AgilePoint Envision User's Guide

AgilePoint BPMS v5.0 SP2

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Contents

Preface....8
Disclaimer of Warranty....8
Copyright....8
Trademarks....8
Government Rights Legend....8
Virus-free software policy....8
Document Revision Numbers....9
AgilePoint Documentation in PDF and HTML....9
Contacting AgilePoint Sales....9
Contacting Customer Support....10
AgilePoint Envision....11
Opening AgilePoint Envision....12
AgileShapes....13
Generic BPM....13
AgilePart....13
AgileWork....21
And....41
Email....42
Manual....43
Manual with Timeout....43
Multiple Condition....44
Or....46
Procedure....50
Procedure with Timeout....52
Single Condition....53
Start....54
Stop....54
SubProcess....55
Premier Extension....58
BRE....58
Cancel Tasks....61
Delay....61
Dynamic Group....62
Dynamic Parallel Approval....63
Dynamic Sequential Approval....66
Process Adaptation....69
Update Custom Attributes....73
Update Parent Process....74
Vote....75
Web Form....78
SharePoint / Microsoft SPS....83
Add User to SP Group....83
Approve....85
Approved....86

Approve Reject Content....87
CAML Query....87
Check In File....89
Check Out File....90
Common Dialog....90
Copy Files AgilePart....94
Copy List Item....96
Create List Item....98
Create SP Group....100
Delete Files....102
Delete List Item....103
Delete Particular File Version....106
Download Files....107
Excel Calculate....109
Excel Read....130
Excel Write....133
InfoPath View....137
InfoPath Sub Process....139
List Form....141
Move Files....144
Move List Item....145
New Folder....147
New Form Library....147
New Library....149
New Site....151
New Site Collection....153
Portal Listing....155
Publish....156
Publish Content....157
Remove SP Group....157
Remove User from SP Group....158
Retrieve List Item....160
Single Condition....163
Submit....164
Submit File to Record Center....164
Undo Check Out....166
Update InfoPath....166
Update Meta Data....167
Update SP Group....170
Upload Files....172
Advanced Extension....174
C#....174
External Command....177
Java....178
Sequential Workflow....179
VB....181
WF Rule....184
Web Services....184
Web Service....184

Web Service Extension (WSE)..... 188
Windows Communication Foundation (WCF)..... 188
Exchange Server..... 191
Create Appointment..... 191
Create Meeting..... 194
Database..... 197
Batch Insert..... 197
Delete Records..... 198
Insert Database..... 200
Query Database..... 202
Stored Procedure..... 205
Update Database..... 207
Extender..... 209
Service Level Agreement (SLA)..... 209
Miscellaneous..... 211
DateTimeOperation..... 211
HTTP Post..... 214
PDF Converter..... 216
Read File..... 217
Text File Writer..... 219
Word..... 220
XML Manipulation..... 221
Active Directory..... 222
Create User..... 222
Update User..... 223
Remove User..... 226
Disable User..... 228
Create Group..... 230
Remove Group..... 232
Remove User from Group..... 235
Retrieve User Information..... 237
Add User to Group..... 239
SAP Integration..... 241
Configuring iNet BPS..... 241
SAP Integration AgileConnector..... 242
Call SAP Function..... 243
Begin SAP Transaction..... 246
End SAP Transaction..... 247
AgileForms Stencil..... 248
AgileForm Shape..... 248
AgileForm Serial..... 249
AgileForm Parallel..... 251
AgileForm Dynamic Group..... 252
AgileForm Process Adaptation..... 253
Menu Options Overview..... 258
File Menu Options..... 258
View Menu Options..... 272
Shape Menu Options..... 273
Help Menu Options..... 274

Process Templates....275
Process Template Types....275
Generic Process Template....275
Microsoft InfoPath Process Template....275
Microsoft SPDoc Process Template....275
Microsoft SPList Process Template....276
AgileForms Process Template....276
Select a Process Template Type....276
Open an existing Process Template....276
Convert a Visio Diagram to a Process Model....276
Process Template Properties....276
Process Template Properties Overview....277
Process Template Properties....277
Convert a Visio Shape to an AgileShape....280
Add an AgileShape to a Process Model....282
Remove an AgileShape from a Process Model....282
Change an AgileShape's Display Name....282
Configure AgileShape Properties....282
Connecting AgileShapes To Each Other....283
Manage Process Attributes....283
Using Swim Lanes in Envision....285
Registering a custom AgileShape....286
Applying Process Attributes....287
Data Services....288
Configure the Windows Service for Data Services....288
Change the Logon Credentials....288
Modify the Enterprise Manager web.config....289
Enable the Server Extension....290
Data Population....291
Mapping Custom Attributes to Multiple Tables....296
Data Tracking....297
Email Templates and Notifications....298
Email Template Window....298
Field Definitions....300
Email Template Process Attributes....301
Data Binding in an Email Template....302
Create a new Activity Entry Email Notification....304
Create a Reminder Email Notification....306
Approval Email Templates....306
Create a Text-Based Approval Email Template....307
Create an HTML-Based Approval Email Template....308
Email Approval on Mobile Devices....311
Custom Macros....311
Process Repository....314
Verify the ProcessRepository Template Exists....314
Set Up a Process Repository....314
Setup Process Discovery in AgilePoint Envision....315
Associate Process Documentation at the Process Model Level....315

Associate Process Documentation at the Activity Level..... 317
Publish Process Documentation to SharePoint..... 320
Open the Process Repository in SharePoint..... 322
Edit Stencil Images.....325
Create and Save a New Stencil.....325
Create a New Master Icon..... 325
Associate a Master Shape with the Icon Image.....328
Finalize the Shape..... 329
Edit an Icon Image on a Stencil..... 329
Edit Master Shape..... 330
Custom Configured Stencils (My Stencil)..... 331
Create an AgileShape with Preconfigured Properties.....331
Modify an AgileShape with Preconfigured Properties.....331
Data Binding..... 333
XML Schema Support for ASP.NET Applications.....333
Schema XML Binding..... 333
SPDoc Metadata Binding.....334
Windows.....336
Adding Participants to an Activity.....336
Add User To Group Configuration Window.....343
Field Definitions.....344
Appointment Schedule for Exchange Server window..... 344
Field Definitions.....346
CAML Query Configuration.....347
Configure Text File Window.....348
Field Definitions.....348
Configuration for Batch Inserting Database Record Window.....348
Field Definitions.....349
Configuration for Copy ListItems AgilePart..... 349
Field Definitions.....350
Configuration for Creating List Item Window..... 351
Field Definitions.....352
Configuration for Deleting Database Record(s) Window..... 353
Field Definitions.....354
Configuration for Deleting List Items Window.....354
Field Definitions.....355
Configuration for Inserting Database Record(s) Window.....356
Field Definitions.....357
Configuration for Invoking Java Program Window.....357
Configuration for Retrieving ListItem Fields Window..... 358
Field Definitions.....361
Configuration for Stored Procedure or Generic SQL Window..... 361
Field Definitions.....362
Configuration for Updating Database Record(s) Window.....362
Field Definitions.....363
Configuration for WCF Service Window..... 363
Field Definitions.....364
Create Group Configuration Window.....365

Field Definitions....365
Create Group Window....366
Field Definitions....366
Customize Common Dialog Interface Window....367
Field Definitions....368
Database Queries Window....369
Field Definitions....370
DateTime Services Configuration Window....370
Field Definitions....371
Delete a Particular Version of a File Window....373
Field Definitions....373
Excel Calculate Configuration Window....374
Field Definitions....374
Excel Read Configuration Window....377
Field Definitions....377
Excel Write Configuration Window....379
Field Definitions....379
Http Post Configuration Window....383
Field Definitions....383
Meeting Schedule for Exchange Server Window....384
Field Definitions....385
MoveListItemsConfiguration Window....386
Field Definitions....386
Name and Value Window....387
Field Definitions....388
Read File Configuration Window....389
Field Definitions....390
Remove Group Configuration Window....390
Field Definitions....391
Remove User From Group Configuration Window....391
Field Definitions....392
SAP Connection Browser....392
Select Exclusive Predecessor Activities Window....396
Set Context Properties Window....399
Field Definitions....400
Submit File To Record Center Configuration Window....401
Field Definitions....401
Time Watch Between Activities Window....401
Field Definitions....402
Update Group Configuration Window....403
Field Definitions....403
Wait for Milestone Configuration Window....404
Field Definitions....405
Web Service Configuration Window....405
Word Configuration Window....407
Field Definitions....407
Workflow Foundation Assembly Window....408
XML Schema Mappings....409
Field Definitions....409

Preface

Disclaimer of Warranty

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Virus-free software policy

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

- AgilePoint is built on top of Microsoft .NET framework. The pre-compiled executable is a.NET Common Language Runtime (CLR) application, not a native machine binary. As far as is known at this time, there are no viruses that infect .NET CLR executables.
- The virtual environment for the product packaging process 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.

Contacting AgilePoint Sales

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

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Contacting Customer Support

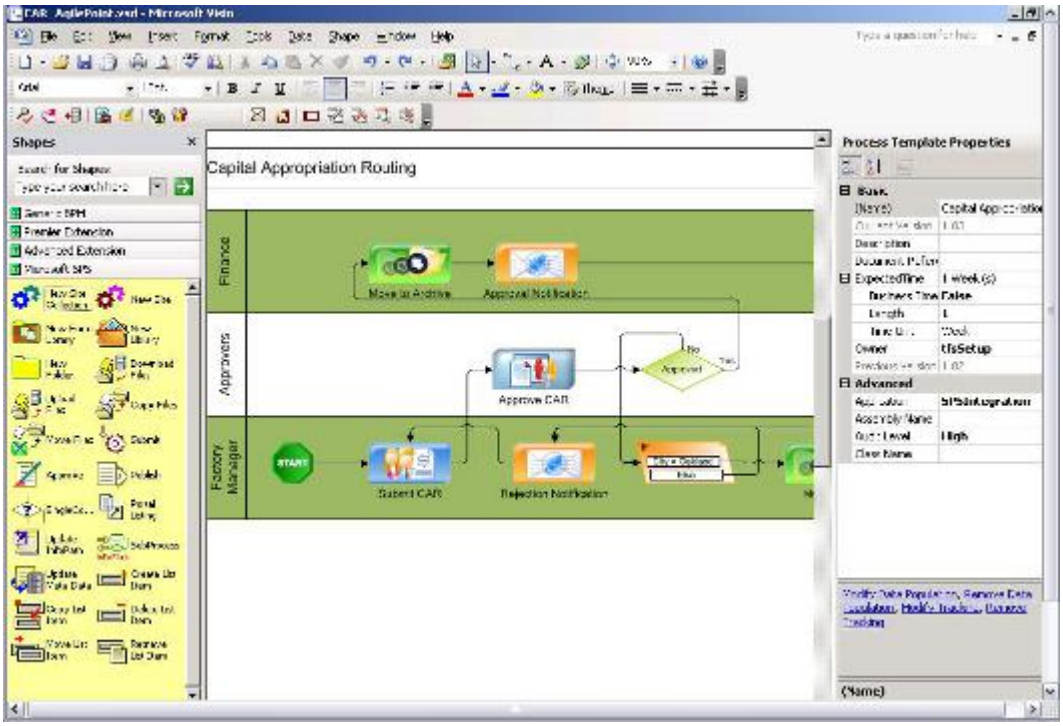
To contact AgilePoint Support, please submit a ticket on the AgilePoint Support Portal: http://support.agilepoint.com/SupportPortal/

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

AgilePoint Envision

AgilePoint Envision is the Microsoft Visio-based business process modeling component of the AgilePoint Business Process Management (BPM) suite. Envision extends Visio into a powerful BPM tool that enables users to model and directly deploy end-to-end business processes that can encompass the full lifecycle of business operations including the system-to-system, human-to-system, and human-to-human activities.

In addition to the many customizable workflow activities that are built in, Envision provides an extensible framework that enables IT assets to be exposed as AgileShapes in Envision.



Opening AgilePoint Envision

To open AgilePoint Envision:

1. Click **Start** > **All Programs** > **AgilePoint** > **AgilePoint Envision**.

AgileShapes

This section provides detailed information on the features, functionality, purpose, and intended usage of the AgileShape components included in the AgilePoint BPMS Suite. "AgileShape" is the collective term applied to all of the shapes (e.g. activities, conditions, end points, etc.) that can be used in an AgilePoint business process to represent an activity. AgilePoint Envision comes with several built-in AgileShapes for common business activities that can be grouped into three different categories; Basic, AgileParts, and AgileWorks.

The Basic AgileShapes are special activities that are used for modeling certain portions of business processes that are common among most (or all) process templates. These include Start and Stop points, conditional shapes (i.e. branching and decision flow shapes), etc.

An AgilePart is an AgileShape (either built-in or custom) that represents a specific automatic activity (e.g. Web Service, Insert Database, Copy Files, etc). It implements specific design-time features and runtime functionality that allows AgilePoint Server to perform (or cause to be performed via interaction with another server or system) the actual work represented by the AgileShape. In addition to the built-in AgileParts, you can also create your own custom AgileParts using the AgilePart project template included as part of AgilePoint Developer. Custom AgileParts allow application developers the extensibility framework to implement more complex process and application logic, and develop domain specific extensions.

An AgileWork is an AgileShape (either built-in or custom) that represents a specific Manual Activity (e.g. Manual, Web form, Vote, etc.). It implements specific design-time features and runtime functionality that allows AgilePoint Server to properly handle (e.g. assign, reassign, monitor, display, etc.) the actual task(s) represented by the AgileShape. In addition to the built-in AgileWorks, you can also create your own custom AgileWorks using the AgileWork project template included as part of AgilePoint Developer. Custom AgileWorks allow application developers the extensibility framework to implement more complex process and application logic, and develop domain specific extensions. An AgileWork is similar to an AgilePart, but for a Manual Activity instead of an Automatic Activity. The main differences between AgileParts and AgileWorks are the same as the differences between any automatic and manual activity. For example, Manual activities are usually assigned to participants, so AgileWork components have additional properties and functionality related to participants, participant reassignment, etc. that AgilePart components do not have.

The AgileShapes will be defined in accordance with the Visio Stencil Pane for which the AgileShape is associated.

Generic BPM

This section describes the AgileShapes in the Generic BPM stencil.

AgilePart

This is a generic AgileShape that can be associated with any AgilePart that is registered in AgilePoint Envision. The user will be prompted to select a specific AgilePart when this AgileShape is added to a process template.

AgilePart Properties

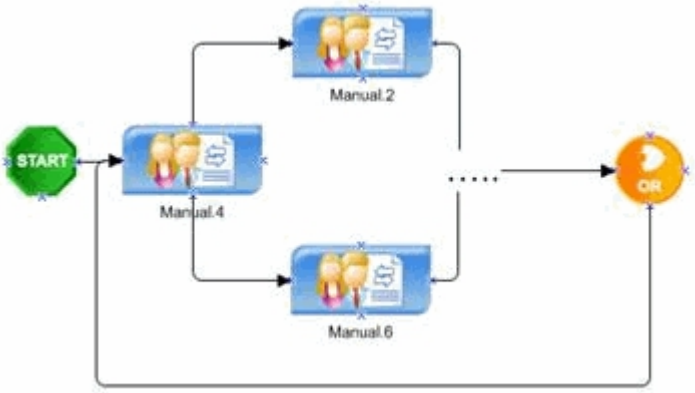
Field Name	Definition
(Name)	Read Only Default value: AgilePart.xxx, AgileWork The display name of the AgileShape.
(UID)	Read Only Default value: AgilePart.xxx or AgileWork The ID that uniquely identifies this AgileShape from all others within the same process template.
Description	Optional A description of the AgileShape. This property is primarily used as a means of recording additional notes, comments, and details about this AgileShape in order to make the process template more understandable to process modelers.
Debug	Default value: False This property enables you to monitor the performance of and troubleshoot a particular AgileShape. Setting this property to **True** adds information to the AgilePoint Server log regarding this shape – for example, data being passed to or from the shape, or database connection information. You can use this data to monitor the performance of particular AgileShapes. This property can be set to the following specific values: ● **False** - This value indicates that the AgileShape will not log additional progress and debugging messages to the AgilePoint Server log file at runtime. ● **True** - This value indicates that the AgileShape will log additional progress and debugging messages to the AgilePoint Server log file at runtime. These messages are often helpful in verifying that the AgileShape is functioning properly and/

Field Name	Definition
	or with troubleshooting any problems or suspected problems with the AgileShape's runtime behavior or configuration.
TimeSpan	Default value: 10 Minute(s) Specifies the maximum amount of time that should be allowed for the completion of the activity associated with this AgileShape before it is considered overdue.
BusinessTime	Default value: False Determines whether the time span represents normal time, or business hours only. This property can be set to the following specific values: ● **True** - When set to this value, the time span represents a span of business hours only. E.g. 5 Days of business time would normally be equivalent to 7 Days of normal time, and 8 hours of business time would normally be equivalent to 24 hours of normal time. As an example, if business hours are configured as 9am to 5pm and a Manual AgileShape activity with a TimeSpan of 6 Business Hours is entered at 4pm on Tuesday, then the activity must be completed by 2pm on Wednesday. ● **False** - When set to this value, the time span represents a normal (absolute) time span, and is unaffected by any business time configuration settings.
Length	Default value: 10 The number of time units represented by the time span.
Time Unit	Default value: Minute The type of time unit represented by the time span. This property can be set to the following specific values: ● Second ● Minute ● Hour

Field Name	Definition
	● Day ● Week ● Month
Activity Entry Email	Optional The name of an Email Template that should be used to generate an automatic email notification when this AgileShape is entered at runtime. If this property is left blank, then an email notification will not be sent automatically when the AgileShape is entered at runtime. If this property is not blank, then an email notification will be dynamically constructed and sent at runtime (when the AgileShape is entered) using the specified Email Template.
Activity Exit Email	Optional The name of an Email Template that should be used to generate an automatic email notification when this AgileShape is exited at runtime. If this property is left blank, then an email notification will not be sent automatically when the AgileShape is exited at runtime. If this property is not blank, then an email notification will be dynamically constructed and sent at runtime (when the AgileShape is exited) using the specified Email Template.
Audit Level	Default value: High This property determines the amount of process related data that is recorded to the workflow database. This property can be set at either the Process Template Properties layer or at the individual AgileShape layer. This property allows you to control the level of granularity in terms of the amount of process related data that is recorded to the workflow database. This property can be set to the following specific values: ● **High** - This value indicates that AgilePoint will record all data about the activity or process to the database. ● **Low** - This value indicates that AgilePoint will only allow a certain amount of data to be recorded to the database. This option provides a level of control over the granularity

Field Name	Definition

	of AgilePoint process-related data that is stored in the AgilePoint workflow database, giving some flexibility in the audit trail records by filtering out unnecessary data.
	Audit level at Process Template level
	• **Manual activity (Generic manual activity and AgileWork)** - After the process is completed (reaches \'91STOP' activity):
	  • If audit level is set to high all records will be kept at the movement of process completion.
	  • If audit level is set to low, the records for manual work items with status of 'Removed' and 'New' will be deleted from the database. After leaving the manual activity, the manual work items with status of 'Removed' will be deleted first, then after the whole process is completed, the manual work items with status of 'New' will be deleted. Also the records for unreached activity instances will be deleted from the database.
	  • For example, this is useful if you assign a group to this manual activity. Manual work items with status of 'Removed' and 'New' are not meaningful data after the process completed.
	• **Automatic activity** - Not supported for now. No action will be taken.
	• **Audit level at AgileShape level** -
	  • Manual activity (Generic manual activity and AgileWork) - If audit level is set to high, all records will be kept at the movement of leaving the activity. Note that one manual activity can have multiple work items at a time.
	  • Automatic activity (AgilePart only, not including AgileStub) - If audit level is set to high, all records will be kept at the movement of leaving the activity. If audit level is set to low, the record of auto work item will be deleted from database after

Field Name	Definition
	leaving the activity. No record will be kept for this particular activity. For example, this is useful if you have a 'Delay' AgilePart that goes through a large number of loops. Usually customers are not interested in the information about the 'Delay' AgilePart, so setting the audit level for 'Delay' AgilePart to low, will delete the record immediately and the database size will not grow as fast.
SessionMode	Default value: Single This property can be set to the following specific values: • **Single** - If it is set to single, then ONLY one session is effective, meaning that in a loop scenario as shown below, the engine would cancel a task from the previous session automatically. • **Multiple** - If it is set to multiple, then multiple sessions can be effective in a loop scenario, and the process will wait for all tasks to complete and not cancel any previous tasks. 
Wait All Incoming	Default value: False When an AgileShape has multiple direct predecessors (i.e. it has multiple In-Connectors leading directly from other AgileShapes), this property determines how many of the predecessor AgileShapes must be exited (at runtime) before this AgileShape can be entered (at runtime).

Field Name	Definition
	This property can be set to the following specific values: ● **False** - This value indicates that the AgileShape will be entered (at runtime) as soon as any one of the AgileShape's direct predecessors are exited (at runtime). ● **True (Dynamic)** - This value indicates that the AgileShape will be entered (at runtime) only after all of the AgileShape's "enterable" direct predecessors are exited (at runtime). If any of the direct predecessors are un-enterable (e.g. they will never be entered in this process instance because conditional logic in the process bypassed them) and therefore un-exitable, then those predecessors are not required to be exited before this AgileShape is entered. ● **True (Static)** - This value indicates that the AgileShape will be entered (at runtime) only after all of the AgileShape's direct predecessors are exited (at runtime).
AssemblyName	Read Only Default value: Automatically determined (based upon the user's input) when the AgileShape is first added to the process template. The name of the .NET assembly containing the specific AgilePart component that this AgileShape instance is associated with.
ClassName	Read Only Default value: Automatically determined (based upon the user's input) when the AgileShape is first added to the process template. The fully qualified Type name (including the namespace) of the .NET class (in the .NET assembly specified by the AssemblyName property) that represents the specific AgilePart component that this AgileShape instance is associated with.
Method	Read Only

Field Name	Definition
	Default value: Automatically determined (based upon the user's input) when the AgileShape is first added to the process template. The name of the method (in the .NET class specified by the ClassName property) that will be invoked at runtime (when the AgileShape is entered).
ConfigureAttachments	Allows you to attach documents to the activity that are accessed from the process repository. (For more information, see Process Repository on the AgilePoint Support Portal.) If you select the **View** check box and you are using SharePoint Integration, you can the attachments also display in the process model in SharePoint.
Reference URL	Allows you to associate an URL to the shape that is used in the process repository. For more information, see Process Repository on the AgilePoint Support Portal.
ExceptionHandlerScope	Default value: Local Specifies the value which determines how AgilePoint Server will handle an AgilePart exception. Two options are available: Local or Global. • **Local** - This value indicates the exception handling (i.e., error message and status) information for an AgilePart within a single process instance will be saved to the custom attribute defined in the SaveErrorMessageTo and SaveStatusTo properties. • **Global** - This value indicates the exception handling (i.e., error message and status) information is handled the same as the Local option, but includes the extended ability to call on a custom AgileConnector to handle the exception as desired.
SaveErrorMessageTo	Default value: ErrorMessage Specifies the name of a custom process attribute that should be updated if the AgileShape causes an error at runtime. If such an error occurs, a message containing information about the error

Field Name	Definition
	will be stored in the custom process attribute specified by this property.
SaveStatusTo	Default value: Success Specifies the name of a custom process attribute that should be updated when the AgileShape is exited. When the AgileShape is exited at runtime, the value of the AgileShape's Status property will be stored (as a String) in the custom process attribute specified by this property.

AgileWork

This is a generic AgileShape that can be associated with any AgileWork that is registered in AgilePoint Envision. The user will be prompted to select a specific AgileWork when this AgileShape is added to a process template.

The main differences of an AgileWork component as compared to an AgilePart are:

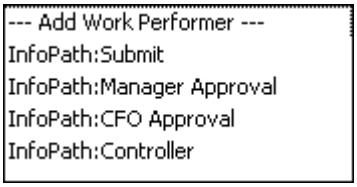
- An AgileWork component must inherit from the WFAgileWork base class.
- An AgileWork component's design-time support is created using the WFAgileWorkDescriptor class. (It is very similar to the WFAgilePartDescriptor class).
- All AgileWorks inherit the following server-side events from the WFAgileWork base class:
  - AssignWorkItem
  - CancelWorkItem
  - CompleteWorkItem
  - EnterActivityInstance
  - LeaveActivityInstance
  - ReassignWorkItem

AgileWork Properties

Field Name	Definition
(Name)	Read Only Default value: AgilePart.xxx, AgileWork The display name of the AgileShape.
(UID)	Read Only Default value: AgilePart.xxx or AgileWork

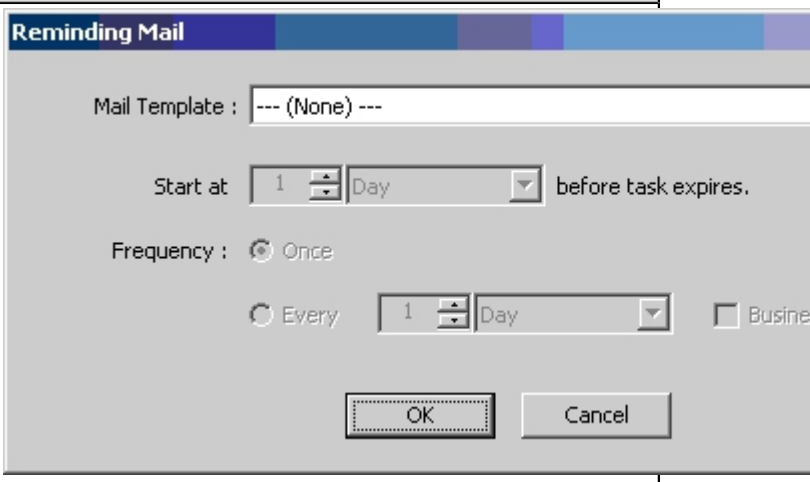
Field Name	Definition
	The ID that uniquely identifies this AgileShape from all others within the same process template.
Description	Optional A description of the AgileShape. This property is primarily used as a means of recording additional notes, comments, and details about this AgileShape in order to make the process template more understandable to process modelers.
Optional	Default value: False Determines whether the activity represented by this AgileShape can be manually canceled (using AgilePoint Enterprise Manager). This property can be set to the following specific values: ● **True** - The activity can be manually canceled. ● **False** - The activity cannot be manually canceled.
TimeSpan	Default value: 10 Minute(s) Specifies the maximum amount of time that should be allowed for the completion of the activity associated with this AgileShape before it is considered overdue.
BusinessTime	Default value: False Determines whether the time span represents normal time, or business hours only. This property can be set to the following specific values: ● **True** - When set to this value, the time span represents a span of business hours only. E.g. 5 Days of business time would normally be equivalent to 7 Days of normal time, and 8 hours of business time would normally be equivalent to 24 hours of normal time. As an example, if business hours are configured as 9am to 5pm and a Manual AgileShape activity with a TimeSpan of 6 Business Hours is entered at 4pm on Tuesday, then the activity must be completed by 2pm on Wednesday.

Field Name	Definition
	● **False** - When set to this value, the time span represents a normal (absolute) time span, and is unaffected by any business time configuration settings.
Length	Default value: 10 The number of time units represented by the time span.
Time Unit	Default value: Minute The type of time unit represented by the time span. This property can be set to the following specific values: ● Second ● Minute ● Hour ● Day ● Week ● Month
Work To Perform	Specifies the name of the manual activity that needs to be performed by the activity's participant(s). The value of this property is used by the AgilePoint Task Manager Web Part (for SharePoint portals) and by the AgilePoint Task List Web Control (for ASP.NET applications) to determine the URL of the Web page that contains the UI for the manual activity represented by this AgileShape. However, the exact effects of this property (and the valid values) vary depending on which type of process template the AgileShape is used in. **For Generic process templates:** When used in Generic process templates, this property refers to the name of an ASP.NET Web form in the ASP.NET application associated with the process. It is the page's file name without the file extension (.aspx). However, if the page resides in a subfolder of the application, you would also include the folder name(s). E.g. If the URL of your ASP.NET application is:

Field Name	Definition
	http://www.mycompany.com/MyApp/ and the URL of the Web page is: http://www.mycompany.com/MyApp/My Page.aspx then you would configure the value of this property as: My Page However, if the URL of your ASP.NET application is: http://www.mycompany.com/MyApp/ and the URL of the Web page is: http://www.mycompany.com/MyApp/pages/admin/My Page.aspx then you would configure the value of this property as: pages/admin/My Page For Microsoft InfoPath process templates: When used in Microsoft InfoPath process templates, this property refers to the Form View of the InfoPath form associated with this AgileShape. The names of the available form views will automatically be listed in the drop-down list for this property (as shown below).  For Microsoft SPDoc process templates: When used in Microsoft SPDoc process templates, this property refers to the name of an ASP.NET Web form located under the "/_layouts/AP/" subfolder of the document library's team site. For Microsoft SPDoc process templates associated with an AgilePoint Document Control Library (i.e. a document library created using the "STSAP" SharePoint Team Site template), the following values can be used by default:

Field Name	Definition
	• **Submit** - This value corresponds to the Web form located at: MyTeamSite/_layouts/AP/APSubmit.aspx The Web form allows the participant(s) to select/update the category metadata for the document. • **Approve** - This value corresponds to the Web form located at: MyTeamSite/_layouts/AP/APApprove.aspx The Web form allows the participant(s) to either approve or reject the document. • **Cancel** - This value corresponds to the Web form located at: MyTeamSite/_layouts/AP/CancelTask.aspx The Web form allows the participant to cancel their involvement in the activity represented by this AgileShape. If there is only one participant, then this will also cancel the entire process. • **Publish** - This value corresponds to the Web form located at: MyTeamSite/_layouts/AP/APPublish.aspx The Web form simply waits for the participant(s) to click the **OK** button in the form. This value is typically used as the last manual activity in a document workflow, and allows the participant(s) to easily update the system when the manual work associated with the activity is finished.
Activity Entry Email	Optional The name of an Email Template that should be used to generate an automatic email notification when this AgileShape is entered at runtime. If this property is left blank, then an email notification will not be sent automatically when the AgileShape is entered at runtime. If this property is not blank, then an email notification will be dynamically constructed and sent at runtime (when the AgileShape is entered) using the specified Email Template.

Field Name	Definition
Activity Exit Email	Optional The name of an Email Template that should be used to generate an automatic email notification when this AgileShape is exited at runtime. If this property is left blank, then an email notification will not be sent automatically when the AgileShape is exited at runtime. If this property is not blank, then an email notification will be dynamically constructed and sent at runtime (when the AgileShape is exited) using the specified Email Template.
Task Reassigned Email	Optional The name of an Email Template that should be used to generate an automatic email notification when this AgileShape is reassigned at runtime. If this property is left blank, then an email notification will not be sent automatically when the AgileShape is reassigned at runtime. If this property is not blank, then an email notification will be dynamically constructed and sent at runtime (when the AgileShape is reassigned to a new participant) using the specified Email Template.
Reminder Email	Optional This property allows the process modeler to configure "reminders" that will notify users (at runtime) based on certain conditions. This property is typically available with AgileShapes that are associated with one or more participants (e.g. Manual and AgileWork AgileShapes). Click the **Ellipses** button to open the Reminder Email dialog (as shown below).

Field Name	Definition
	 This dialog allows the process modeler to choose a specific Email Template that should be used to generate the "reminder" email notification(s). It also allows the process modeler to configure the start time (relative to the AgileShape's expiration) and the frequency of recurrence at which the email notification(s) will be sent.
TimeoutEmail	Optional The name of an Email Template that should be used to generate an automatic email notification when this AgileShape becomes overdue at runtime. If this property is left blank, then an email notification will not be sent automatically when the AgileShape becomes overdue at runtime. If this property is not blank, then an email notification will be dynamically constructed and sent at runtime (when the AgileShape becomes overdue) using the specified Email Template.
Max. Participant	Default value: 1 Specifies how many Participants actually need to be assigned to work on the activity. E.g. If the Participants property is set to a group of users, and Max. Participant is 2, then only 2 users in the group actually need to be assigned to "participate" in the activity when the AgileShape is entered (at runtime). If all users must complete the task, set the value to **Maximum**.

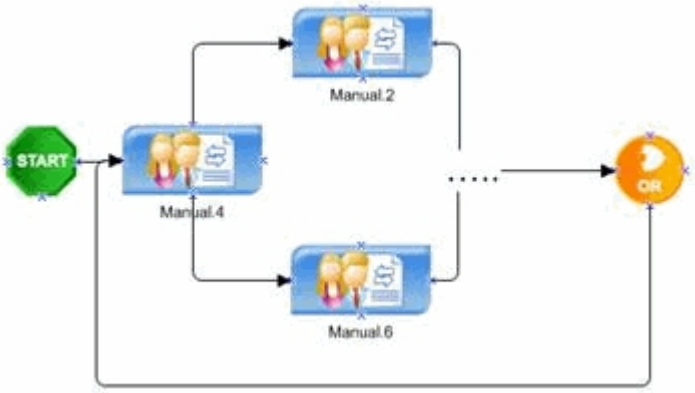
Field Name	Definition
Participants	Specifies the user(s) that the activity can be assigned to for completion. This property can be set to a specific user, group of users, or a user role. To specify multiple participants, separate the usernames with a semicolon (;). For more information, see Adding Participants to an Activity on the AgilePoint Support Portal.
Reuse Participant	Default value: True This property can be set to the following specific values: • **True** - Force the same participants to take the rejected cases. E.g. Users A, B, C, D are the Participants and Max. Participant is 2. Initially, A and D are assigned to work on the activity, but have rejected the incoming input. If Reuse Participant is True, then the next time the same incoming input routes back to the activity, the same users (A and D) must be assigned to work on the activity again. • **False** - Any participant or any combination of participants can involve subjected to the MaxParticipant.
Audit Level	Default value: High This property determines the amount of process related data that is recorded to the workflow database. This property can be set at either the Process Template Properties layer or at the individual AgileShape layer. This property allows you to control the level of granularity in terms of the amount of process related data that is recorded to the workflow database. This property can be set to the following specific values: • **High** - This value indicates that AgilePoint will record all data about the activity or process to the database. • **Low** - This value indicates that AgilePoint will only allow a certain amount of data to be recorded to the database. This option provides a level of control over the granularity of AgilePoint process-related data that is stored in the AgilePoint workflow database,

Field Name	Definition

	giving some flexibility in the audit trail records by filtering out unnecessary data.
	
	Audit level at Process Template level
	
	● **Manual activity (Generic manual activity and AgileWork)** - After the process is completed (reaches \'91STOP' activity):
	  ● If audit level is set to high all records will be kept at the movement of process completion.
	  ● If audit level is set to low, the records for manual work items with status of 'Removed' and 'New' will be deleted from the database. After leaving the manual activity, the manual work items with status of 'Removed' will be deleted first, then after the whole process is completed, the manual work items with status of 'New' will be deleted. Also the records for unreached activity instances will be deleted from the database.
	  ● For example, this is useful if you assign a group to this manual activity. Manual work items with status of 'Removed' and 'New' are not meaningful data after the process completed.
	● **Automatic activity** - Not supported for now. No action will be taken.
	● **Audit level at AgileShape level** -
	  ● Manual activity (Generic manual activity and AgileWork) - If audit level is set to high, all records will be kept at the movement of leaving the activity. Note that one manual activity can have multiple work items at a time.
	  ● Automatic activity (AgilePart only, not including AgileStub) - If audit level is set to high, all records will be kept at the movement of leaving the activity. If audit level is set to low, the record of auto work item will be deleted from database after leaving the activity. No record will be kept for this particular activity.

Field Name	Definition
	For example, this is useful if you have a 'Delay' AgilePart that goes through a large number of loops. Usually customers are not interested in the information about the 'Delay' AgilePart, so setting the audit level for 'Delay' AgilePart to low, will delete the record immediately and the database size will not grow as fast.
Auto Complete	Default value: False This property can be set to the following specific values: ● **True** - The work item (task) will be marked as completed if it is carried out for the first time. If a subsequent AgileShape causes the process flow to re-enter this same AgileShape, it will not be automatically marked as completed in order to avoid an infinite loop. ● **False** - The work item (task) will not be marked as completed.
Debug	Default value: False This property enables you to monitor the performance of and troubleshoot a particular AgileShape. Setting this property to **True** adds information to the AgilePoint Server log regarding this shape – for example, data being passed to or from the shape, or database connection information. You can use this data to monitor the performance of particular AgileShapes. This property can be set to the following specific values: ● **False** - This value indicates that the AgileShape will not log additional progress and debugging messages to the AgilePoint Server log file at runtime. ● **True** - This value indicates that the AgileShape will log additional progress and debugging messages to the AgilePoint Server log file at runtime. These messages are often helpful in verifying that the AgileShape is functioning properly and/

Field Name	Definition
	or with troubleshooting any problems or suspected problems with the AgileShape's runtime behavior or configuration.
Priority	Default value: Normal This property indicates the priority level for the task to be shown at runtime in the user's task list. This property can be set to the following specific values, or you can type over the value to set a custom attribute: ● **High** - Setting the priority to 'High' will show a Red icon in the users task list next to the task. ● **Normal** - Setting the priority to 'Normal' will show a Green icon in the users task list next to the task. ● **Low** - Setting the priority to 'Low' will show a Yellow icon in the users task list next to the task.
SessionMode	Default value: Single This property can be set to the following specific values: ● **Single** - If it is set to single, then ONLY one session is effective, meaning that in a loop scenario as shown below, the engine would cancel a task from the previous session automatically. ● **Multiple** - If it is set to multiple, then multiple sessions can be effective in a loop scenario, and the process will wait for all tasks to complete and not cancel any previous tasks.

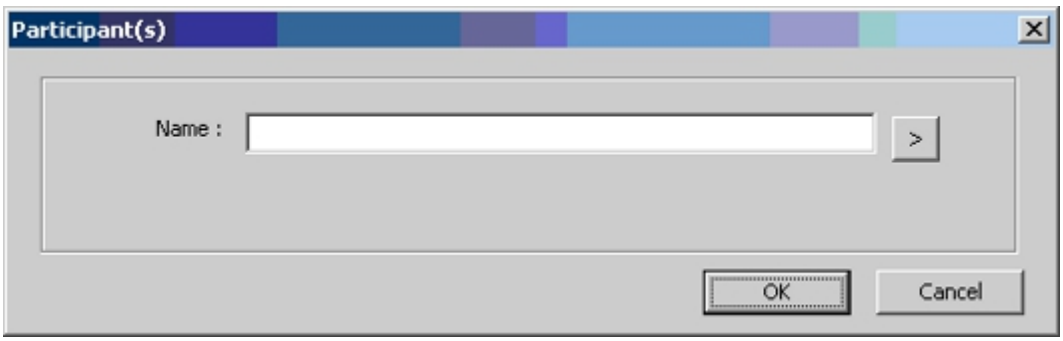
Field Name	Definition
	
Wait All Incoming	Default value: False When an AgileShape has multiple direct predecessors (i.e. it has multiple In-Connectors leading directly from other AgileShapes), this property determines how many of the predecessor AgileShapes must be exited (at runtime) before this AgileShape can be entered (at runtime). This property can be set to the following specific values: • **False** - This value indicates that the AgileShape will be entered (at runtime) as soon as any one of the AgileShape's direct predecessors are exited (at runtime). • **True (Dynamic)** - This value indicates that the AgileShape will be entered (at runtime) only after all of the AgileShape's "enterable" direct predecessors are exited (at runtime). If any of the direct predecessors are un-enterable (e.g. they will never be entered in this process instance because conditional logic in the process bypassed them) and therefore un-exitable, then those predecessors are not required to be exited before this AgileShape is entered. • **True (Static)** - This value indicates that the AgileShape will be entered (at runtime) only after all of the AgileShape's direct predecessors are exited (at runtime).
Wait Work Performed	Default value: True

Field Name	Definition
	This property can be set to the following specific values: • **True** - Any data involved needs to be handled first (e.g. if participants need to input some comments) before the activity is considered complete. • **False** - No specific data entry involved (e.g. the participants' just need to send some letters to the post office). The activity will be complete when the participant(s) manually update the status (e.g. by clicking the **Complete** link in Enterprise Manager).
AssemblyName	Read Only Default value: Automatically determined (based upon the user's input) when the AgileShape is first added to the process template. The name of the .NET assembly containing the specific AgilePart component that this AgileShape instance is associated with.
ClassName	Read Only Default value: Automatically determined (based upon the user's input) when the AgileShape is first added to the process template. The fully qualified Type name (including the namespace) of the .NET class (in the .NET assembly specified by the AssemblyName property) that represents the specific AgilePart component that this AgileShape instance is associated with.

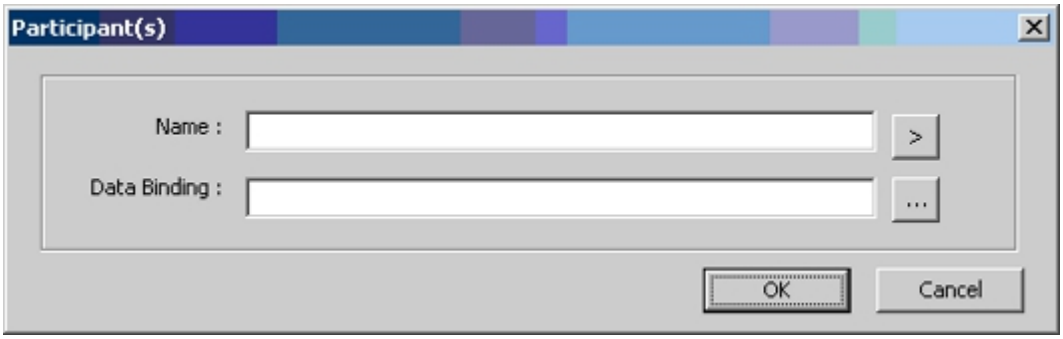
Adding Participants to an Activity

This topic describes how to add participants to an activity.

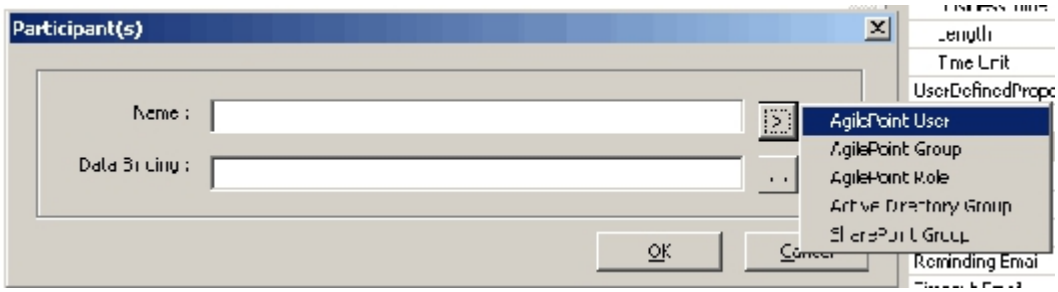
In a Generic process template:

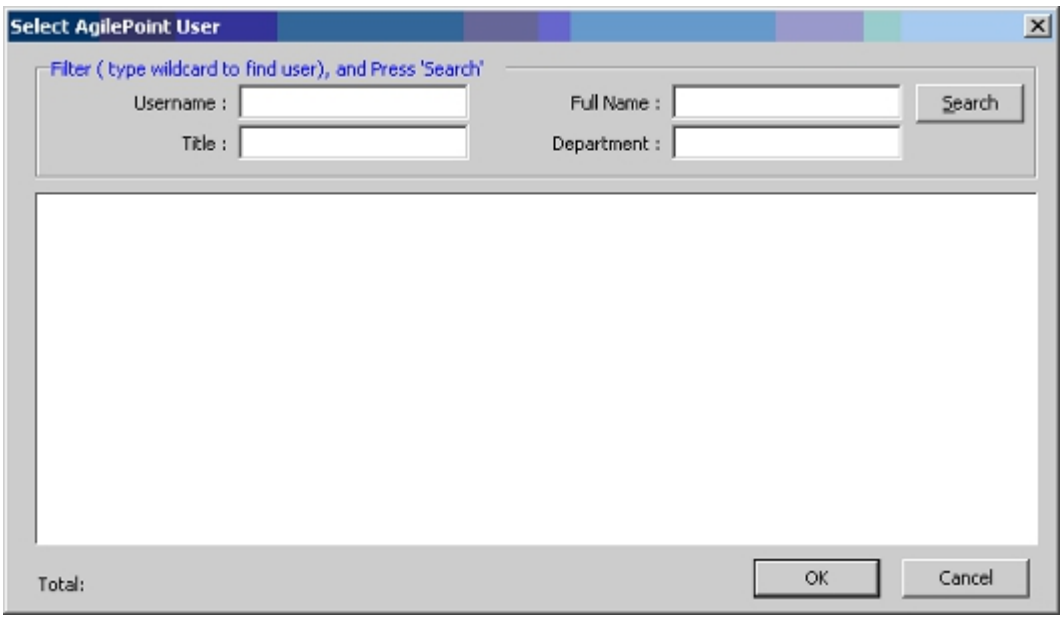


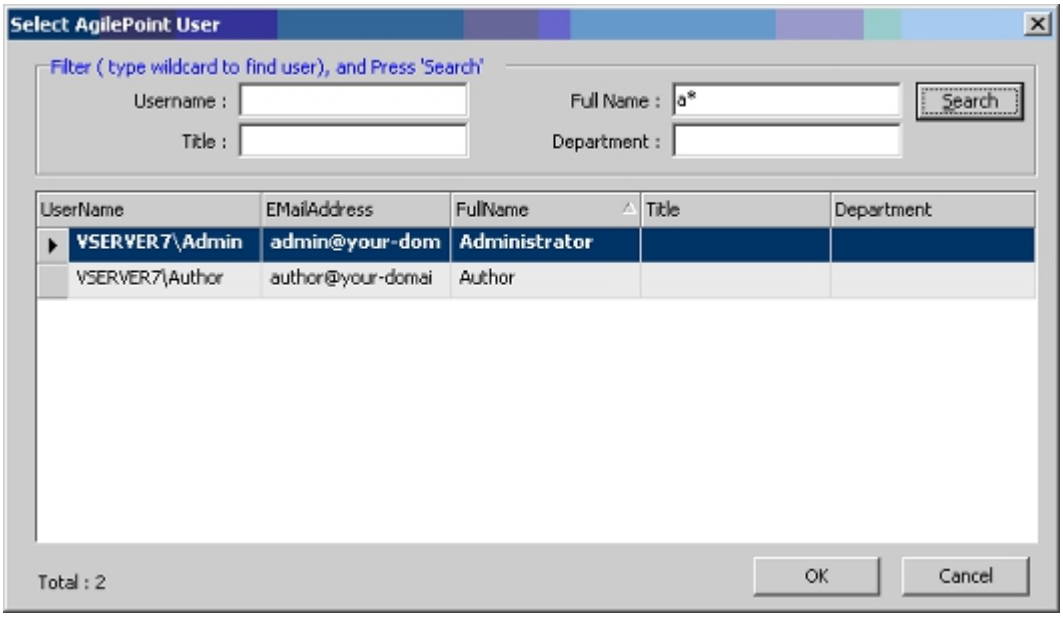
In a Microsoft InfoPath, Microsoft SPDoc, or Microsoft SPList process template:

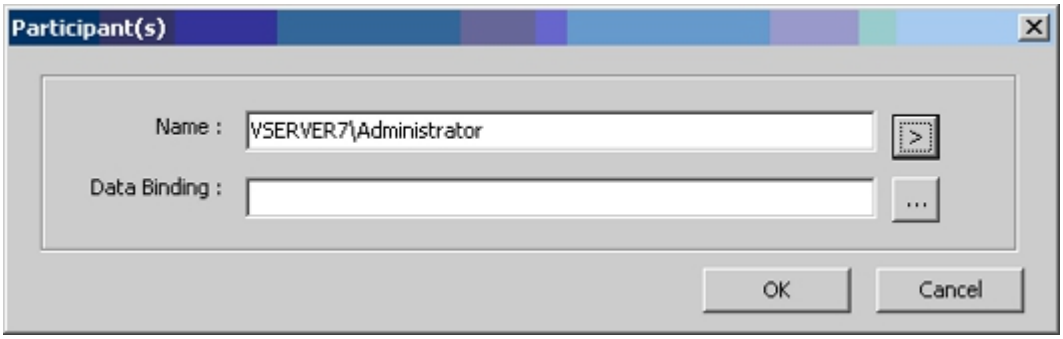


Choosing a participant from the AgilePoint User list:

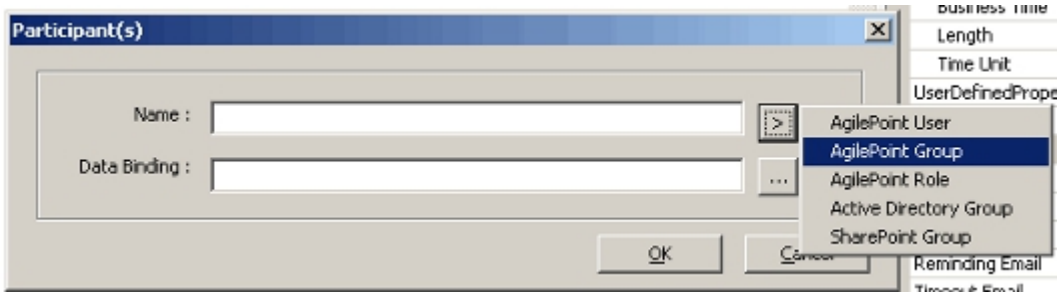


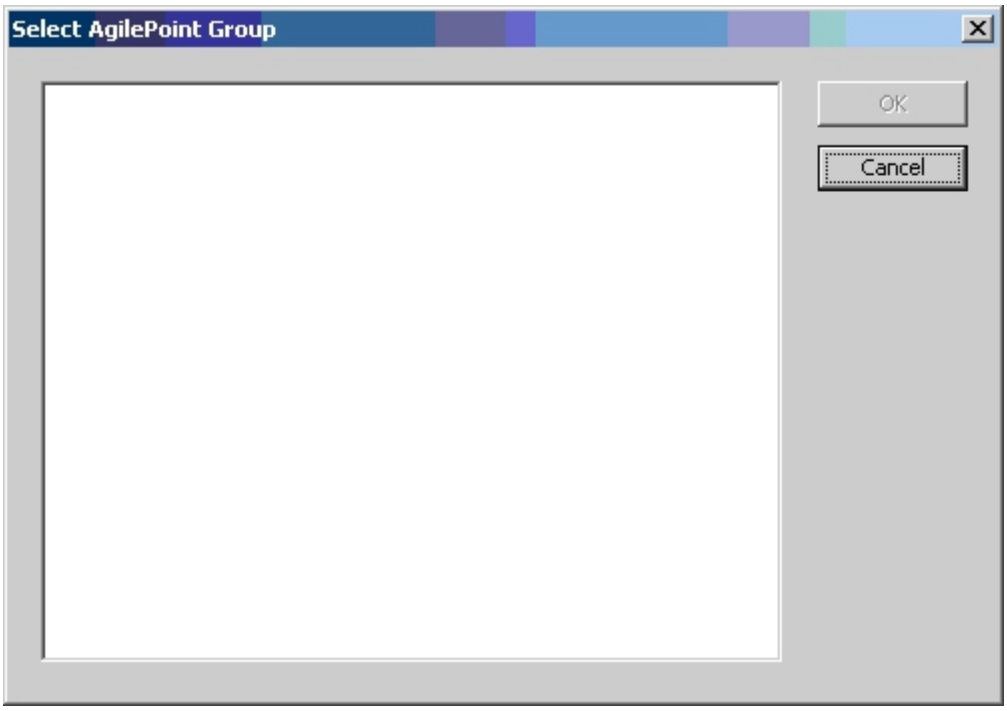

Select AgilePoint User
Filter (type wildcard to find user), and Press 'Search'
Username :
Full Name :
Search
Title :
Department :
Total:
OK
Cancel


Select AgilePoint User
Filter (type wildcard to find user), and Press 'Search'
Username :
Full Name :
a*
Search
Title :
Department :
UserName
EMailAddress
FullName
Title
Department
VSERVER7\Admin
admin@your-dom
Administrator
VSERVER7\Author
author@your-domai
Author
Total : 2
OK
Cancel

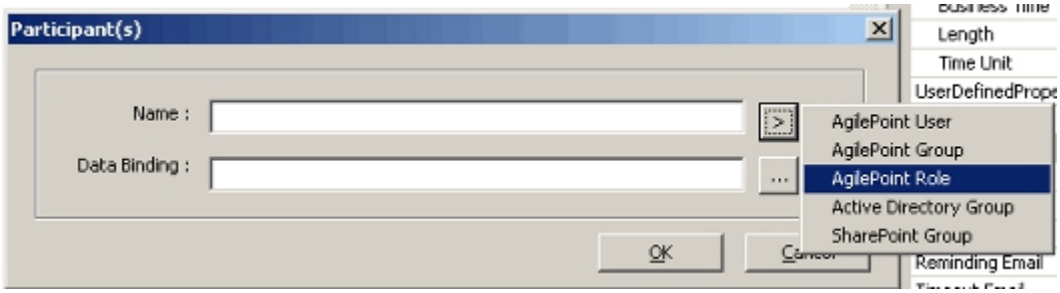

Participant(s)
Name :
VSERVER7\Administrator
Data Binding :
OK
Cancel

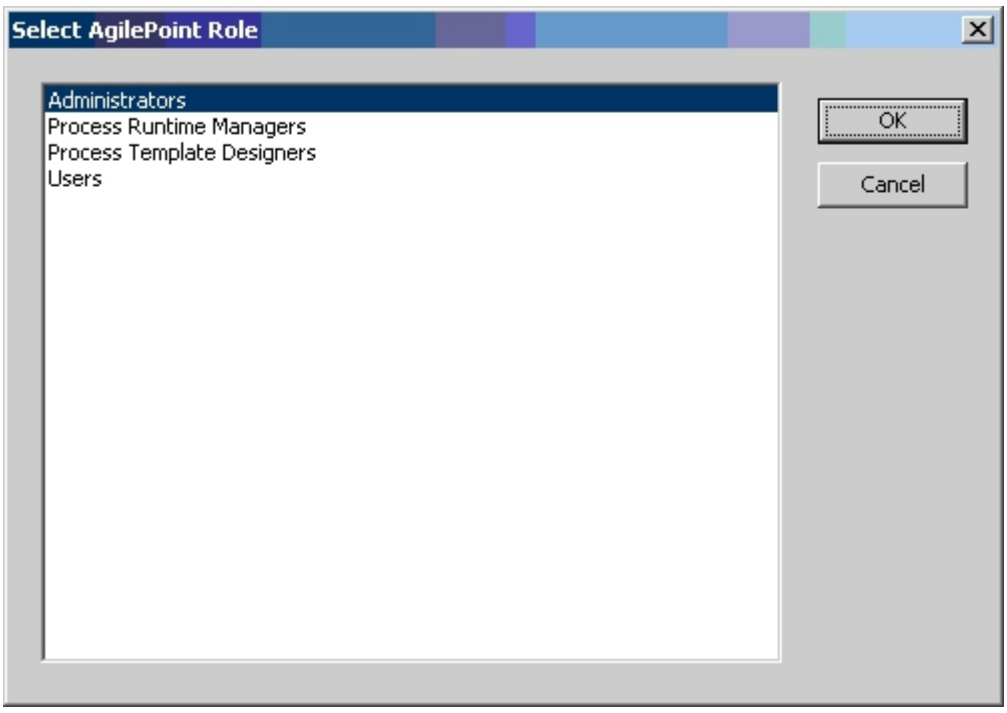
Choosing a group of participants from the AgilePoint Group list:

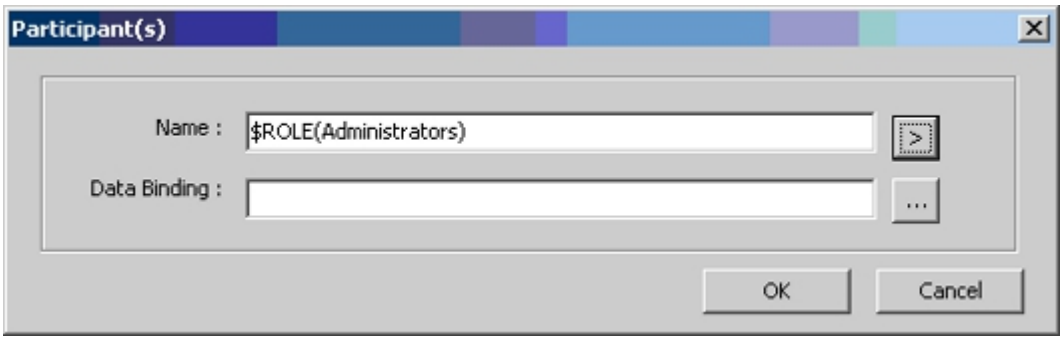




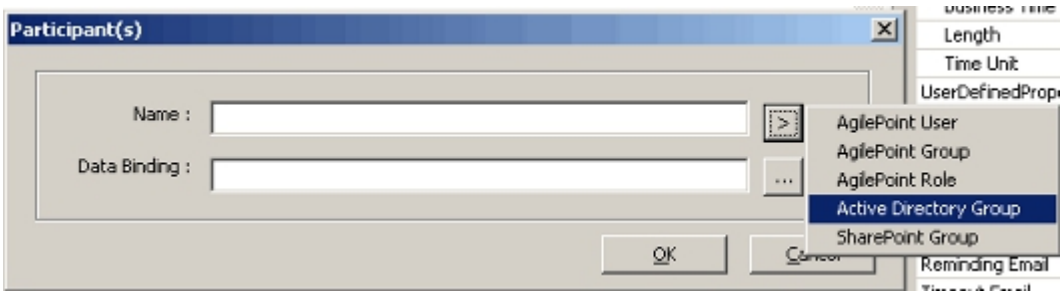
Choosing a group of participants from the AgilePoint Role list:



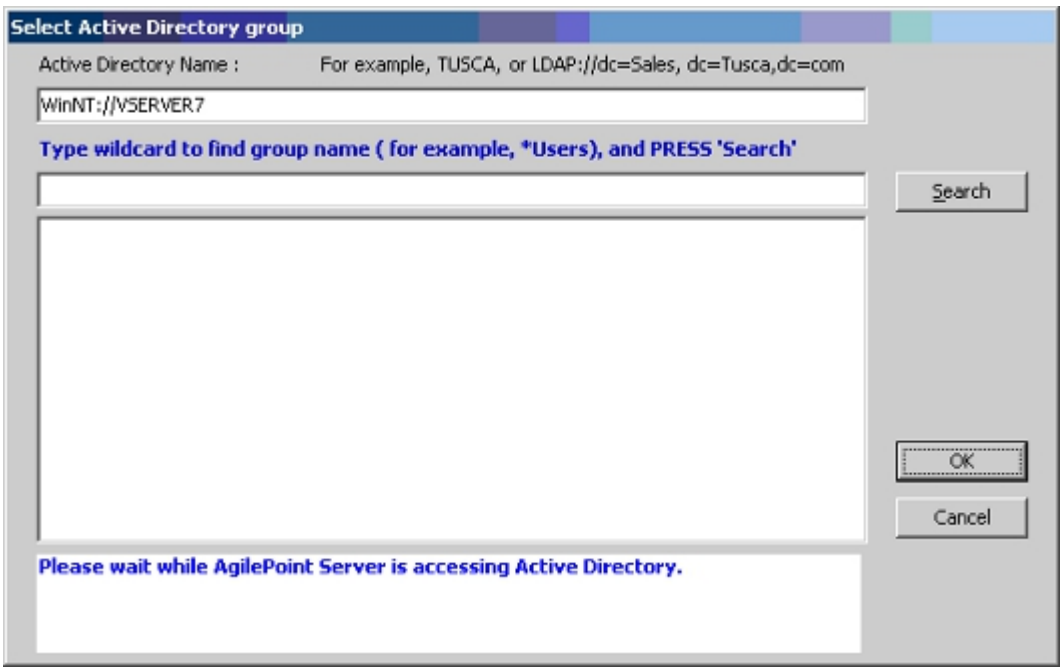




Choosing a group of participants from Active Directory:



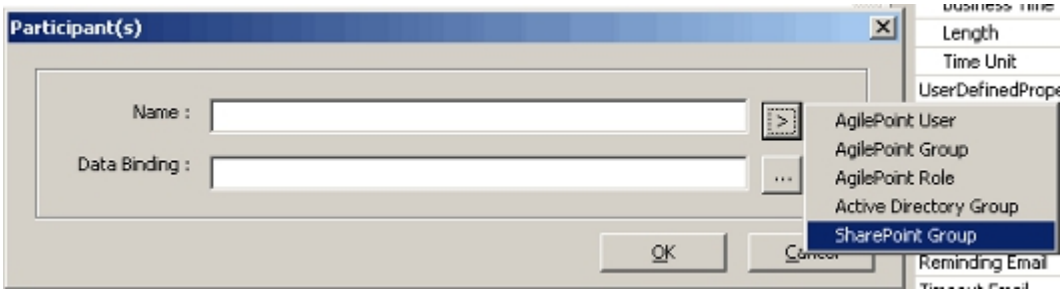
Select the AgilePoint Server URL and enter the login credential to connect to AgilePoint Server. The Select Active Directory Group window appears.



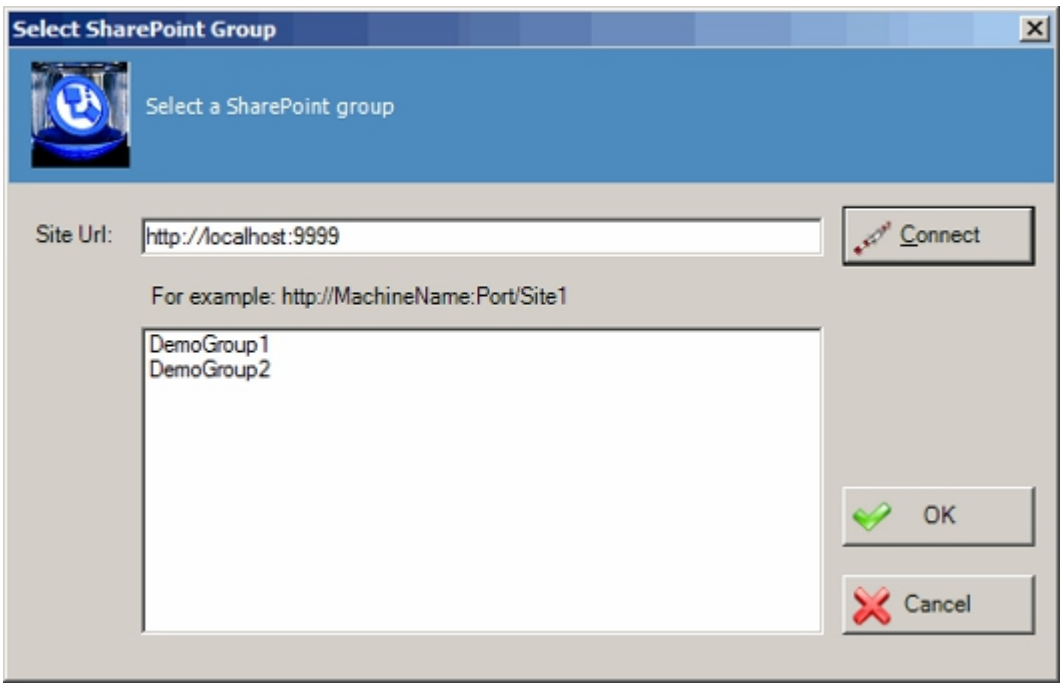
Make sure the Active Directory Name (LDAP Path) is correct, enter the search criteria and click **Search**. A list of groups from Active Directory appears. Select the group to add as the participant and click **OK** to complete.

Group names can include up to 64 characters.

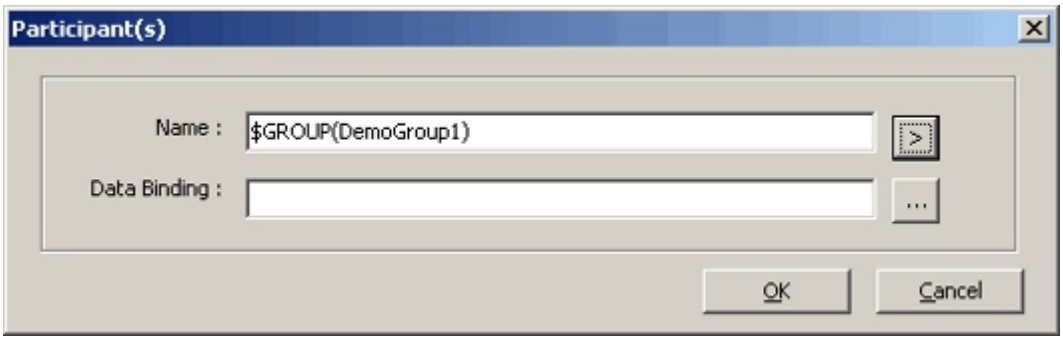
Choosing a group of participants from SharePoint:



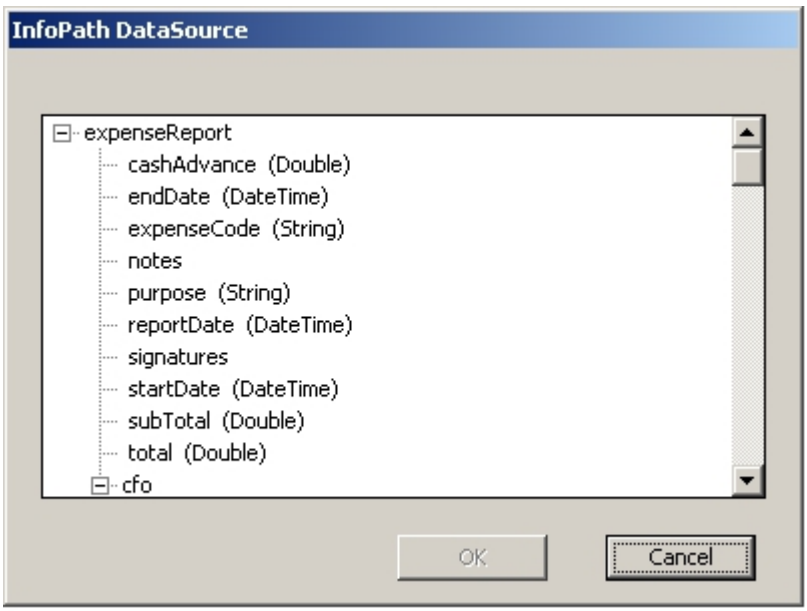
Select the AgilePoint Server URL and enter the login credential to connect to AgilePoint Server. The Select SharePoint Group window appears.

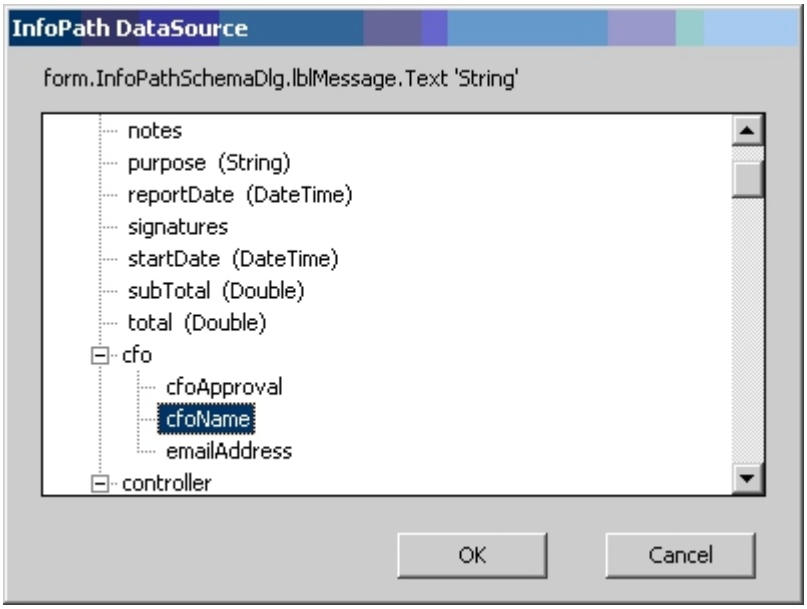


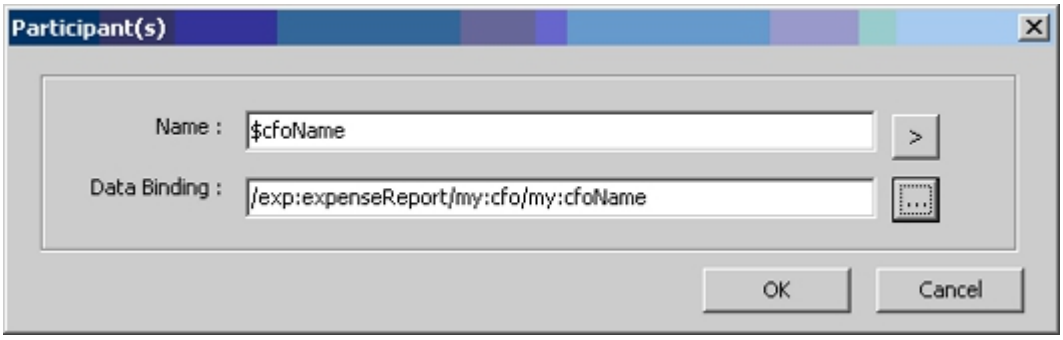
Enter the SharePoint Site URL and click **Connect**. The available groups will appear. Select the Group and click **OK**.



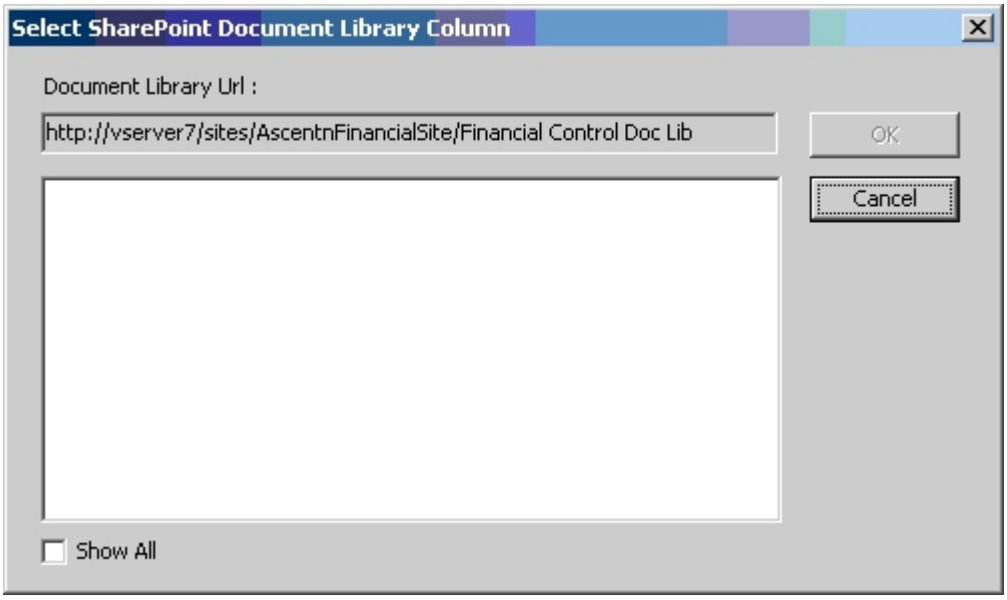
Binding the participants to an InfoPath Form's metadata:


InfoPath DataSource
expenseReport
cashAdvance (Double)
endDate (DateTime)
expenseCode (String)
notes
purpose (String)
reportDate (DateTime)
signatures
startDate (DateTime)
subTotal (Double)
total (Double)
cfo
OK
Cancel


InfoPath DataSource
form.InfoPathSchemaDlg.lblMessage.Text 'String'
notes
purpose (String)
reportDate (DateTime)
signatures
startDate (DateTime)
subTotal (Double)
total (Double)
cfo
cfoApproval
cfoName
emailAddress
controller
OK
Cancel


Participant(s)
Name :
$cfoName
>
Data Binding :
/exp:expenseReport/my:cfo/my:cfoName
...
OK
Cancel

Binding the participants to a SharePoint Document Library's metadata:



And

An activity that associates multiple activities with the And condition. All associated activities must be completed successful before the start of the exit activity of the And condition activity.

Properties for This AgilePart

Field Name	Definition
Email	Optional The name of an Email Template that should be used to generate an automatic email notification when this AgileShape is entered at runtime.
Dynamic	Default value: True When an AgileShape has multiple direct predecessors (i.e. it has multiple In-Connectors leading directly from other AgileShapes), this property determines how many of the predecessor AgileShapes must be exited (at runtime) before this AgileShape can be entered

Field Name	Definition
	(at runtime). This property can be set to the following specific values: • **True** - This value indicates that the And AgileShape will be entered after one of the AgileShape's "enterable" direct predecessors are exited (at runtime). If any of the direct predecessors are un-enterable (e.g. they will never be entered in this process instance because conditional logic in the process bypassed them), then those predecessors are not required to be exited before this AgileShape is entered and the process proceeds. • **False** - This value indicates that the AgileShape will be entered (at runtime) only after all of the AgileShape's direct predecessors are exited (at runtime).

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Email

An activity that specifies an email notification.

Properties for This AgilePart

Field Name	Definition
Deferred Time	Default value: 0 Minute(s) Specifies the amount of additional time that should be allowed to pass before the email notification is sent. This property (and its sub-properties) are very similar to the TimeSpan property.
Email	Optional

Field Name	Definition
	The name of an Email Template that should be used to generate an automatic email notification when this AgileShape is entered at runtime.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Manual

A fully functional activity that is associated with a user interface (such as Web Form, Win Form) to perform human task. A manual activity requires set up of task type, participant, and schedule to generate task at runtime and prompt for human intervention. For instance, a manual activity may be to prompt a user interface at run time for placing an order, approving a request, submitting or reviewing a document, etc.

AgileWork Properties

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

Manual with Timeout

This AgileShape is identical to the Manual AgileShape, except that it has one additional design-time property, and one additional Output connection. These two differences allow the process modeler to model the portion of the process that should occur should the activity become overdue (i.e. is not completed within the specified TimeSpan).

This AgileShape is typically used to represent a manual activity that requires a time-based escalation process.

Properties for This AgilePart

Field Name	Definition
TimeoutEmail	Optional The name of an Email Template that should be used to generate an automatic email notification when this AgileShape becomes overdue at runtime.

Field Name	Definition
	If this property is left blank, then an email notification will not be sent automatically when the AgileShape becomes overdue at runtime. If this property is not blank, then an email notification will be dynamically constructed and sent at runtime (when the AgileShape becomes overdue) using the specified Email Template.

AgileWork Properties

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

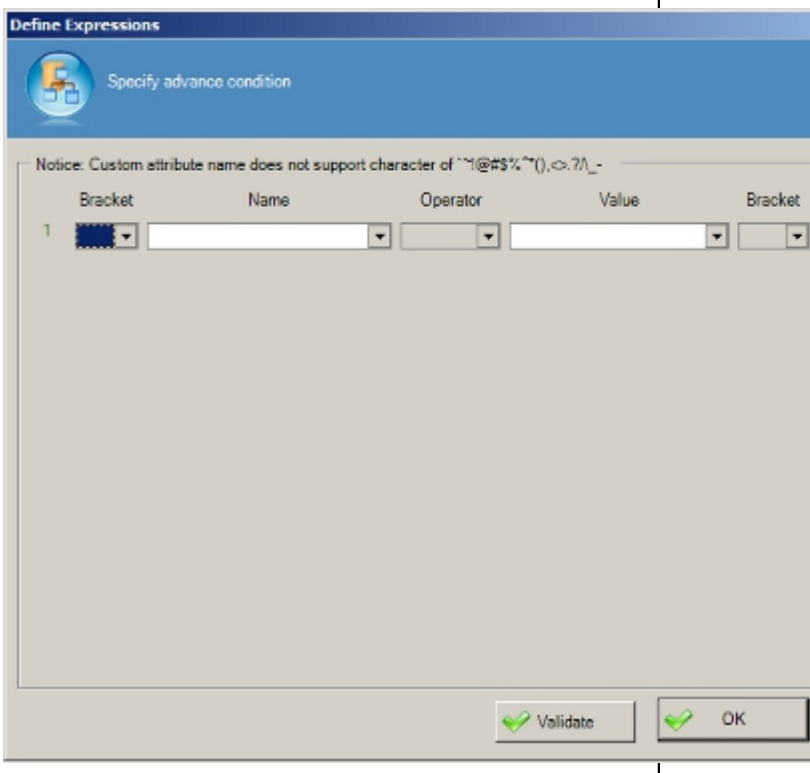
Multiple Condition

A condition activity that can branch into more than two routines based on the value of the specified Data Binding property and the expression operator. Each Data Binding property is assigned a data type such as: integer, number, date, and string. Various expression operators such as =, >, >=, etc., are supported to enable the most sophisticated process dynamics. The following is a complete list of the complex branching options that are available based on the data type that is specified.

Data Type	Expression Operators
Integer	= > >= < <= !=
String	= =(IgnoreCase) StartsWith EndsWith Contains !=
DateTime	= LaterThan EarlierThan !=
Double	= > >= < <= !=
Short	= > >= < <= !=
Float	= > >= < <= !=
Decimal	= > >= < <= !=

TIP: You can use the Multiple Condition AgileShape to determine whether a String value is null by using the operator "Equals" and entering the value as <NULL>.

Properties for This AgilePart

Field Name	Definition
Data Binding	Select a custom attribute for data binding. The data binding expression that is used to evaluate the value of the condition at runtime.
Type	The data type for the condition.
Advanced	Opens the Define Conditions dialog box, which enables you to add, edit, and manage conditions. On the Define Conditions dialog box, click Advanced to open the Define Expressions dialog box. You can use the Define dialog box to add or edit expressions. Use brackets to create complex expressions. 
PropertyBinding	ReadOnly Default value: Chosen by the user when the AgileShape is first added to the process template.

Field Name	Definition
	The data binding expression that is used to evaluate the value of the condition at runtime.
PropertyType	The data type that the data binding expression (see PropertyBinding) evaluates to at runtime. This property can be set to the following specific values: • Integer • String • DateTime • Double • Short • Float • Decimal

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Or

An activity that associates multiple activities with the Or condition. Successful completion of one or more of the associated activities will trigger the exit of the Or condition activity.

Properties for This AgilePart

Field Name	Definition
Email	Optional The name of an Email Template that should be used to generate an automatic email notification when this AgileShape is entered at runtime.
Configuration	Opens the Select Exclusive Predecessor Activities dialog box, where you can configure whether the activities in the parallel process flow will continue to process or be canceled once one of the process flows enters the "Or" shape.

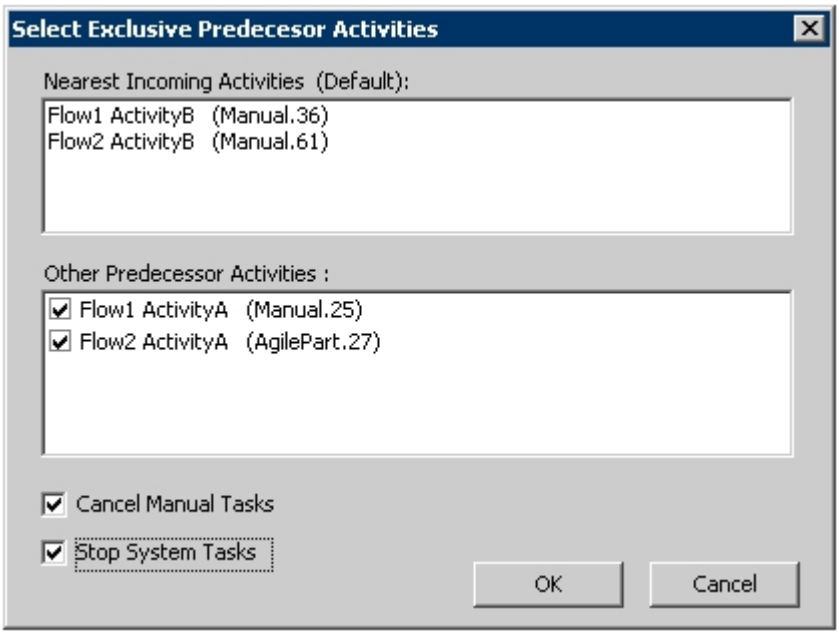
Field Name	Definition
Exclusive	This property allows the process modeler to configure whether the "Or" shape will handle inputs exclusively or wait and process all inputs as they enter. Default value: False This property can be set to the following specific values: • **True** - This value indicates that the AgileShape will handle incomplete activities from the parallel process flow exclusively based on the configuration defined using the Select Exclusive Predecessor Activities dialog. This dialog allows you to configure whether the activities in the parallel process flow will continue to process or be canceled once one of the process flows enters the "Or" shape. • **False** - This value indicates that the AgileShape will continue to handle incoming activities (without the option of canceling the activities in the parallel process flow) regardless of the sequence upon which the process flow enters the AgileShape.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Select Exclusive Predecessor Activities Window

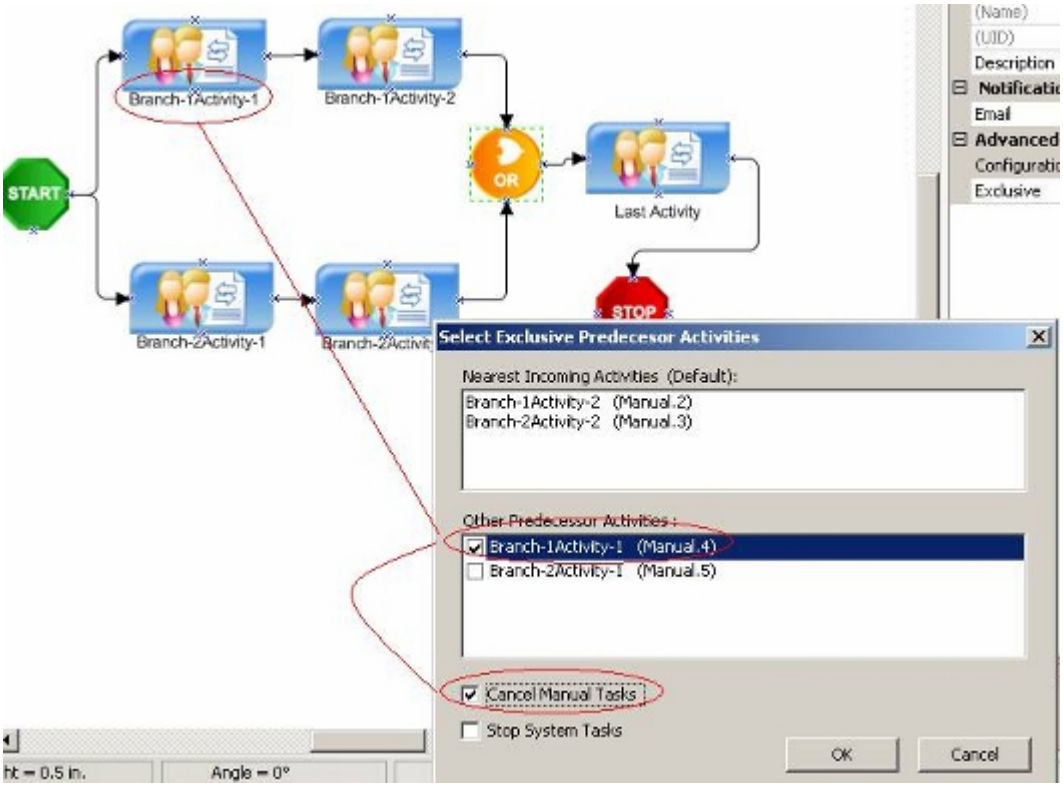
This window allows the process modeler to configure whether the activities in the parallel process flow will continue to process or be canceled once one of the process flows enters the "Or" shape.

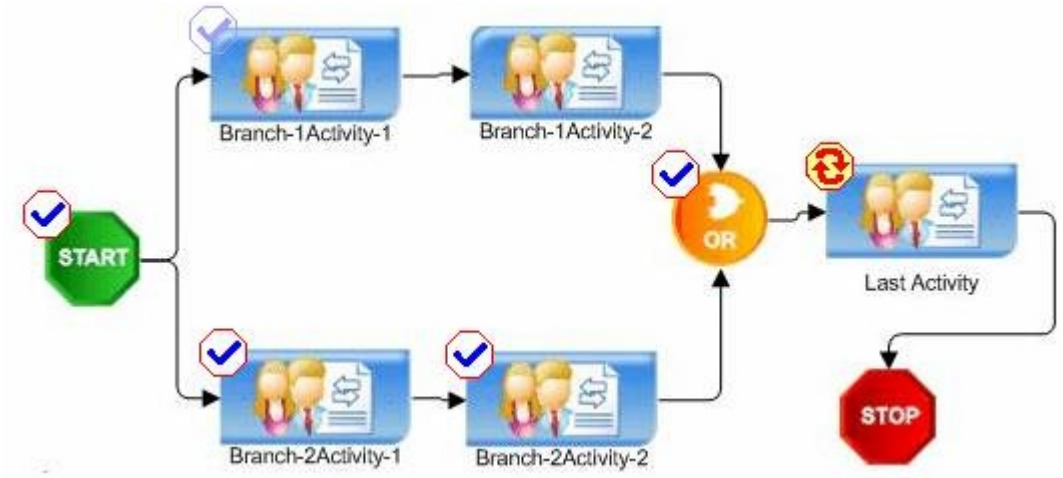


The "Nearest Incoming Activities" group box displays the activities that are nearest the "Or" AgileShape. Selecting the "Cancel Manual Tasks" and/or "Stop System Tasks" will cancel the activity that has yet to complete.

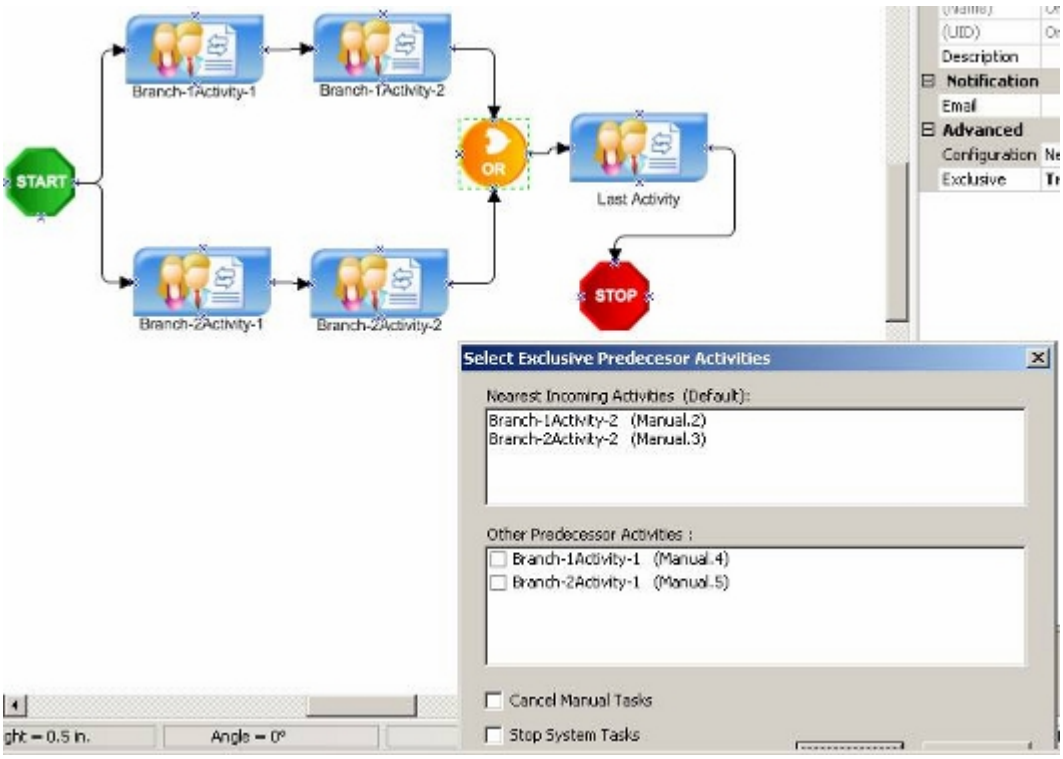
The "Other Predecessor Activities" group box displays any additional activities that are associated with a process flow leading into the "Or" AgileShape. You can select which other predecessor activities to cancel by selecting the check box. Below is a sample usage scenario that describes how this functionality would work.

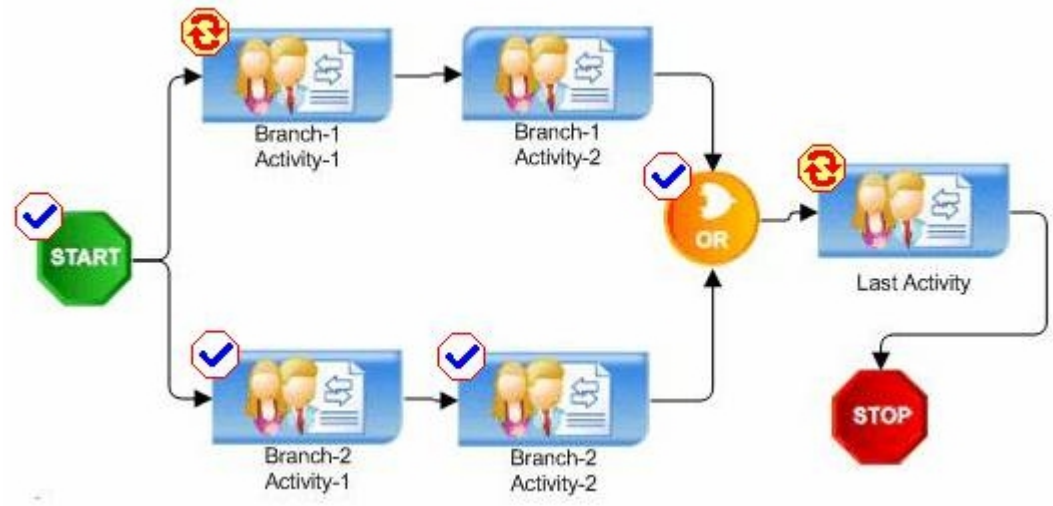
Case 1:


Branch-1Activity-1
Branch-1Activity-2
START
OR
Last Activity
STOP
Branch-2Activity-1
Select Exclusive Predecesor Activities
Nearest Incoming Activities (Default):
Branch-1Activity-2 (Manual.2)
Branch-2Activity-2 (Manual.3)
Other Predecessor Activities :
Branch-1Activity-1 (Manual.4)
Branch-2Activity-1 (Manual.5)
Cancel Manual Tasks
Stop System Tasks
OK
Cancel
(Name)
(UID)
Description
Email
Exclusive
Angle = 0°


Branch-1Activity-1
Branch-1Activity-2
START
OR
Last Activity
STOP
Branch-2Activity-1
Branch-2Activity-2

Case 2:





Leaving the "Cancel Manual Tasks" and/or "Stop System Tasks" blank will allow the parallel process flow(s) to continue processing once one of the process flows enters the "Or" shape. This would be the same behavior as if "False" was selected in the "Exclusive" property of the "Or" AgileShape.

Procedure

An activity that is tied to a system task and performed on the server side. In general, an automated activity is for performing a task between two or more systems such as application integration.

Examples of automated activities include generating a report at the end of a process, updating a database when a request is approved, etc. AgilePoint provides various ways to integrate with applications, synchronously or asynchronously, through C#, VB.NET, managed C++, COM, XML Web Service, Messaging queue, etc.

This AgileShape should only be used within process templates that are (or will be) associated with an AgileStub (created using AgilePoint Developer). The AgilePart and WebService AgileShapes do not require the creation of an AgileStub, and can often be used instead of this AgileShape.

Properties for This AgilePart

Field Name	Definition
Asynchronous	Default value: False This property determines whether this AgileShape is exited immediately after invoking the .NET method associated with this AgileShape, or only after the associated method has finished executing. This property can be set to the following specific values: • **False** - This value indicates that the AgileShape invoke its associated .NET method synchronously. The AgileShape will only be exited (at runtime) after the associated method has finished executing. • **True** - This value indicates that the AgileShape invoke its associated .NET method asynchronously (i.e. in a separate thread). The AgileShape will be exited (at runtime) as soon as the associated method has been invoked, regardless of whether the method has finished executing. This property setting is typically used to initiate long-running procedures when the rest of the process will be unaffected by any possible work that the procedure might perform.

AgileWork Properties

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

Procedure with Timeout

This AgileShape should only be used within process templates that are (or will be) associated with an AgileStub (created using AgilePoint Developer).

The AgilePart and Web Service AgileShapes do not require the creation of an AgileStub, and can often be used instead of this AgileShape. This AgileShape is identical to the Procedure AgileShape, except that it has one additional design-time property, and one additional Output connection. These two differences allow the process modeler to model the portion of the process that should occur should the activity become overdue (i.e. is not completed within the specified TimeSpan). This AgileShape is typically used to represent a procedure activity that requires a time-based escalation process.

Properties for This AgilePart

Field Name	Definition
Asynchronous	Default value: False This property determines whether this AgileShape is exited immediately after invoking the .NET method associated with this AgileShape, or only after the associated method has finished executing. This property can be set to the following specific values: ● **False** - This value indicates that the AgileShape invoke its associated .NET method synchronously. The AgileShape will only be exited (at runtime) after the associated method has finished executing. ● **True** - This value indicates that the AgileShape invoke its associated .NET method asynchronously (i.e. in a separate thread). The AgileShape will be exited (at runtime) as soon as the associated method has been invoked, regardless of whether the method has finished executing. This property setting is typically used to initiate long-running procedures when the rest of the process will be unaffected by any possible work that the procedure might perform.
TimeoutEmail	Optional The name of an Email Template that should be used to generate an automatic email notification

Field Name	Definition
	when this AgileShape becomes overdue at runtime. If this property is left blank, then an email notification will not be sent automatically when the AgileShape becomes overdue at runtime. If this property is not blank, then an email notification will be dynamically constructed and sent at runtime (when the AgileShape becomes overdue) using the specified Email Template.

AgileWork Properties

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

Single Condition

A conditional logic activity that branches into two routines determined by a Boolean value. For instance, Approval status of a request.

Properties for This AgilePart

Field Name	Definition
PropertyBinding	ReadOnly Default value: Chosen by the user when the AgileShape is first added to the process template. The data binding expression that is used to evaluate the value of the condition at runtime.
PropertyType	The data type that the data binding expression (see PropertyBinding) evaluates to at runtime. This property can be set to the following specific values: • Integer • String • DateTime • Double • Short

Field Name	Definition
	• Float • Decimal

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Start

This is a special AgileShape that represents the starting point of a process. This AgileShape is activated when a process instance is initiated, and can never be reentered. A process template must always contain exactly one Start AgileShape.

Properties for This AgilePart

Field Name	Definition
None	This AgileShape has no unique design time properties.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Stop

A special activity that is activated at the end of a running process. A process template must always contain exactly one Stop AgileShape.

Properties for This AgilePart

Field Name	Definition
None	This AgileShape has no unique design time properties.

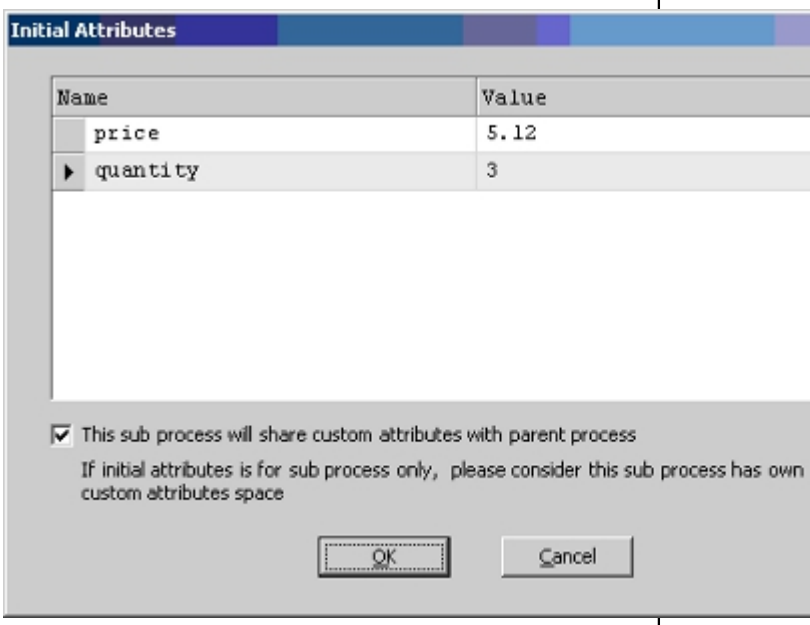
Common AgilePart Properties

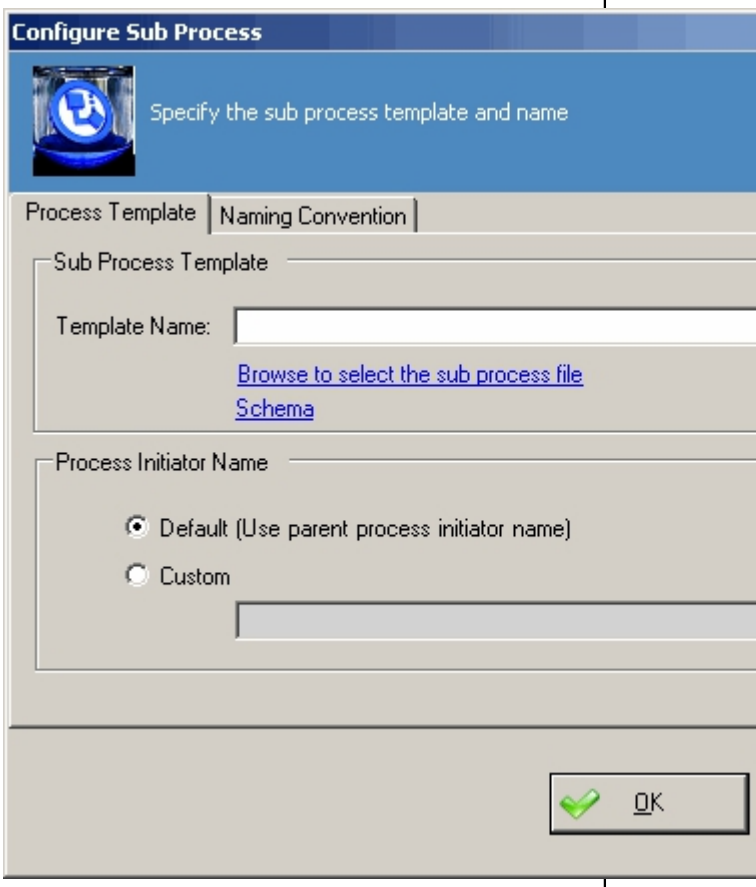
The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

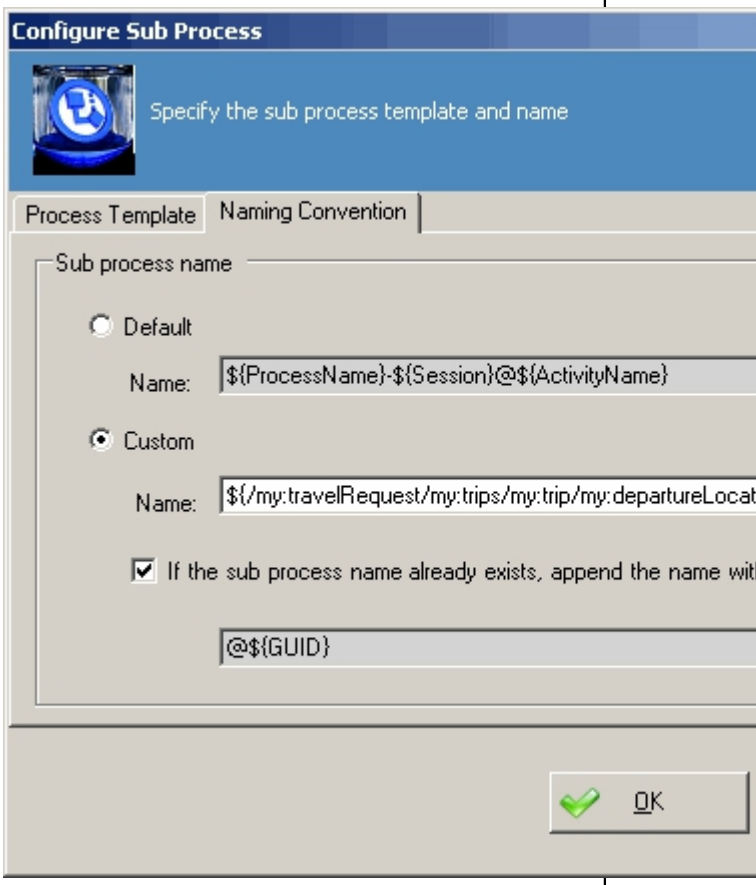
SubProcess

When entered, this AgileShape will initiate another process instance as a sub process.

Properties for This AgilePart

Field Name	Definition
InitialAttributes	This property allows the process modeler to define a set of custom process attributes that should be initialized when the sub process is initiated, and also determines whether the sub process shares the parent process' custom process attributes. Click the **Ellipses** button to open the Initial Attributes dialog.  The Initial Attributes dialog also has a check box that allows the process modeler to choose whether the sub process shares the same custom process attributes as the parent process.

Field Name	Definition
SubProcess	The name of the process that will be initiated as a sub process. To configure the AgilePoint sub process: 1. Click the **Sub Process** ellipses button. The Configure Sub Process window appears.  2. Click the **Browse to select the sub process file** link and select the sub process, or click the **Schema** link to configure the sub process naming to be dynamic based on associated metadata. 3. In the "Process Initiator Name" section, select either **Default** to inherit the parent's process initiator value or select the **Custom** option to assign a custom process initiator name. 4. Click the **Naming Convention** tab. The Configure Sub Process window appears.

Field Name	Definition
	 5. Click the **Default** option to allow AgilePoint to auto-generate the sub process name or click the **Custom** option and provide a name or select it to be dynamically created based on an associated schema value.
Wait For Complete	Default value: True This property determines whether this AgileShape is exited immediately after initiating the sub process, or only after the entire sub process instance is complete. This property can be set to the following specific values: • **False** - This value indicates that the AgileShape will be exited (at runtime) immediately after initiating the sub process. • **True** - This value indicates that the AgileShape will be exited (at runtime) only

Field Name	Definition
	after the entire sub process instance is complete.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Premier Extension

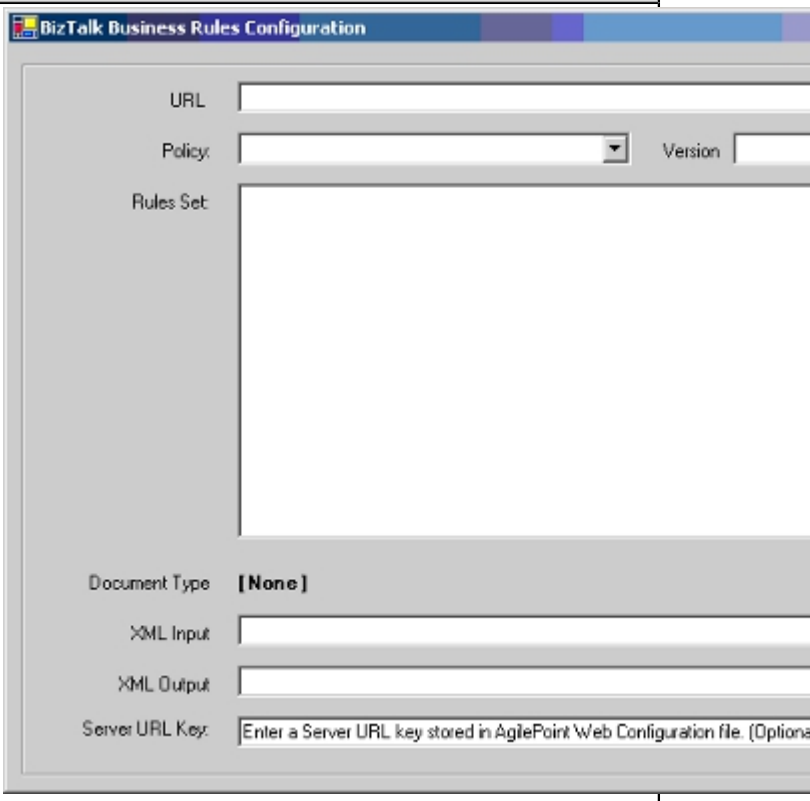
This section describes the AgileShapes in the Premier Extension stencil.

BRE

An activity that accesses BizTalk Rules Engine and its policies which are registered in the AgilePoint Envision. User can select the appropriate BizTalk Rules Engine and its specific policies using the BRE shape.

Properties for This AgilePart

Field Name	Definition
Policy	Specifies the name of the Business Rule Policy associated with this AgileShape.
Version	Specifies the version of the Business Rule Policy (see Policy) associated with this AgileShape.
Configure	This property allows the process modeler to configure which BizTalk Business Rule Policy should be invoked at runtime. It also allows the process modeler to configure the way in which the policy should be invoked (e.g. which custom process attributes should be associated with the policy's input and output). Click the **Ellipses** button to open the BizTalk Business Rules Configuration dialog.

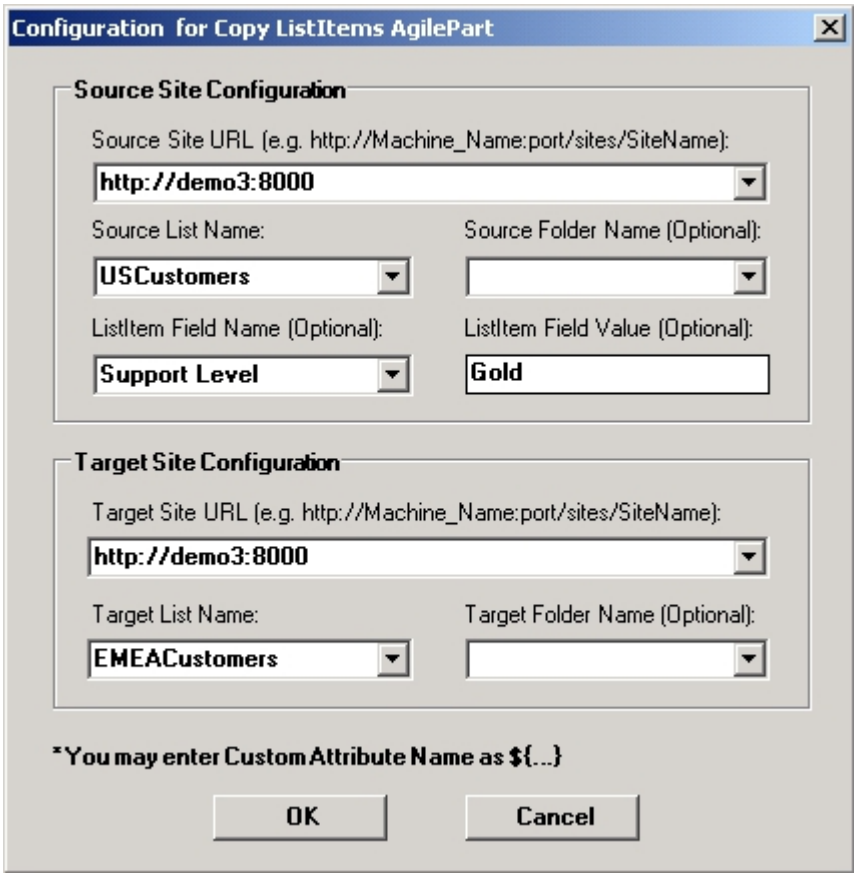
Field Name	Definition
	
Input	Specifies the name of the custom process attribute that contains the XML input that will be passed to the Business Rule Engine. The value of the specified custom process attribute will be passed to the Business Rule Engine when this AgileShape is exited at runtime.
Output	Specifies the name of the custom process attribute that should be used to store the XML output from the Business Rule Engine. The value of the specified custom process attribute will be updated when this AgileShape is exited at runtime.
CopyProcessInformation	Opens the CopyListItemsConfiguration dialog box specifies the configuration for copying list items.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Configuration for Copy ListItems AgilePart

Specifies the configuration for copying list items.



Field Definitions

Field Name	Definition
Source Site URL	Specifies the name of the list that includes the affected (copied, moved, etc.) list items.
Source List Name	Specifies the source SharePoint site URL that includes the list for which items are to be affected (copied, moved, etc.).
Source Folder Name	Specifies the name of the folder that includes the list items to be affected (copied, moved, etc.).

Field Name	Definition
ListItem Field Name	Specifies the name of the list item field to be affected (copied, moved, etc.).
ListItem Field Value	Specifies the value of the field to be affected (copied, moved, etc.). This can be used as a filtering mechanism where only fields with the specified value are affected. The following are sample values: • $\{ListItemID\} or $\{SubListItemID\} • list item ID
Target List Name	Specifies the name of the destination list for the affected items.
Target Folder Name	Specifies the name of the destination folder for the affected items. If the folder does not exist the system will automatically create it.
Target Site URL	Specifies the target SharePoint site URL that includes the destination list for the affected items.

Cancel Tasks

This AgileShape can be used to cancel all Assigned and Overdue tasks.

Properties for This AgilePart

Field Name	Definition
None	This AgileShape has no unique design time properties.

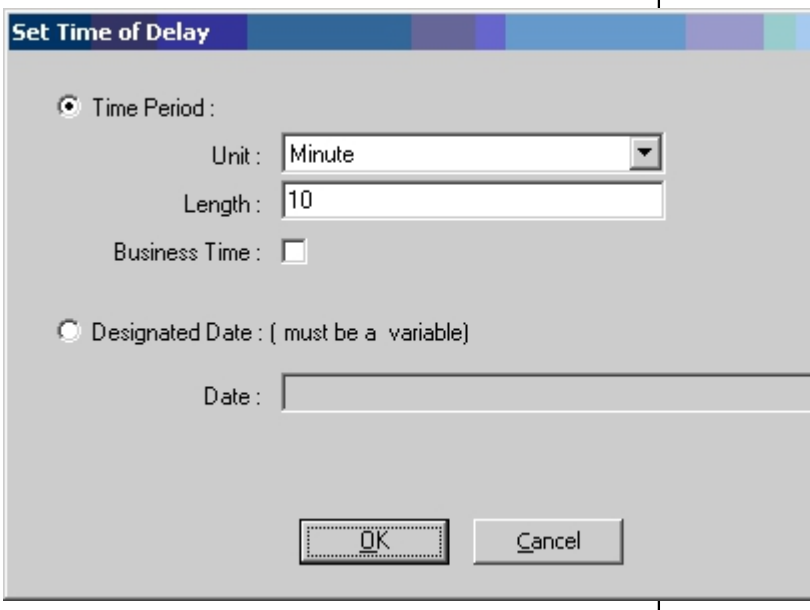
Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Delay

This AgileShape can be used to force the process to pause (for a specified length of time, or until a specified date) before allow the process to continue to the next AgileShape.

Properties for This AgilePart

Field Name	Definition
Configure	This property allows the process modeler to configure how long this AgileShape will delay the process. Click the **Ellipses** button to open the Set Time of Delay dialog.  See the TimeSpan section of the Common AgileShape Design-Time Properties section for additional information about specifying a time period.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Dynamic Group

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

Properties for This AgilePart

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

AgileWork Properties

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

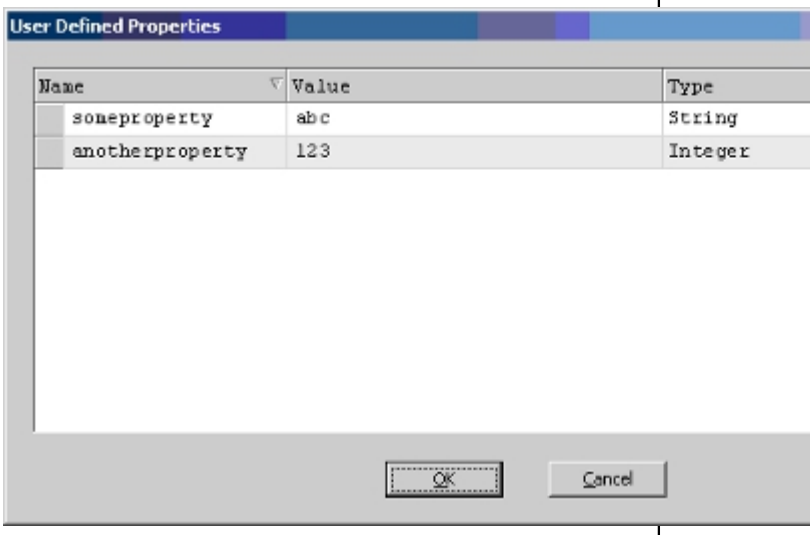
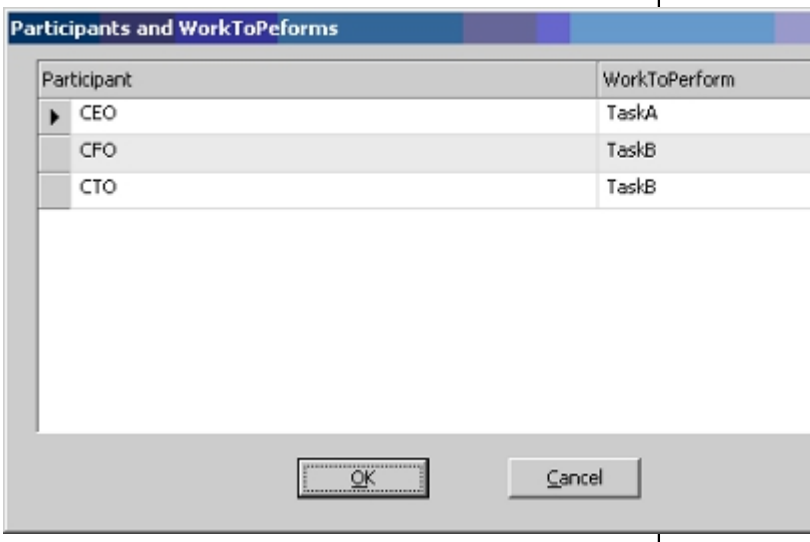
Dynamic Parallel Approval

This AgileShape can be used to represent multiple manual (i.e. human input required) activities that must be completed simultaneously (or in parallel).

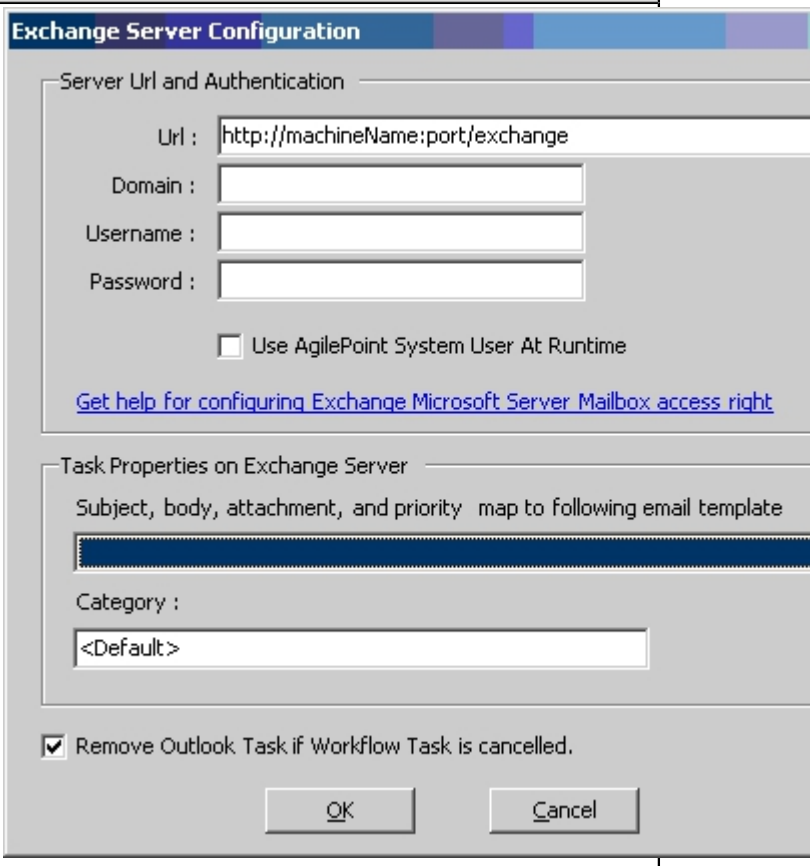
The Dynamic Parallel Approval AgileShape currently only allows one participant per line. You cannot (at this time) use a semicolon-delimited list of participants to assign a task to a pool of users using the Dynamic Parallel Approval AgileShape.

Properties for This AgilePart

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

Field Name	Definition
	
WorkToPerforms	This property allows the process modeler to configure the number of parallel tasks, and the participants and "WorkToPerform" for each task. Click the **Ellipses** button to open the configuration dialog.  The Participant values can only be a single username. Enhancements will be made in a future release to allow custom attributes to be used such as $GROUP() and $ROLE(). If you

Field Name	Definition
	need to use $GROUP() and $ROLE() before then, you can simply use Manual AgileShapes.
EnabledExchangeServer	Default value: False This property allows the process modeler to enable the AgileShape to integrate directly with Microsoft Exchange Server so that the AgileShape's associated task(s) can be viewed directly from Microsoft Outlook's Task List by the task(s)'s assigned participant(s). See the ExchangeServer property for additional information.
ExchangeServer	This property allows the process modeler to configure the AgileShape's integration with Microsoft Exchange Server. When properly enabled and configured, the AgileShape will then insert, update, and remove Task items for the task's assigned participants, so that the tasks can be viewed directly from Microsoft Outlook. Click the **Ellipses** button to open the configuration dialog.

Field Name	Definition
	 See the **EnabledExchangeServer** property for additional information.

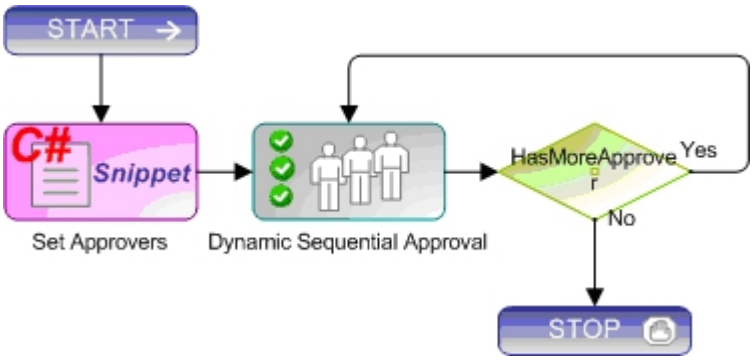
AgileWork Properties

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

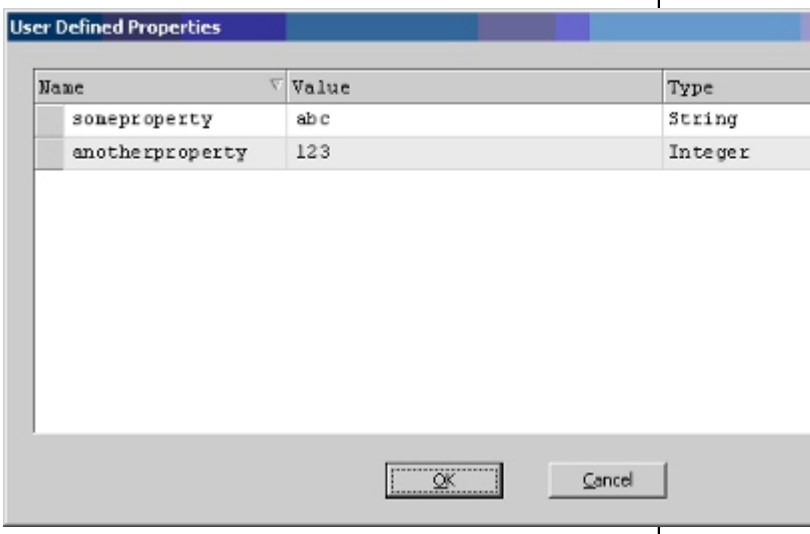
Dynamic Sequential Approval

This AgileShape can be used to represent a Manual (i.e. human input required) activity that must be completed sequentially by 1 or more participants. It is designed to be used as part of a loop in a process, so that the process flow will keep returning to this AgileShape until a sufficient number of participants have completed the activity (or until some other condition exits the loop). The UI associated with the Task determines where the value(s) associated with the UI are stored (e.g. an Approval value).

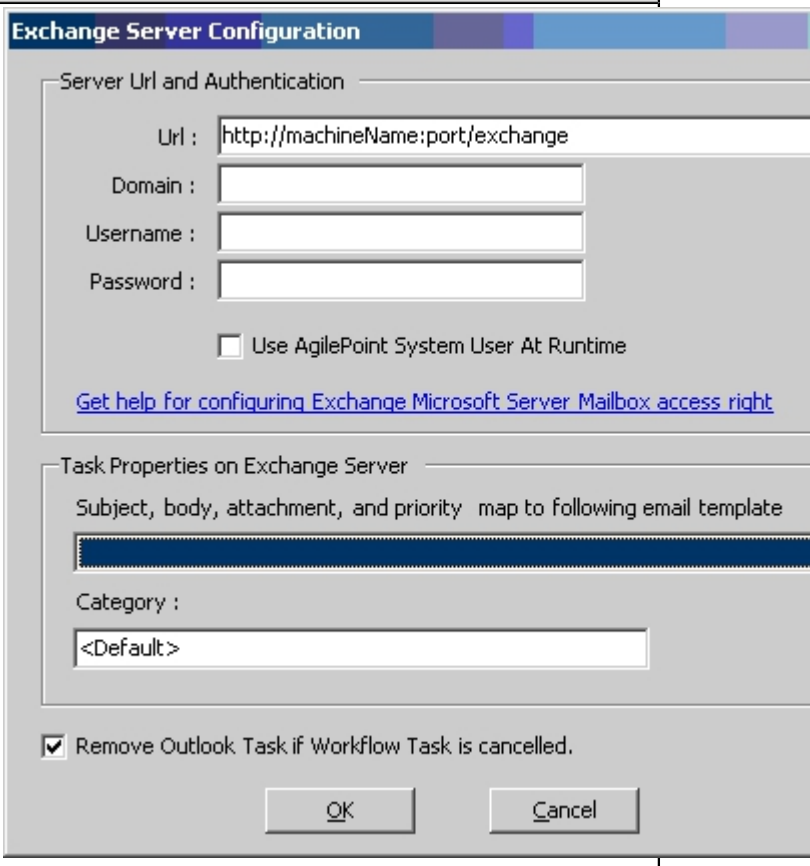
Here is a simple example of how this AgileShape is typically used:



Properties for This AgilePart

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

Field Name	Definition
	This property specifies the name of the custom attribute that (initially) contains the user names of the approvers. The usernames should be separated by a semicolon. Each time this AgileShape is entered at runtime, the AgileShape will assign a task to the first username specified by this property. Then the custom attribute associated with this property will be modified to remove the username so that the next username will be assigned the task during the next iteration through the loop.
LoopCondition	Default value: $HasMoreApprover This property specifies the name of the custom attribute that will be updated each time the AgileShape is exited to indicate whether more Approvers are still waiting to be assigned the task. The value of the specified custom attribute should be checked (using a SingleCondition AgileShape within the loop) to determine whether the loop should be exited or not.
EnabledExchangeServer	Default value: False This property allows the process modeler to enable the AgileShape to integrate directly with Microsoft Exchange Server so that the AgileShape's associated task(s) can be viewed directly from Microsoft Outlook's Task List by the task(s)'s assigned participant(s). See the ExchangeServer property for additional information.
ExchangeServer	This property allows the process modeler to configure the AgileShape's integration with Microsoft Exchange Server. When properly enabled and configured, the AgileShape will then insert, update, and remove Task items for the task's assigned participants, so that the tasks can be viewed directly from Microsoft Outlook. Click the **Ellipses** button to open the configuration dialog.

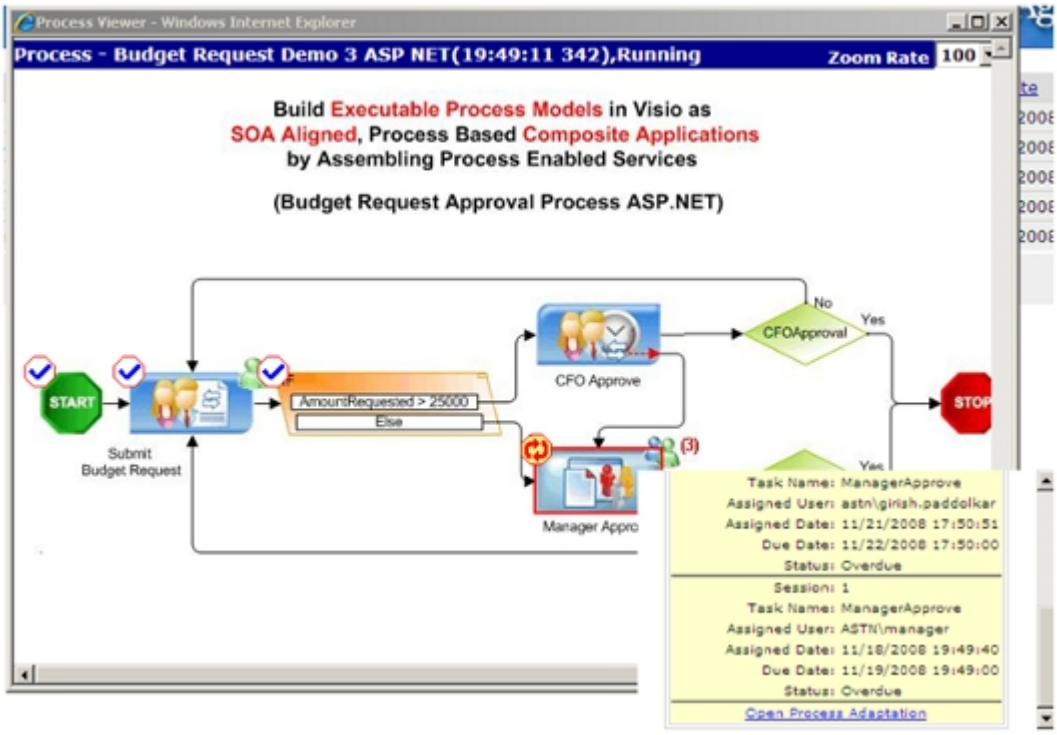
Field Name	Definition
	 See the **EnabledExchangeServer** property for additional information.

AgileWork Properties

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

Process Adaptation

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



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

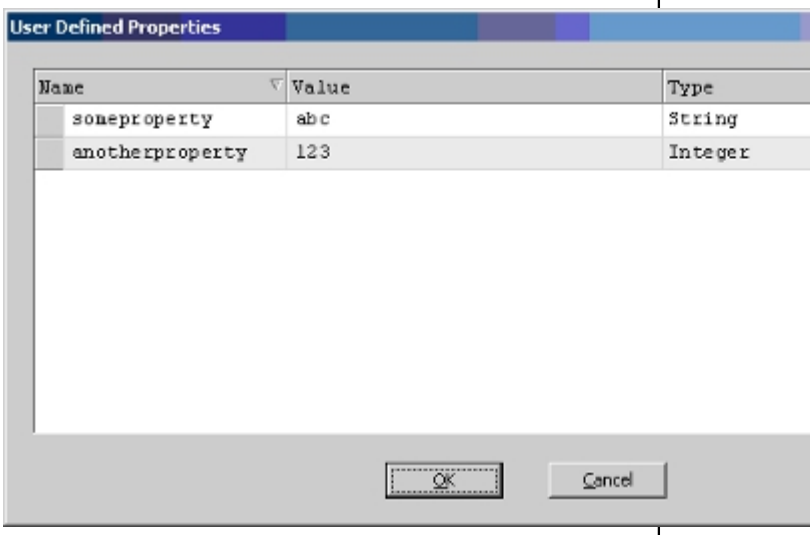
```
<appSettings>
         <add key="ProcessAdaptationUrl"
              value="http://[hostname]:[port]/EnterpriseManager/
ProcessAdaptation/LinkedTasks.aspx"/>
</appSettings>
```

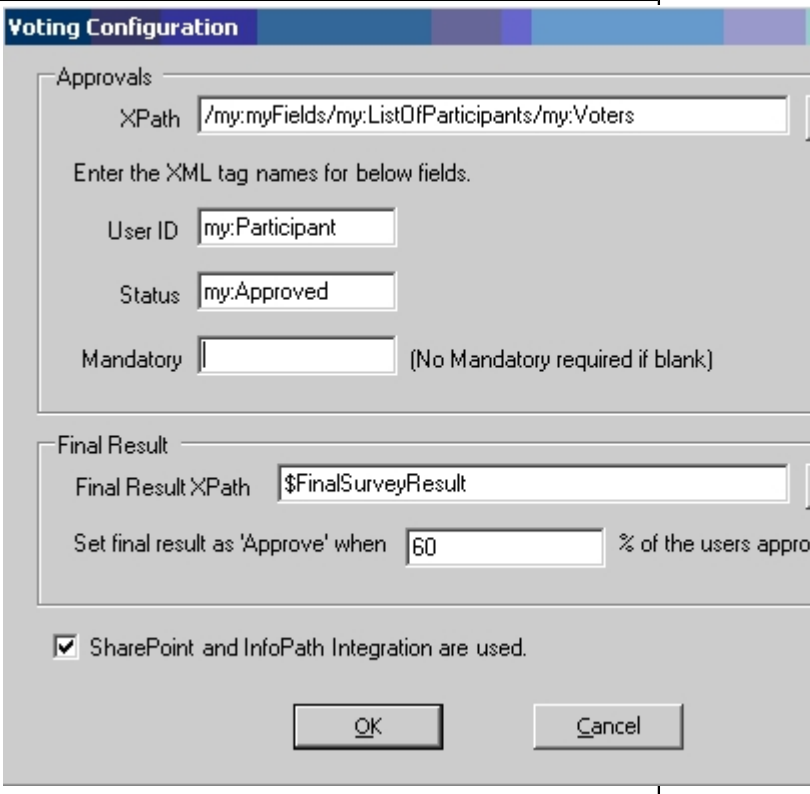
The value for the Process Adaptation is the URL of the process adaptation URL in AgilePoint Enterprise Manager.

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

Properties for This AgilePart

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

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

Field Name	Definition
	
ApprovalType	The property can be set to Sequential or Parallel at design time. This property determines a runtime whether the task will be delivered in a sequential or parallel fashion to the participants of the task. This can be changed at runtime via AgilePoint Enterprise Manager or the Process Viewer. 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.
UpdateCustomAttribute	This property allows the process modeler to configure an update to a custom attribute value based on an event type.

AgileWork Properties

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

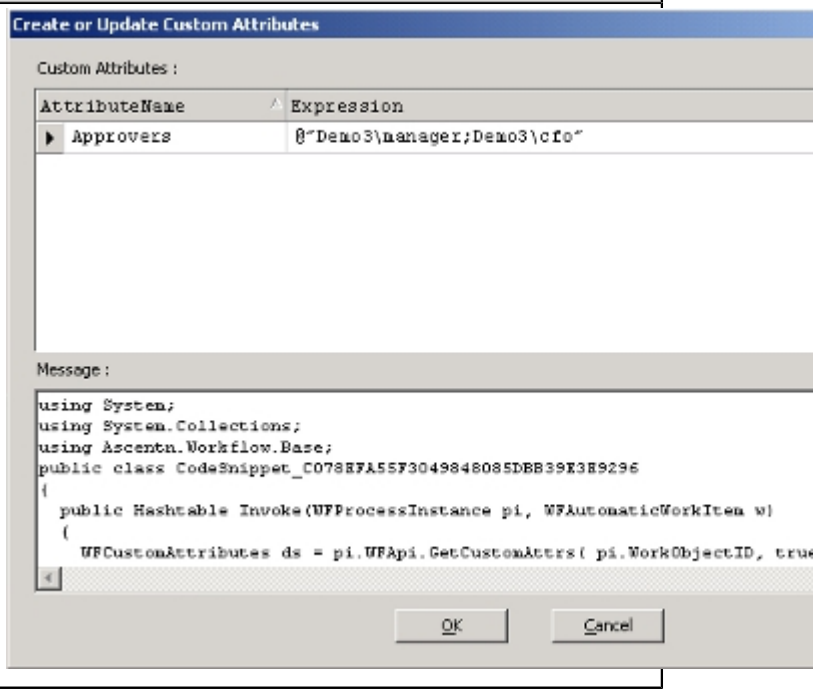
Update Custom Attributes

This AgileShape can be used to update the runtime value(s) of one or more custom process attributes. When using this shape, you specify the name(s) of one or more custom process attributes, and associate a snippet/fragment of C# code with each attribute name. At runtime, each snippet will be executed/evaluated to determine the value that will be assigned to the associated custom process attribute.

This AgilePart essentially allows you to create and embed a simple custom AgilePart in your process, without actually having to create, name, compile, deploy, or register the AgilePart.

Properties for This AgilePart

Field Name	Definition
Configuration	This property allows the process modeler to configure the code snippet(s) that will be invoked at runtime, as well as the custom process attribute(s) that the return value(s) of the snippet(s) will be stored in. Click the **Ellipses** button to open the configuration dialog. After clicking the **Add** button, entering an attribute name and a code snippet, and then clicking the **View Code** button, the dialog might look like this:

Field Name	Definition
	

AgilePart Properties

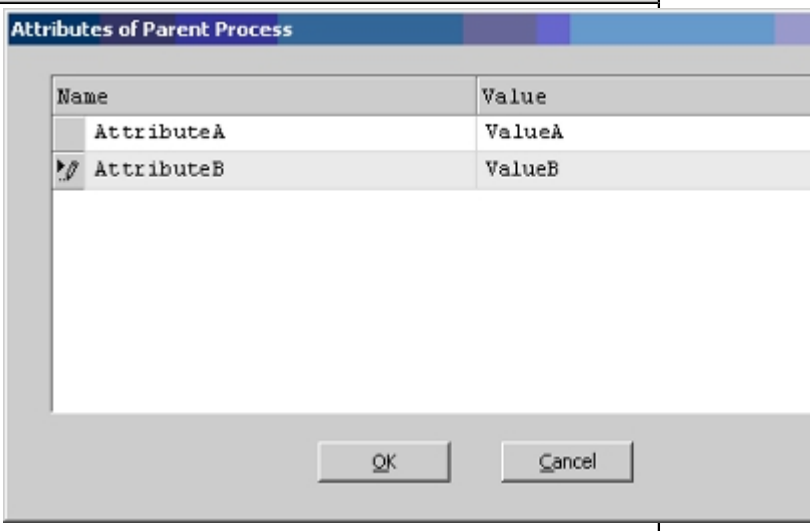
The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Update Parent Process

This AgileShape can be used to update the values of one or more custom process attributes in a separate process instance.

Properties for This AgilePart

Field Name	Definition
Attributes	This property allows the process modeler to update the values of one or more custom process attributes in a separate process instance (see ParentProcessID). Click the Ellipses button to open the configuration dialog.

Field Name	Definition
	
ParentProcessID	Default value: $ParentProcessID This property specifies the Process ID of the process instance containing the custom process attributes that should be updated.

Common AgilePart Properties

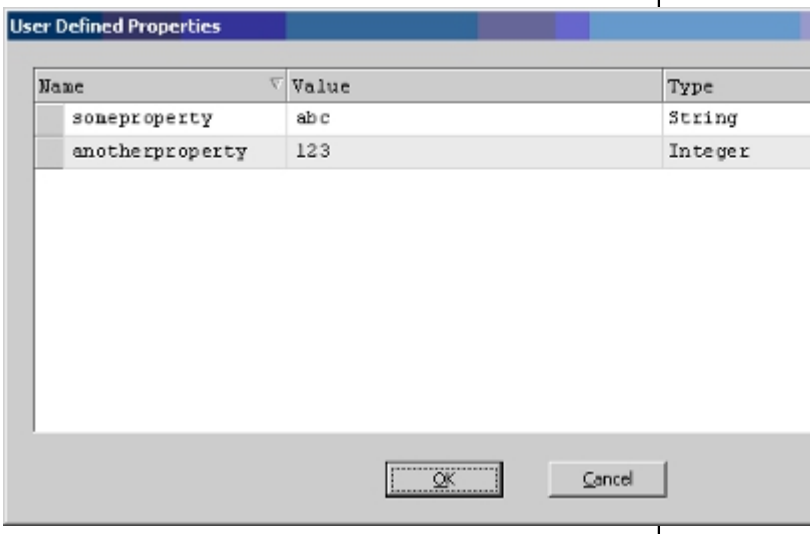
The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

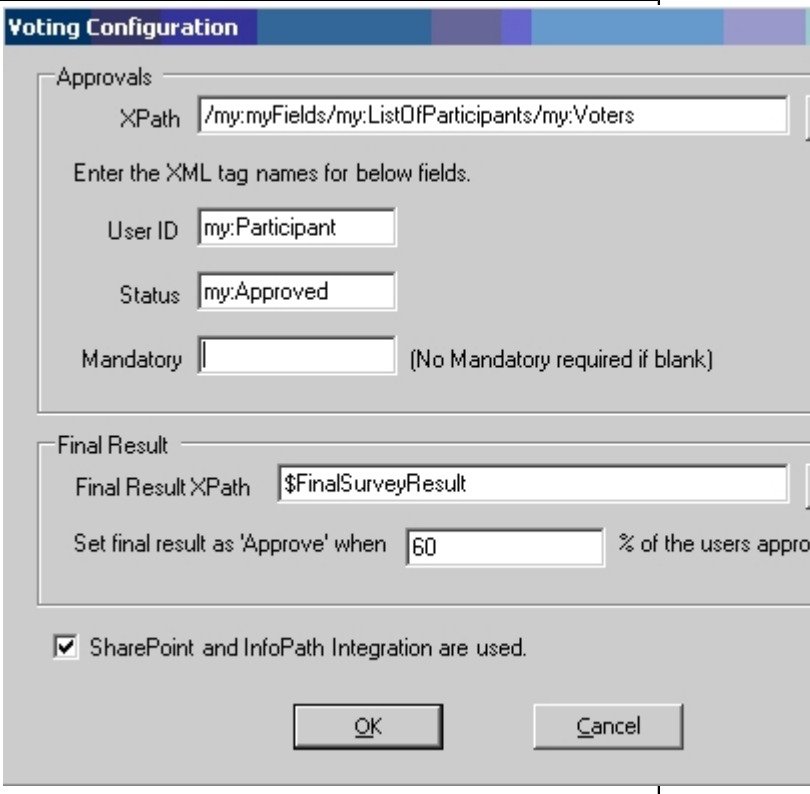
Vote

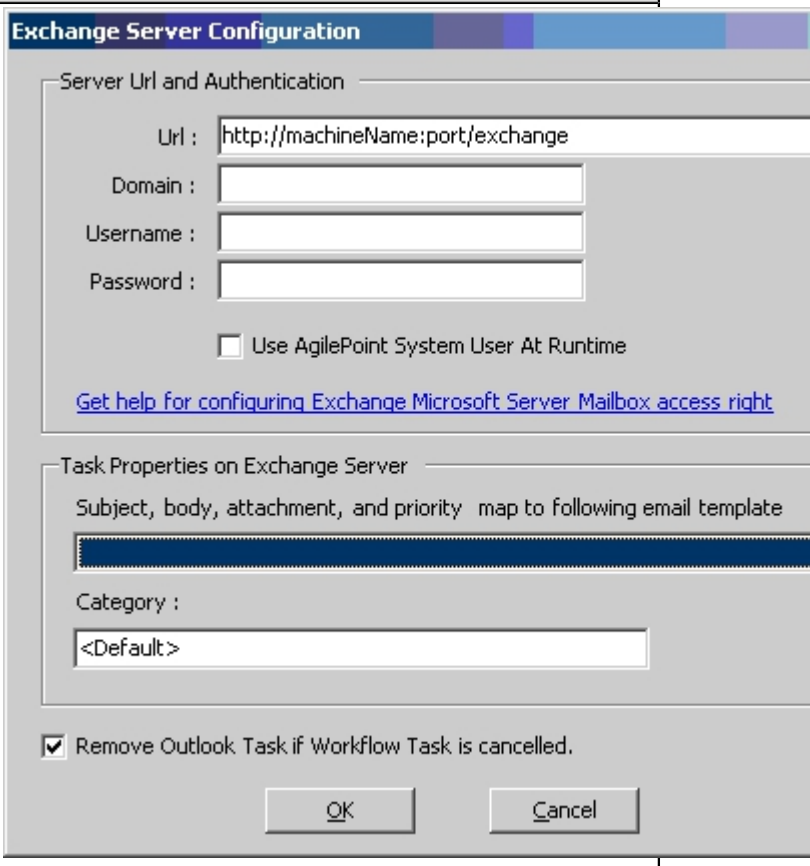
This AgileShape can be used when a group of approvers is involved at an activity step, you can configure the AgileWork to require mandatory approvals from certain participants and to move forward based on a certain percentage of approves that have approved.

Properties for This AgilePart

Field Name	Definition
UserDefinedProperties	This property allows the process modeler to configure initial ClientData values that will be associated with the AgileShape's associated task(s) at runtime. This is basically a way of allowing you to specify a set of name/value pairs that are passed to your Web page via an object called a WorkItem. This is an alternative to

Field Name	Definition
	passing data via URL parameters. In your Web page you can retrieve this data via the ClientData property of the WorkItem. It is then up to you to decide how to use the data. Click the **Ellipses** button to open the configuration dialog. 
Voting Configuration	This property allows the process modeler to configure data binding to the data schema within a repeating table for which to establish the approval data. The "Mandatory" option provides an added level of functionality, requiring any participants that have been identified as "Mandatory" to approve, or the final decision will be not-approved. The final result is also configured here by setting a custom attribute to store the final result and specifying the percentage of participants that will need to approve before the final decision is considered as approved. For example, the process designer specifies the voting percentage as 60%. If 60% of the approvers approve the preceding request, then the final decision is considered as approved. Click the **Ellipses** button to open the configuration dialog.

Field Name	Definition
	
EnabledExchangeServer	Default value: False This property allows the process modeler to enable the AgileShape to integrate directly with Microsoft Exchange Server so that the AgileShape's associated task(s) can be viewed directly from Microsoft Outlook's Task List by the task(s)'s assigned participant(s). See the ExchangeServer property for additional information.
ExchangeServer	This property allows the process modeler to configure the AgileShape's integration with Microsoft Exchange Server. When properly enabled and configured, the AgileShape will then insert, update, and remove Task items for the task's assigned participants, so that the tasks can be viewed directly from Microsoft Outlook. Click the **Ellipses** button to open the configuration dialog.

Field Name	Definition
	 See the **EnabledExchangeServer** property for additional information.

AgileWork Properties

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

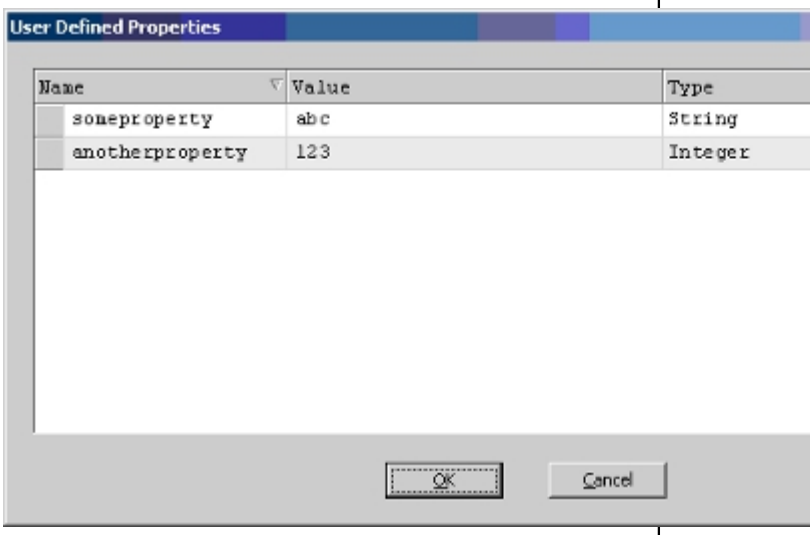
Web Form

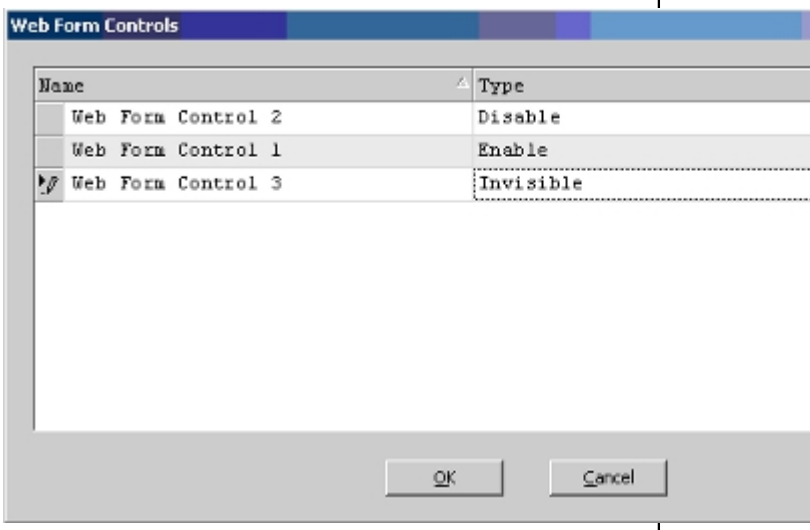
This AgileShape can be used to represent a manual (i.e. human input required) activity that uses a Web page as the user interface for the activity. Since the associated Web page's URL is configurable (and can include URL parameters), one common use of this AgileShape is to associate several different activities with the same Web page. Each activity (i.e. each AgileShape instance) can pass different input to the Web page (via URL parameters) in order to make the Web page initialize appropriately for each individual activity.

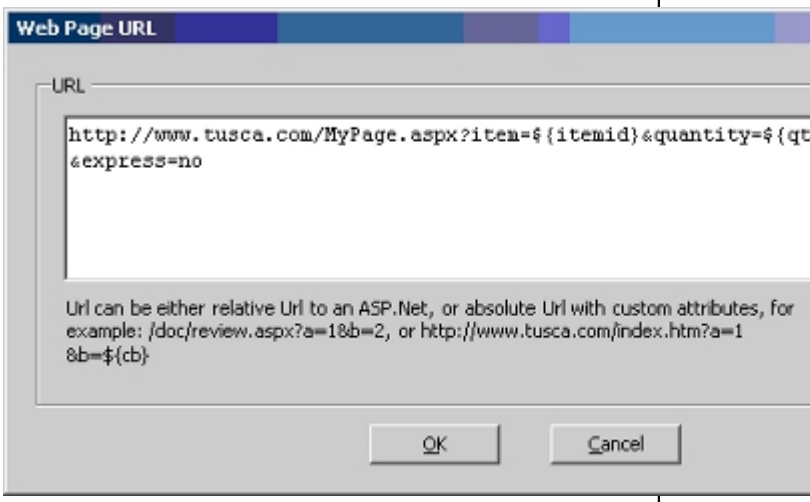
Another feature of the WebForm shape is that it lets you configure "User Defined Properties". This is basically a way of allowing you to specify a set of name/value pairs that are passed to your Web page via an object called a WorkItem. This is an alternative to passing data via URL parameters. In your Web page you can retrieve this data via the ClientData property of the WorkItem. It is then up to you to

decide how to use the data. Another feature of the WebForm shape is that it has the ability to integrate with Microsoft Exchange. The User's Guide has some explanation on this.

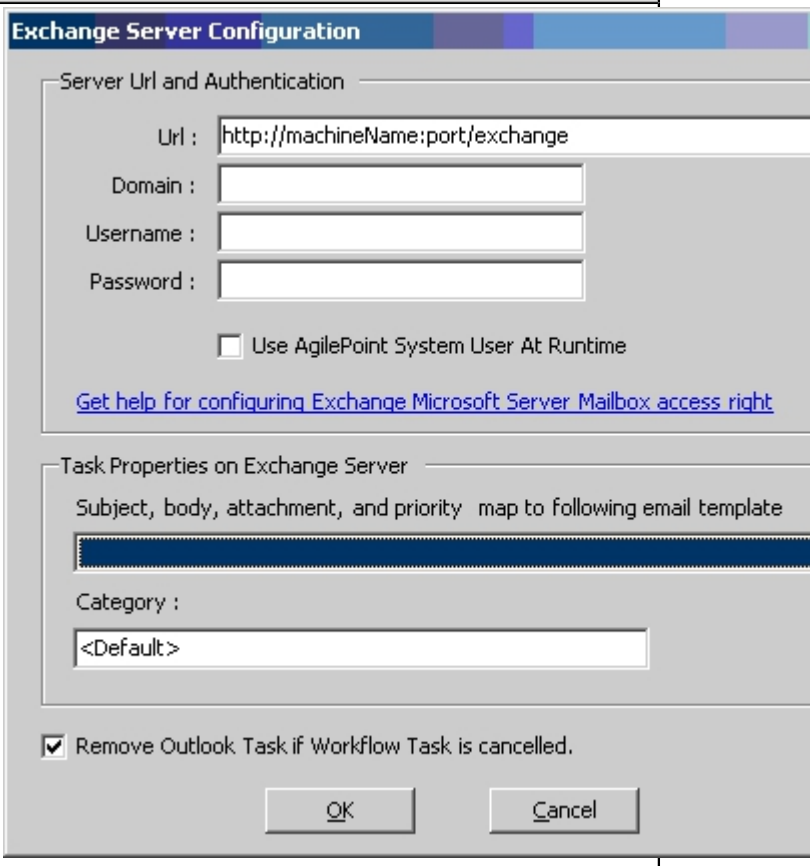
Properties for This AgilePart

Field Name	Definition
UserDefinedProperties	This property allows the process modeler to configure initial ClientData values that will be associated with the AgileShape's associated task(s) at runtime. This is basically a way of allowing you to specify a set of name/value pairs that are passed to your Web page via an object called a WorkItem. This is an alternative to passing data via URL parameters. In your Web page you can retrieve this data via the ClientData property of the WorkItem. It is then up to you to decide how to use the data. Click the **Ellipses** button to open the configuration dialog. 
WebFormControls	This property provides control over the display of custom Web Form. Controls that are used in the form. • **Disable** - The control will be visible, but not editable. • **Enable** - The control will be visible and editable.

Field Name	Definition
	• **Invisible** - The control will not be visible. 
WebPageUrl	Required This property specifies the URL of the Web page associated with this AgileShape. This property will be used at runtime to determine the (absolute) URL that will be associated with individual activity instances. This URL will be displayed in the AgilePoint TaskList WebControl (if it is used). See the Manual AgileShape for more information about how URLs associated with manual activities are displayed in task lists. The way the URL is derived at runtime depends on the way this property's value is configured, as described below: • **A Relative URL** - An ASP.NET application-relative URL can be used by specifying a URL that starts with a slash. E.g.: /doc/review.aspx?a=1&b=2 The location of the ASP.NET application is derived in the same way as described under the documentation of the Work To Perform property of the Manual AgileShape. • **An Absolute URL** - An absolute URL which provides the full path to the Web page can be used. E.g. The following value specifies an absolute URL with three URL parameters. The values of two of the parameters are

Field Name	Definition
	initialized by custom process attributes ($\{itemid\} and $\{qty\}) at runtime, and the third is initialized to a hard coded value. http://www.tusca.com/MyPage.aspx?item=$\{itemid\}&quantity=$\{qty\}&express=no Click the button to open the configuration dialog. Click the **Ellipses** button to open the configuration dialog. 
Work To Perform	Required This property specifies the name of the task associated with this AgileShape. This name is displayed to the end user when a human-readable label is needed (as opposed to the WebPageUrl property, which specifies the actual location/URL of the AgileShape's Web page). Unlike most of the properties that this AgileShape has in common with the Manual AgileShape, this property functions very differently for the two AgileShapes. The Work To Perform property of both the Manual and WebForm shapes represents the name of the activity that will be displayed on a user's task list. For the Manual shape, if the user interface is implemented in a Web page then the WorkToPerform property is used as the name of the Web page with an implied extension of ".aspx". The WebForm shape does not use the WorkToPerform property as the Web page name. Instead, it uses the WebPageUrl property. This property gives you

Field Name	Definition
	some enhanced capabilities such as being able to define full or relative URL paths as well as pass URL parameters. For example, in the Manual shape you may specify the WorkToPerform as "Approve". This implies that the Web page to run is "Approve.aspx". In the WebForm shape, you can specify an absolute WebPageUrl like this: http://machine:port/AppName/Subfolder/Approve.aspx?param1=value1&param2=value2 or relative like this: Subfolder/Approve.aspx?param1=value1&param2=value2 The main reason you might want to use URL parameters is so that you can send instructions to the page telling it to behave a certain way. For example, you might want the page to display certain data and controls only if there is a certain URL parameter.
EnabledExchangeServer	Default value: False This property allows the process modeler to enable the AgileShape to integrate directly with Microsoft Exchange Server so that the AgileShape's associated task(s) can be viewed directly from Microsoft Outlook's Task List by the task(s)'s assigned participant(s). See the ExchangeServer property for additional information.
ExchangeServer	This property allows the process modeler to configure the AgileShape's integration with Microsoft Exchange Server. When properly enabled and configured, the AgileShape will then insert, update, and remove Task items for the task's assigned participants, so that the tasks can be viewed directly from Microsoft Outlook. Click the **Ellipses** button to open the configuration dialog.

Field Name	Definition
	 See the **EnabledExchangeServer** property for additional information.

AgileWork Properties

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

SharePoint / Microsoft SPS

This section describes the AgileShapes in the SharePoint and Microsoft SPS stencils. This stencil is to be used with the AgilePoint SharePoint Integration.

Add User to SP Group

This AgileShape can be used to automatically add a user to a SharePoint Group.

Properties for This AgilePart

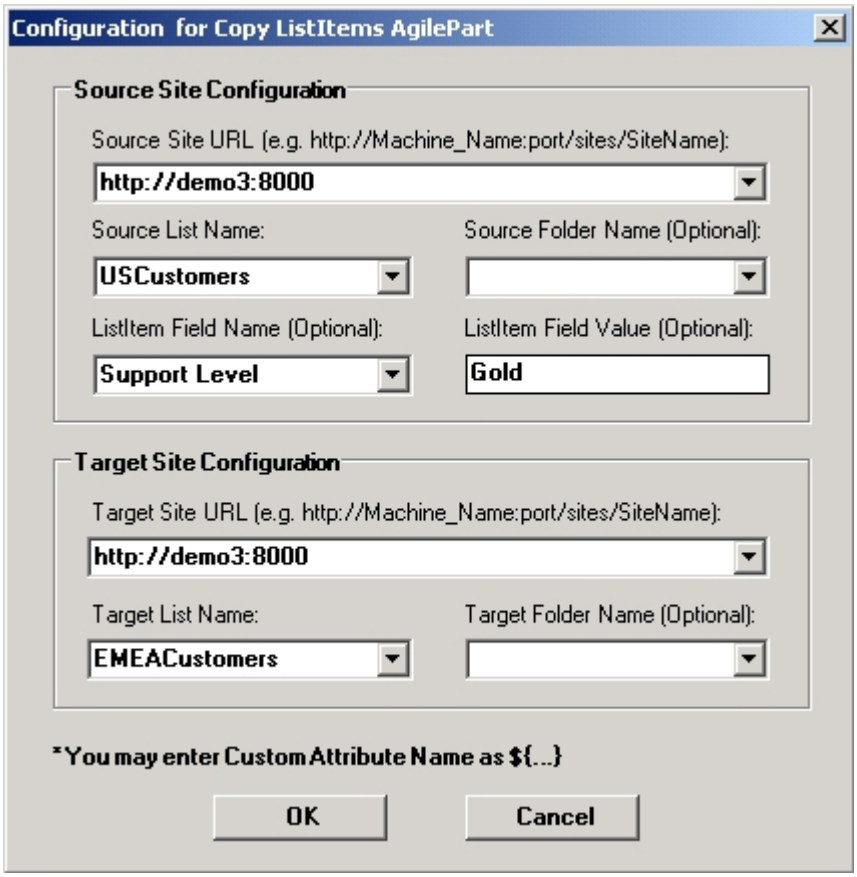
Field Name	Definition
CopyProcessInformation	Opens the CopyListItemsConfiguration dialog box specifies the configuration for copying list items.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Configuration for Copy ListItems AgilePart

Specifies the configuration for copying list items.



Field Definitions

Field Name	Definition
Source Site URL	Specifies the name of the list that includes the affected (copied, moved, etc.) list items.
Source List Name	Specifies the source SharePoint site URL that includes the list for which items are to be affected (copied, moved, etc.).
Source Folder Name	Specifies the name of the folder that includes the list items to be affected (copied, moved, etc.).
ListItem Field Name	Specifies the name of the list item field to be affected (copied, moved, etc.).
ListItem Field Value	Specifies the value of the field to be affected (copied, moved, etc.). This can be used as a filtering mechanism where only fields with the specified value are affected. The following are sample values: • $\{ListItemID\} or $\{SubListItemID\} • list item ID
Target List Name	Specifies the name of the destination list for the affected items.
Target Folder Name	Specifies the name of the destination folder for the affected items. If the folder does not exist the system will automatically create it.
Target Site URL	Specifies the target SharePoint site URL that includes the destination list for the affected items.

Approve

This AgileShape is essentially identical to the Manual AgileShape, except that its Work To Perform property defaults to the value **Approve**, and it has a different visual appearance in the process template. This AgileShape is provided simply for the convenience of the process modeler.

Properties for This AgilePart

Field Name	Definition
None	This AgileShape has no unique design time properties.

AgileWork Properties

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

Approved

A single condition activity to check the custom attribute of Approved. This AgileShape is essentially identical to the SingleCondition AgileShape, except that its PropertyBinding property defaults to the value **Approved**. This AgileShape is provided simply for the convenience of the process modeler.

Properties for This AgilePart

Field Name	Definition
PropertyBinding	ReadOnly Default value: Chosen by the user when the AgileShape is first added to the process template. The data binding expression that is used to evaluate the value of the condition at runtime.
PropertyType	The data type that the data binding expression (see PropertyBinding) evaluates to at runtime. This property can be set to the following specific values: • Integer • String • DateTime • Double • Short • Float

Field Name	Definition
	• Decimal

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Approve Reject Content

This AgileShape can be used to automatically approve or reject a document.

Properties for This AgilePart

Field Name	Definition
ApprovalType	The property can be set to Sequential or Parallel at design time. This property determines a runtime whether the task will be delivered in a sequential or parallel fashion to the participants of the task. This can be changed at runtime via AgilePoint Enterprise Manager or the Process Viewer. 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.
DocumentURL	The URL location of the affected file (for example, the file you want to add, delete, check out, etc.).

AgileWork Properties

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

CAML Query

This AgileShape can be used to create a SharePoint view based on available fields using a CAML query. You can use the CAML Query Builder AgilePart to create your CAML query, and your view.

Properties for This AgilePart

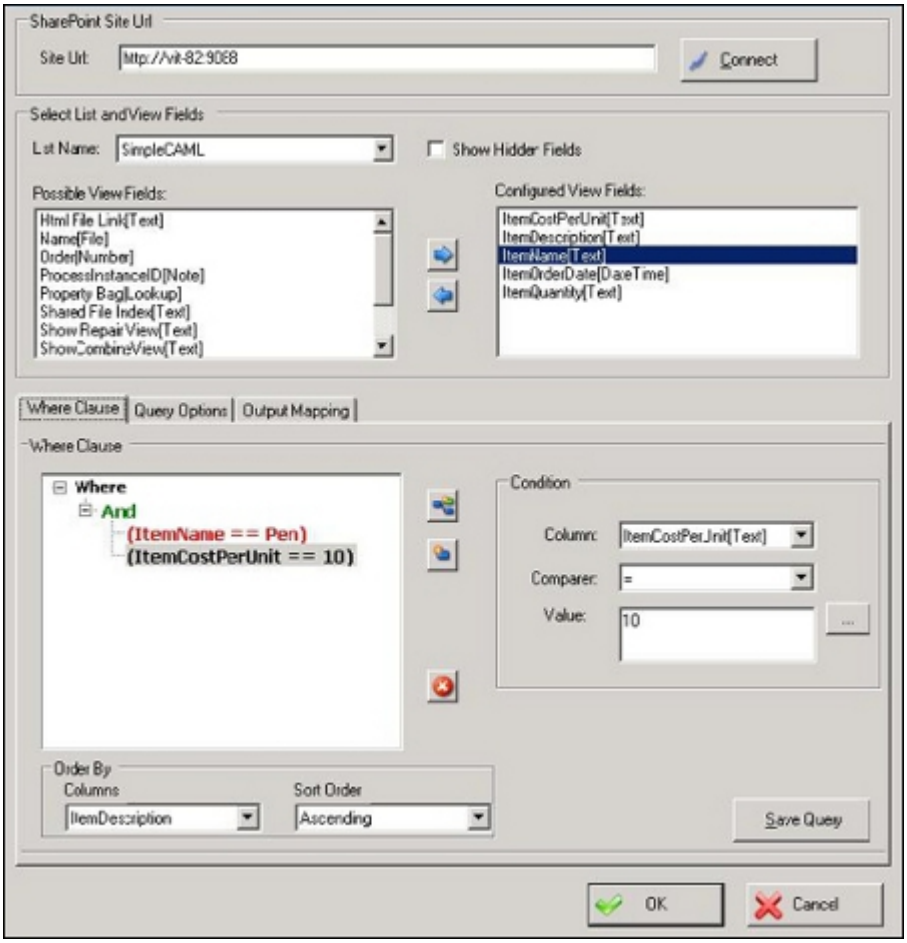
Field Name	Definition
Configuration	Opens the CAML Query Configuration dialog box, where you can configure a CAML query.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

CAML Query Configuration

Use this window to configure a CAML query.



To configure the CAML query and create your view from available fields:

1. Enter the site URL in the **Site Url** text box and click **Connect**. The various Lists and Document libraries are loaded in the **List Name** drop-down.
2. Select **Show hidden fields** if you want to use the SharePoint hidden fields in the CAML Query.
3. Select the List. All the columns in the selected list will be loaded in the **Possible View Fields** box.
4. Move the required columns to the **Configured View Fields** list.
5. Configure the Where clause by selecting a nest type -- **And** or **Or**.
6. Select the columns required for the condition.
7. Select the **Column** to order the data by and the **Sort Type**.
8. Click the **Query Options** tab, and select options such as the maximum number of rows (Row Limit), whether to include mandatory columns, Folder location and Group By Column.
9. Click the **Output Mapping** tab, and map the nodes from SharePoint column to the InfoPath schema.

If the output type is an InfoPath form, the results from the operations performed by the CAML Query AgilePart are automatically updated in the InfoPath form. The following conditions apply:

- The InfoPath form must have a repeating table which can be mapped to the row node.
- The columns must be mapped to this repeating table.
- The ItemCount node will contain the number of rows returned by the CAML Query. This can also be mapped if required.

Check In File

This AgileShape can be used to automatically check in a file to a SharePoint document library and make it available to others.

Properties for This AgilePart

Field Name	Definition
CheckinType	The check in type. MinorCheckin may mean that the file is in draft status, MajorCheckIn may mean the file is ready to publish, OverwriteCheckIn will overwrite the file if it already exists.
Comments	Any comments to be associated with the action.
DocumentURL	The URL location of the affected file (for example, the file you want to add, delete, check out, etc.).

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Check Out File

This AgileShape can be used to automatically check out a file from a SharePoint document library and make it unavailable for others to edit.

Properties for This AgilePart

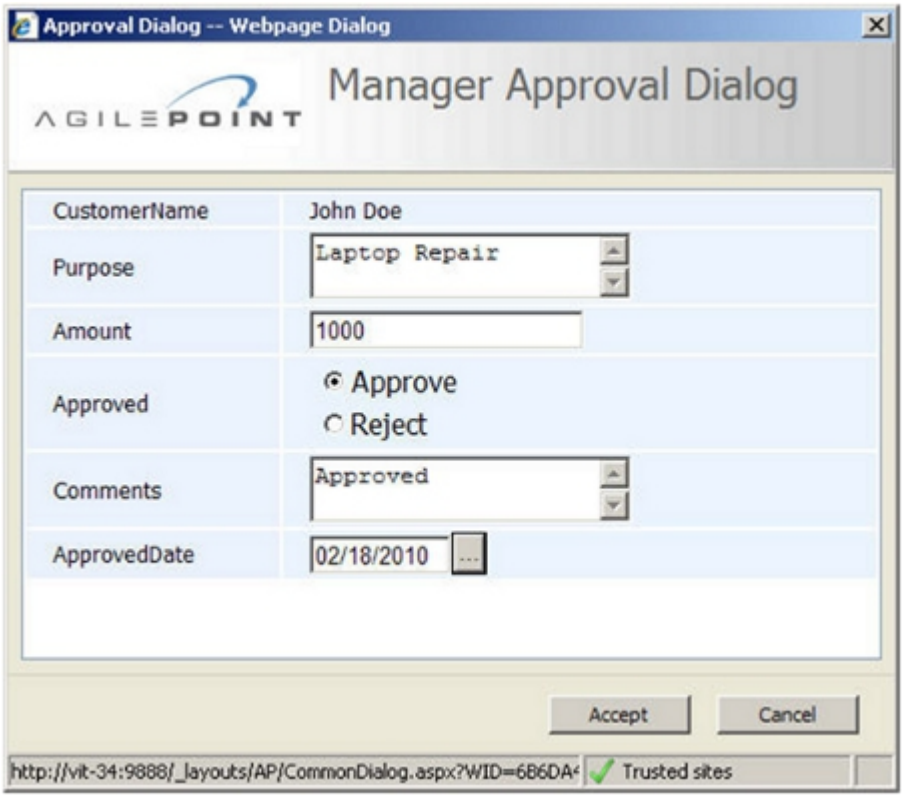
Field Name	Definition
CheckoutToLocal	Select True if you want to work on a copy of the file on your hard disk. If you want the draft copy to be stored on the server while it is checked out to you, select False.
DocumentURL	The URL location of the affected file (for example, the file you want to add, delete, check out, etc.).

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Common Dialog

This AgileShape can be used to create a dialog box form in SharePoint. The most common use for this AgileShape is creating simple input or approval forms. Once you have created a Common Dialog and deployed your process, the dialog displays to a user when he or she clicks a task in SharePoint. The following image shows an approval form using a Common Dialog.



Properties for This AgilePart

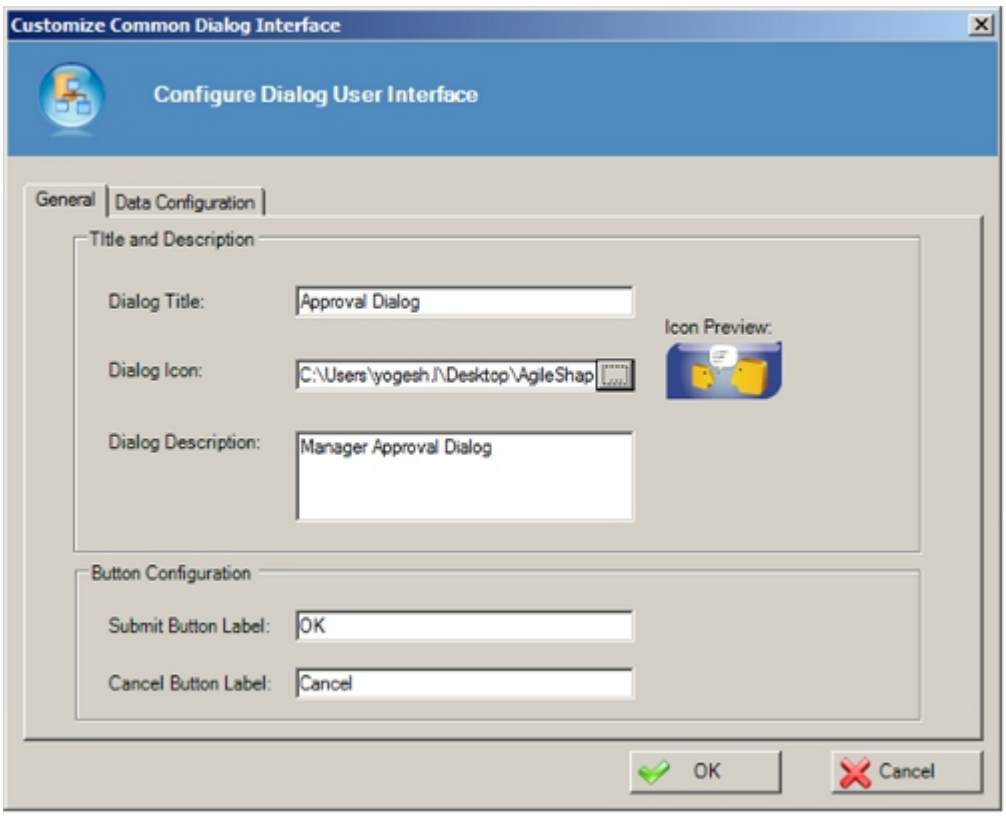
Field Name	Definition
Configuration	Opens the Customize Common Dialog Interface dialog box, where you can configure the dialog box you want to display in SharePoint.

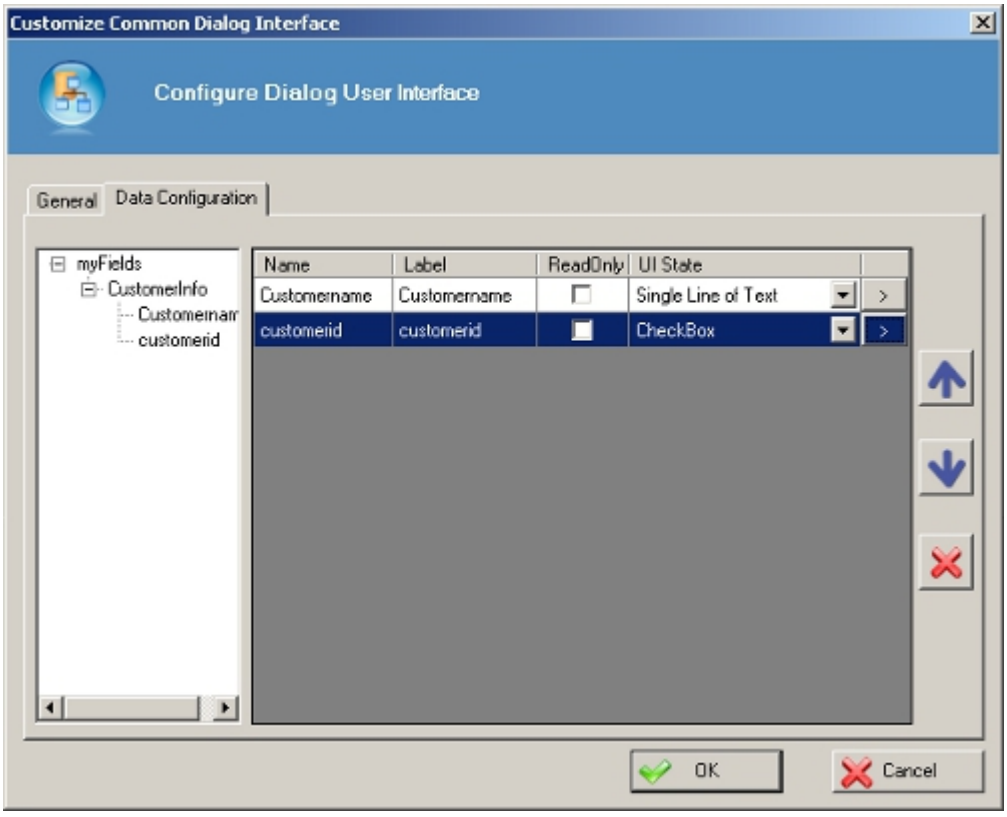
AgileWork Properties

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

Customize Common Dialog Interface Window

This window allows you to configure the dialog box you want to display in SharePoint.


Customize Common Dialog Interface
Configure Dialog User Interface
General
Data Configuration
Title and Description
Dialog Title:
Approval Dialog
Icon Preview:
Dialog Icon:
C:\Users\yogesh.l\Desktop\AgileShap
Dialog Description:
Manager Approval Dialog
Button Configuration
Submit Button Label:
OK
Cancel Button Label:
Cancel
OK
Cancel


Customize Common Dialog Interface
Configure Dialog User Interface
General
Data Configuration
myFields
CustomerInfo
customerid
Name
Label
ReadOnly
UI State
Customername
Customername
Single Line of Text
customerid
customerid
CheckBox
OK
Cancel

Field Definitions

Field Name	Definition
Dialog Title	The title that appears in the title bar of the dialog box.
Dialog Icon	An icon that appears at the top of the dialog box.
Dialog Description	A text description that at the top of the dialog box.
Submit Button Label	The text that appears on the button that submits the form on the dialog box and closes the dialog box. (The text is "OK" by default in Windows.)
Cancel Button Label	The text that appears on the button that closes the dialog box without submitting the form. (The text is "Cancel" by default in Windows.)
Data Configuration tab	Opens the Data Configuration tab, which enables you to define the fields on the form.
Schema	The schema for the current process is displayed in the left pane. Drag and drop schema fields in the right pane to add them to the dialog box.
Label	The name that appears for the field in the dialog box. By default, this is the same as the field name, but this can be changed.
Name	The name of the field as it appears in the schema. This name is read-only.
ReadOnly	When selected, indicates that the field is read-only in the dialog box.
Input Type	The type of input field that appears on the dialog box.
> (Data Binding)	Opens a pop-up that enables you to modify the data binding for the field.
Up Arrow	Moves a field up in the list.
Down Arrow	Moves a field down in the list.
X	Deletes a field from the dialog box.

Copy Files AgilePart

This AgileShape can be used to automatically copy one or more files from one SharePoint library (or folder) to another SharePoint library (or folder).

Properties for This AgilePart

Field Name	Definition
CopyProcessInformation	This property specifies whether to copy certain process related data with the file.
Filter	This property specifies the filename (or a filename filter containing wildcards) that will be acted upon -- for example, downloaded by the Download Files AgilePart, uploaded by the Upload Files AgilePart, or converted to PDF by the Convert to PDF AgilePart. The action is taken in the location specified by the associated URL -- either Local Path or AbsoluteURL, depending upon the AgileShape. If the location is a folder, only the specified file types will be acted upon. Some examples of possible values for this property are listed below: ● ***.*** - This value indicates that all files (located at the source location) will be affected. ● ***.XML** - This value indicates that all files (located at the source location) that have the ".XML" file extension will be affected. ● ***.doc** - This value indicates that all files (located at the source location) that have the ".DOC" file extension will be affected. ● **MyFile.xml** - This value indicates that only the specific file (located at the source location) named MyFile.xml will be affected.
OverWriteFile	Default value: False This property specifies whether the AgileShape should overwrite the existing file(s) if they already exist at the specified destination. This property can be set to the following specific values:

Field Name	Definition
	• **False** - This value indicates that the AgileShape will not overwrite any existing file(s). • **True** - This value indicates that the AgileShape will overwrite any existing file(s).
Recursive	Default value: False This property specifies whether the AgileShape should affect files contained in any subfolders located under the library (or folder) in the specified location. This property can be set to the following specific values: • **False** - This value indicates that the AgileShape will only affect files located in the specified folder only. • **True** - This value indicates that the AgileShape will affect files located directly under the specified folder, and also files in any subfolders.
SourceFolderURL	Default value: ${SPServer}/${SitePath}/ ${DocLibPath} This property specifies the URL of the SharePoint document library (or subfolder) the file(s) should be copied from. E.g. http://MachineName:Port/sites/SiteName/ DocumentLibraryName -or- http://MachineName:Port/sites/SiteName/ DocumentLibraryName/FolderName
TargetFolderURL	This property specifies the URL of the SharePoint document library (or subfolder) the file(s) should be copied to. E.g. http://MachineName:Port/sites/SiteName/ DocumentLibraryName -or- http://MachineName:Port/sites/SiteName/ DocumentLibraryName/FolderName

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Copy List Item

This AgileShape can be used to copy custom list items from one list to another.

Properties for This AgilePart

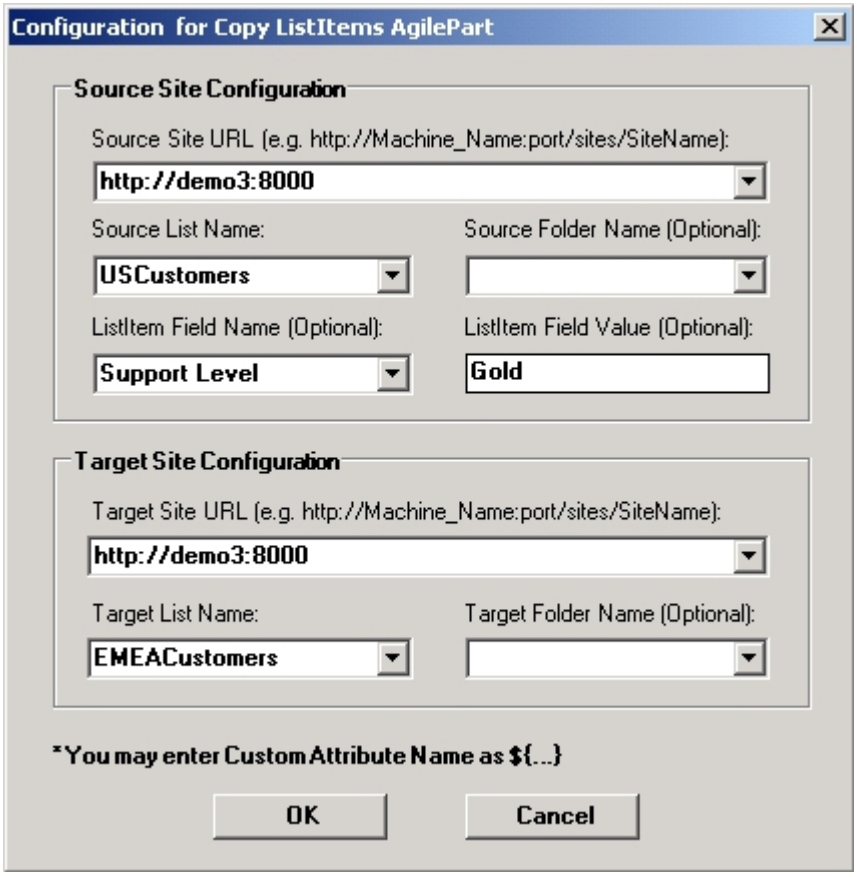
Field Name	Definition
CopyProcessInformation	Opens the CopyListItemsConfiguration dialog box specifies the configuration for copying list items.

AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Configuration for Copy ListItems AgilePart

Specifies the configuration for copying list items.



Field Definitions

Field Name	Definition
Source Site URL	Specifies the name of the list that includes the affected (copied, moved, etc.) list items.
Source List Name	Specifies the source SharePoint site URL that includes the list for which items are to be affected (copied, moved, etc.).
Source Folder Name	Specifies the name of the folder that includes the list items to be affected (copied, moved, etc.).
ListItem Field Name	Specifies the name of the list item field to be affected (copied, moved, etc.).
ListItem Field Value	Specifies the value of the field to be affected (copied, moved, etc.). This can be used as a filtering mechanism where only fields with the specified value are affected. The following are sample values:

Field Name	Definition
	• $\{ListItemID\} or $\{SubListItemID\} • list item ID
Target List Name	Specifies the name of the destination list for the affected items.
Target Folder Name	Specifies the name of the destination folder for the affected items. If the folder does not exist the system will automatically create it.
Target Site URL	Specifies the target SharePoint site URL that includes the destination list for the affected items.

Create List Item

This AgileShape can be used to create a list item.

Properties for This AgilePart

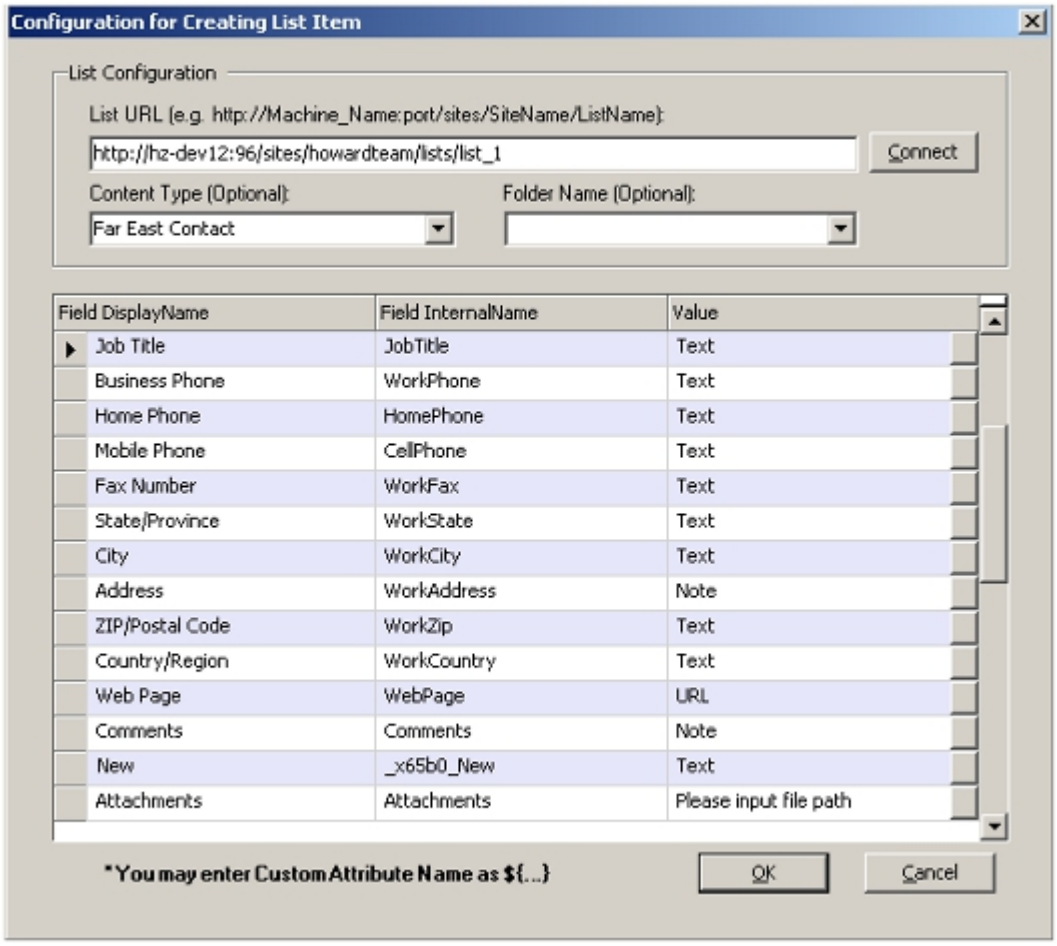
Field Name	Definition
ItemValues	Opens the Configuration for Creating List Item window, where you can specify the configuration for creating the list item.

AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Configuration for Creating List Item Window

Specifies the configuration for creating the list item.



Field Definitions

Field Name	Definition
List URL	Specifies the URL for the associated SharePoint list. A valid list URL is required, if a library URL (such as document library URL or form library URL) instead of a list URL is used, an error will occur during execution. Below are examples of a valid list URL: • http://Machine_Name:port/sites/SiteName/ListName • ${DocUrl} After entering the list URL, click the **Connect** button. Now a Content Type can be selected.

Field Name	Definition
Content Type	Specifies the Content Type for the list item. This is an optional item, the system will get a default Content Type for the configuration.

Folder Name	Specifies the folder name under which a list item will be affected (created, deleted, etc.). There are two ways to specify a folder:
	• Select a Folder Name from the drop-down list.
	• Input a Folder Name in the drop-down list, if the list doesn't contain the folder, the system will create it automatically.
	After the first section is completed, all columns (with the exception of read-only columns, e.g., Calculate) in the selected list are shown. The Value column shows the Data Type of the column. If the value is Text, input is to be a string, if it is DateTime, input is to be a valid date, etc. There are 4 ways to set the Value column:
	• Input a value (string value or datetime value etc.) or empty.
	• Input a custom attribute name ${FuLLName}.
	• Click the button at the right side to select schema metadata associated with the process model.
	• The Attachment field allows you to attach a file to the list item, there are 2 ways to do this:
	  • Local machine path, such as c: \FileName.Extension.
	  • Http path, such as Http://Url / FileName.Extesion.

Create SP Group

This AgileShape can be used to automatically add a user to a SharePoint Group.

Properties for This AgilePart

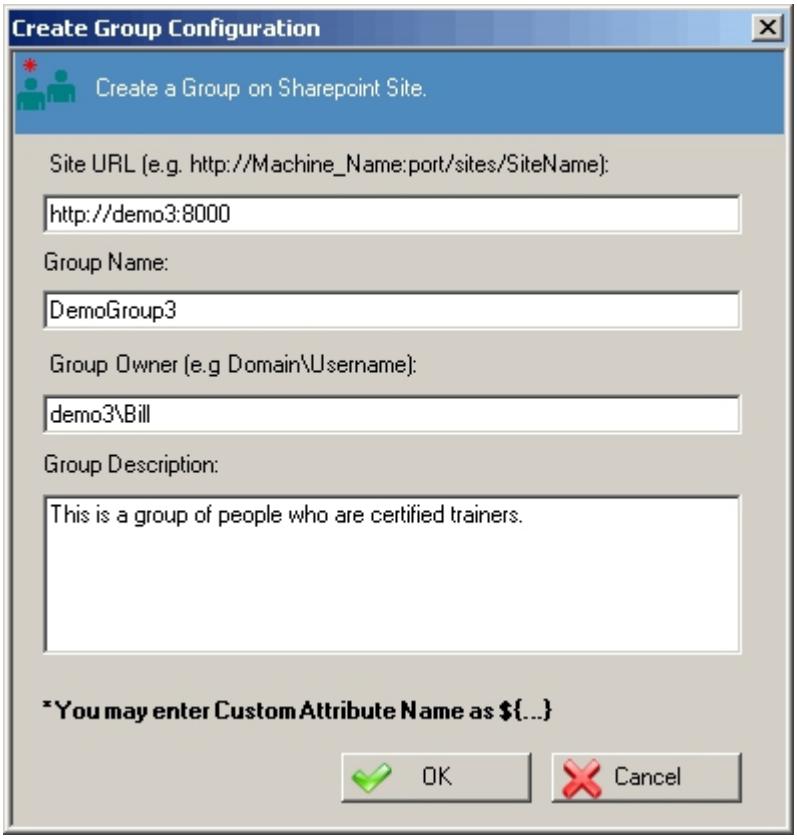
Field Name	Definition
GroupConfiguration	Opens the Create Group Configuration window, where you can configure the new group details to be created in SharePoint.

AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Create Group Configuration Window

This property allows you to configure the new group details to be created in SharePoint.



Field Definitions

Field Name	Definition
SiteURL	This property specifies the URL for the new where you want to add or remove the associated item (e.g., SharePoint site, document library, site collection, user, group, etc.). Below are examples of a valid SharePoint site URL: ● http://Machine_Name:port/sites/SiteName ● $\{DocUrl\}
Group Name	The name of the affected SharePoint Group (e.g., the group to be created, to be deleted, to which a user will be added, etc.).
Group Owner	The domain and user name of the SharePoint user who is to be the owner of the group.
Group Description	A description of the group.

Delete Files

This AgileShape can be used to automatically delete files from a SharePoint document library.

Properties for This AgilePart

Field Name	Definition
DocumentLibraryURL	The SharePoint document library URL where you would like to delete files.
Filter	This property specifies the filename (or a filename filter containing wildcards) that will be acted upon -- for example, downloaded by the Download Files AgilePart, uploaded by the Upload Files AgilePart, or converted to PDF by the Convert to PDF AgilePart. The action is taken in the location specified by the associated URL -- either Local Path or AbsoluteURL, depending upon the AgileShape. If the location is a folder, only the specified file types will be acted upon.

Field Name	Definition
	Some examples of possible values for this property are listed below: • ***.*** - This value indicates that all files (located at the source location) will be affected. • ***.XML*** - This value indicates that all files (located at the source location) that have the ".XML" file extension will be affected. • ***.doc*** - This value indicates that all files (located at the source location) that have the ".DOC" file extension will be affected. • **MyFile.xml** - This value indicates that only the specific file (located at the source location) named MyFile.xml will be affected.
Recursive	Default value: False This property specifies whether the AgileShape should affect files contained in any subfolders located under the library (or folder) in the specified location. This property can be set to the following specific values: • **False** - This value indicates that the AgileShape will only affect files located in the specified folder only. • **True** - This value indicates that the AgileShape will affect files located directly under the specified folder, and also files in any subfolders.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Delete List Item

This AgileShape can be used to delete one or more list items.

Properties for This AgilePart

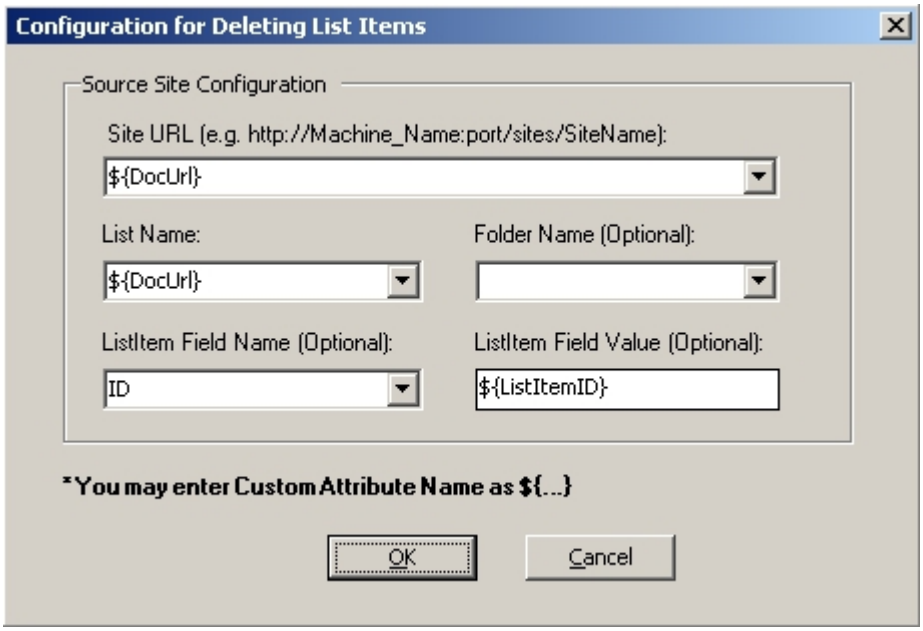
Field Name	Definition
DeleteListItemsConfiguration	Opens the Configuration for Deleting List Items dialog box, where you can specify the configuration for deleting list items.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Configuration for Deleting List Items Window

This window enables you to specify the configuration for deleting list items.



Field Definitions

Field Name	Definition
SiteURL	This property specifies the URL for the new where you want to add or remove the associated

Field Name	Definition
	item (e.g., SharePoint site, document library, site collection, user, group, etc.). Below are examples of a valid SharePoint site URL: ● http://Machine_Name:port/sites/SiteName ● $\{DocUrl\}
List Name	Specifies the name of the list where the list items will be deleted.

Folder Name	Specifies the folder name under which a list item will be affected (created, deleted, etc.). There are two ways to specify a folder:
	
	● Select a Folder Name from the drop-down list.
	● Input a Folder Name in the drop-down list, if the list doesn't contain the folder, the system will create it automatically.
	
	After the first section is completed, all columns (with the exception of read-only columns, e.g., Calculate) in the selected list are shown. The Value column shows the Data Type of the column. If the value is Text, input is to be a string, if it is DateTime, input is to be a valid date, etc. There are 4 ways to set the Value column:
	
	● Input a value (string value or datetime value etc.) or empty.
	● Input a custom attribute name ${FuLLName}.
	● Click the button at the right side to select schema metadata associated with the process model.
	● The Attachment field allows you to attach a file to the list item, there are 2 ways to do this:
	  ● Local machine path, such as c: \FileName.Extension.
	  ● Http path, such as Http://Url / FileName.Extesion.

Field Name	Definition
ListItem Field Name	Specifies the name of the list item field to be deleted. This allows you to delete only one field from a list item.
ListItem Field Value	Specifies a value for which all corresponding fields will be deleted. This can be used as a filtering mechanism where only fields with the specified value are deleted.

Delete Particular File Version

This AgileShape can be used to automatically delete a major or minor version of a file from a SharePoint document library.

Properties for This AgilePart

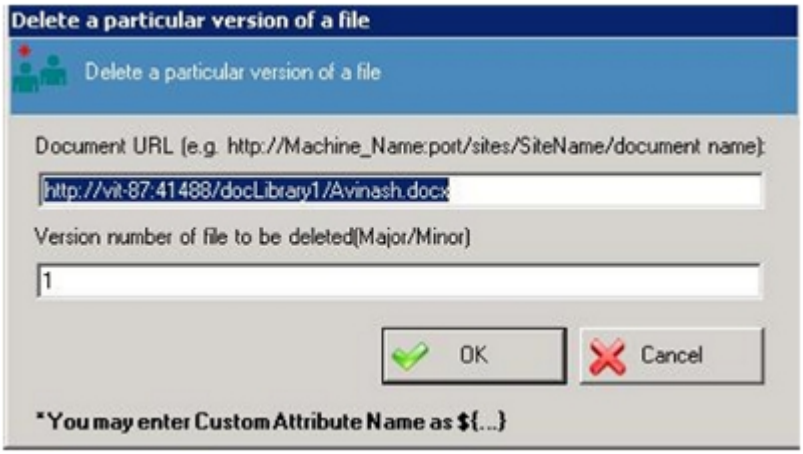
Field Name	Definition
DeleteFileVersionConfiguration	Opens the Delete a particular version of a file window, where you can configure the file version you want to delete. Click the **Ellipses** button to open the Delete a particular version of a file dialog box.

AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Delete a Particular Version of a File Window

This property enables you to configure the file version you want to delete. Click the **Ellipses** button to open and delete a particular version of a file dialog box.



Field Definitions

Field Name	Definition
Document URL	The URI of the file for which you want to delete a version.
Version number of file to be deleted	The URI of the file for which you want to delete a version.

Download Files

This AgileShape can be used to automatically download one or more files from a SharePoint library to the local file system (of the AgilePoint Server machine).

Properties for This AgilePart

Field Name	Definition
AbsoluteURL	This property specifies the complete target URL. E.g. http://MachineName:Port/sites/SiteName/DocumentLibraryName/FolderName
Filter	This property specifies the filename (or a filename filter containing wildcards) that will be acted upon -- for example, downloaded by the Download Files AgilePart, uploaded by the Upload Files AgilePart, or converted to PDF by the Convert to PDF AgilePart.

Field Name	Definition
	The action is taken in the location specified by the associated URL -- either Local Path or AbsoluteURL, depending upon the AgileShape. If the location is a folder, only the specified file types will be acted upon. Some examples of possible values for this property are listed below: ● ***.*** - This value indicates that all files (located at the source location) will be affected. ● ***.XML** - This value indicates that all files (located at the source location) that have the ".XML" file extension will be affected. ● ***.doc** - This value indicates that all files (located at the source location) that have the ".DOC" file extension will be affected. ● **MyFile.xml** - This value indicates that only the specific file (located at the source location) named MyFile.xml will be affected.
LocalPath	This property specifies the local file system folder that is the destination location for the AgilePart's action (for example, upload or download a file). The value of this property should be a relative path that specifies the location of the folder relative to the AgilePoint Server application's root directory. E.g. If AgilePoint Server is installed at: c:\\Inetpub\\wwwroot\\AgilePointServer\\ and the file (once downloaded) should be located at: c:\\Inetpub\\wwwroot\\AgilePointServer\\files\\ \MyFile.txt then this property should be set to the following value: files E.g. If AgilePoint Server is installed at: c:\\Inetpub \\wwwroot\\AgilePointServer\\ and the file (once downloaded) should be located at: c:\\Inetpub\\wwwroot\\AgilePointServer\\files\\ \temp\\MyFile.txt

Field Name	Definition
	then this property should be set to the following value: /files/temp/
OverWriteFile	Default value: False This property specifies whether the AgileShape should overwrite the existing file(s) if they already exist at the specified destination. This property can be set to the following specific values: • **False** - This value indicates that the AgileShape will not overwrite any existing file(s). • **True** - This value indicates that the AgileShape will overwrite any existing file(s).
Recursive	Default value: False This property specifies whether the AgileShape should affect files contained in any subfolders located under the library (or folder) in the specified location. This property can be set to the following specific values: • **False** - This value indicates that the AgileShape will only affect files located in the specified folder only. • **True** - This value indicates that the AgileShape will affect files located directly under the specified folder, and also files in any subfolders.

Common AgilePart Properties

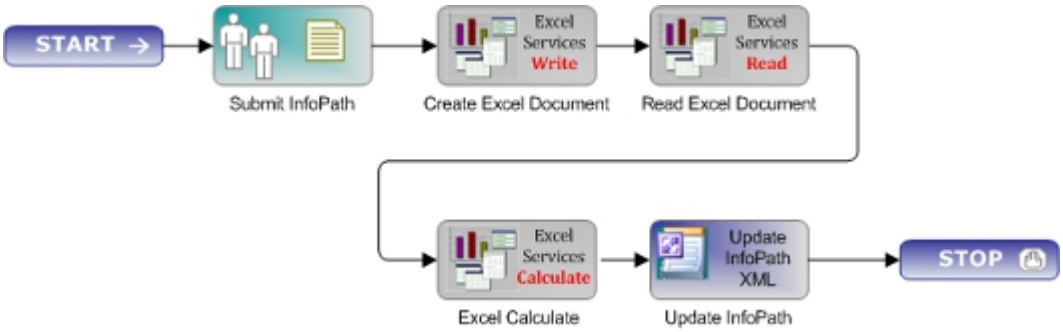
The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Excel Calculate

This AgileShape unleashes the full power of Excel Services as a calculation engine. It is the combination of the other two methods and permits both writing (temporarily or permanently) and reading from an Excel document in the same step. In this case, the Save To field is not a required parameter, but instead it is optional.

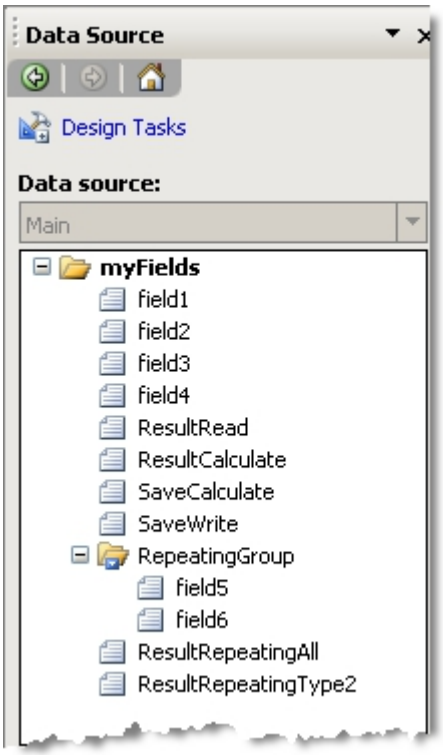
The following is a use case:

Here is a simple InfoPath-based Process that uses the three methods of the AgilePart:

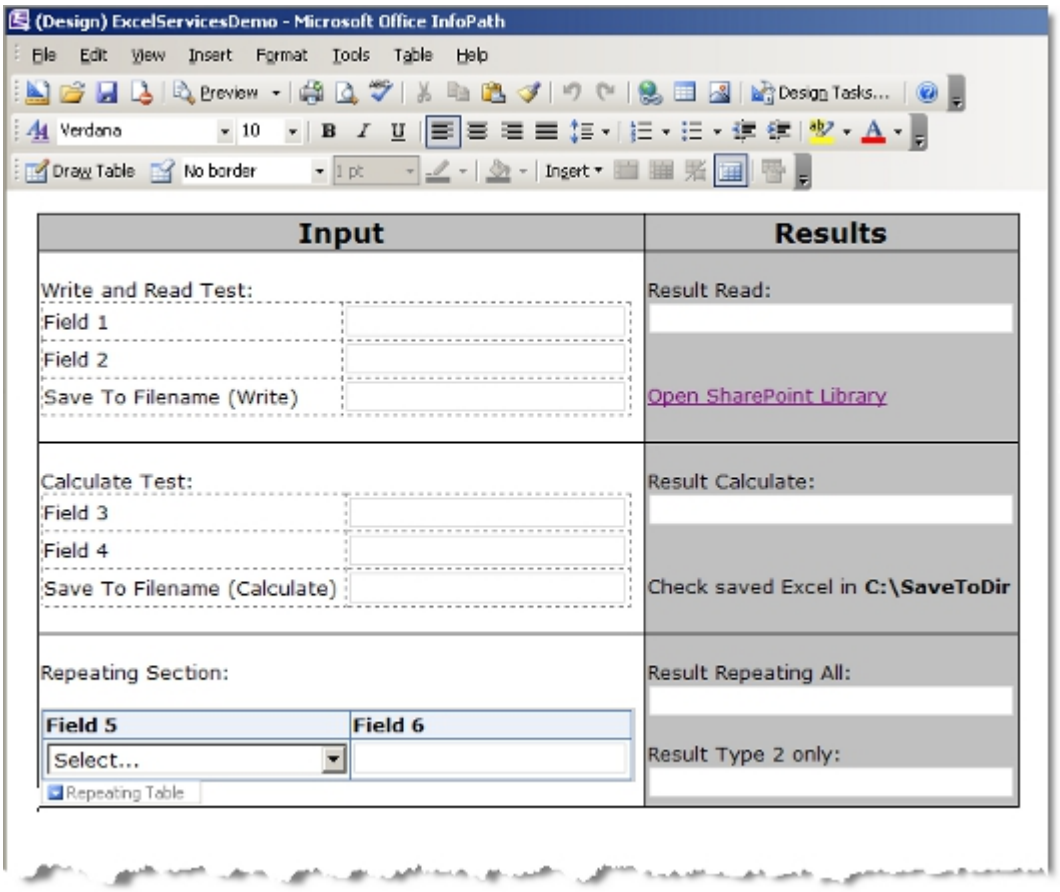


The example process is to demonstrate the different uses of the AgilePart. It is not necessary to use all the methods in the same process. Steps to set this up are as follows:

Create InfoPath file

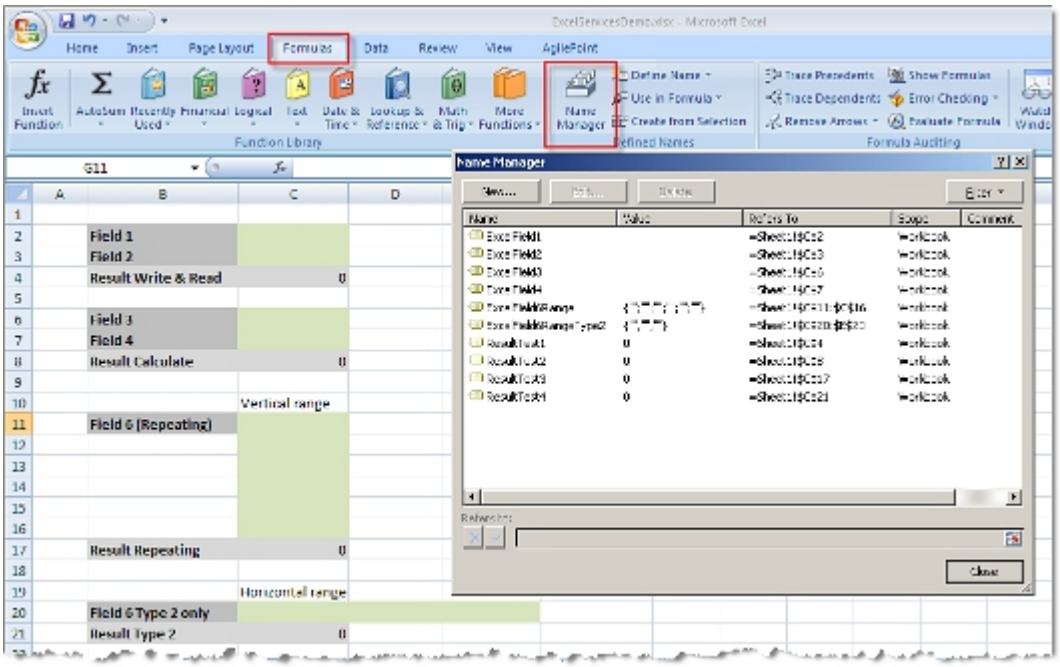


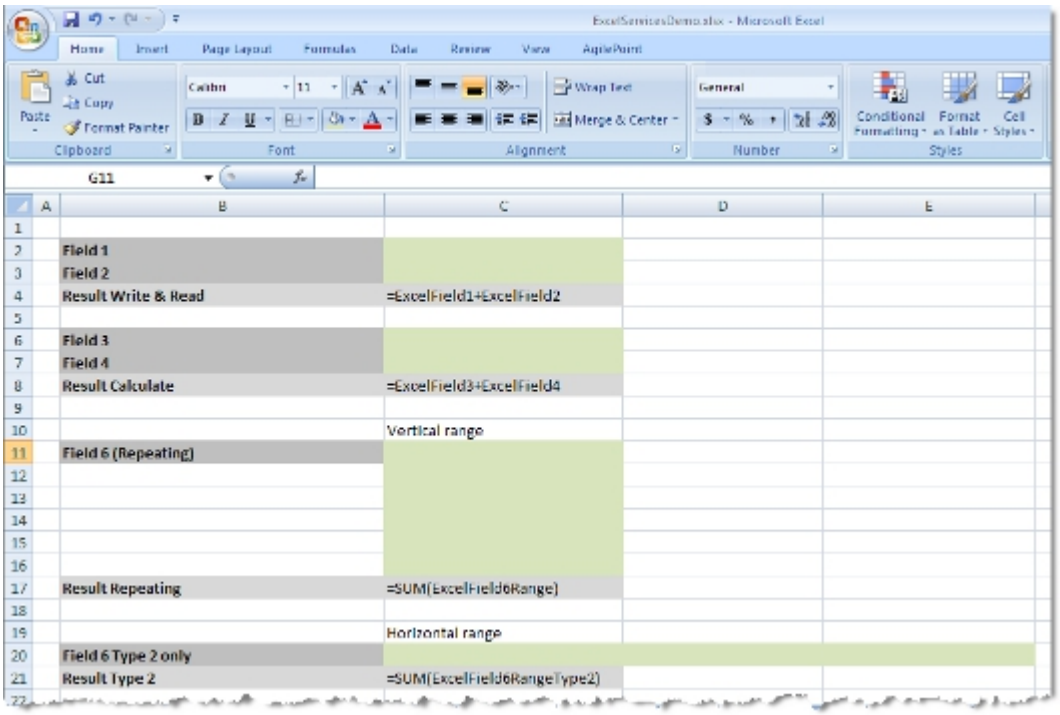
Create the form:



Save form as ExcelServicesDemo.xsn

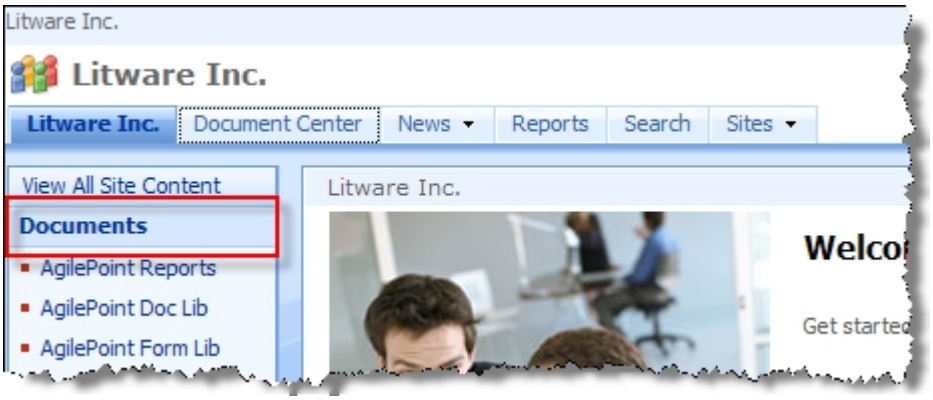
Prepare Excel Template, create an Excel document with the right structure:

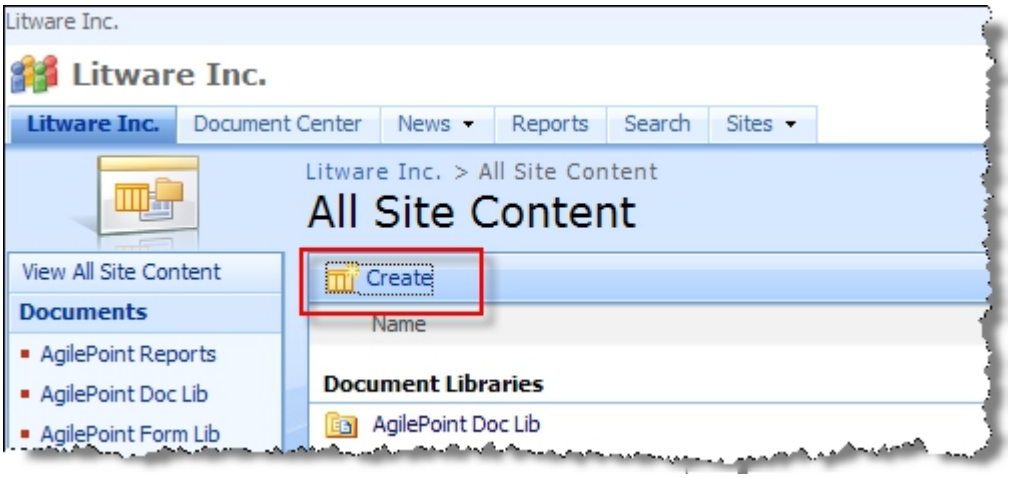


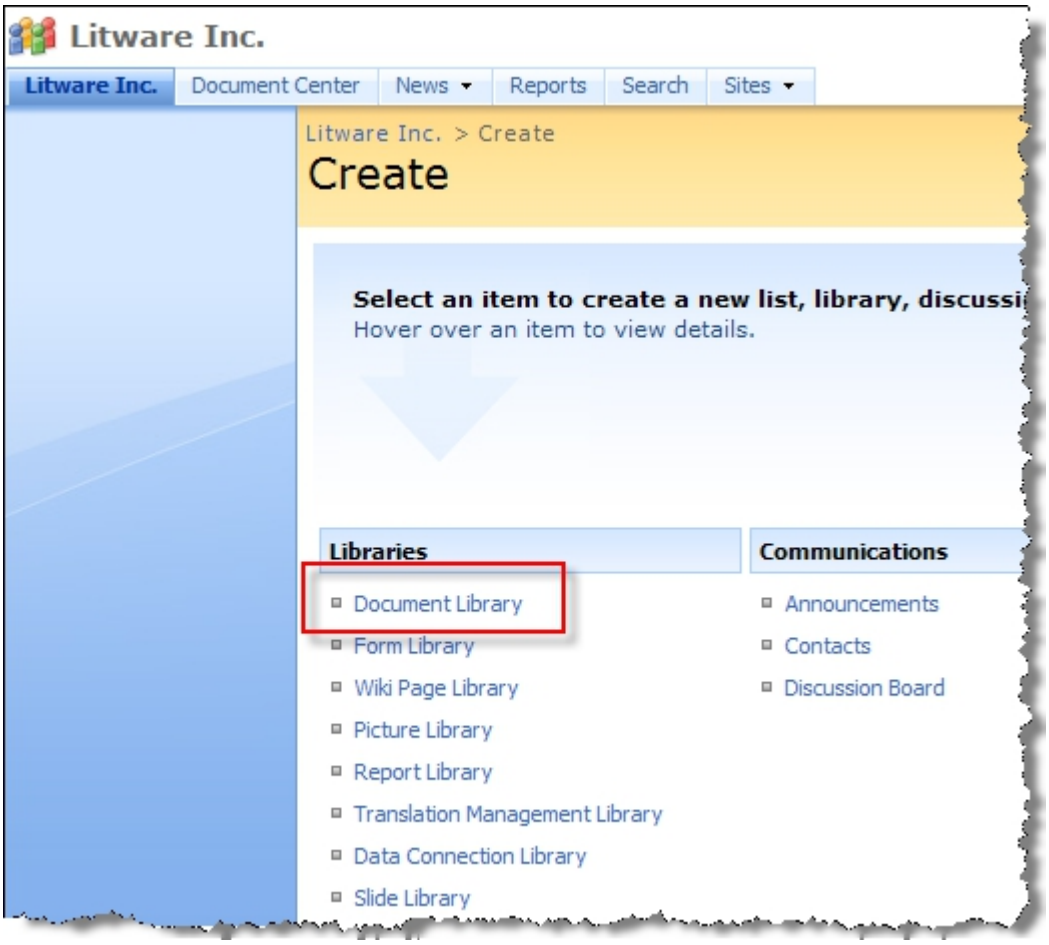


Save the Excel document as ExcelServicesDemo.xlsx on the Desktop.

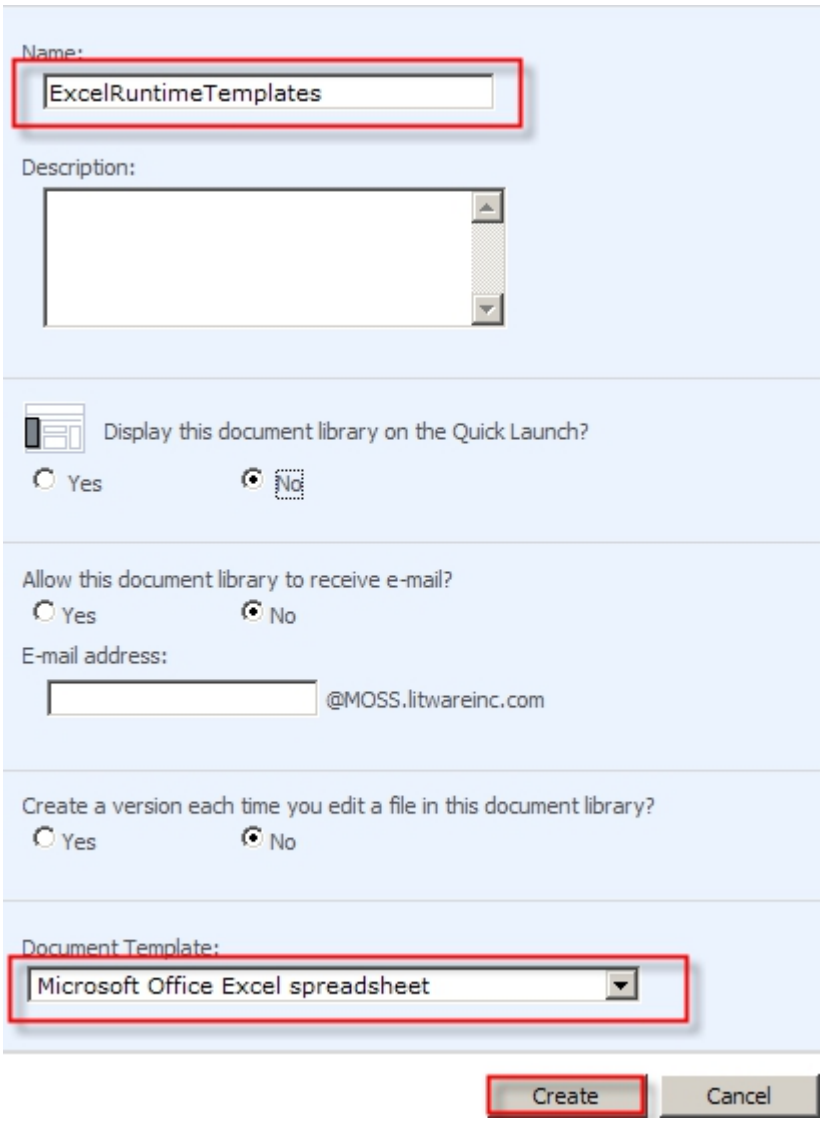
Create two SharePoint Doc Libraries to store the run-time Excel template and the resultant Excel file:

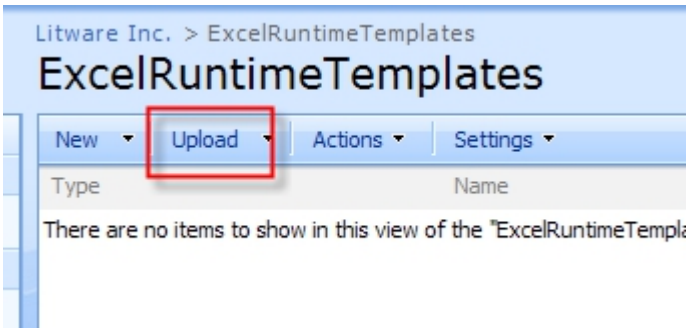

Litware Inc.
Litware Inc.
Litware Inc.
Document Center
News
Reports
Search
Sites
View All Site Content
Documents
AgilePoint Reports
AgilePoint Doc Lib
AgilePoint Form Lib
Litware Inc.
Welco
Get started


Litware Inc.
Litware Inc.
Litware Inc.
Document Center
News
Reports
Search
Sites
Litware Inc. > All Site Content
All Site Content
View All Site Content
Documents
AgilePoint Reports
AgilePoint Doc Lib
AgilePoint Form Lib
Create
Name
Document Libraries
AgilePoint Doc Lib

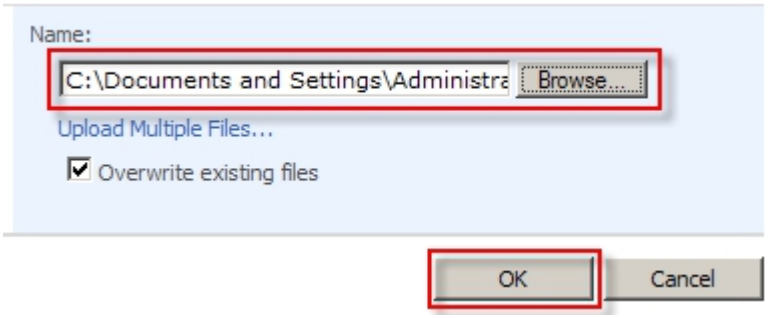


Call first one ExcelRuntimeTemplates:

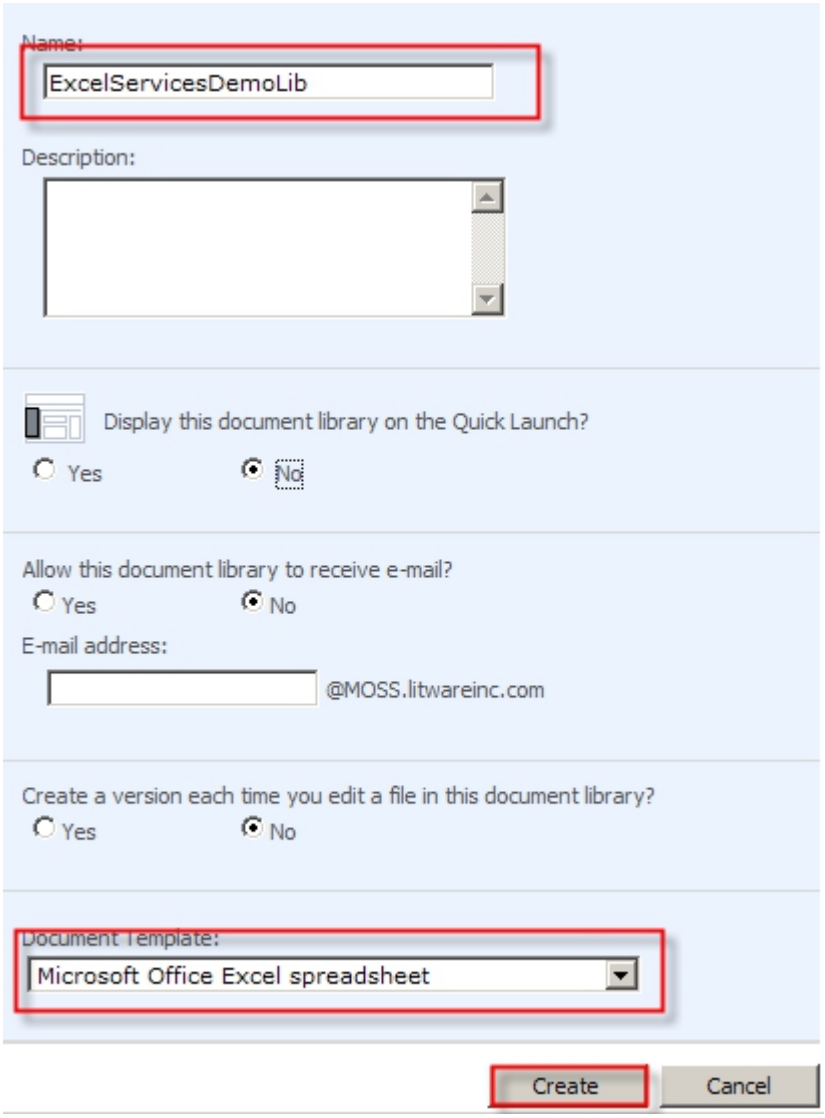




Browse to the Excel file ExcelServicesDemo.xlsx on the Desktop and upload it to the document library. (Another method is to Publish the Excel from within Excel itself.)



Create second Doc library to store resultant Excel file:

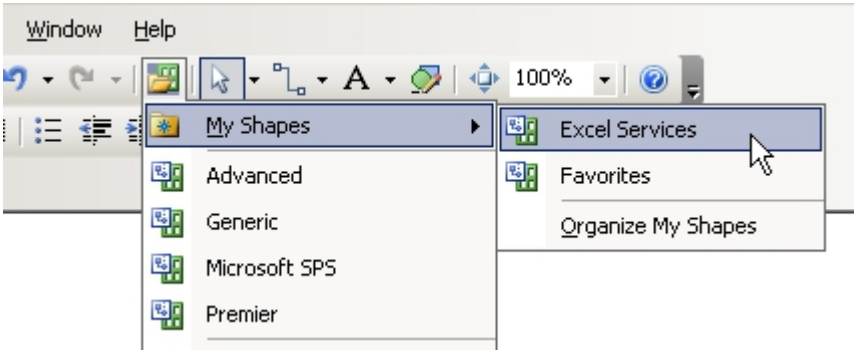


Design the Process. Design a new InfoPath process based on ExcelServicesDemo.xsn form.

Register the Excel Services AgilePart in Envision. File->Extend AgilePoint->Register AgilePart.

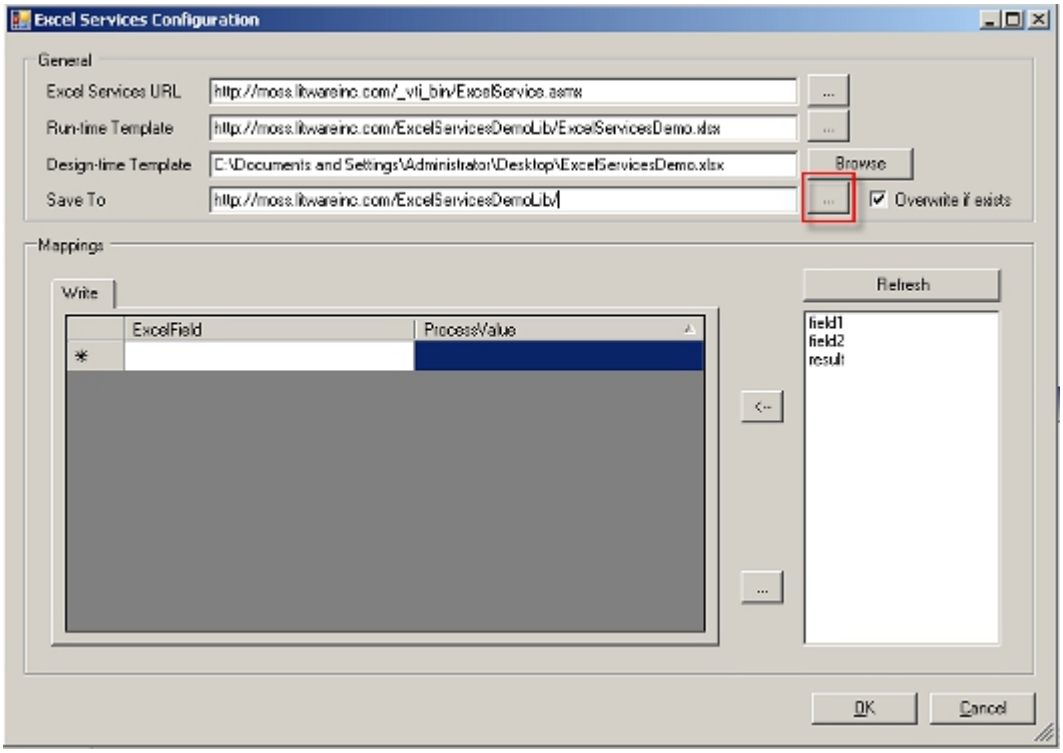
Copy the Excel Services.vss file to My Documents\\My Shapes directory.

Open the Excel Services stencil in Envision.



Drag an Excel Write shape on to the canvas.

Configure the shape as shown below:

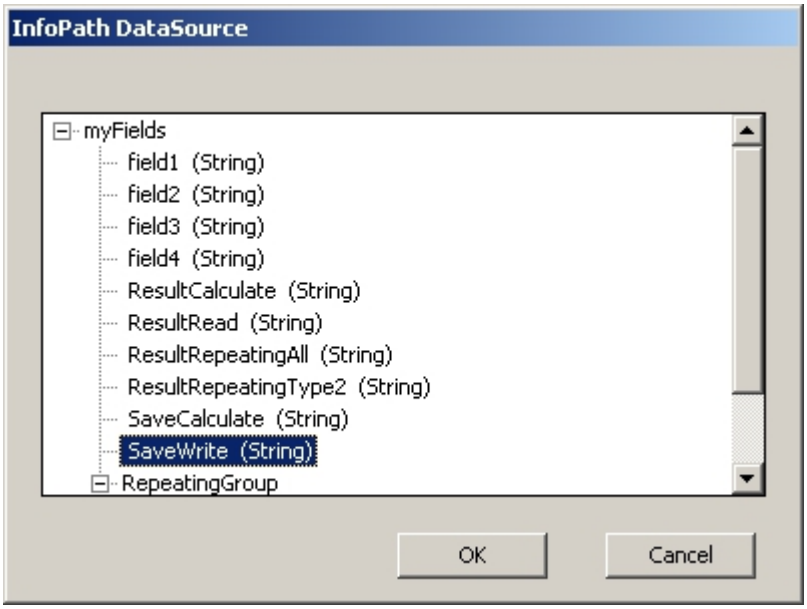


In the example, the SharePoint URL is http://moss.litwareinc.com. You should substitute it with your own site URL.

Use the Browse button to select the Design-time Template Excel document from the Desktop. The named fields list box gets filled automatically.

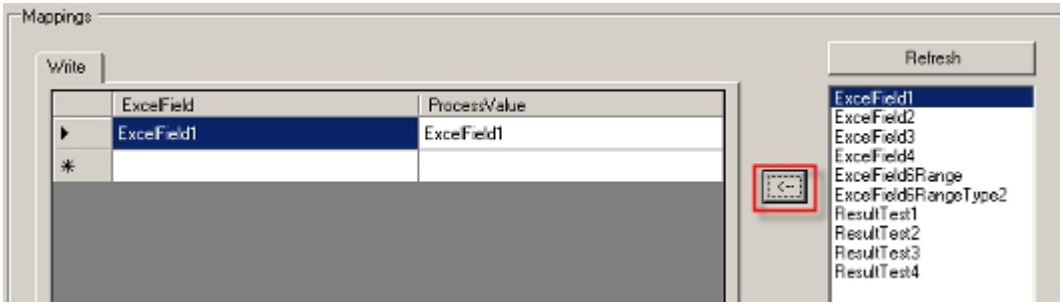
Type the URL of a SharePoint Doc Library in the Save To field. In this example it is http://moss.litwareinc.com/ExcelServicesDemoLib If the document library does not exist, it will NOT be created.

Click the **ellipsis** button, and select the form field **SaveWrite**.

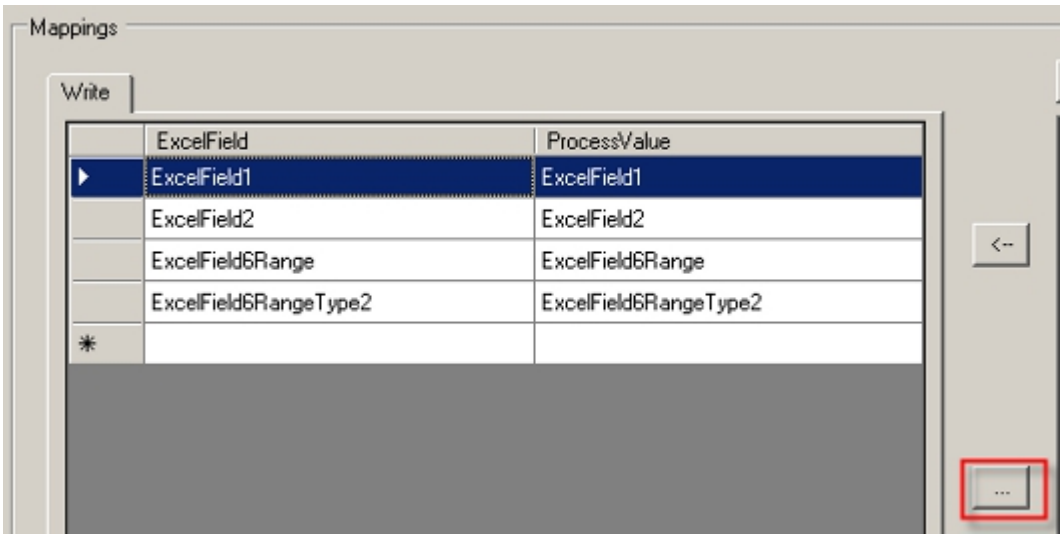


Add the extension **.xlsx**.

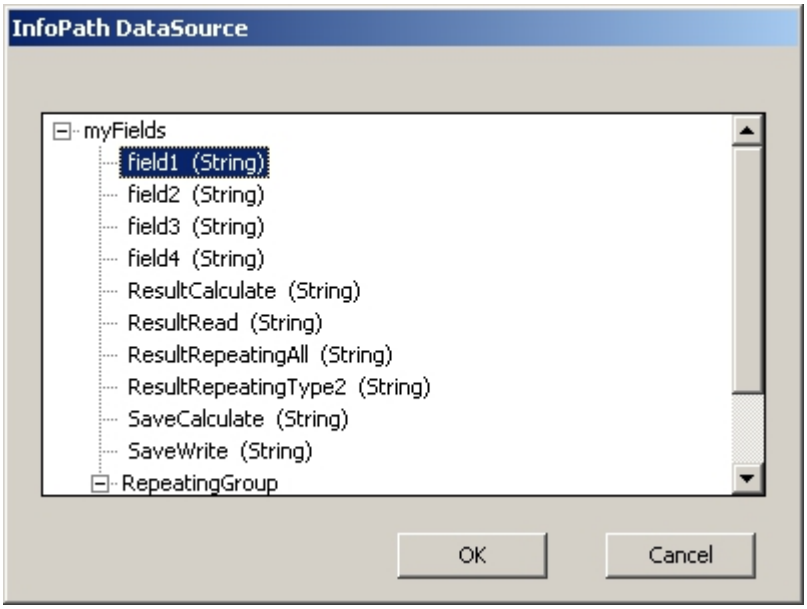
Configure the mappings: Select named field ExcelField1 from the list and press the arrow button shown in red:



Do the same for the other named fields. Now select the first row of the mapping grid and press ellipsis button as shown in red below:

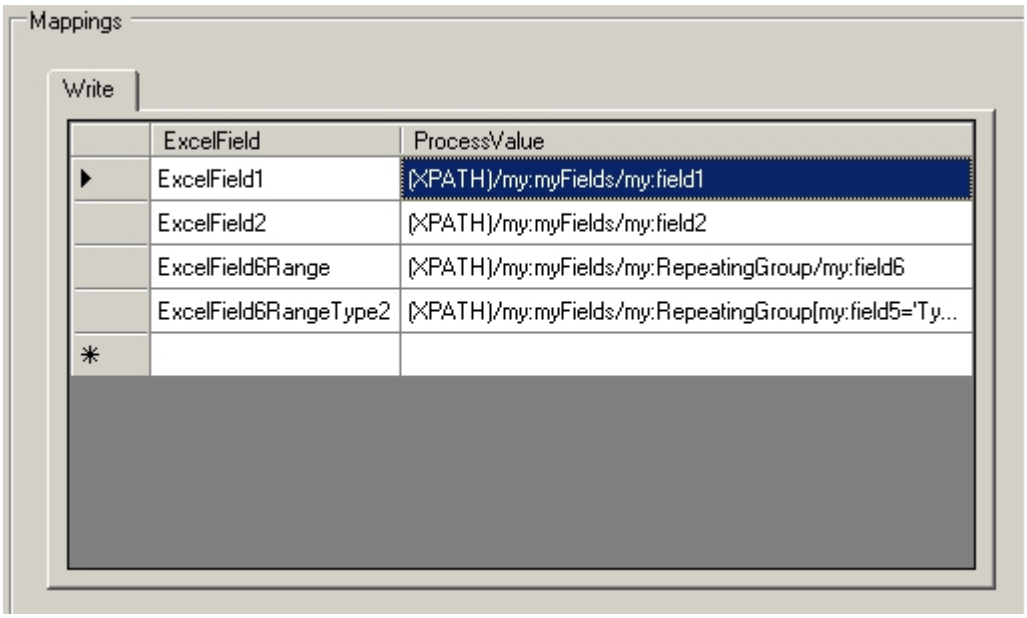


Select field1 from the schema dialog:



Repeat last two steps for all the other fields.

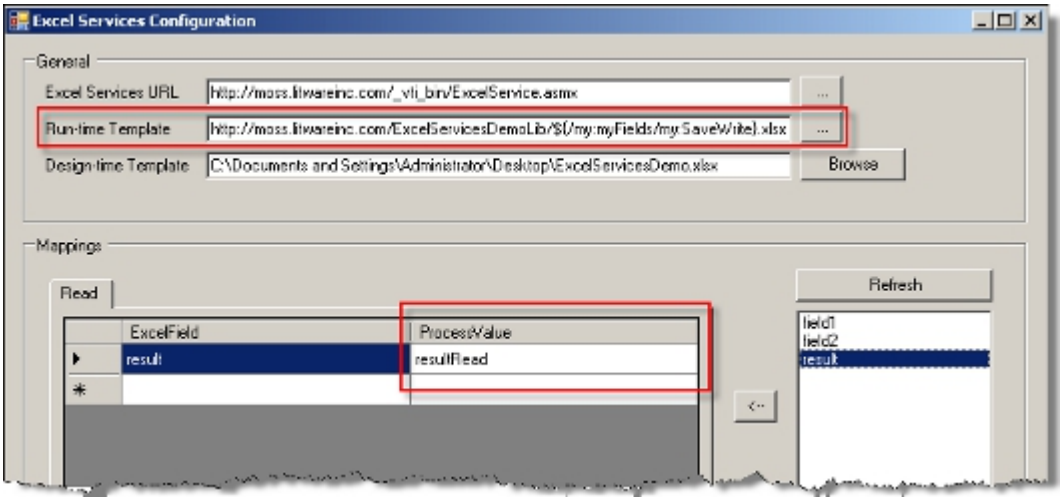
Manually change the XPath value for the Repeating Field Type 2 to: (XPATH)/my:myFields/ my:RepeatingGroup[my:field5='Type 2']/my:field6



Press OK to finish configuring this Shape. Now to add a step in the process to read from an Excel document.

Drag an Excel Read shape on to the canvas:

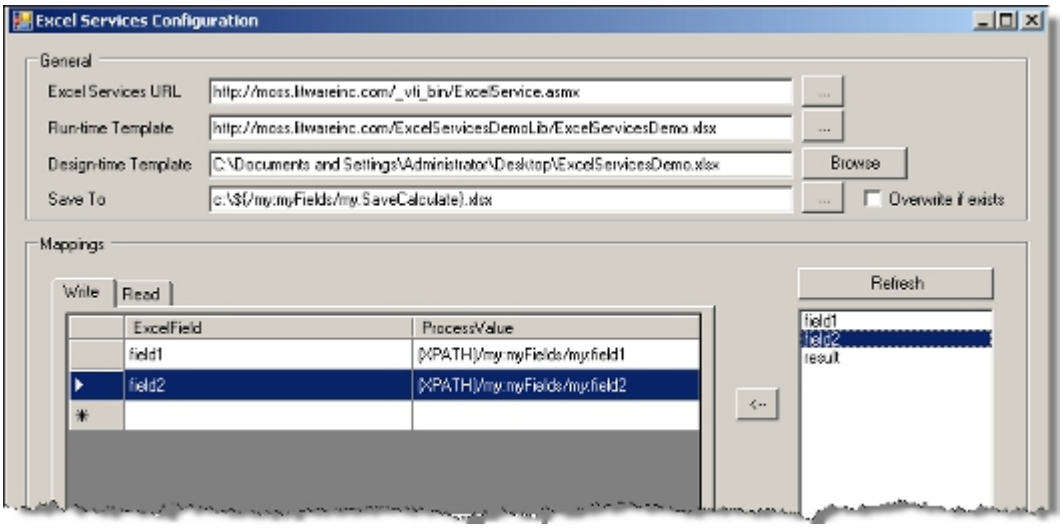
Open the Configuration dialog and fill as shown:



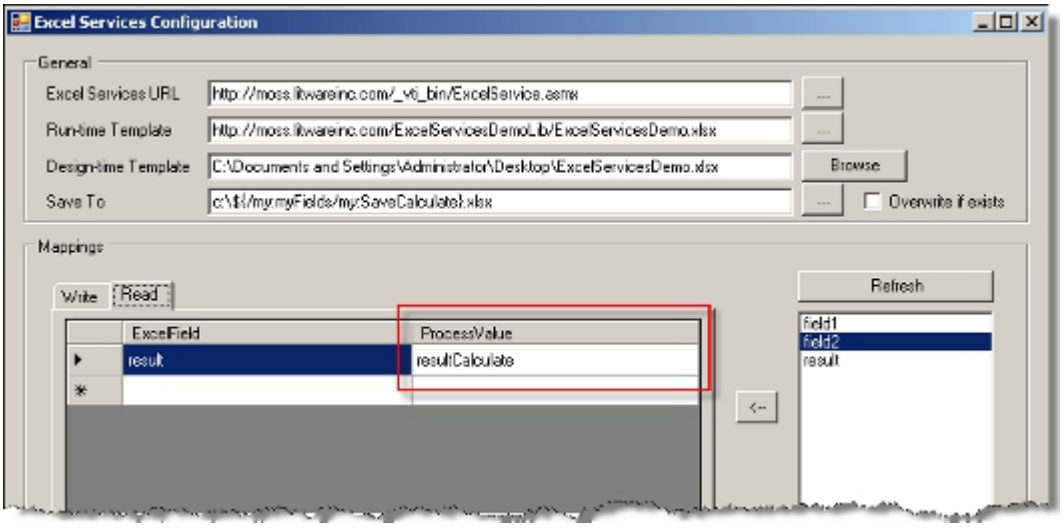
Now to add another step in the process to write and read from an Excel document:

Drag an Excel Calculate shape on to the canvas.

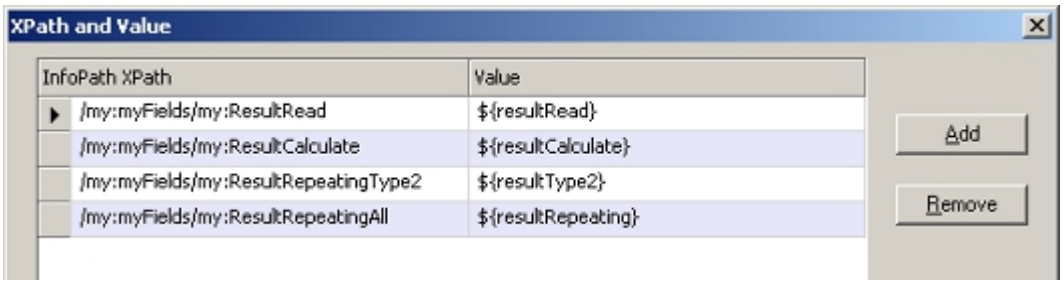
In the Configuration dialog, set fields as shown:



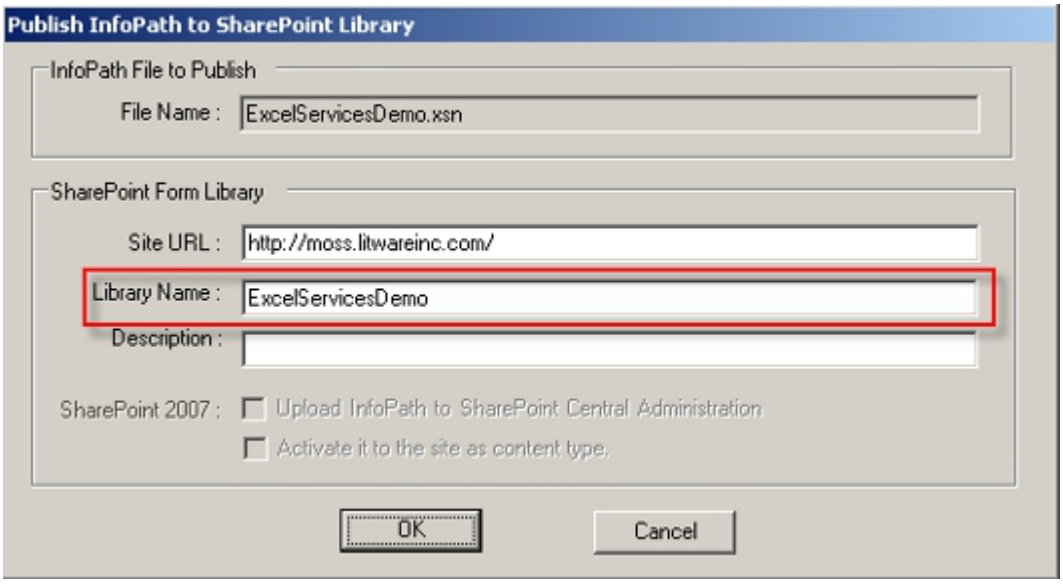
For the Read tab configure as shown:



For the last step, add Update InfoPath shape and configure as shown:



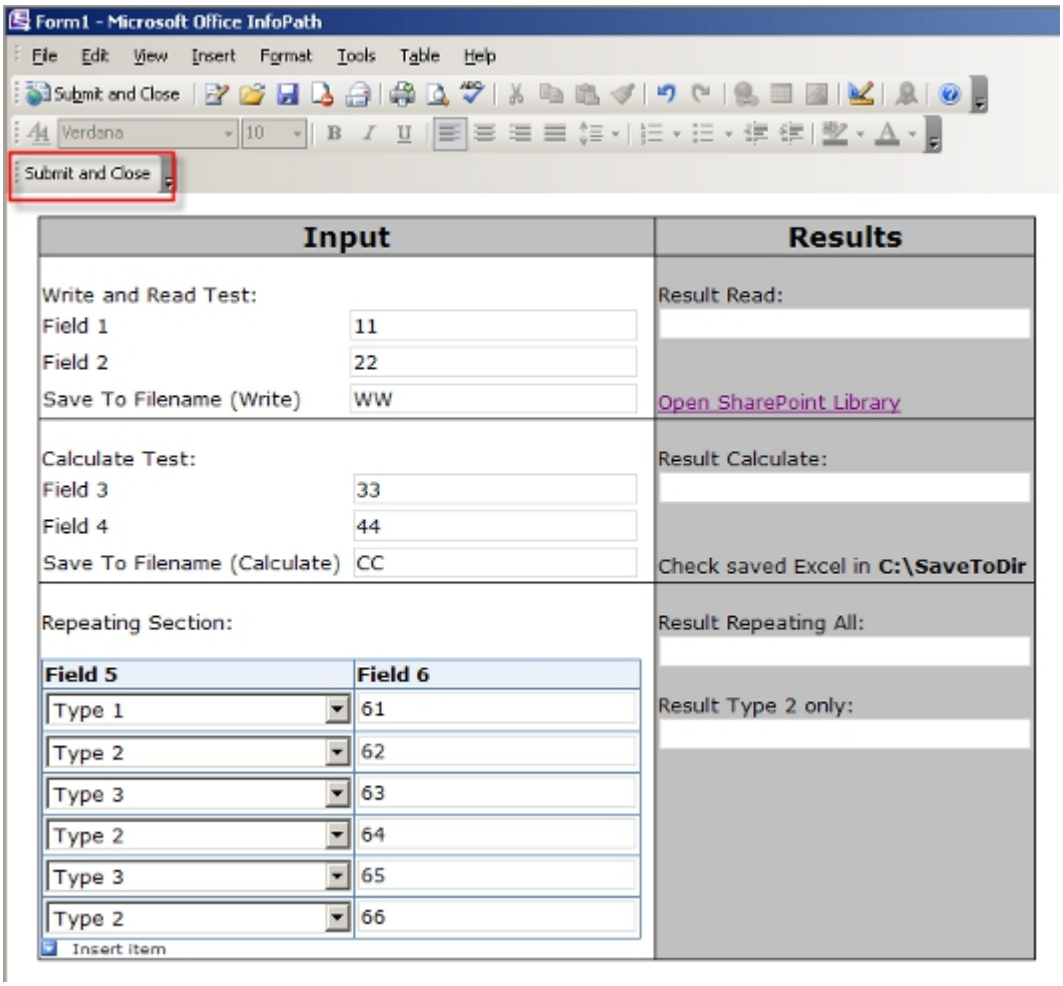
Publish Process and InfoPath to ExcelServicesDemo:



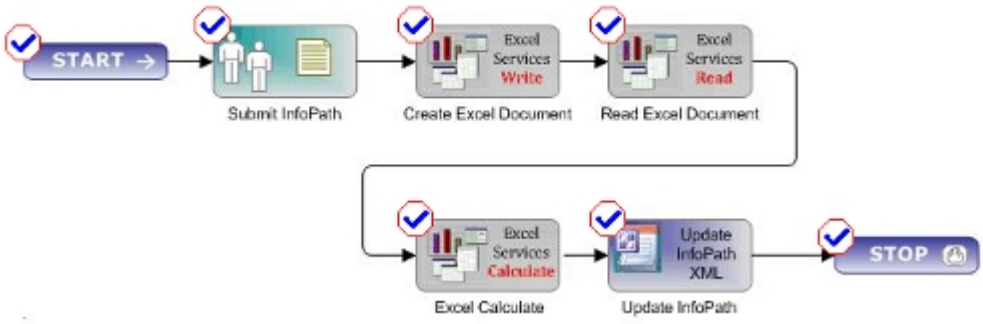
Initiate a Process.

Click **New** in the form Library ExcelServicesDemo.

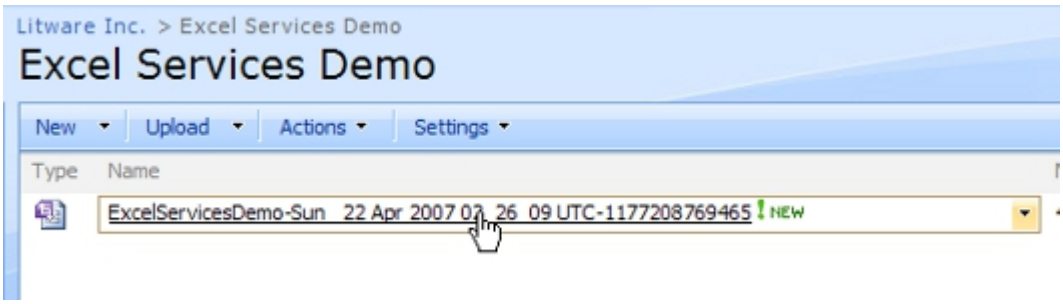
Fill as shown and click **Submit and Close**:

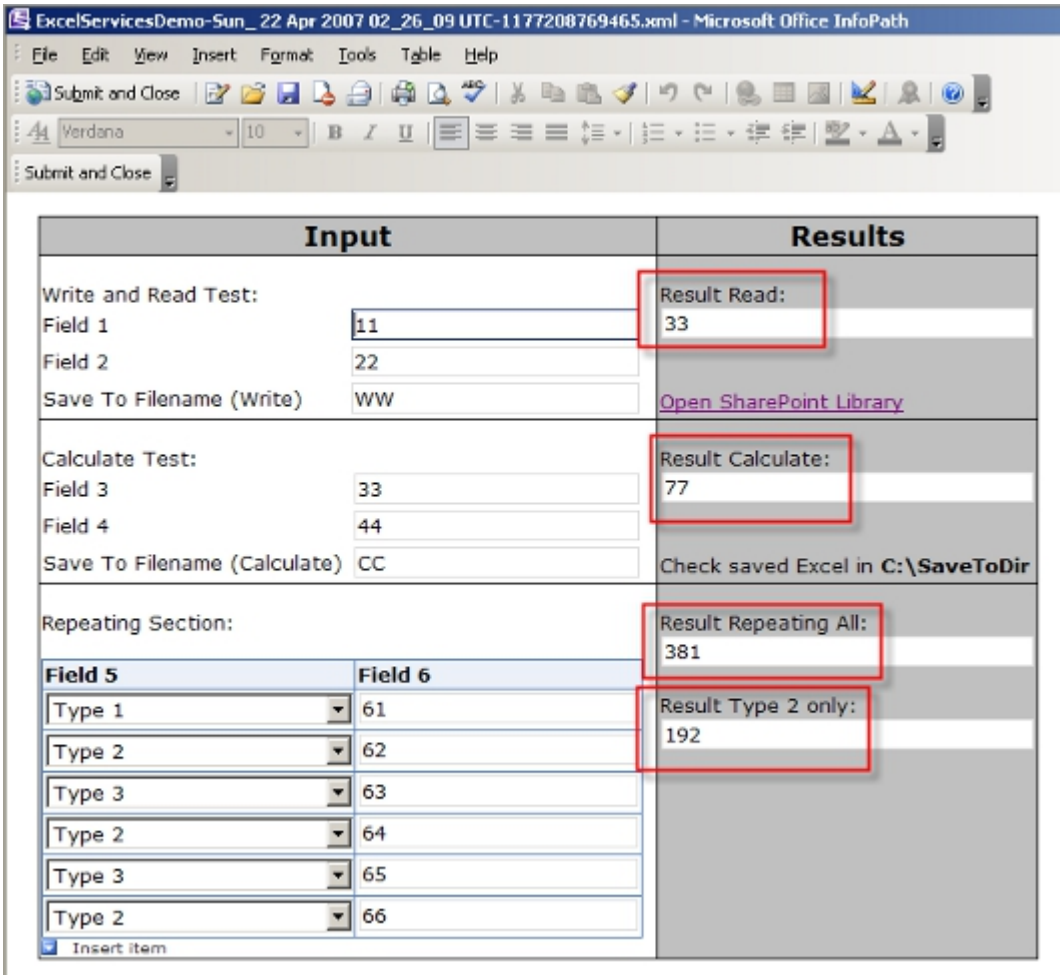


The process runs automatically.



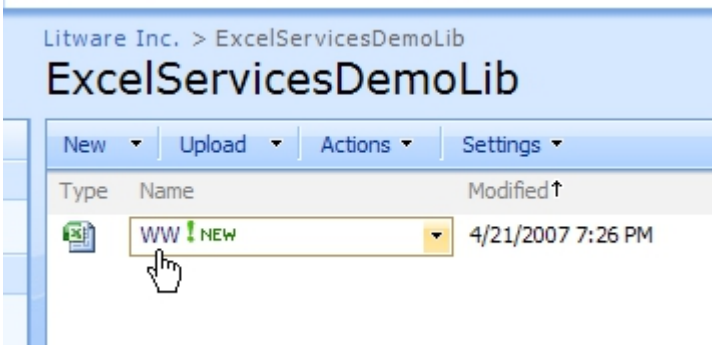
Revising the results of running the process. Open the form just submitted and should see this:





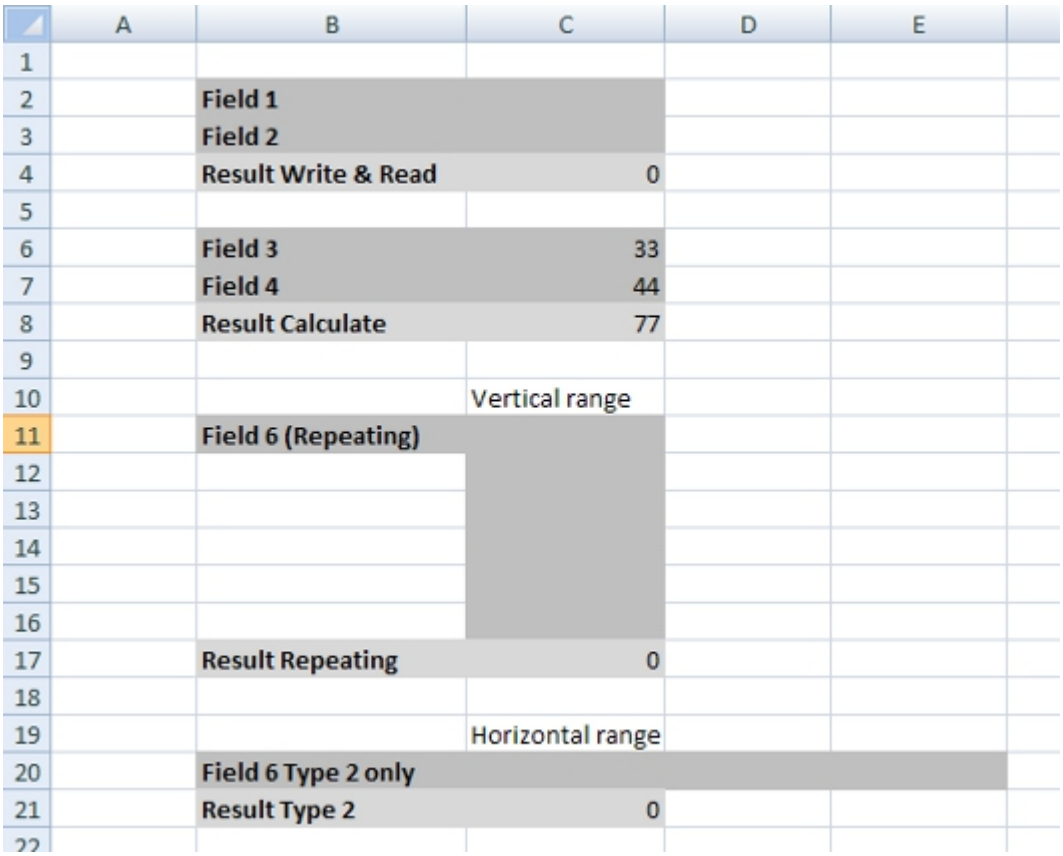
Click the **Open SharePoint Library** link to open ExcelServicesDemoLib.

Open the Excel document created by first AgilePart to check it is correctly filled:



	A	B	C	D	E	F
1						
2		**Field 1**	11			
3		**Field 2**	22			
4		**Result Write & Read**	33			
5						
6		**Field 3**				
7		**Field 4**				
8		**Result Calculate**	0			
9						
10			Vertical range			
11		**Field 6 (Repeating)**	61			
12			62			
13			63			
14			64			
15			65			
16			66			
17		**Result Repeating**	381			
18						
19			Horizontal range			
20		**Field 6 Type 2 only**	62	64	66	
21		**Result Type 2**	192			
22						

Check that the third AgilePart in the process has created an Excel file in C:\\SaveToDir\\CC.xlsx



	A	B	C	D	E
1					
2		Field 1			
3		Field 2			
4		Result Write & Read	0		
5					
6		Field 3	33		
7		Field 4	44		
8		Result Calculate	77		
9					
10			Vertical range		
11		Field 6 (Repeating)			
12					
13					
14					
15					
16					
17		Result Repeating	0		
18					
19			Horizontal range		
20		Field 6 Type 2 only			
21		Result Type 2	0		
22					

Properties for This AgilePart

Field Name	Definition
Configuration	Opens the Excel Calculate Configuration dialog box, where you can configure an Excel calculate action.
Mappings	In order to update the named fields in the Excel sheet, they need to be mapped to the process values here. The named fields appear in the list box on the right and can be mapped to, by selecting them first and then pressing the arrow button. Once a named field is in the mapping grid on the left, in order to map it to a process value, first select the row and then press the ellipsis button to select from the schema dialog for the process or type a custom attribute directly in the ProcessValue column.

Field Name	Definition
	If the file in Design-time Template changes, then it is necessary to press the Refresh button to reload the named fields again.

Common AgilePart Properties

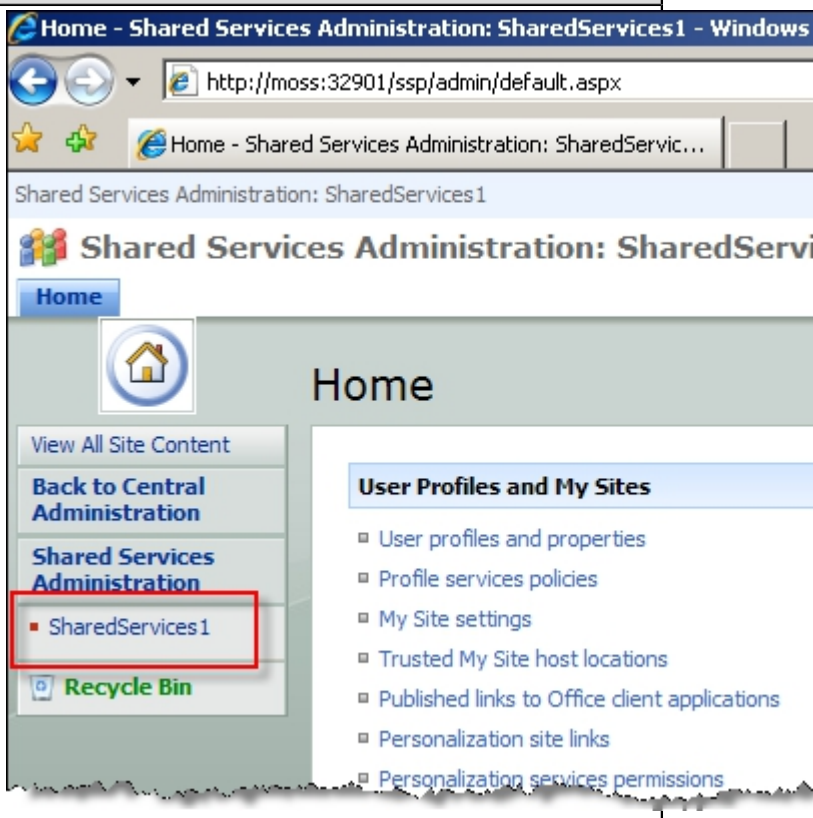
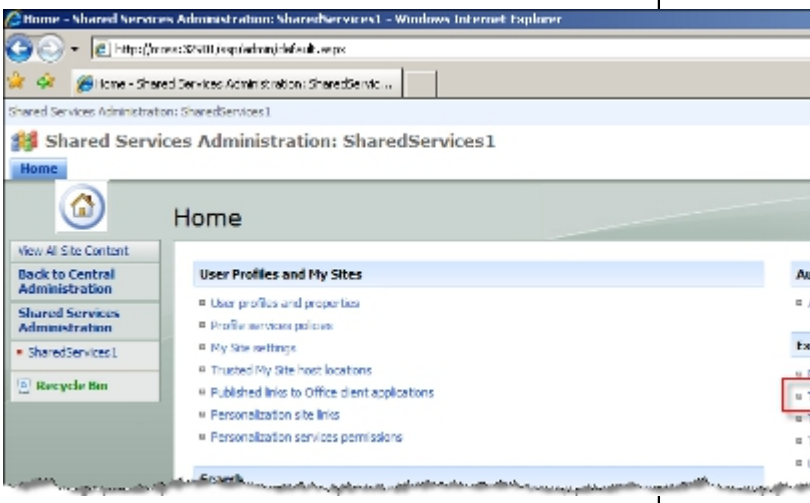
The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

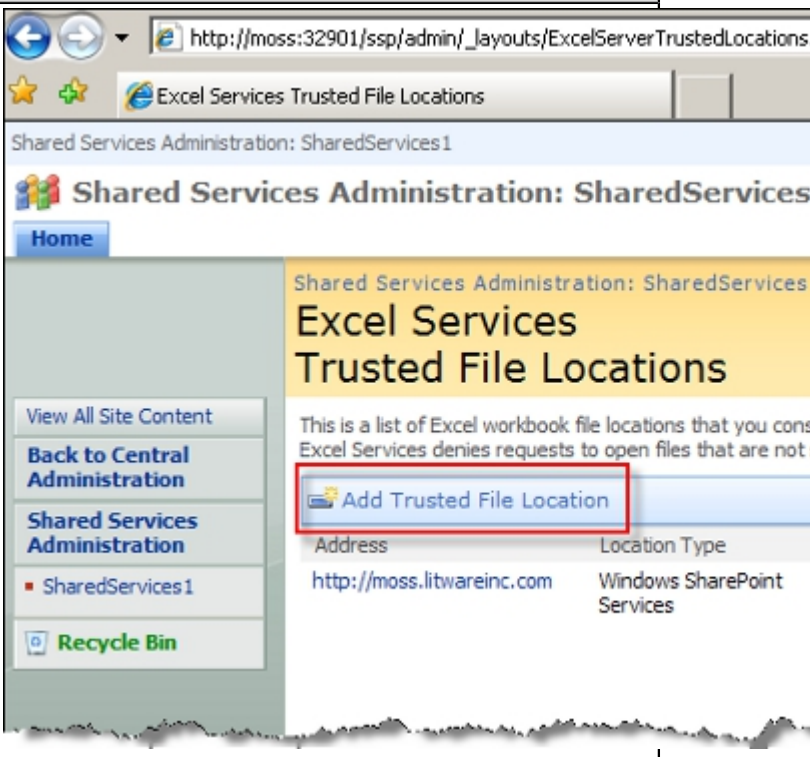
Excel Calculate Configuration Window

This window enables you to configure an Excel calculate action

Field Definitions

Field Name	Definition
Excel Services URL (Required)	The URL of the Excel Service. For example http://moss.litwareinc.com/_vti_bin/ExcelService.asmx This could include custom attributes like $\{SharePointURL\}$\{ExcelService\}. Also schema XPaths can be added using the ellipsis button.
Runtime Template (Required)	The Excel template that will be used at run-time (either .xlsx or .xltx). This document will be copied to the location as defined by the Save To parameter. This could be custom attributes like $\{SharePointURL\}$\{RuntimeTemplateLibrary\}$\{ExcelFilename\}. Also schema XPaths can be added using the ellipsis button. This file should be equivalent to the Design-time Template file with the same named fields. This document should be located in either a SharePoint Doc Library or in a shared folder. Either way, this must be added to the Trusted file locations of the Excel Services (configured in SharePoint Central Administration - Shared Services):

Field Name	Definition
	 

Field Name	Definition
	
Design Time Template (Required)	Excel template to use at design-time. This template document is loaded at design-time to get access to all the named fields in the Excel sheet for mapping purposes. It is not used at run-time. This file should be equivalent to the Run-time Template file with the same named fields. Also, while designing in Envision, the file should be accessible to the Process Designer from his/her PC via the Browse button.
Save To (Required)	The path and filename for saving the resulting Excel document. This can be in a SharePoint Doc library or in a directory path. This could also be an expression like $\{SharePointURL \}$\{ExcelDocLibrary\}$\{ExcelFilename\}. Also schema XPaths can be added using the ellipsis button.
Overwrite if Exists	Overwrite the Save To file if it already exists.

Excel Read

This AgileShape can be used to read data from an Excel document and store the values in custom attributes to be used in the process.

The configuration is similar to that of WriteExcelDocument except there is no "Save To" field and there is a "Read" tab in Mappings, instead of a Write tab.

Properties for This AgilePart

Field Name	Definition
Configuration	Opens the Excel Read Configuration dialog box, where you can configure an Excel read action.
Mappings	For example, to read the value in the named field called ExcelResult into a custom attribute called ProcessResult, set the two mapping columns respectively. The Formatted check box, if set, indicates that the Formatted Value of the cell should be read instead of the Value. For example, a Currency type cell, would return €1,023.34 rather than 1023.34. This is useful for situations where Formatted values of numbers or dates are needed to be included in, say emails.

Common AgilePart Properties

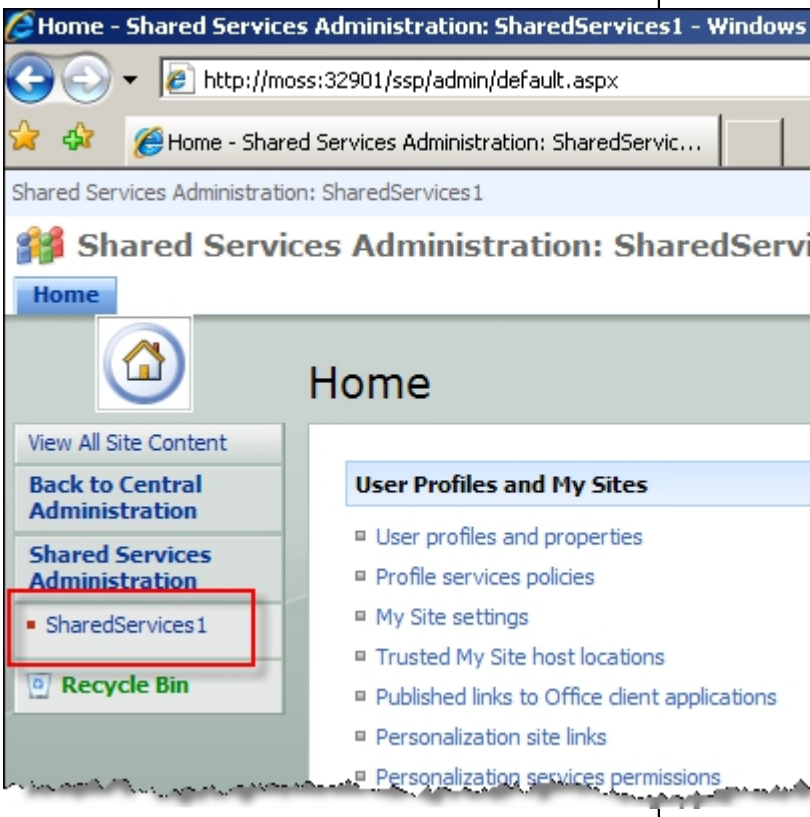
The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

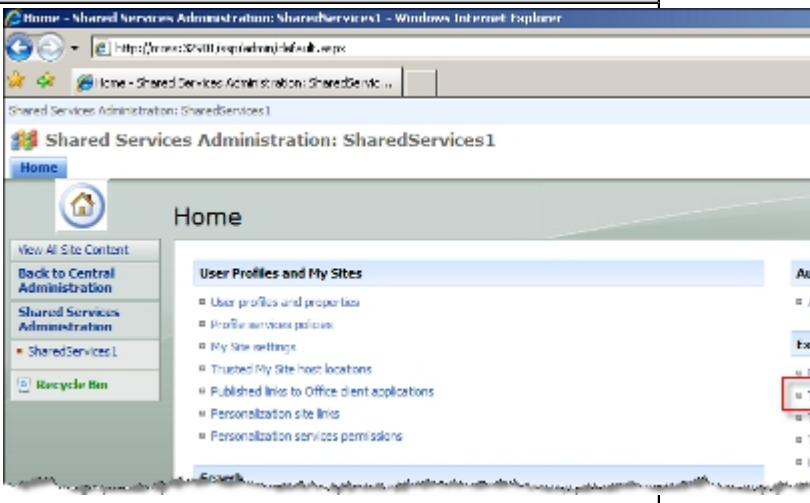
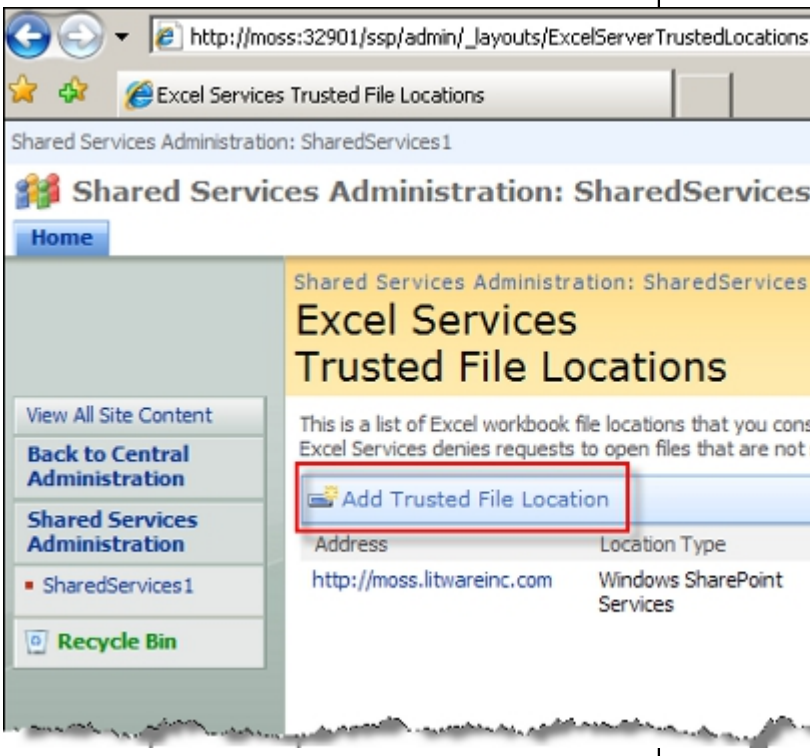
Excel Read Configuration Window

This window enables you to configure an Excel read action

Field Definitions

Field Name	Definition
Excel Services URL (Required)	The URL of the Excel Service. For example http://moss.litwareinc.com/_vti_bin/ExcelService.asmx

Field Name	Definition
	This could include custom attributes like $ \{SharePointURL\}$\{ExcelService\}. Also schema XPaths can be added using the ellipsis button.
Runtime Template (Required)	The Excel template that will be used at run-time (either .xlsx or .xltx). This document will be copied to the location as defined by the Save To parameter. This could be custom attributes like $ \{SharePointURL\}$\{RuntimeTemplateLibrary\}$ \{ExcelFilename\}. Also schema XPaths can be added using the ellipsis button. This file should be equivalent to the Design-time Template file with the same named fields. This document should be located in either a SharePoint Doc Library or in a shared folder. Either way, this must be added to the Trusted file locations of the Excel Services (configured in SharePoint Central Administration - Shared Services): 

Field Name	Definition
	 
Design Time Template (Required)	Excel template to use at design-time. This template document is loaded at design-time to get access to all the named fields in the Excel sheet for mapping purposes. It is not used at run-time. This file should be equivalent to the Run-time Template file with the same named fields. Also, while designing in Envision, the file should be

Field Name	Definition
	accessible to the Process Designer from his/her PC via the Browse button.

Excel Write

This AgileShape can be used to create and afterwards modify an Excel document based on an Excel template. The resultant document can be saved either to a SharePoint document library or to a directory path (local on the server or a shared folder).

Properties for This AgilePart

Field Name	Definition
Configuration	Opens the Excel Write Configuration dialog box, where you can configure an Excel write action.
Mappings	In order to update the named fields in the Excel sheet, they need to be mapped to the process values here. The named fields appear in the list box on the right and can be mapped to, by selecting them first and then pressing the arrow button. Once a named field is in the mapping grid on the left, in order to map it to a process value, first select the row and then press the ellipsis button to select from the schema dialog for the process or type a custom attribute directly in the ProcessValue column. If the file in Design-time Template changes, then it is necessary to press the Refresh button to reload the named fields again.

Common AgilePart Properties

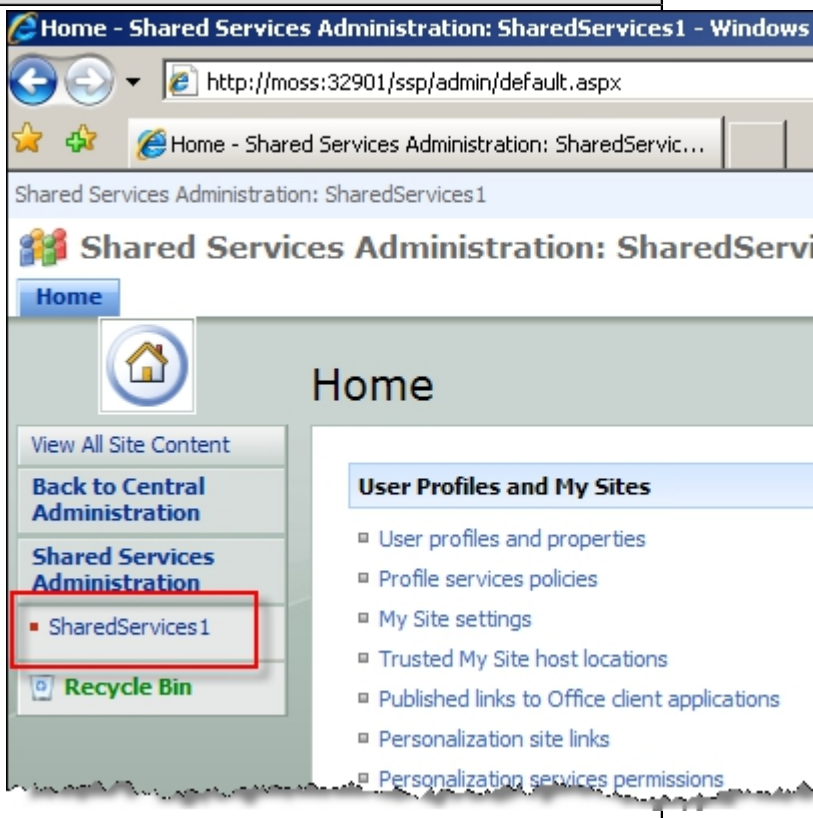
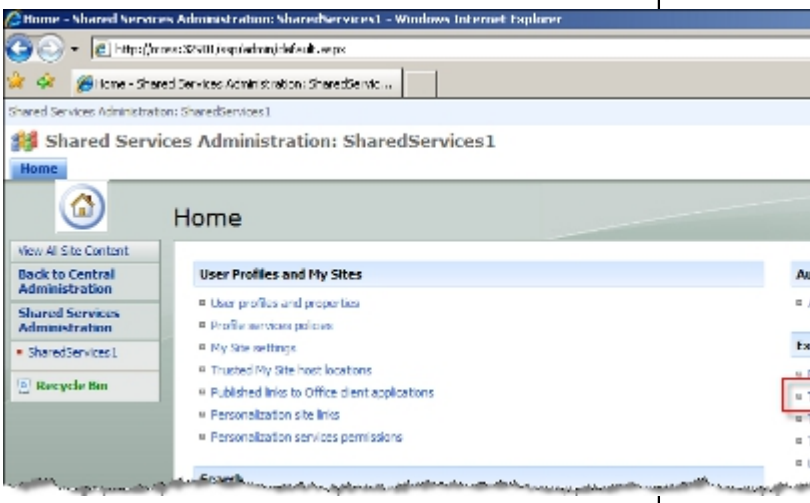
The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

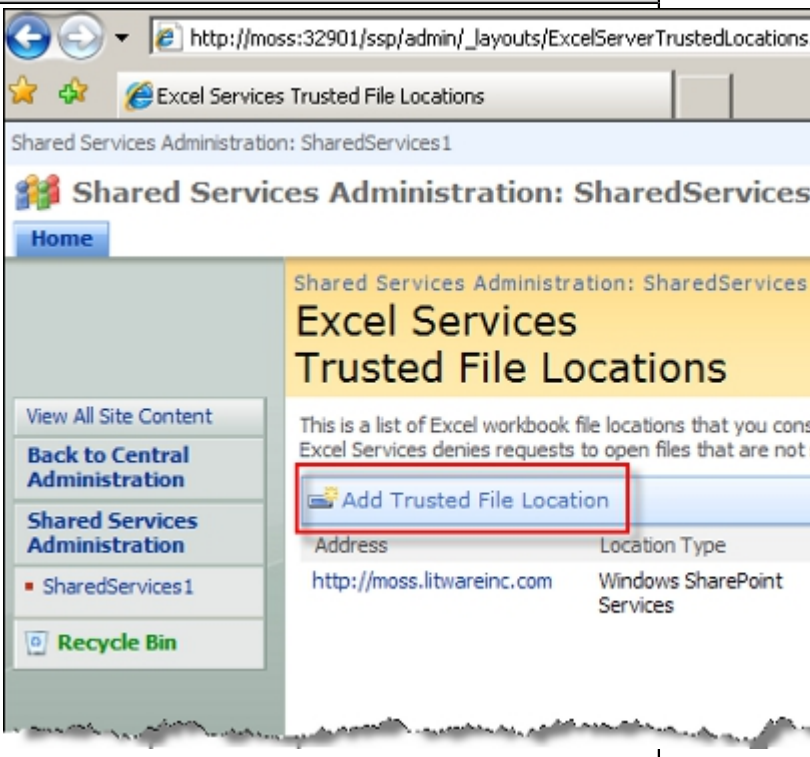
Excel Write Configuration Window

This window enables you to configure an Excel write action

Field Definitions

Field Name	Definition
Excel Services URL (Required)	The URL of the Excel Service. For example http://moss.litwareinc.com/_vti_bin/ExcelService.asmx This could include custom attributes like $\{SharePointURL\}$\{ExcelService\}. Also schema XPaths can be added using the ellipsis button.
Runtime Template (Required)	The Excel template that will be used at run-time (either .xlsx or .xltx). This document will be copied to the location as defined by the Save To parameter. This could be custom attributes like $\{SharePointURL\}$\{RuntimeTemplateLibrary\}$\{ExcelFilename\}. Also schema XPaths can be added using the ellipsis button. This file should be equivalent to the Design-time Template file with the same named fields. This document should be located in either a SharePoint Doc Library or in a shared folder. Either way, this must be added to the Trusted file locations of the Excel Services (configured in SharePoint Central Administration - Shared Services):

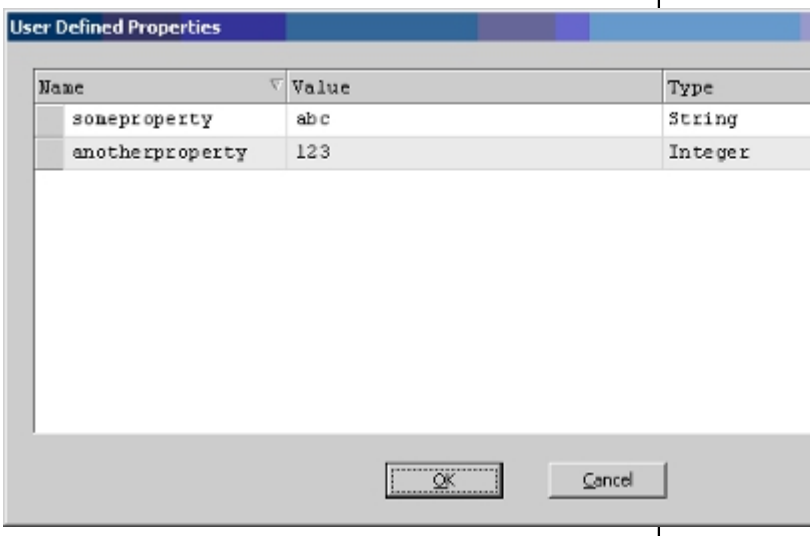
Field Name	Definition
	 

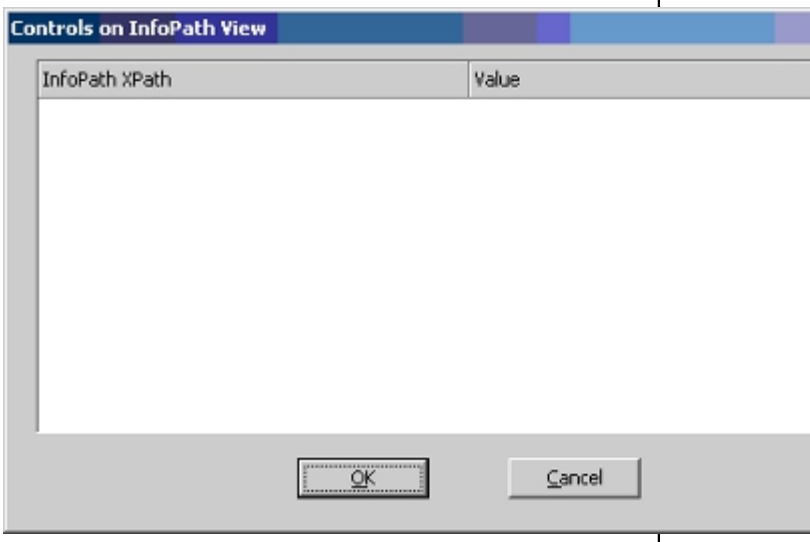
Field Name	Definition
	
Design Time Template (Required)	Excel template to use at design-time. This template document is loaded at design-time to get access to all the named fields in the Excel sheet for mapping purposes. It is not used at run-time. This file should be equivalent to the Run-time Template file with the same named fields. Also, while designing in Envision, the file should be accessible to the Process Designer from his/her PC via the Browse button.
Save To (Required)	The path and filename for saving the resulting Excel document. This can be in a SharePoint Doc library or in a directory path. This could also be an expression like $\{SharePointURL \}$\{ExcelDocLibrary\}$\{ExcelFilename\}. Also schema XPaths can be added using the ellipsis button.
Overwrite if Exists	Overwrite the Save To file if it already exists.

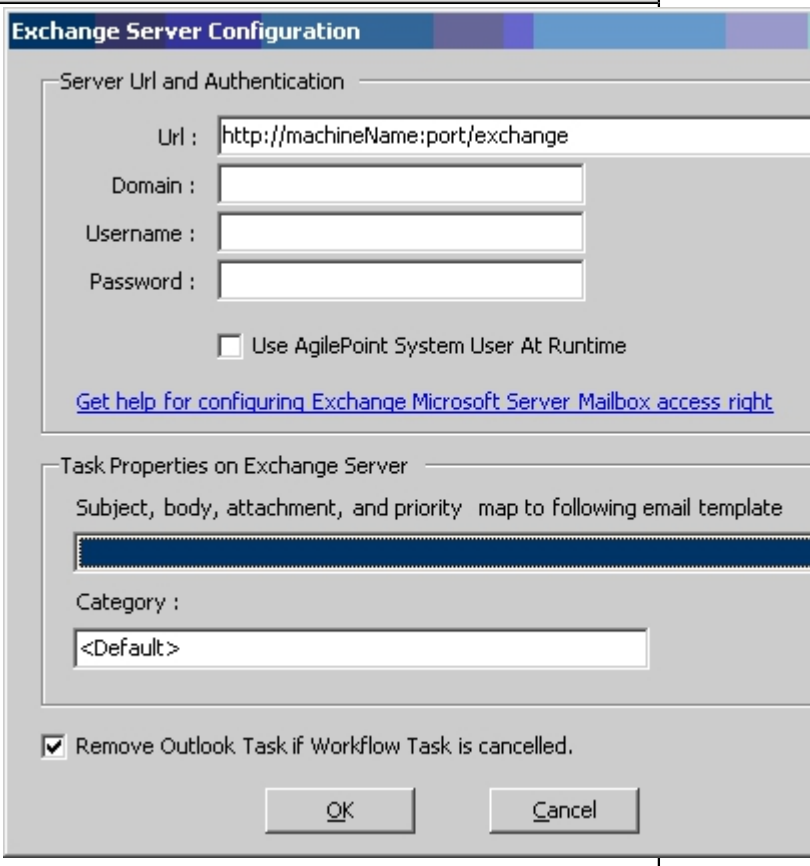
InfoPath View

This AgileShape can be used to represent a manual (i.e. human input required) activity that uses a view of a Microsoft InfoPath form as the user interface for the activity. One use of this AgileShape is to associate several different activities with the same view in an InfoPath form. Each activity (i.e. each AgileShape instance) can be configured in order to make the InfoPath form view initialize appropriately for each individual activity.

Properties for This AgilePart

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

Field Name	Definition
ViewController	This property allows the process modeler to configure the InfoPath view. Click the **Ellipses** button to open the configuration dialog. 
EnabledExchangeServer	Default value: False This property allows the process modeler to enable the AgileShape to integrate directly with Microsoft Exchange Server so that the AgileShape's associated task(s) can be viewed directly from Microsoft Outlook's Task List by the task(s)'s assigned participant(s). See the ExchangeServer property for additional information.
ExchangeServer	This property allows the process modeler to configure the AgileShape's integration with Microsoft Exchange Server. When properly enabled and configured, the AgileShape will then insert, update, and remove Task items for the task's assigned participants, so that the tasks can be viewed directly from Microsoft Outlook. Click the **Ellipses** button to open the configuration dialog.

Field Name	Definition
	 See the **EnabledExchangeServer** property for additional information.

AgileWork Properties

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

InfoPath Sub Process

This AgileShape is used to provide the flexibility to associate different InfoPath forms for each Sub Process in a particular process.

Properties for This AgilePart

Field Name	Definition
FormLibURL	This property specifies the URL of the form (which must be located in a SharePoint form

Field Name	Definition
	library or folder). The value must be an absolute URL.
Prefix	This property specifies the prefix of the InfoPath file name associated with the sub process.
Sub Process	This property specifies the name of the sub process.
XML Mappings	Opens the XML Schema Mappings dialog box, where you can specify the XML mapping from the parent process to the child sub-process.
XsnFileUrl	The URI of the InfoPath form for the subprocess.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

XML Schema Mappings

This window enables you to map schema nodes from a parent process to a sub-process.

Field Definitions

Field Name	Definition
Child	The mapped XML schema node for a child process.
Parent	The mapped XML schema node for a parent process.
Schema	Opens the schema associated with the selected **Child** or **Parent**.
Add	Creates a new parent/child pair you can map using the schema mapper.

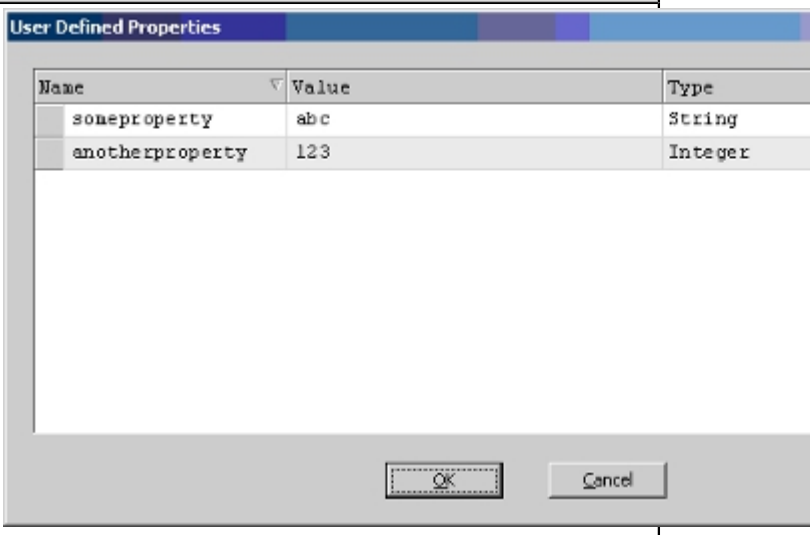
Field Name	Definition
Remove	Removes the selected new parent/child schema node pair.

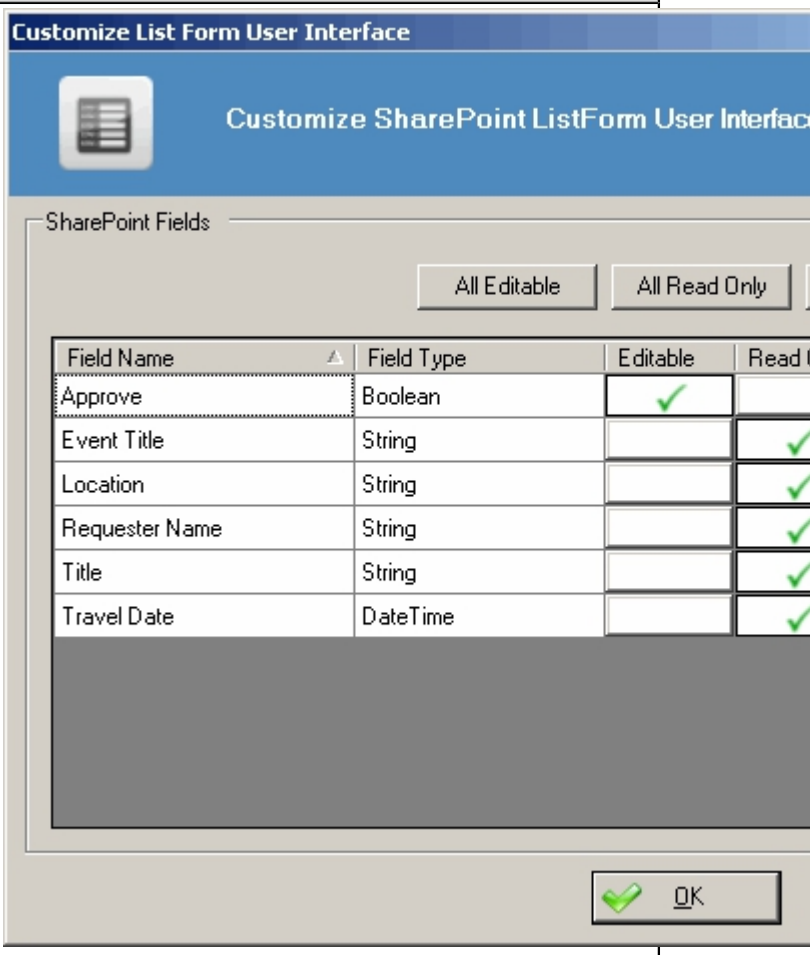
List Form

This AgileShape can be used to leverage a SharePoint List as the form UI for manual tasks. This feature provides an easy way of building forms with different views based on a SharePoint List. A simple configuration window allows you to determine how fields on the form are displayed to the end-user (e.g. Editable, Locked, or Hidden). This drastically simplifies the effort and time required to build UI forms and therefore, building processes has become even easier for business users.

Properties for This AgilePart

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

Field Name	Definition
	
ListForm Controls	Once a SharePoint List is created and associated to the process model, this property specifies the view characteristics of each SharePoint List form field for the selected work to perform view such as Edit, Lock, and Hide.

Field Name	Definition
	 Click the **Editable**, **Read Only**, or **Hidden** field to make a field editable, read only, or hidden when it is served to the end user at runtime.
SubmitStep	Default value: False This property should be set to 'True' if the Form is used as the Submit step (i.e. the first step where you are creating the list item).

AgileWork Properties

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

Move Files

This AgileShape can be used to automatically move one file from one SharePoint library (or folder) to another SharePoint library (or folder).

Moving a file from one library to another and then back to its original location will work as long as the columns on both libraries are the same.

Properties for This AgilePart

Field Name	Definition
DocumentURL	The URL location of the affected file (for example, the file you want to add, delete, check out, etc.).
OverWriteFile	Default value: False This property specifies whether the AgileShape should overwrite the existing file(s) if they already exist at the specified destination. This property can be set to the following specific values: • **False** - This value indicates that the AgileShape will not overwrite any existing file(s). • **True** - This value indicates that the AgileShape will overwrite any existing file(s).
TargetFolder	This property specifies the URL of the SharePoint document library (or subfolder) the file(s) should be copied to. E.g. http://MachineName:Port/sites/SiteName/DocumentLibraryName -or- http://MachineName:Port/sites/SiteName/DocumentLibraryName/FolderName

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Move List Item

This AgileShape can be used to move a custom list item from one list to another.

Properties for This AgilePart

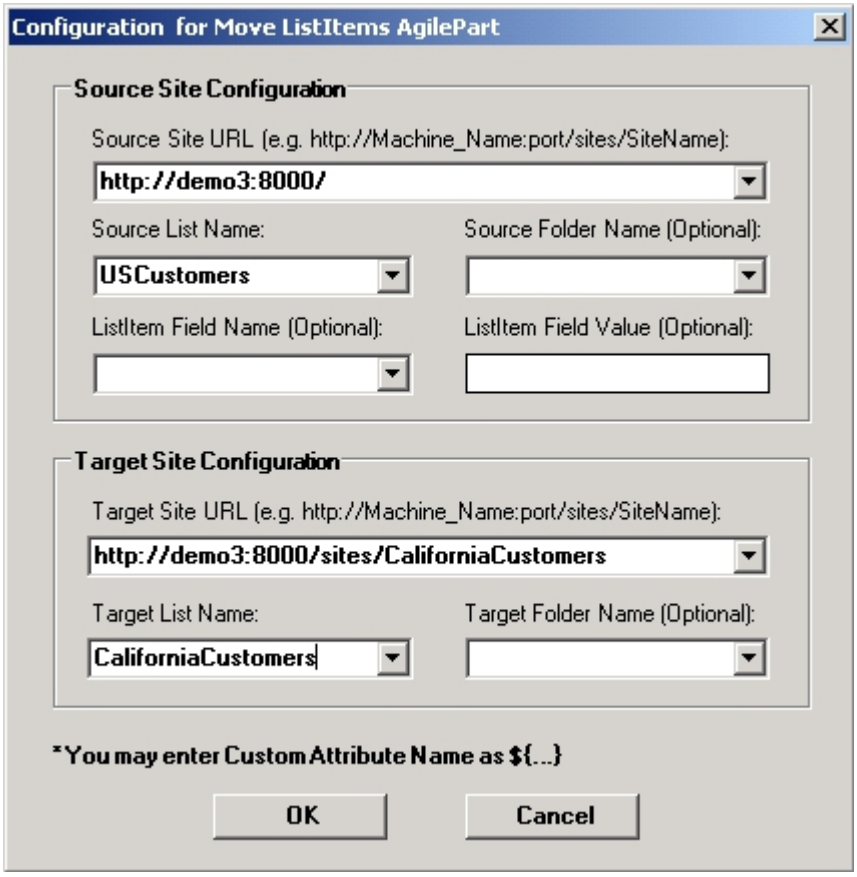
Field Name	Definition
MoveListItemsConfiguration	Opens the MoveListItemsConfiguration dialog box, where you can specify the configuration for moving list items from one list to another.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

MoveListItemsConfiguration Window

This window enables you to specify the configuration for moving list items from one list to another.



Field Definitions

Field Name	Definition
Source Site URL	Specifies the name of the list that includes the affected (copied, moved, etc.) list items.
Source List Name	Specifies the source SharePoint site URL that includes the list for which items are to be affected (copied, moved, etc.).
Source Folder Name	Specifies the name of the folder that includes the list items to be affected (copied, moved, etc.).
ListItem Field Name	Specifies the name of the list item field to be affected (copied, moved, etc.).
ListItem Field Value	Specifies the value of the field to be affected (copied, moved, etc.). This can be used as a filtering mechanism where only fields with the specified value are affected. The following are sample values:

Field Name	Definition
	• $\{ListItemID\} or $\{SubListItemID\} • list item ID
Target List Name	Specifies the name of the destination list for the affected items.
Target Folder Name	Specifies the name of the destination folder for the affected items. If the folder does not exist the system will automatically create it.
Target Site URL	Specifies the target SharePoint site URL that includes the destination list for the affected items.

New Folder

This AgileShape can be used to automatically create a new folder under an existing SharePoint document library.

AbsoluteURL

This property specifies the URL where the new folder will be created.

E.g. http://MachineName:Port/sites/SiteName/DocumentLibraryName/FolderName

Properties for This AgilePart

Field Name	Definition
AbsoluteURL	This property specifies the complete target URL. E.g. http://MachineName:Port/sites/SiteName/DocumentLibraryName/FolderName

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

New Form Library

This AgileShape can be used to automatically create a new form library under an existing SharePoint team site.

Properties for This AgilePart

Field Name	Definition
FormLibraryName	This property specifies the name for the new form library.
FormTemplateRelativePath	This property specifies the location of the InfoPath form template file (i.e. the XSN file) that should be associated with the new form library. The value of this property should be a relative path that specifies the location of the file relative to the AgilePoint Server application's root directory. E.g. If AgilePoint Server is installed at: c:\\Inetpub\\wwwroot\\AgilePointServer\\ and the InfoPath form template file is located at: c:\\Inetpub\\wwwroot\\AgilePointServer\\files\\ \MyTemplate.xsn then this property should be set to the following value: /files/MyTemplate.xsn
OverWriteFormLib	Default value: False This property specifies whether the AgileShape should overwrite the existing form library if one already exists at the location where the new library will be created. This property can be set to the following specific values: ● **False** - This value indicates that the AgileShape will not overwrite an existing SharePoint form library. If this value is specified and a library already exists, then SharePoint will not be modified, and this AgileShape will exit and will update the appropriate custom process attributes (specified by the SaveErrorMessageTo and SaveStatusTo properties). ● **True** - This value indicates that the AgileShape will overwrite an existing SharePoint form library.

Field Name	Definition
SiteURL	This property specifies the URL for the new where you want to add or remove the associated item (e.g., SharePoint site, document library, site collection, user, group, etc.). Below are examples of a valid SharePoint site URL: • http://Machine_Name:port/sites/SiteName • $\{DocUrl\}

Common AgilePart Properties

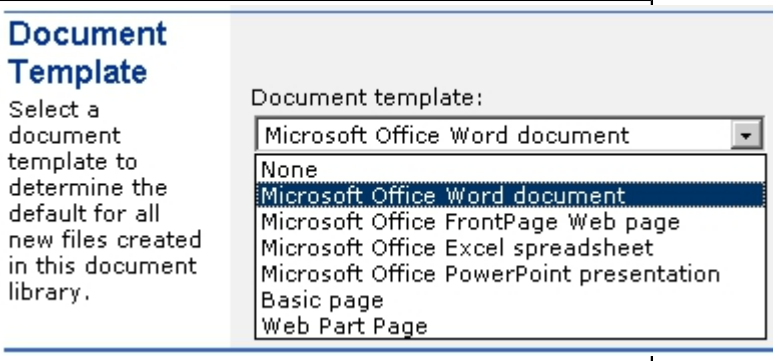
The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

New Library

This AgileShape can be used to automatically create a new document library under an existing SharePoint team site.

Properties for This AgilePart

Field Name	Definition
DocumentLibraryName	This property specifies the name for the new document library.
DocumentTemplate	This property specifies the SharePoint Document Template that should be associated with the new document library. The valid values for this property are the same as the values listed in the "New Document Library" page (displayed when manually creating a new document library in SharePoint). The portion of the "New Document Library" page that lists the available values is shown below.

Field Name	Definition
	 To make the AgileShape create a new document library for Microsoft Word documents, you would use the following value: Microsoft Office Word document
ListTemplate	Default value: STS This property specifies the name of the SharePoint List template that will be used to create the new document library. This property can be set to the name of any SharePoint List template. Some common values are listed below: • **Document Library** - This value indicates that the SharePoint installation's standard Document Library template should be used. • **Control Document Library** - This value indicates that the Document Control Library template (installed by the AgilePoint SharePoint Integration component) should be used.
OverWriteDocLib	Default value: False This property specifies whether the AgileShape should overwrite the existing document library if one already exists at the location where the new library will be created. This property can be set to the following specific values: • **False** - This value indicates that the AgileShape will not overwrite an existing SharePoint document library. If this value is specified and a library already exists, then SharePoint will not be modified, and this AgileShape will exit and will update

Field Name	Definition
	the appropriate custom process attributes (specified by the SaveErrorMessageTo and SaveStatusTo properties). • **True** - This value indicates that the AgileShape will overwrite an existing SharePoint document library.
SiteURL	This property specifies the URL for the new where you want to add or remove the associated item (e.g., SharePoint site, document library, site collection, user, group, etc.). Below are examples of a valid SharePoint site URL: • http://Machine_Name:port/sites/SiteName • $\{DocUrl\}

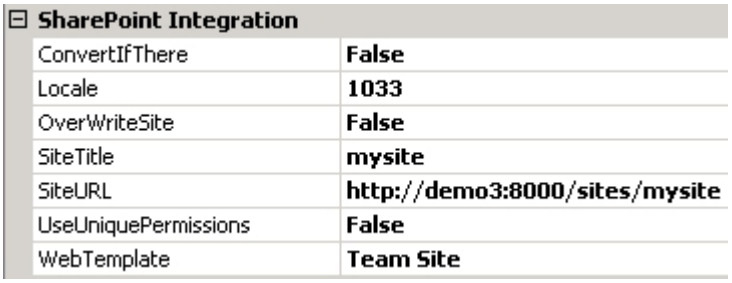
Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

New Site

This AgileShape can be used to automatically create a new SharePoint team site.

The properties below are all required fields in order for the new site to be created. Below is an example of how these properties can be populated:



Properties for This AgilePart

Field Name	Definition
ConvertIfThere	Default value: False This property specifies whether the AgileShape should convert an existing site of the same name to a new SharePoint site. This property can be set to the following specific values: ● **False** - This value indicates that the AgileShape will not overwrite an existing SharePoint site. If this value is specified and a site already exists, then SharePoint will not be modified, and this AgileShape will exit and will update the appropriate custom process attributes (specified by the SaveErrorMessageTo and SaveStatusTo properties). ● **True** - This value indicates that the AgileShape will overwrite an existing SharePoint site.
Locale	This property specifies the locale code for the new SharePoint site or site collection (E.g. 1033).
OverWriteSite	Default value: False This property specifies whether the AgileShape should overwrite the existing site or site collection if one already exists at the location where the new site collection will be created. This property can be set to the following specific values: ● **False** - This value indicates that the AgileShape will not overwrite an existing SharePoint site or site collection. If this value is specified and a site already exists, then SharePoint will not be modified, and this AgileShape will exit and will update the appropriate custom process attributes (specified by the SaveErrorMessageTo and SaveStatusTo properties). ● **True** - This value indicates that the AgileShape will overwrite an existing SharePoint site or site collection.

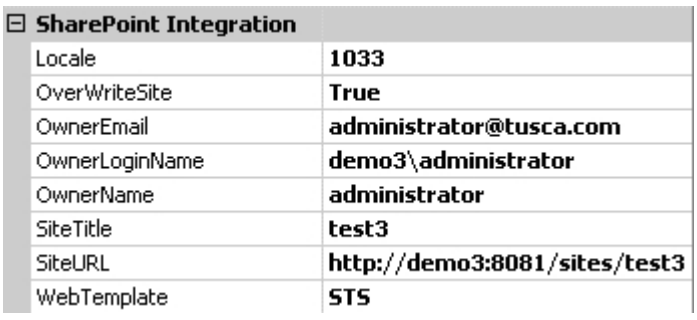
Field Name	Definition
SiteTitle	This property specifies the title for the new SharePoint site.
SiteURL	This property specifies the URL for the new where you want to add or remove the associated item (e.g., SharePoint site, document library, site collection, user, group, etc.). Below are examples of a valid SharePoint site URL: • http://Machine_Name:port/sites/SiteName • $\{DocUrl\}
UseUniquePermissions	This property specifies whether the sub site should inherit permissions from the parent site. If set to "True" the site will use unique permissions.
WebTemplate	This property specifies the name of the SharePoint Team Site template that will be used to create the new SharePoint site collection. This property can be set to the name of any SharePoint Site template (e.g. Team Site).

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

New Site Collection

This AgileShape can be used to automatically create a new SharePoint site collection.



SharePoint Integration	
Locale	1033
OverWriteSite	True
OwnerEmail	administrator@tusca.com
OwnerLoginName	demo3\administrator
OwnerName	administrator
SiteTitle	test3
SiteURL	http://demo3:8081/sites/test3
WebTemplate	STS

Properties for This AgilePart

Field Name	Definition
Locale	This property specifies the locale code for the new SharePoint site or site collection (E.g. 1033).
OverWriteSite	Default value: False This property specifies whether the AgileShape should overwrite the existing site or site collection if one already exists at the location where the new site collection will be created. This property can be set to the following specific values: ● **False** - This value indicates that the AgileShape will not overwrite an existing SharePoint site or site collection. If this value is specified and a site already exists, then SharePoint will not be modified, and this AgileShape will exit and will update the appropriate custom process attributes (specified by the SaveErrorMessageTo and SaveStatusTo properties). ● **True** - This value indicates that the AgileShape will overwrite an existing SharePoint site or site collection.
OwnerEmail	This property specifies the email address of the site owner of the new SharePoint site collection.
OwnerLoginName	This property specifies the login name of the site owner of the new SharePoint site collection. The value should be specified using the following format: DomainName\\UserName E.g. MyDomain\\Administrator
OwnerName	This property specifies the display name of the site owner of the new SharePoint site collection.
SiteTitle	This property specifies the title for the new SharePoint site.
SiteURL	This property specifies the URL for the new where you want to add or remove the associated

Field Name	Definition
	item (e.g., SharePoint site, document library, site collection, user, group, etc.). Below are examples of a valid SharePoint site URL: • http://Machine_Name:port/sites/SiteName • $\{DocUrl\}
WebTemplate	This property specifies the name of the SharePoint Team Site template that will be used to create the new SharePoint site collection. This property can be set to the name of any SharePoint Site template (e.g. Team Site).

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Portal Listing

This AgileShape is often used to add a link to a document that is created in a SharePoint document library by an AgilePoint process.

Properties for This AgilePart

Field Name	Definition
LinkURL	This property specifies the URL for the new portal link.
Notes	This property specifies the notes for the new portal link.
Overwrite	Default value: True This property specifies whether the AgileShape should replace the link (if any) with the same LinkURL rather than creating a new link. This property can be set to the following specific values: • **False** - This value indicates that the AgileShape should simply create a new link.

Field Name	Definition
	• **True** - This value indicates that the AgileShape should replace an existing link that has the same LinkURL with the new link. When this value is specified and an existing link exists, this means that the AgileShape will essentially "update" the non-URL properties of the existing link.
SharePointPortalURL	Default value: $SPServer This property specifies the URL for the SharePoint Portal site. E.g. http://MachineName:Port
Title	This property specifies the title for the new portal link.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Publish

This AgileShape is essentially identical to the Manual AgileShape, except that its **Work To Perform** property defaults to the value **Publish**, and it has a different visual appearance in the process template. This AgileShape is provided simply for the convenience of the process modeler.

Properties for This AgilePart

Field Name	Definition
None	This AgileShape has no unique design time properties.

AgileWork Properties

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

Publish Content

This AgileShape can be used to automatically change the status of a document from Draft to Published.

Properties for This AgilePart

Field Name	Definition
DocumentURL	The URL location of the affected file (for example, the file you want to add, delete, check out, etc.).

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Remove SP Group

This AgileShape can be used to automatically delete a SharePoint Group from a site.

Properties for This AgilePart

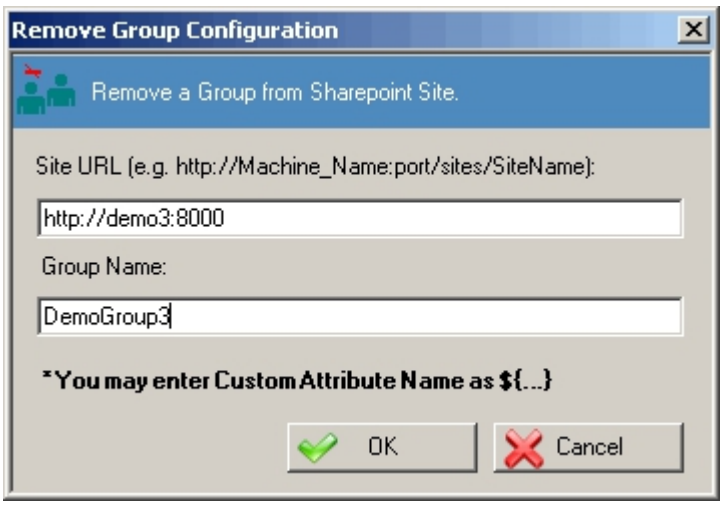
Field Name	Definition
GroupConfiguration	Opens the Remove Group Configuration dialog box, where you can specify which SharePoint group to delete from a SharePoint site.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Remove Group Configuration Window

This window allows you to specify which SharePoint group to delete from a SharePoint site.



Field Definitions

Field Name	Definition
SiteURL	This property specifies the URL for the new where you want to add or remove the associated item (e.g., SharePoint site, document library, site collection, user, group, etc.). Below are examples of a valid SharePoint site URL: • http://Machine_Name:port/sites/SiteName • $\{DocUrl\}
Group Name	Specifies the affected group name (the group name to be created, removed, etc.). The Group Name cannot be duplicated in the domain. Also, once the Group is created, it cannot be changed.

Remove User from SP Group

This AgileShape can be used to automatically remove a user from a SharePoint Group.

Properties for This AgilePart

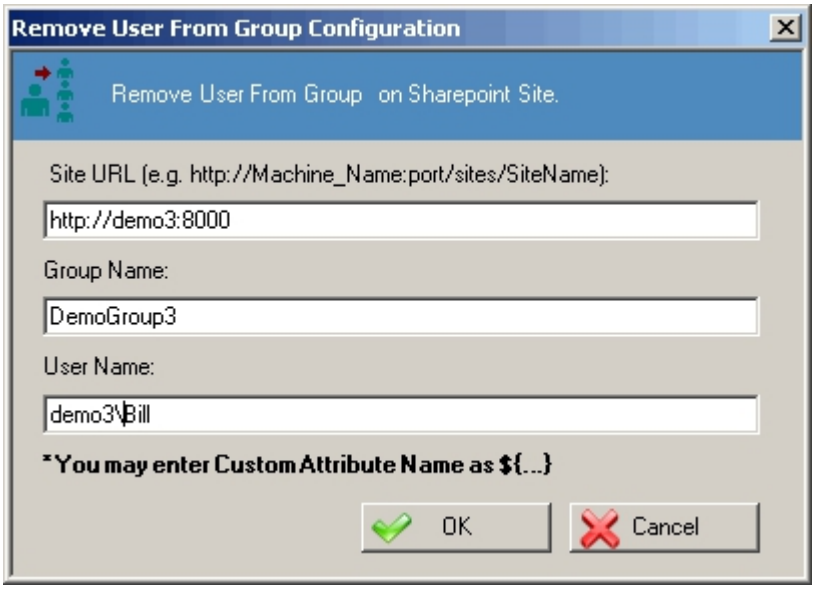
Field Name	Definition
RemoveUserFromGroupConfiguration	Opens the Remove User From Group Configuration dialog box, where you can remove a user from a SharePoint group.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Remove User From Group Configuration Window

This property allows you to remove a user from a SharePoint group.



Field Definitions

Field Name	Definition
SiteURL	This property specifies the URL for the new where you want to add or remove the associated item (e.g., SharePoint site, document library, site collection, user, group, etc.).

Field Name	Definition
	Below are examples of a valid SharePoint site URL: • http://Machine_Name:port/sites/SiteName • $\{DocUrl\}
Group Name	Specifies the affected group name (the group name to be created, removed, etc.). The Group Name cannot be duplicated in the domain. Also, once the Group is created, it cannot be changed.
User Name	The user name you want to associate with the action.

Retrieve List Item

This AgileShape can be used to retrieve list item field values to be updated in a custom attribute, schema metadata, or SharePoint metadata.

Properties for This AgilePart

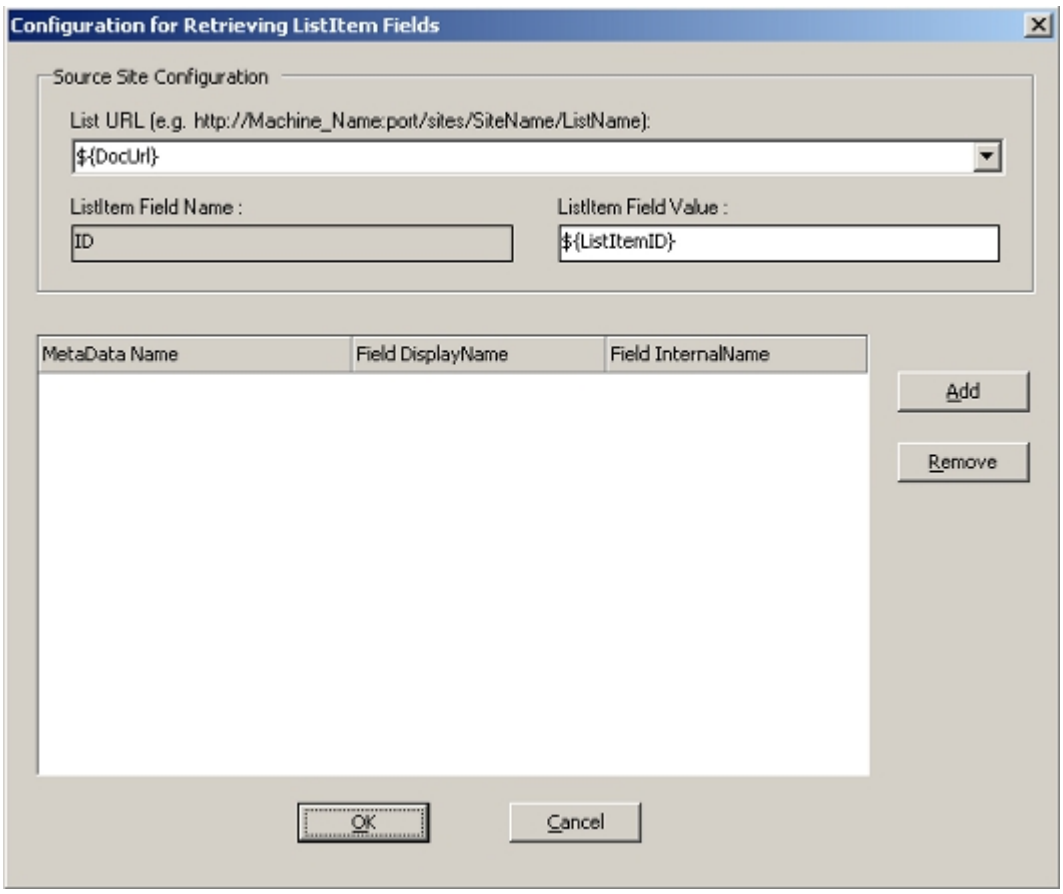
Field Name	Definition
ItemValues	Opens the Configuration for Retrieving ListItem Fields dialog box, where you can specify the configuration for retrieving list item field values and where the values will be updated in a custom attribute, schema metadata, or SharePoint metadata.

Common AgilePart Properties

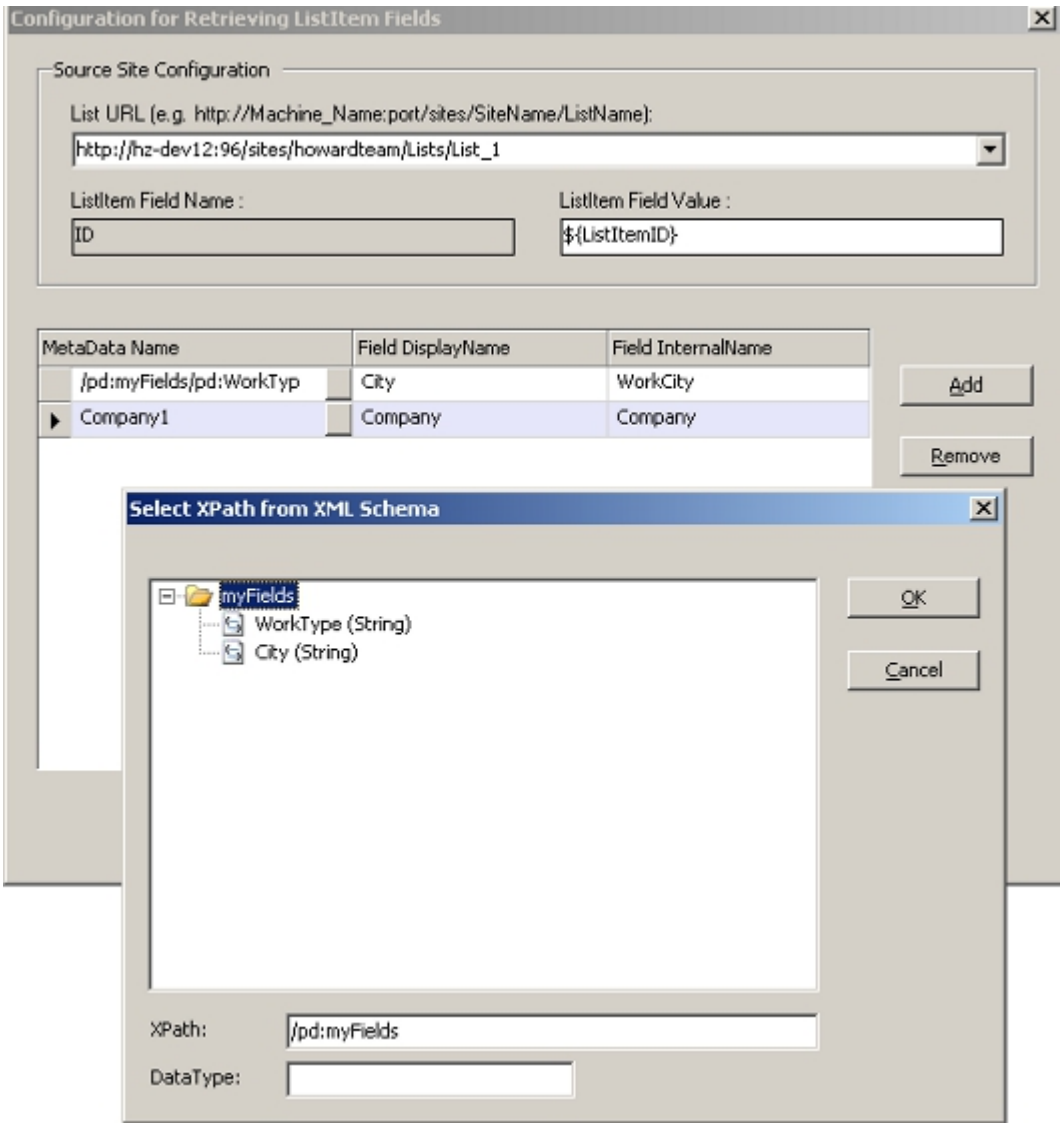
The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Configuration for Retrieving ListItem Fields Window

Specifies the configuration for retrieving list item field values and where the values will be updated in a custom attribute, schema metadata, or SharePoint metadata.



After the Source Site is configured, the configuration window will look similar to below.



The MetaData Name column is used to specify a custom attribute, schema metadata, or SharePoint metadata where the value from the list field that is retrieved will be updated to.

The MetaData Name can be configured as follows:

1. Use the Add button to select a SharePoint metadata item.
2. Input a custom attribute name (e.g. Company1).
3. Click the button at the right side of the field to select a schema metadata.

Field Definitions

Field Name	Definition
List URL	Specifies the URL for the associated SharePoint list. A valid list URL is required, if a library URL (such as document library URL or form library

Field Name	Definition
	URL) instead of a list URL is used, an error will occur during execution. Below are examples of a valid list URL: ● http://Machine_Name:port/sites/SiteName/ListName ● ${DocUrl} After entering the list URL, click the **Connect** button. Now a Content Type can be selected.
ListItem Field Name	Specifies the name of the list item field to be affected (copied, moved, etc.).
ListItem Field Value	Specifies the value of the field to be affected (copied, moved, etc.). This can be used as a filtering mechanism where only fields with the specified value are affected. The following are sample values: ● $\{ListItemID\} or $\{SubListItemID\} ● list item ID

Single Condition

A conditional logic activity that branches into two routines determined by a Boolean value. For instance, Approval status of a request.

Properties for This AgilePart

Field Name	Definition
PropertyBinding	ReadOnly Default value: Chosen by the user when the AgileShape is first added to the process template. The data binding expression that is used to evaluate the value of the condition at runtime.
PropertyType	The data type that the data binding expression (see PropertyBinding) evaluates to at runtime. This property can be set to the following specific values: ● Integer

Field Name	Definition
	• String • DateTime • Double • Short • Float • Decimal

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Submit

This AgileShape is essentially identical to the Manual AgileShape, except that its **Work To Perform** property defaults to the value **Submit**, and it has a different visual appearance in the process template. This AgileShape is provided simply for the convenience of the process modeler.

Properties for This AgilePart

Field Name	Definition
None	This AgileShape has no unique design time properties.

Common AgileWork Properties

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

Submit File to Record Center

This AgileShape can be used to store a specified file in a SharePoint Record Center.

Properties for This AgilePart

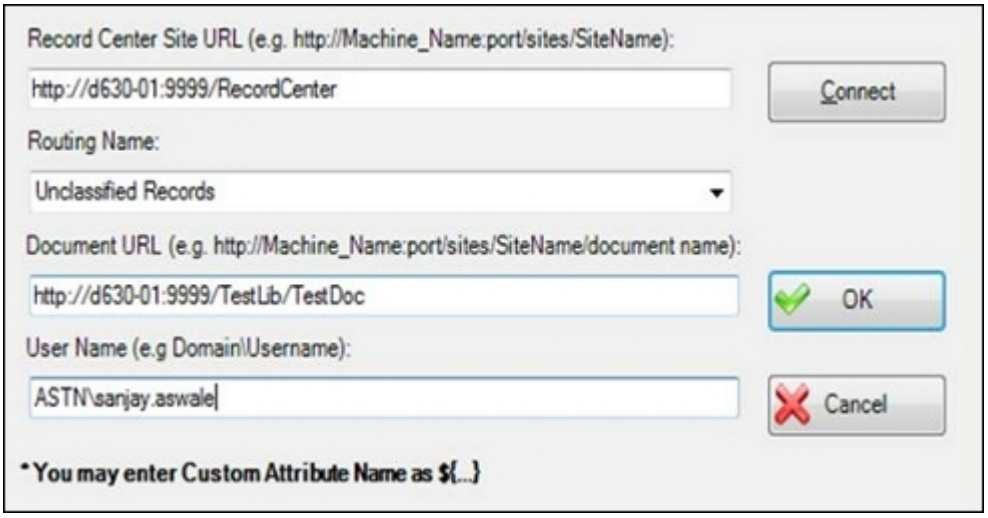
Field Name	Definition
RecordCenterConf	Opens the Submit File To Record Center Configuration dialog box, where you can configure the record center submission.

AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Submit File To Record Center Configuration Window

Use this window to configure the record center submission.



Field Definitions

Field Name	Definition
Record Center Site URL	The URL of the SharePoint Record Center where you want to submit the file. Once you have entered the URL, click **Connect** to populate the Routing Name list.

Field Name	Definition
Routing Name	The Routing Name you want to use to submit the file.
DocumentURL	The URL location of the affected file (for example, the file you want to add, delete, check out, etc.).
User Name	The user name you want to associate with the action.

Undo Check Out

This AgileShape can be used to undo a document check out from a SharePoint document library.

Properties for This AgilePart

Field Name	Definition
DocumentURL	The URL location of the affected file (for example, the file you want to add, delete, check out, etc.).

AgilePart Properties

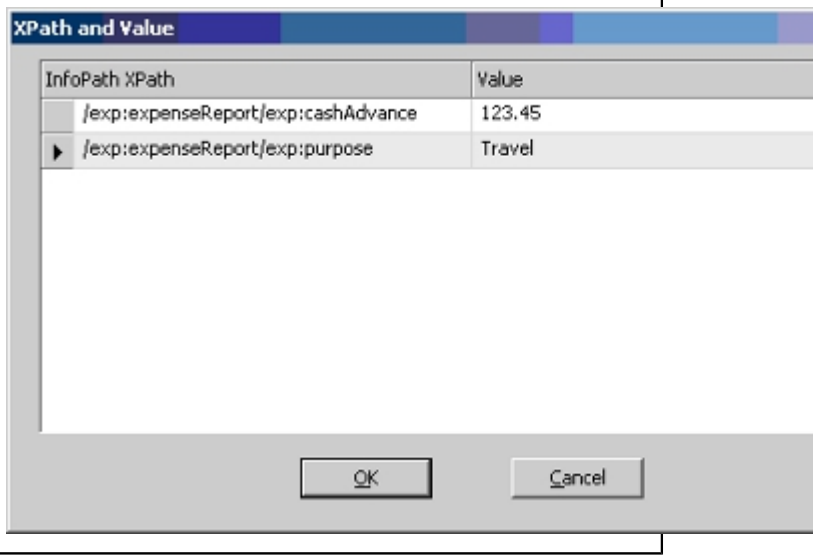
The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Update InfoPath

This AgileShape can be used to update the values of one or more of the data elements in the XML of the InfoPath form associated with this AgileShape.

Properties for This AgilePart

Field Name	Definition
InfoPathFileURL	Default value: $DocUrl This property specifies the URL of the InfoPath form (in Microsoft SharePoint).
XPathAndValues	This property allows the process modeler to specify new values for one or more of the

Field Name	Definition
	data elements in the XML of the InfoPath form associated with this AgileShape. Click the **Ellipses** button to open the configuration dialog. 

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Update Meta Data

This AgileShape can be used to update metadata in SharePoint.

To define the metadata you want to update:

1. In the **MetaDataNameAndValue** field, click the **Ellipses**.
2. On the **Name and Value** dialog box in the **Library URL** field, enter a SharePoint URL that contains the metadata attributes you want to change.
3. In the **Library URL** field, expand the drop-down list, and select the URL you want. This populates the data for the rest of the fields in the dialog box.
4. Click **Add**.
5. On the **Select SharePoint Library Column** dialog box, select the field you want to update, and click **OK**. (Note that you can select only one field at a time. Repeat this step for each field you want to update.)
6. Update the following fields as desired. (See the descriptions in this topic.)
   - Folder Name
   - Field Name

- Field Value
- Library URL

Properties for This AgilePart

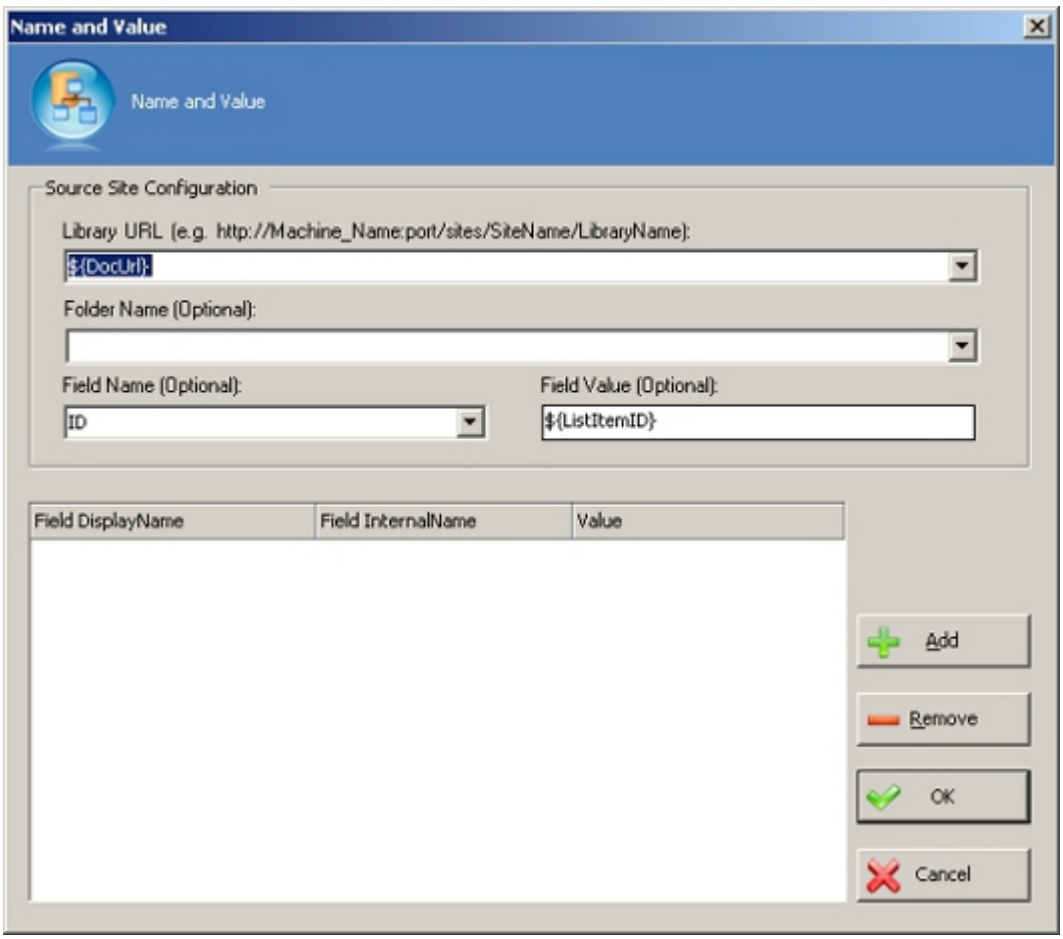
Field Name	Definition
MetaDataNameAndValue	Opens the Name and Value dialog box, where you can define the field name and value you want to update within a specific SharePoint Library and folder.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Name and Value Window

Use the Name and Value dialog box, where you can define the field name and value you want to update within a specific SharePoint Library and folder.



Field Definitions

Field Name	Definition
Library URL	The URL of the SharePoint Library where you want to update the metadata field name and value. Enter a valid SharePoint URL, and then expand the drop-down to select a specific list or library URL and to populate the fields for the rest of the options in the dialog box. To retrieve the metadata associated with the Library URL, you must use an actual URL. However, you can use a custom attribute at runtime. If you want to change the runtime URL, replace the URL in the Library URL field with the runtime URL after you have configured the other options in the dialog box.

Field Name	Definition
Folder Name	The folder within the SharePoint Library where you want to update the metadata field name and value.
Field Name	Identifies a field by which you want to restrict the metadata update.
Field Value	Identifies a value by which you want to restrict the metadata update.
Add	Opens the **Select SharePoint Library Column** dialog box. Use this dialog box to select the metadata attributes you want to update.
Remove	Removes a metadata field and value from the list of metadata values to update.
Value	A metadata value you want to update.

Update SP Group

This AgileShape can be used to automatically update information for a SharePoint Group.

Properties for This AgilePart

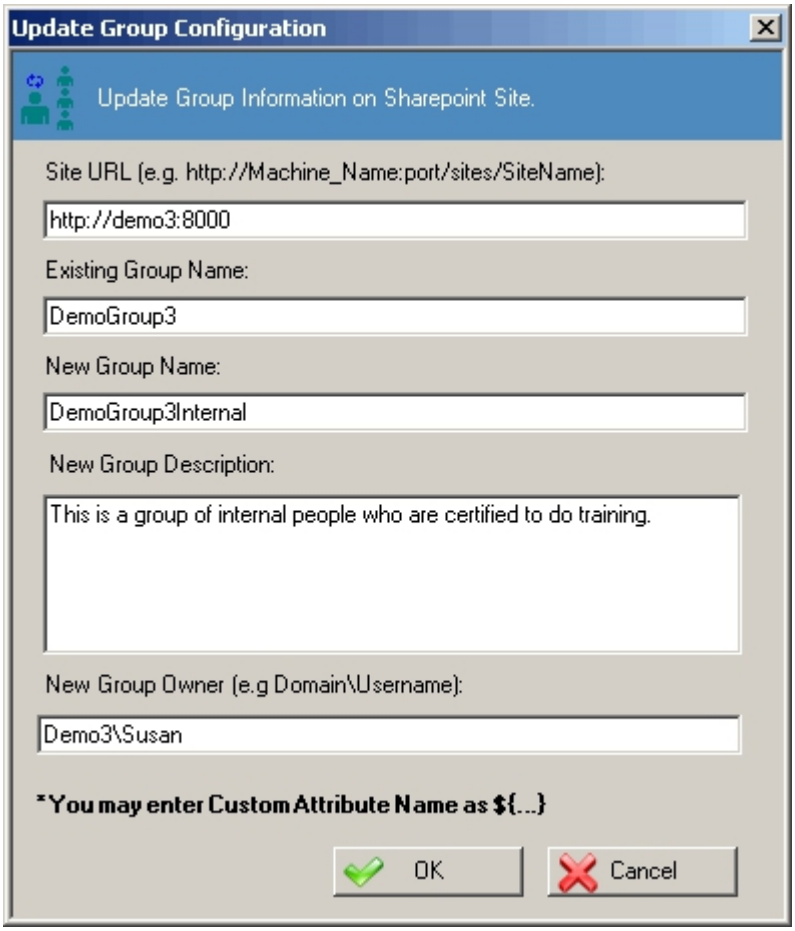
Field Name	Definition
GroupConfiguration	Opens the Update Group Configuration dialog box, where you can update information for a SharePoint group.

AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Update Group Configuration Window

This window allows you to update information for a SharePoint group.



Field Definitions

Field Name	Definition
SiteURL	This property specifies the URL for the new where you want to add or remove the associated item (e.g., SharePoint site, document library, site collection, user, group, etc.). Below are examples of a valid SharePoint site URL: • http://Machine_Name:port/sites/SiteName • $\{DocUrl\}
Existing Group Name	The name of the existing SharePoint Group for which you would like to change the information.
New Group Name	The new name of the SharePoint Group.

Field Name	Definition
New Group Description	The new description that will overwrite the existing group description.
New Group Owner	The domain and user name for the new group owner.

Upload Files

This AgileShape can be used to automatically upload one or more files from the local file system (of the AgilePoint Server machine) to a SharePoint library.

Properties for This AgilePart

Field Name	Definition
DestinationURL	This property specifies the URL of the SharePoint document library (or subfolder) the file(s) should be uploaded to. E.g. http://MachineName:Port/sites/SiteName/DocumentLibraryName -or- http://MachineName:Port/sites/SiteName/DocumentLibraryName/FolderName
Filter	This property specifies the filename (or a filename filter containing wildcards) that will be acted upon -- for example, downloaded by the Download Files AgilePart, uploaded by the Upload Files AgilePart, or converted to PDF by the Convert to PDF AgilePart. The action is taken in the location specified by the associated URL -- either Local Path or AbsoluteURL, depending upon the AgileShape. If the location is a folder, only the specified file types will be acted upon. Some examples of possible values for this property are listed below: ● ***.*** - This value indicates that all files (located at the source location) will be affected.

Field Name	Definition
	• ***.XML** - This value indicates that all files (located at the source location) that have the ".XML" file extension will be affected. • ***.doc** - This value indicates that all files (located at the source location) that have the ".DOC" file extension will be affected. • **MyFile.xml** - This value indicates that only the specific file (located at the source location) named MyFile.xml will be affected.
LocalPath	This property specifies the local file system folder that is the destination location for the AgilePart's action (for example, upload or download a file). The value of this property should be a relative path that specifies the location of the folder relative to the AgilePoint Server application's root directory. E.g. If AgilePoint Server is installed at: c:\\Inetpub\\wwwroot\\AgilePointServer\\ and the file (once downloaded) should be located at: c:\\Inetpub\\wwwroot\\AgilePointServer\\files\ \\MyFile.txt then this property should be set to the following value: files E.g. If AgilePoint Server is installed at: c:\\Inetpub \\wwwroot\\AgilePointServer\\ and the file (once downloaded) should be located at: c:\\Inetpub\\wwwroot\\AgilePointServer\\files\ \\temp\\MyFile.txt then this property should be set to the following value: /files/temp/
OverWriteFile	Default value: False This property specifies whether the AgileShape should overwrite the existing file(s) if they already exist at the specified destination. This property can be set to the following specific values:

Field Name	Definition
	• **False** - This value indicates that the AgileShape will not overwrite any existing file(s). • **True** - This value indicates that the AgileShape will overwrite any existing file(s).
Recursive	Default value: False This property specifies whether the AgileShape should affect files contained in any subfolders located under the library (or folder) in the specified location. This property can be set to the following specific values: • **False** - This value indicates that the AgileShape will only affect files located in the specified folder only. • **True** - This value indicates that the AgileShape will affect files located directly under the specified folder, and also files in any subfolders.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Advanced Extension

This section describes the AgileShapes in the Advanced Extension stencil.

C#

This AgileShape can be used to add managed custom code using the C# coding language.

Custom Assembly Support

The Managed Code C# and Managed Code VB AgileParts allow developers to add custom classes to their code snippets. Support for custom classes requires the following setup:

1. Create a custom assembly as a class library using managed code C# or managed code VB.
2. Deploy the custom assembly to the GAC on all AgilePoint Server and Envision machines.
3. In a text editor, create a new file.

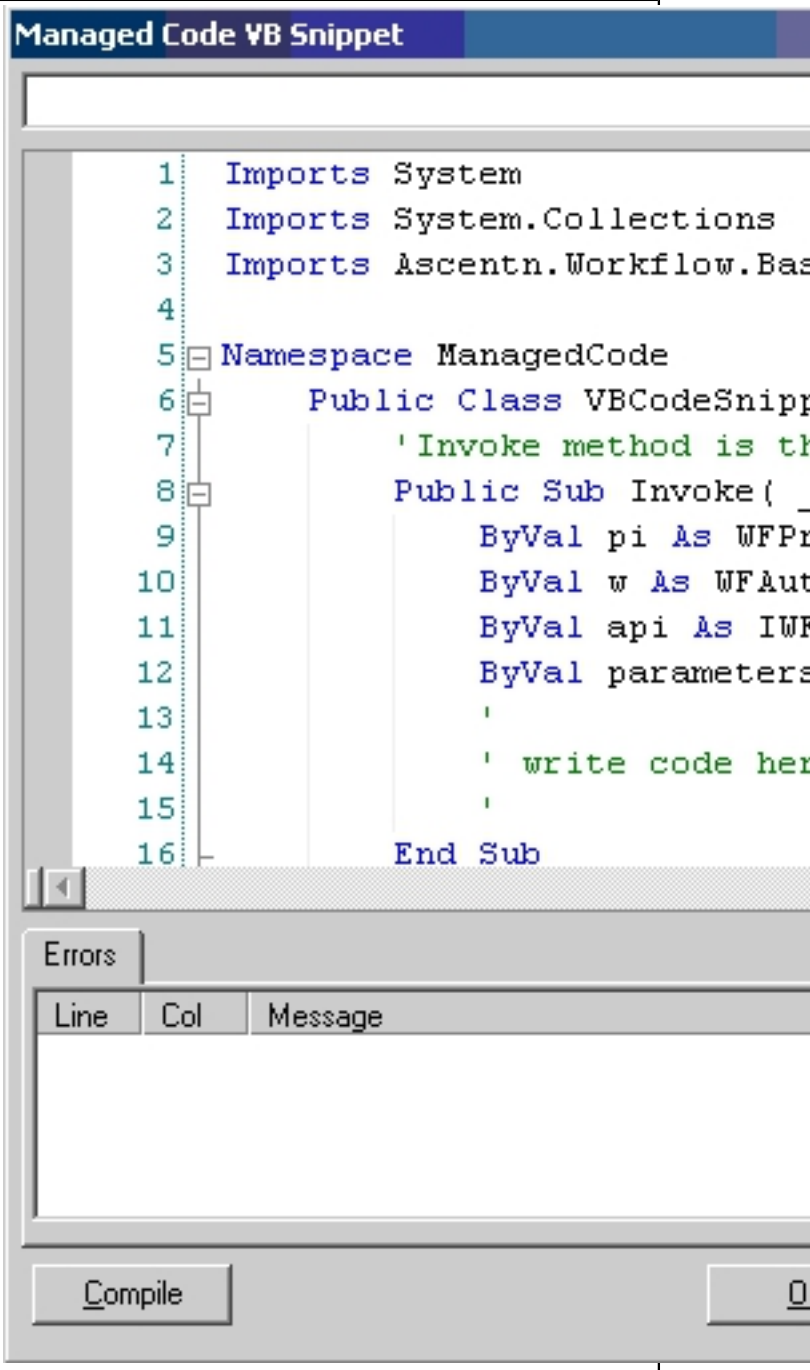
4. In the text file, paste the following:

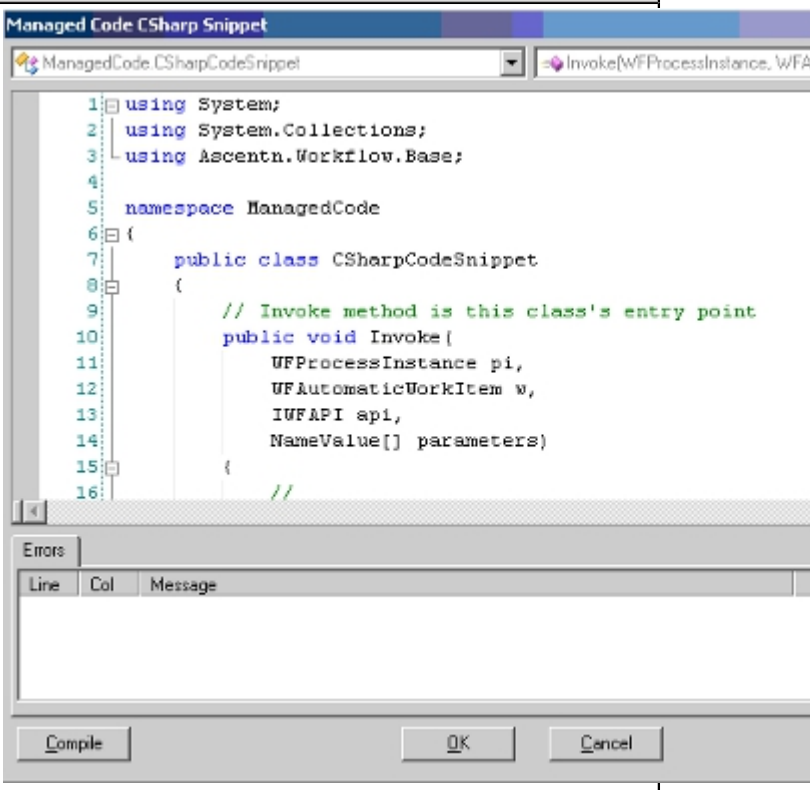
```
<?xml version="1.0" encoding="utf-8" ?>
   <configuration>
      <assemblies>
         <Assembly>Infragistics2.WebUI.Misc.v8.1,
            Version=8.1.20081.1000, Culture=neutral,
            PublicKeyToken=7dd5c3163f2cd0cb
         </Assembly>
      </assemblies>
   </configuration>
```

5. Replace the information in the **<Assembly>** element with the correct information for your assembly. You can add as many Assembly nodes as required.
6. Save the file with the name **CustomAssembly.xml**.
7. Place a copy of the file in all of the following locations:
   - The root installation folder for AgilePoint Server.
   - The GAC of the AgilePoint Server machine.
   - The root installation folder for each AgilePoint Envision instance where the custom classes will be used.
   - The GAC of each AgilePoint Envision machine.

Properties for This AgilePart

Field Name	Definition
CodeSnippet	This property allows the process modeler to build and compile the managed code snippet. Click the **Ellipses** button to open the Managed Code VB Snippet.

Field Name	Definition
	

Field Name	Definition
	

Common AgilePart Properties

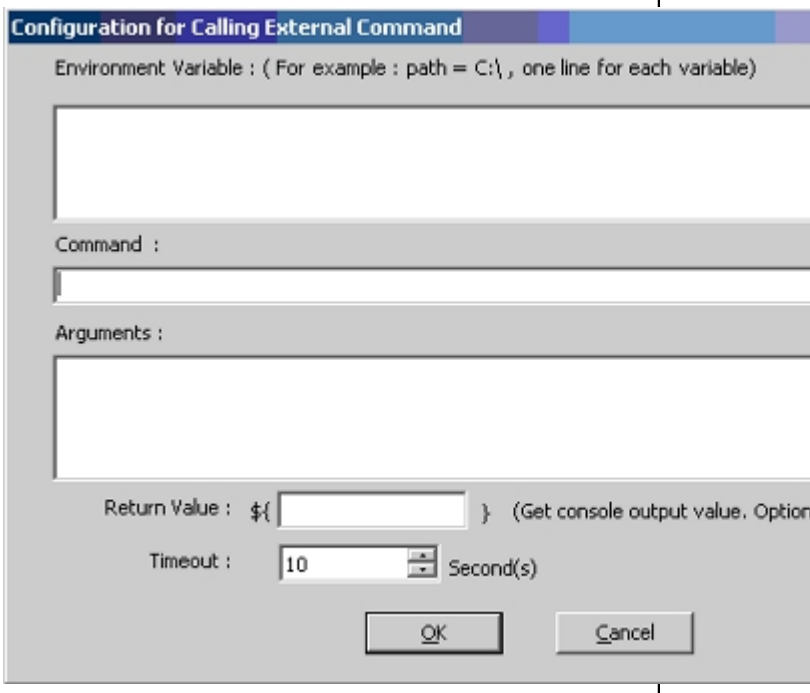
The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

External Command

This AgileShape can be used to configure an external command to run in the workflow process.

Properties for This AgilePart

Field Name	Definition
Configure	This property allows the process modeler to configure the details for calling an external command. Click the **Ellipses** button to open the Configuration for Calling External Command dialog.

Field Name	Definition
	

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Java

This AgileShape can be used to run a Java application.

Properties for This AgilePart

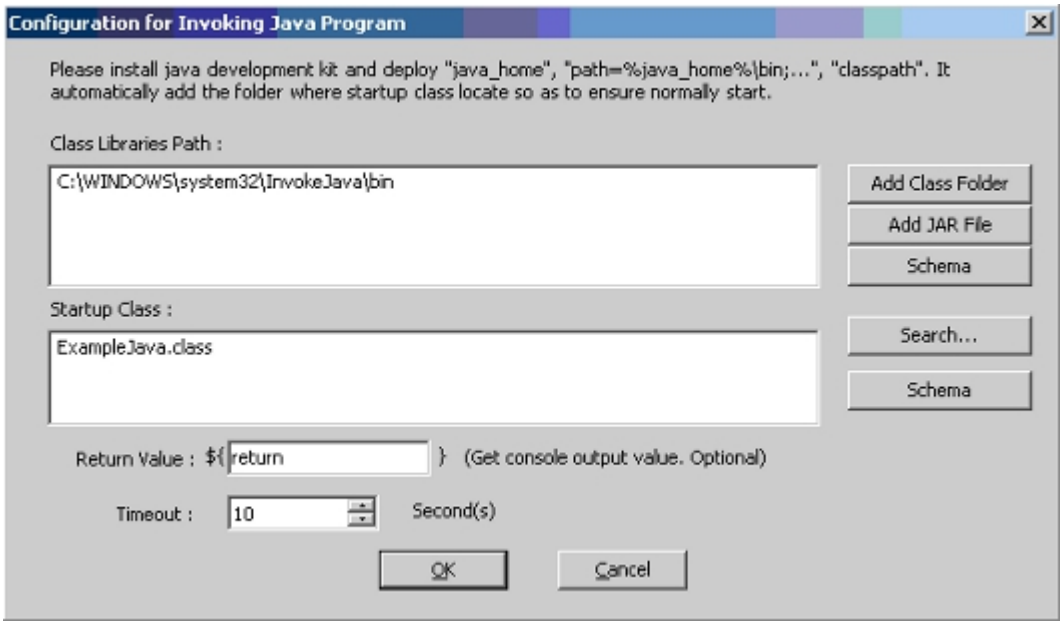
Field Name	Definition
Configure	Opens the Configuration for Invoking Java Program Window dialog box, where you can configure the details for invoking the Java program.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Configuration for Invoking Java Program Window

This window allows the process modeler to configure the details for invoking the Java program.



1. Click the **Search** button to add a class that contains the main method for the startup class. It automatically adds the folder where the startup class is located to ensure normal startup as shown above.
2. Add all the libraries and/or class folders that the startup class requires by clicking either the **Add Class Folder** or **Add External JAR** button.
3. Enter a custom parameter name for the output value in the **"Return Value"** text box. This is an optional step and only returns the console output value.
4. To limit the run time, input the number of seconds before timeout.
5. Click **OK** when finished with the configuration.

Sequential Workflow

This AgileShape can be used to expose your Microsoft Windows Workflow Foundation assets at the AgilePoint process layer.

Properties for This AgilePart

Field Name	Definition
Configure	Opens the Workflow Foundation Assembly dialog box, where you can configure the details for invoking Windows Workflow Foundation activities.
Timeout	Default value: 600 Specifies the maximum amount of time (in seconds) that should be allowed for the completion of the web service call for this AgileShape.

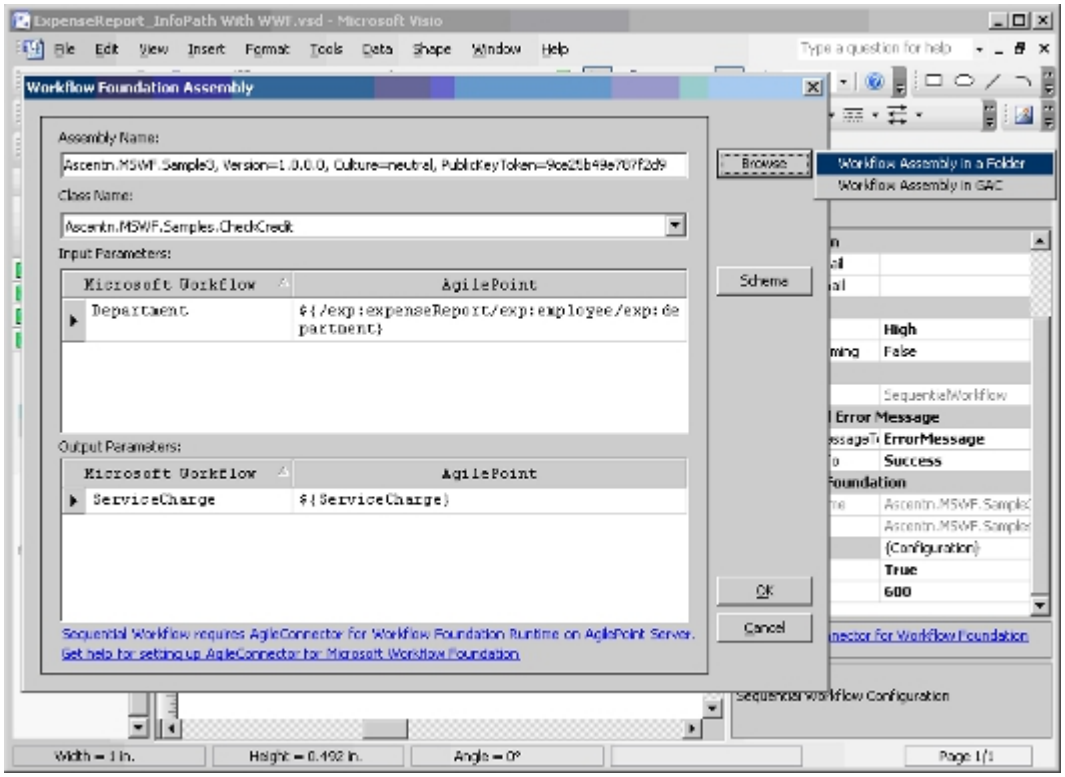
Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Workflow Foundation Assembly Window

This window allows the process modeler to configure the details for invoking Windows Workflow Foundation activities.

1. Click the **Ellipses** button to open the Workflow Foundation Assembly window.



2. Click **Browse**, the following two choices are available:
   - Workflow Assembly in a folder
   - Workflow Assembly in GAC

   The Sequential Workflow assembly can be either in the GAC or in a folder. If it is in a folder, it will be added into the GAC automatically when the Sequential Workflow AgilePart is configured.
3. Choose a workflow assembly.
4. Configure the "Input Parameters" and "Output Parameters".
5. Click **OK**.

VB

This AgileShape can be used to add managed custom code using the Visual Basic coding language.

Custom Assembly Support

The Managed Code C# and Managed Code VB AgileParts allow developers to add custom classes to their code snippets. Support for custom classes requires the following setup:

1. Create a custom assembly as a class library using managed code C# or managed code VB.
2. Deploy the custom assembly to the GAC on all AgilePoint Server and Envision machines.
3. In a text editor, create a new file.

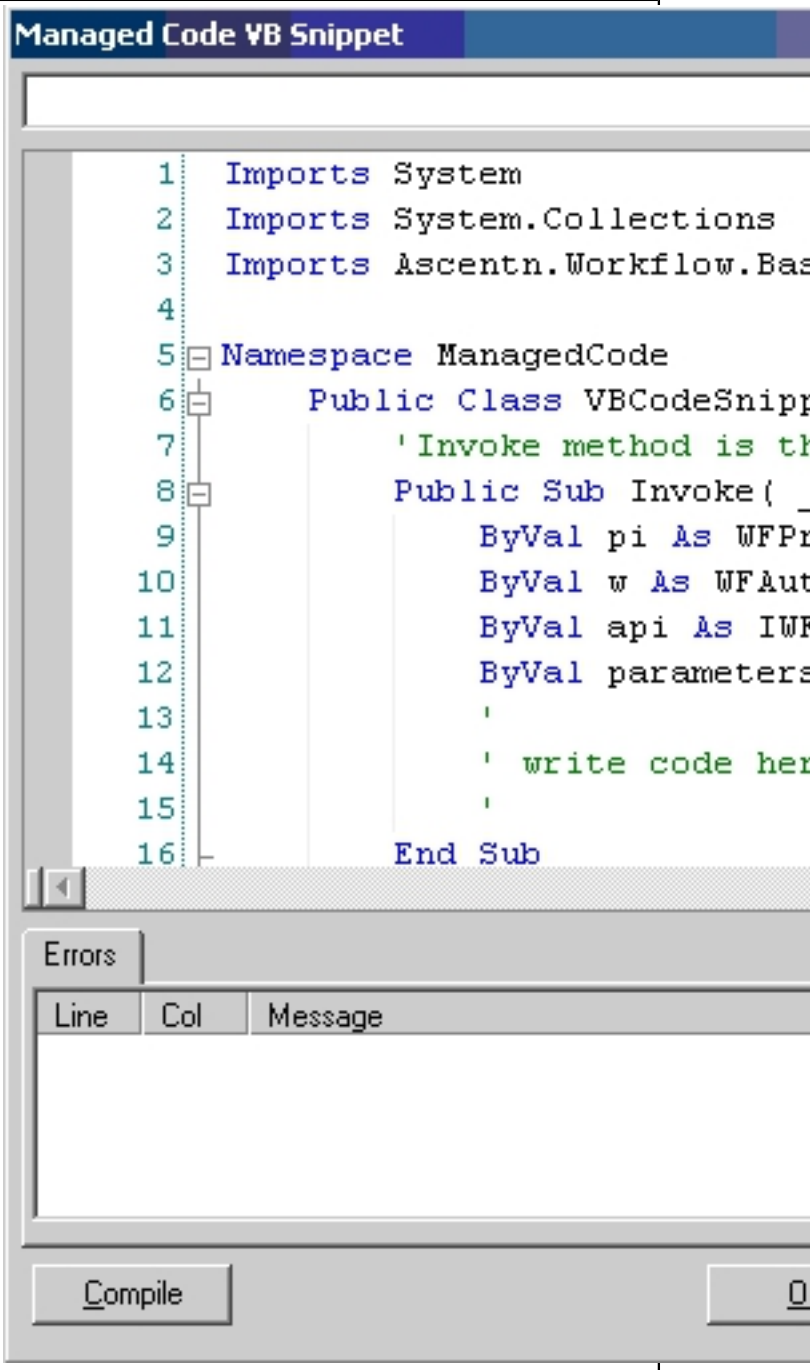
4. In the text file, paste the following:

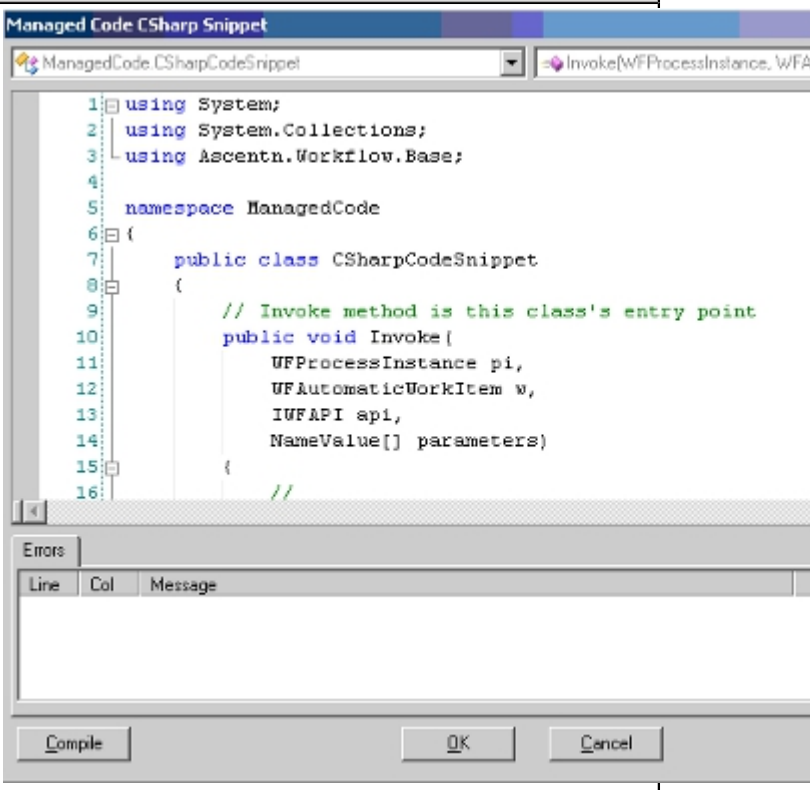
```
<?xml version="1.0" encoding="utf-8" ?>
   <configuration>
      <assemblies>
         <Assembly>Infragistics2.WebUI.Misc.v8.1,
            Version=8.1.20081.1000, Culture=neutral,
            PublicKeyToken=7dd5c3163f2cd0cb
         </Assembly>
      </assemblies>
   </configuration>
```

5. Replace the information in the **<Assembly>** element with the correct information for your assembly. You can add as many Assembly nodes as required.
6. Save the file with the name **CustomAssembly.xml**.
7. Place a copy of the file in all of the following locations:
   - The root installation folder for AgilePoint Server.
   - The GAC of the AgilePoint Server machine.
   - The root installation folder for each AgilePoint Envision instance where the custom classes will be used.
   - The GAC of each AgilePoint Envision machine.

Properties for This AgilePart

Field Name	Definition
CodeSnippet	This property allows the process modeler to build and compile the managed code snippet. Click the **Ellipses** button to open the Managed Code VB Snippet.

Field Name	Definition
	

Field Name	Definition
	

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

WF Rule

Information pending.

Web Services

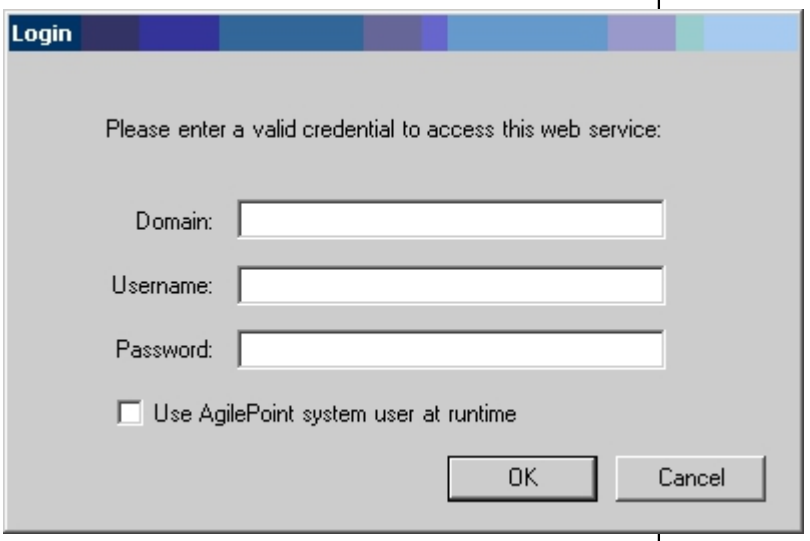
This section describes the AgileShapes in the Web Services stencil.

Web Service

An AgilePart activity that accesses a Web Service and its methods which are registered in AgilePoint Envision. The user can select the appropriate Web Service and its specific method using the Web Service shape.

Properties for This AgilePart

Field Name	Definition
NeedCallback	Default value: False This property determines whether this AgileShape is exited immediately after invoking the Web service method, or will wait to exit until the activity's status is explicitly updated to Complete. This property can be set to the following specific values: • **False** - This value indicates that the AgileShape invoke its associated .NET method synchronously. The AgileShape will be exited (at runtime) immediately after invoking the Web service method. • **True** - This value indicates that the AgileShape invoke its associated .NET method asynchronously (i.e. in a separate thread). The AgileShape will be exited (at runtime) only after the activity's status is explicitly updated. This explicit update could be performed manually (e.g. using AgilePoint Enterprise Manager) or automatically by an external system (e.g. by a separate application that uses the AgilePoint Workflow API to programmatically update the activity's status).
Configuration	Opens the Web Service Configuration dialog box, where you can configure which Web service method should be invoked at runtime. It also allows the process modeler to configure the custom process attributes that should be associated with the Web service method's parameters (if any), and the custom process attribute that will be used to store the Web service method's return value (if any).
Credential	Default value: None This property allows the process modeler to configure which authentication credentials (i.e. windows user account) should be used to invoke the Web service method at runtime. Click the **Ellipses** button to open the Login dialog.

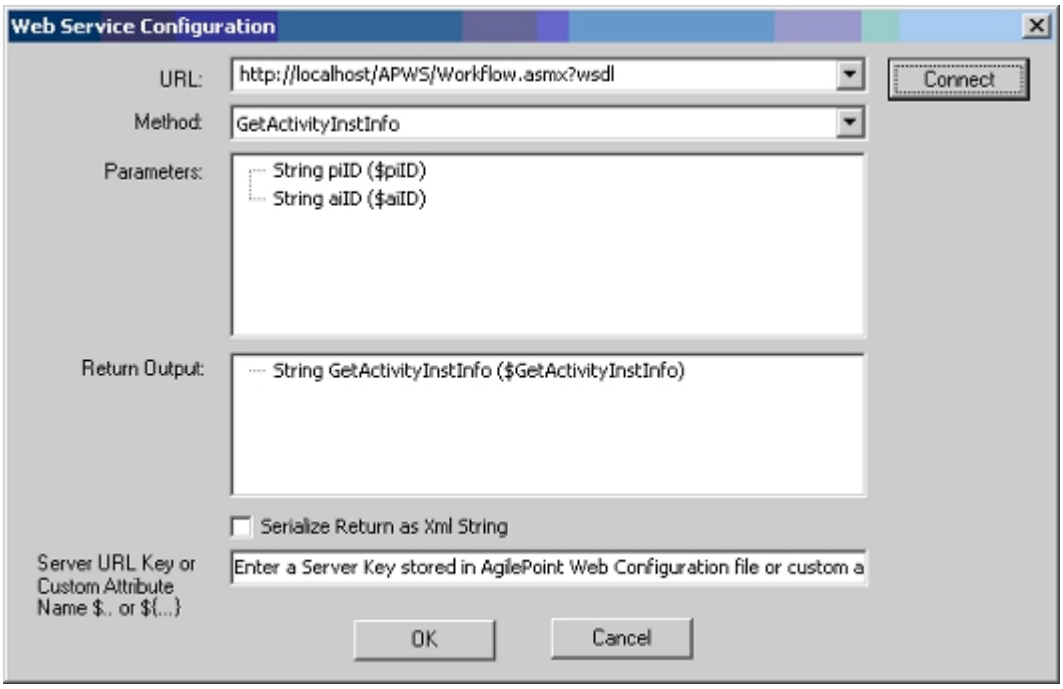
Field Name	Definition
	
Proxy	This property allows you to specify that a proxy server should be used to connect to the Web service at runtime. It allows you to bypass the permission constraints on the local machine at runtime.
Timeout	Default value: 600 Specifies the maximum amount of time (in seconds) that should be allowed for the completion of the web service call for this AgileShape.
XmlSerializeReturnValue	Default value: False This property determines whether the data returned by the Web service call invoked by this AgileShape will be serialized as XML or not. This property can be set to the following specific values: • **False** - This value indicates that the return value will be stored into the specified custom process attribute exactly as returned by the Web service. • **True** - This value indicates that the return value will be serialized into an XML string before being stored into the specified custom process attribute exactly as returned by the Web service.

AgilePart Properties

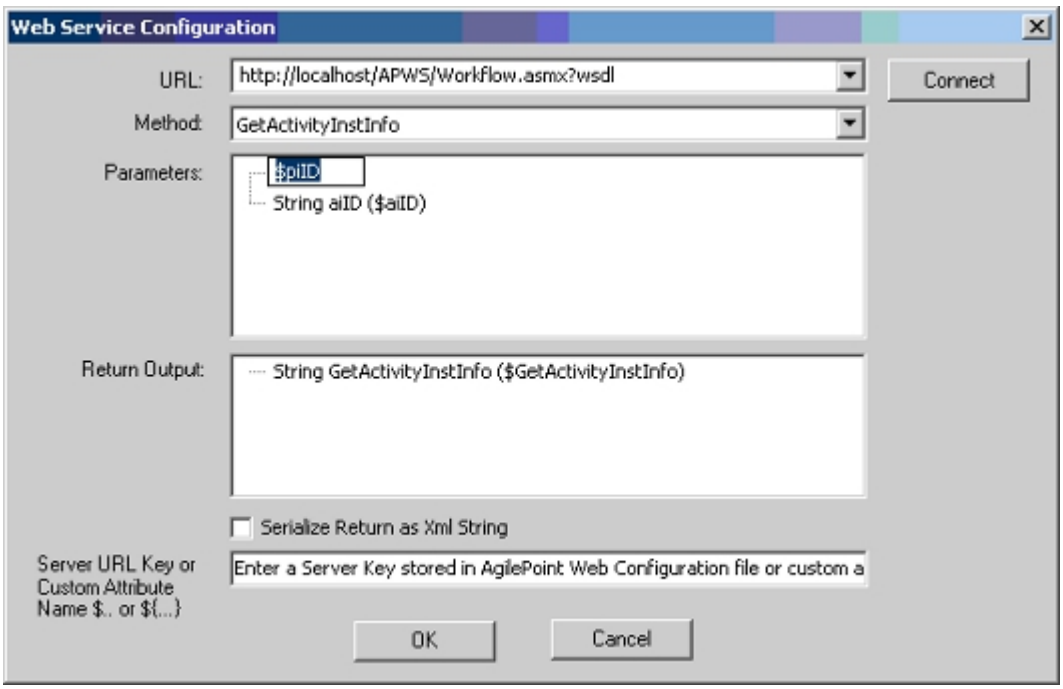
The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Web Service Configuration Window

This window allows the process modeler to configure which Web service method should be invoked at runtime. It also allows the process modeler to configure the custom process attributes that should be associated with the Web service method's parameters (if any), and the custom process attribute that will be used to store the Web service method's return value (if any).



Once the configuration dialog is open, enter the URL of a Web Service and click the **Connect** button. A list of the Web service's available methods will be retrieved. Select the method you want to associate with this AgileShape. To configure the custom process attributes for the parameters and/or return value, simply click on an attribute (e.g. $piID) to highlight it, and then click on it again to modify the value.



Web Service Extension (WSE)

An AgilePart activity that accesses a Web Service and its methods which are registered in AgilePoint Envision. The user can select the appropriate Web Service and its specific method using the Web Service shape. The Web Service Extension uses SOAP calls over HTTP and allows for schema mapping between the AgilePoint application schema and the Web method's request schema.

Properties for This AgilePart

Field Name	Definition
None	This AgileShape has no unique design time properties.

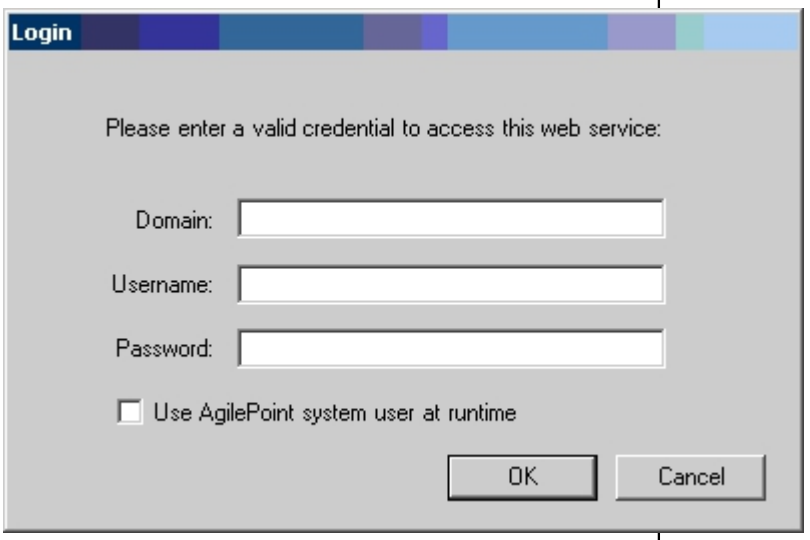
AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Windows Communication Foundation (WCF)

An AgilePart that enables you to call services enabled with Windows Communication Foundation (WCF).

Properties for This AgilePart

Field Name	Definition
Configuration	Opens the WCF Service Configuration dialog box, where you can configure communication with a WCF service.
Credential	Default value: None This property allows the process modeler to configure which authentication credentials (i.e. windows user account) should be used to invoke the Web service method at runtime. Click the **Ellipses** button to open the Login dialog. 
Timeout	Default value: 600 Specifies the maximum amount of time (in seconds) that should be allowed for the completion of the web service call for this AgileShape.

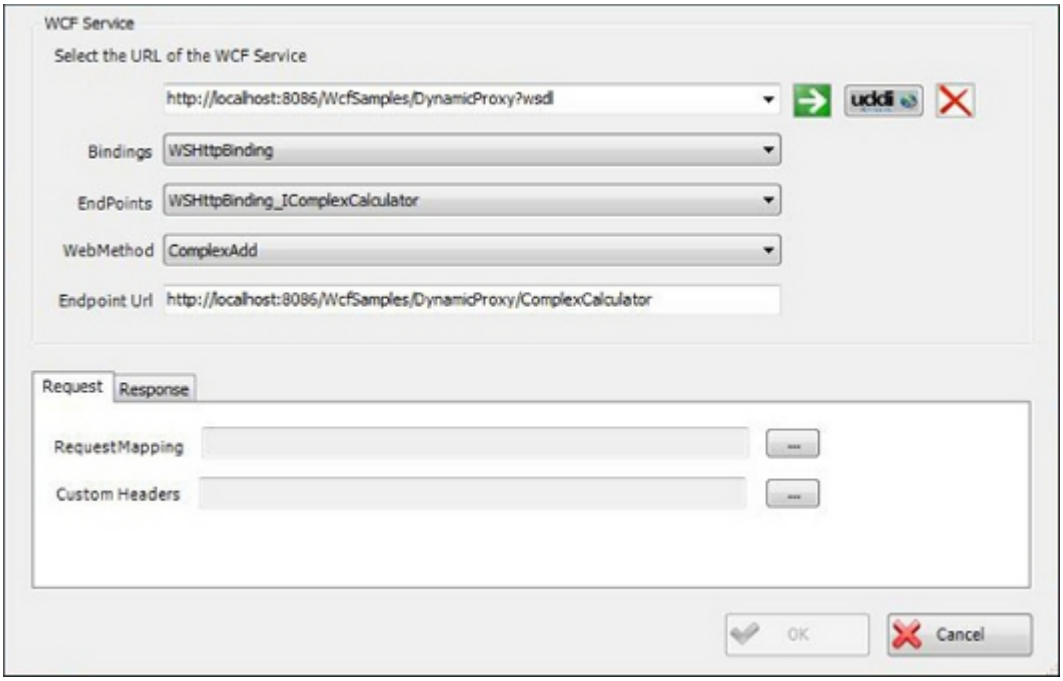
Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Configuration for WCF Service Window

This dialog box enables you to configure communication with a WCF service.

The values entered in the Configuration dialog box populate the **BindingName**, **EndpointName**, **MethodName**, and **URL** properties that display in the Envision Properties box.



Field Definitions

Field Name	Definition
URL	URL of the item you are configuring
Bindings	Specifies the data binding you want to use.
Endpoints	Specifies the endpoint to which you want to connect.
WebMethod	Specifies a method to invoke.
Endpoint URL	The URL of the endpoint of the service to which you want to connect.
RequestMapping / ResponseMapping	Click the **Ellipses** button to map the schemas for the process model and the WCF service.

Field Name	Definition
Custom Headers (Response)	Click the **Ellipses** button to map the schemas for the process model and the WCF service for a request or response, as appropriate.

Exchange Server

This section describes the AgileShapes in the Exchange Server stencil.

Create Appointment

This AgileShape can be used to automatically create an appointment on a user's Outlook Calendar.

Properties for This AgilePart

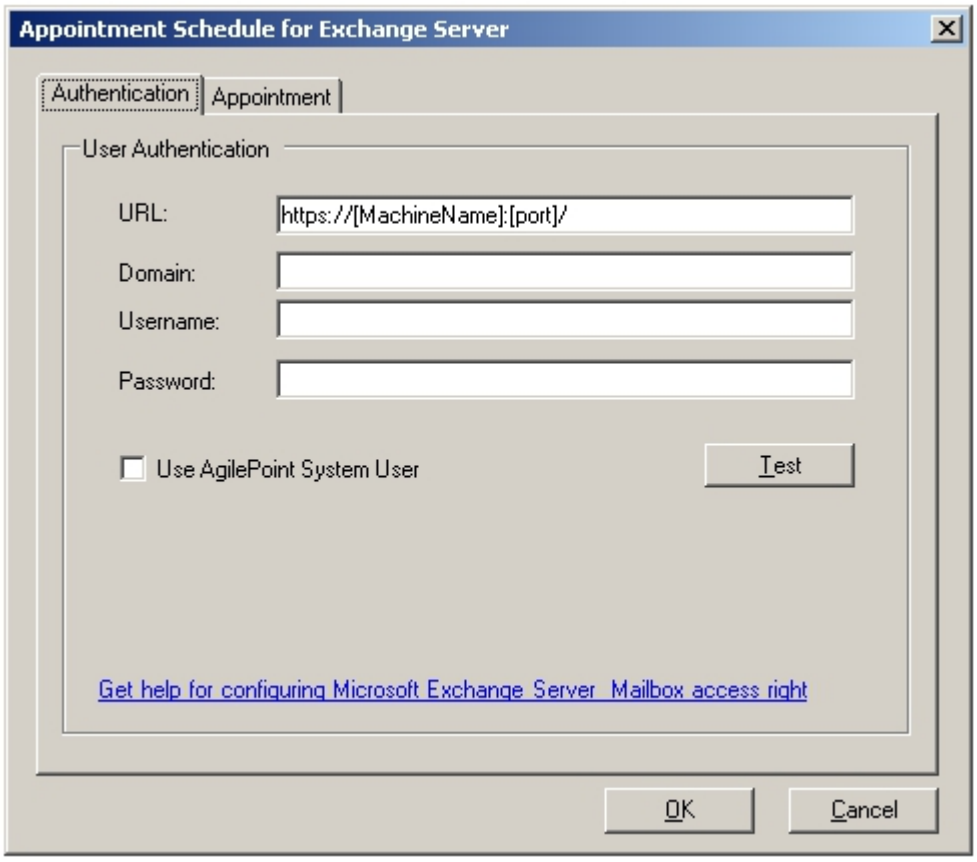
Field Name	Definition
Configuration	Opens the Appointment Schedule for Exchange Server window, where you can specify the authentication mode to be used to access the Exchange Server and schedule the appointment and the appointment details.

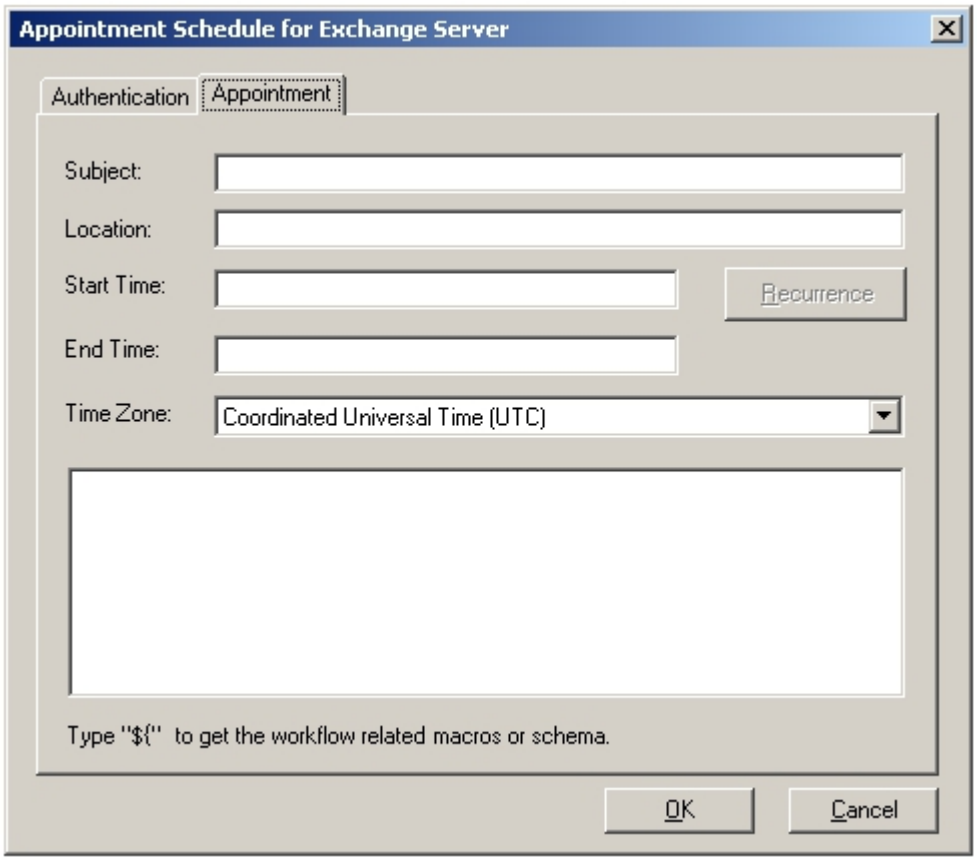
AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Appointment Schedule for Exchange Server window

Specifies the configuration for the Create Appointment AgileShape.


Appointment Schedule for Exchange Server
Authentication
Appointment
User Authentication
URL:
https://[MachineName]:[port]/
Domain:
Username:
Password:
Use AgilePoint System User
Test
Get help for configuring Microsoft Exchange Server Mailbox access right
OK
Cancel



Field Definitions

Field Name	Definition
Exchange 2007 or Exchange 2010	Specifies the version of your Microsoft Exchange Server.
(Authentication) URL	Specifies the Exchange Server URL.
(Authentication) Domain, Username, Password	Determines that a specified account will be used to access the Exchange Server and what the credentials will be.
(Authentication) Use AgilePoint System User	specifies to use the AgilePoint System User credentials to access the Exchange Server. The credentials and URL can be verified by clicking the **Test** button. The **Test** button is disabled if Use **AgilePoint System User** is checked. In both cases, make sure that the user has proper access rights to the Exchange Server.

Field Name	Definition
(Appointment or Meeting) Subject, Location, Start Time, End Time, Time Zone	The details about the appointment or meeting.
(Appointment or Meeting) Body	The body of the email. Accepts custom attributes and schema by typing ${.

Create Meeting

This AgileShape can be used to automatically create a meeting on a user's Outlook Calendar

Properties for This AgilePart

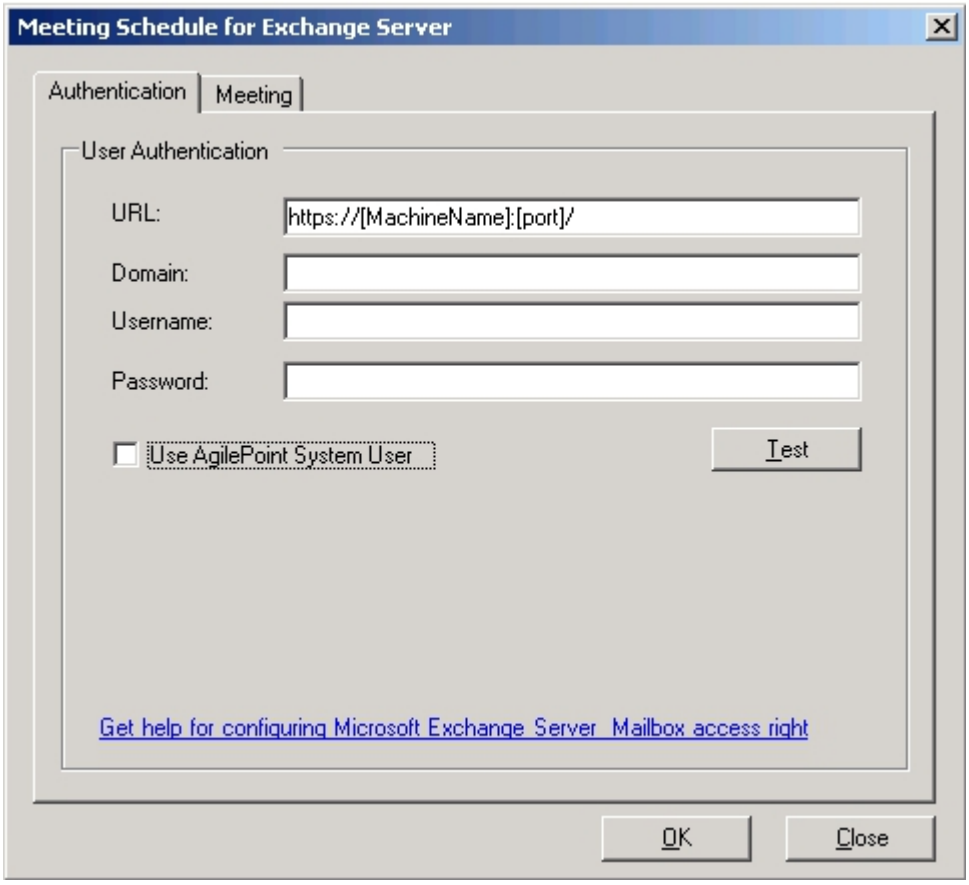
Field Name	Definition
Configuration	Opens the Meeting Schedule for Exchange Server window, where you can specify the authentication mode to be used to access the Exchange Server and schedule the meeting and the meeting details.

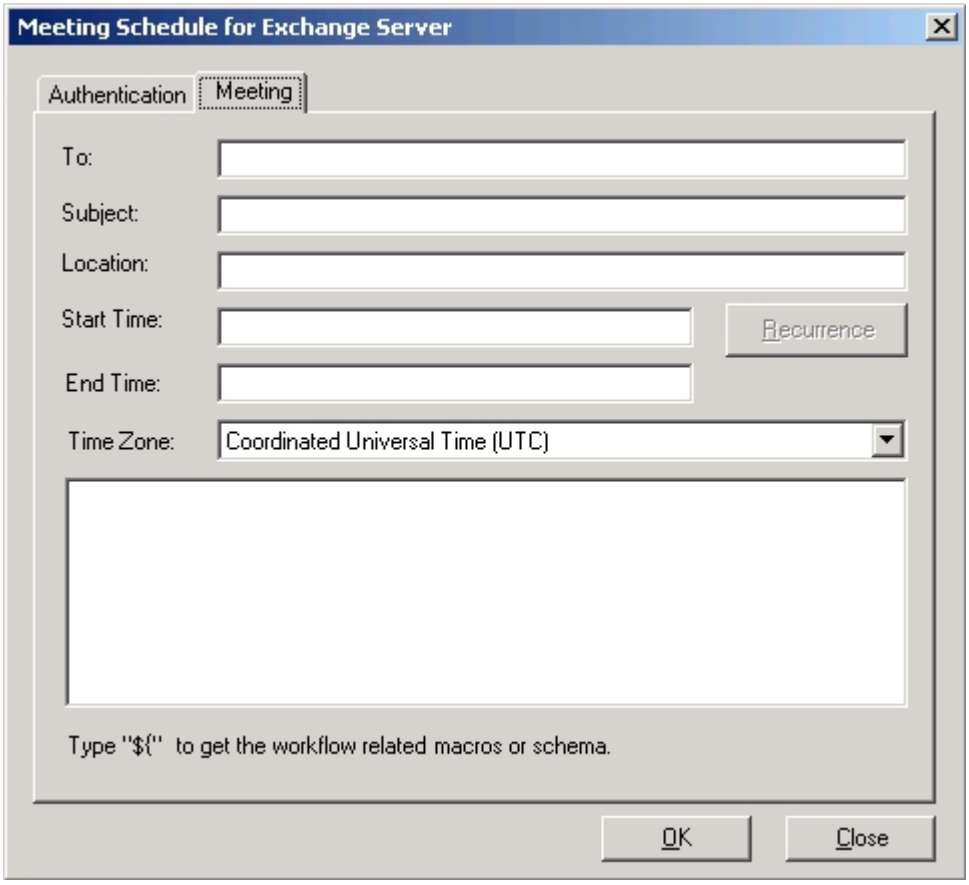
AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Meeting Schedule for Exchange Server Window

Specifies the authentication mode to be used to access the Exchange Server and schedule the appointment and the appointment details.


Meeting Schedule for Exchange Server
Authentication
Meeting
User Authentication
URL:
https://[MachineName]:[port]/
Domain:
Username:
Password:
Use AgilePoint System User
Test
Get help for configuring Microsoft Exchange Server Mailbox access right
OK
Close



Field Definitions

Field Name	Definition
Exchange 2007 or Exchange 2010	Specifies the version of your Microsoft Exchange Server.
(Authentication) URL	Specifies the Exchange Server URL.
(Authentication) Domain, Username, Password	Determines that a specified account will be used to access the Exchange Server and what the credentials will be.
(Authentication) Use AgilePoint System User	specifies to use the AgilePoint System User credentials to access the Exchange Server. The credentials and URL can be verified by clicking the **Test** button. The **Test** button is disabled if Use **AgilePoint System User** is checked. In both cases, make sure that the user has proper access rights to the Exchange Server.

Field Name	Definition
(Appointment or Meeting) Subject, Location, Start Time, End Time, Time Zone	The details about the appointment or meeting.
(Appointment or Meeting) Body	The body of the email. Accepts custom attributes and schema by typing ${.

Database

This section describes the AgileShapes in the Database stencil.

Batch Insert

This AgileShape can be used to insert multiple new database records into a database table. It can also be configured to delete certain records before the new records are inserted.

Properties for This AgilePart

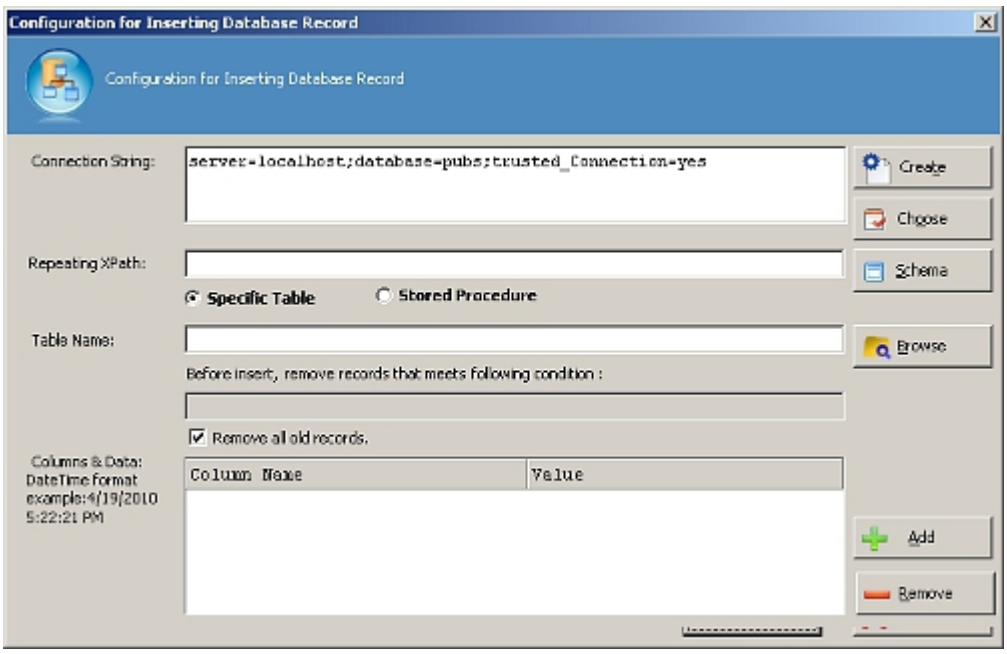
Field Name	Definition
Configure	Opens the Batch Insert Configuration dialog box, where you can configure how records are inserted into a database table.
DatabaseType	The type of database that will be used.
Timeout	Default value: 600 Specifies the maximum amount of time (in seconds) that should be allowed for the completion of the web service call for this AgileShape.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Configuration for Inserting Database Record(s) Window

This property allows the process modeler to configure where and how the new database records are inserted into the database.



Field Definitions

Field Name	Definition
ConnectionString	The connection string that will be used to connect to the database at runtime. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. to create a new connection string.
TableName	The name of the database table where this AgileShape should insert the database record.

Delete Records

This AgileShape can be used to delete multiple existing database records in a database table.

Properties for This AgilePart

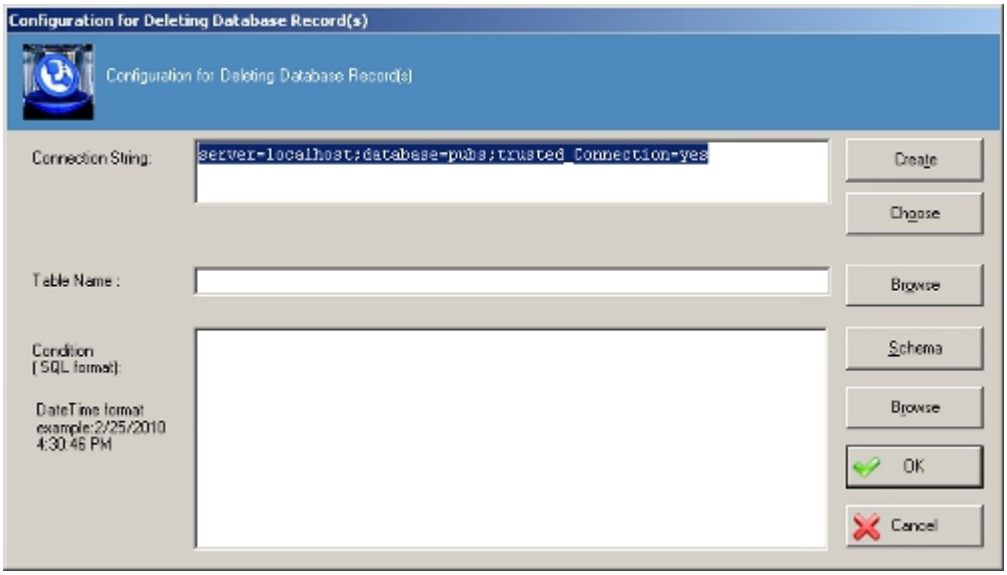
Field Name	Definition
Configure	Opens the Configuration for Deleting Database Record(s) dialog box, where you can configure where and how the records are deleted from the database.
DatabaseType	The type of database that will be used.
Timeout	Default value: 600 Specifies the maximum amount of time (in seconds) that should be allowed for the completion of the web service call for this AgileShape.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Configuration for Deleting Database Record(s) Window

This property allows the process modeler to configure where and how the records are deleted from the database.



Field Definitions

Field Name	Definition
ConnectionString	The connection string that will be used to connect to the database at runtime. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. to create a new connection string.
TableName	The name of the database table where this AgileShape should insert the database record.
Condition	The SQL WHERE clause that defines which database records should be updated.

Insert Database

This AgileShape can be used to insert a new database record into a database table.

Properties for This AgilePart

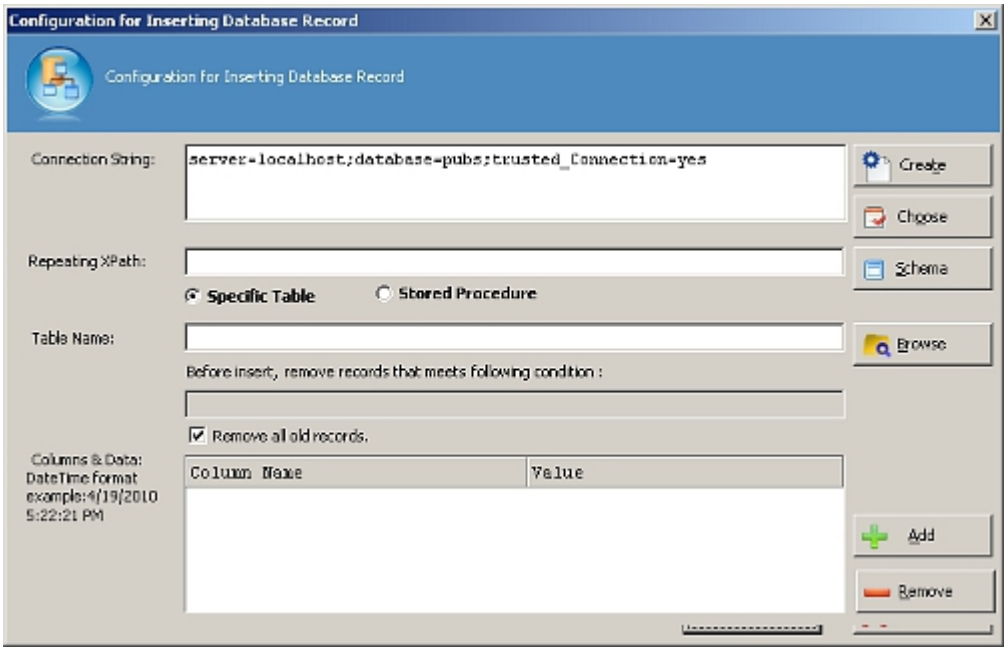
Field Name	Definition
Configure	Opens the Configuration for Inserting Database Record dialog box, where you can configure where and how the new database records are inserted into the database.
DatabaseType	The type of database that will be used.
Timeout	Default value: 600 Specifies the maximum amount of time (in seconds) that should be allowed for the completion of the web service call for this AgileShape.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Configuration for Inserting Database Record(s) Window

This property allows the process modeler to configure where and how the new database records are inserted into the database.



Field Definitions

Field Name	Definition
ConnectionString	The connection string that will be used to connect to the database at runtime. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. to create a new connection string.

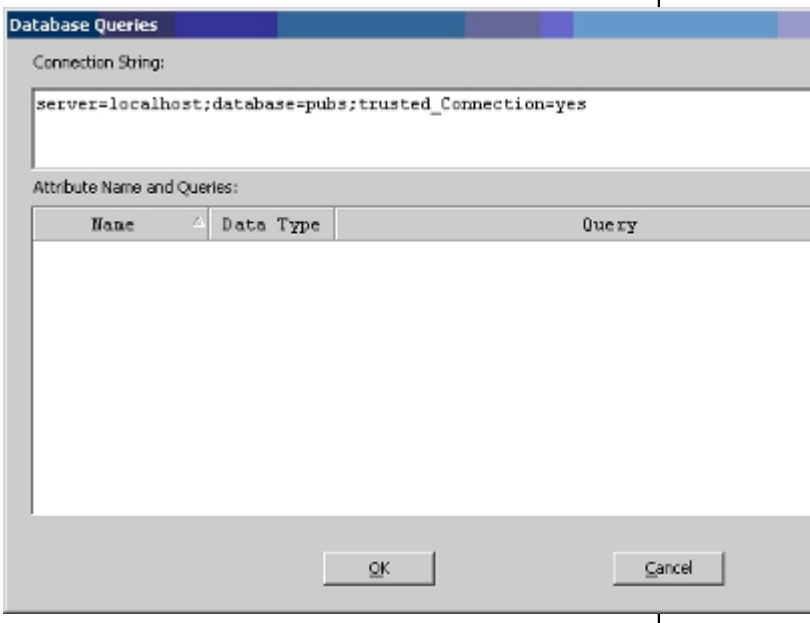
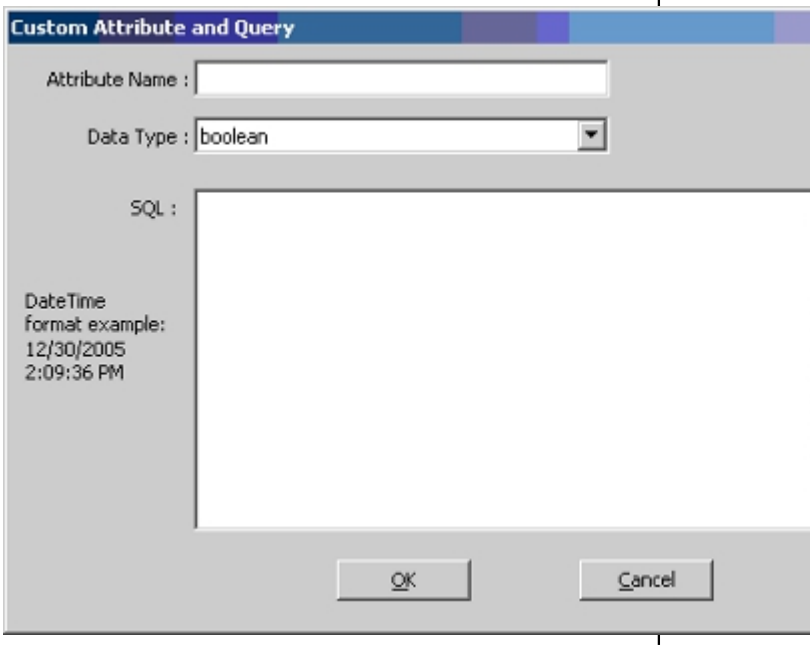
Field Name	Definition
TableName	The name of the database table where this AgileShape should insert the database record.

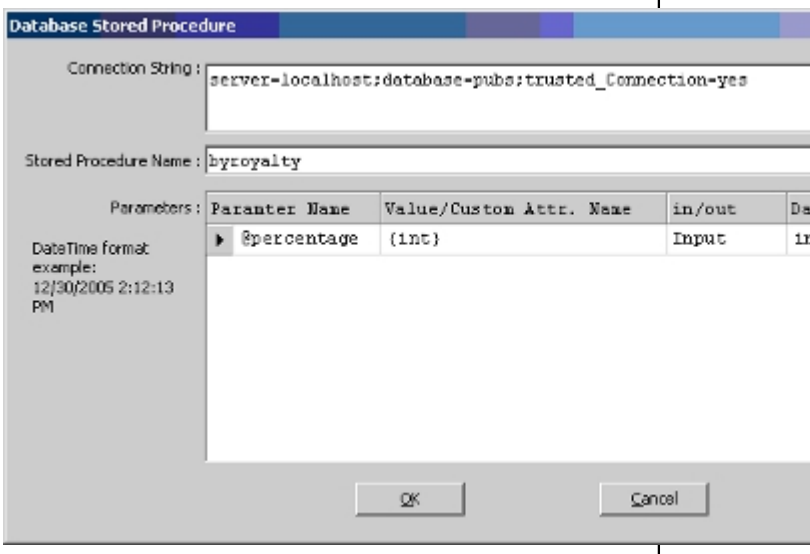
Query Database

This AgileShape can be used to execute dynamic SQL statements and/or call database stored procedures in order to retrieve data from the database.

Properties for This AgilePart

Field Name	Definition
Configure	Opens the Batch Insert Configuration dialog box, where you can configure how records are inserted into a database table.
DatabaseType	The type of database that will be used.
Timeout	Default value: 600 Specifies the maximum amount of time (in seconds) that should be allowed for the completion of the web service call for this AgileShape.
SQLType	Default value: SQL This property determines whether this AgileShape will retrieve the data from the database using a database stored procedure, or using (one or more) dynamic SQL statements. This property can be set to the following specific values: • **SQL** - This value indicates that the data will be retrieved from the database using one or more dynamic SQL statements. • **StoredProcedure** - This value indicates that the data will be retrieved from the database using one database stored procedure. If the SqlType property is set to SQL when you click the **Ellipses** button, it will open a configuration dialog like the one shown below.

Field Name	Definition
	If the **SqlType** property is set to SQL when you click the **Ellipses** button, it will open a configuration dialog like the one shown below.  Clicking the **Add** button from this dialog will allow you to enter a dynamic SQL statement, and the name of the custom process attribute that the statement's return value should be stored in. 

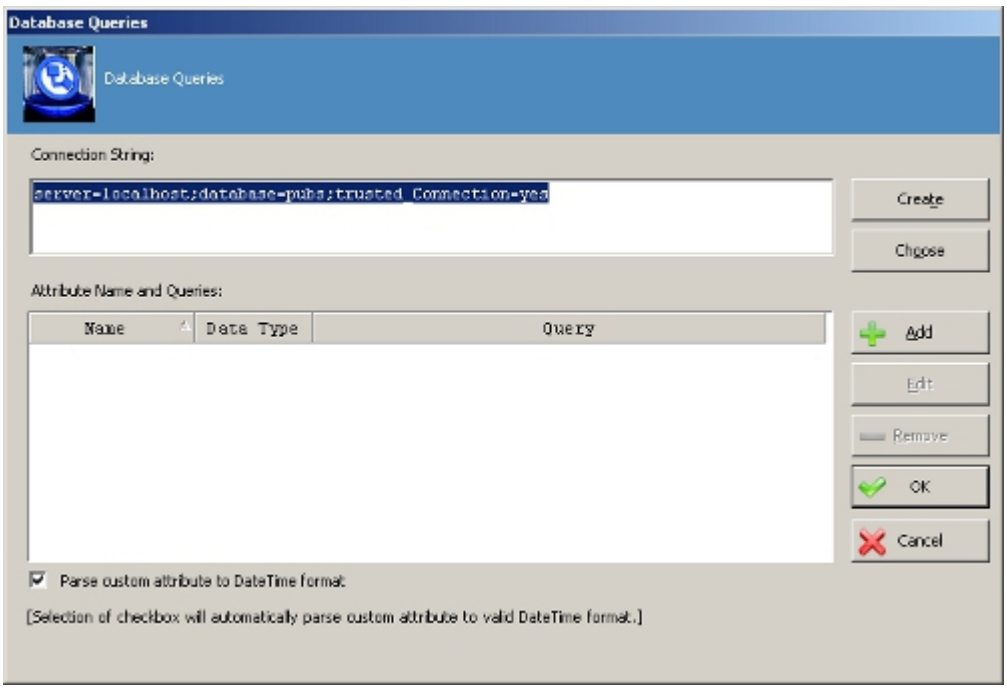
Field Name	Definition
	StoredProcedure Mode: If the SqlType property is set to StoredProcedure when you click the button, it will open a configuration dialog like the one shown below. 

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Database Queries Window

Use this window to configure where and how the data is retrieved from the database



Field Definitions

Field Name	Definition
ConnectionString	The connection string that will be used to connect to the database at runtime. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. to create a new connection string.
TableName	The name of the database table where this AgileShape should insert the database record.

Stored Procedure

This AgileShape can be used to execute dynamic SQL statements and/or call database stored procedures.

This AgileShape does not support capturing return values or output parameters. See the Query Database AgileShape for additional information about retrieving data from the database.

Properties for This AgilePart

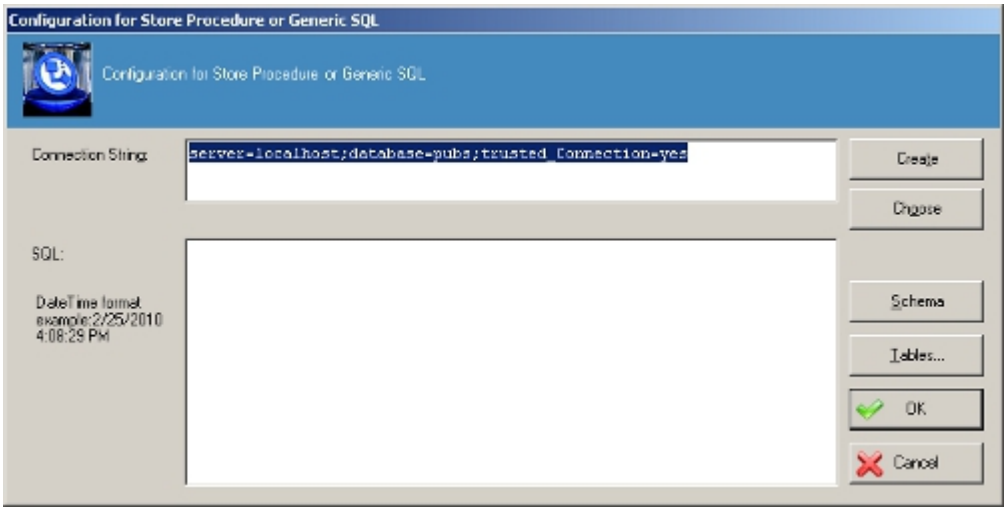
Field Name	Definition
Configure	Opens the Configuration for Stored Procedure or Generic SQL dialog box, where you can configure where and how the new database records are inserted into the database.
DatabaseType	The type of database that will be used.
Timeout	Default value: 600 Specifies the maximum amount of time (in seconds) that should be allowed for the completion of the web service call for this AgileShape.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Configuration for Stored Procedure or Generic SQL Window

This property allows the process modeler to configure where and how the new database records are inserted into the database.



Field Definitions

Field Name	Definition
ConnectionString	The connection string that will be used to connect to the database at runtime. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. to create a new connection string.
SQL	The SQL statement that will be performed on the database by this AgileShape at runtime.

Update Database

This AgileShape can be used to update multiple existing database records in a database table.

Properties for This AgilePart

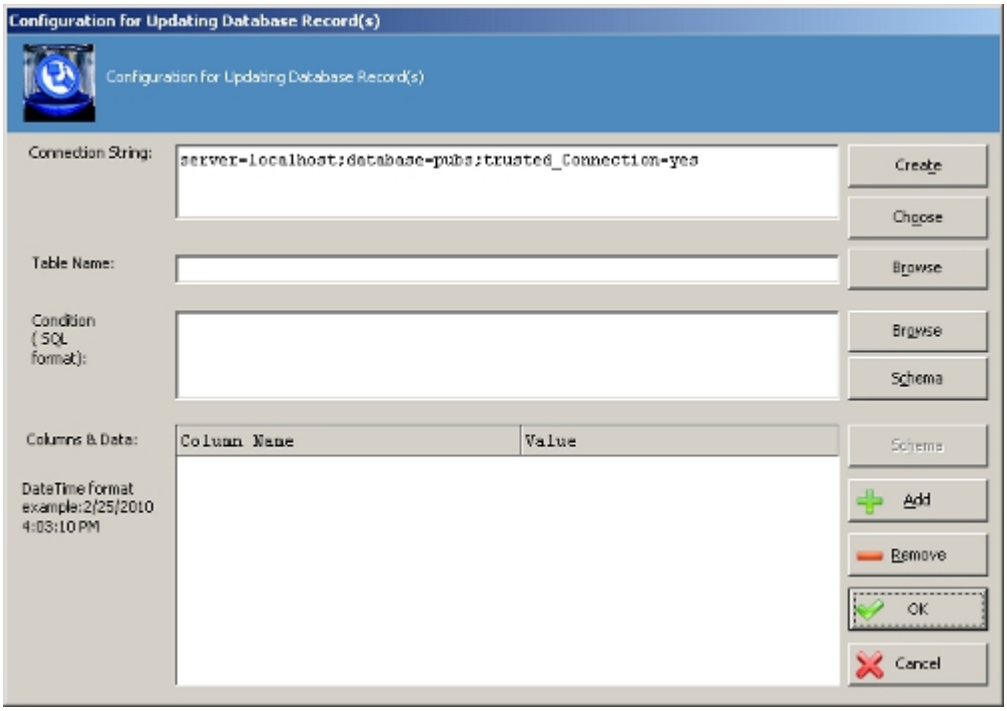
Field Name	Definition
Configure	Opens the Configuration for Updating Database Record(s) dialog box, where you can configure where and how the new database records are inserted into the database.
DatabaseType	The type of database that will be used.
Timeout	Default value: 600 Specifies the maximum amount of time (in seconds) that should be allowed for the completion of the web service call for this AgileShape.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Configuration for Updating Database Record(s) Window

This property allows the process modeler to configure where and how the new database records are inserted into the database.



Field Definitions

Field Name	Definition
ConnectionString	The connection string that will be used to connect to the database at runtime. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. to create a new connection string.
TableName	The name of the database table where this AgileShape should insert the database record.
Condition	The SQL WHERE clause that defines which database records should be updated.

Extender

An AgileExtender is a type of AgileShape that allows users to overlay the AgilePoint process model with custom behavior. An AgileExtender is a kind of "meta shape" that runs on top of or in parallel to the process, rather than running inline within the process flow. This provides increased extensibility and allows layers of powerful functionality to be added to the process without making the core process model unnecessarily complex.

This section describes the AgileShapes in the Extender stencil, which provides access to the built-in AgileExtenders.

Service Level Agreement (SLA)

This AgileShape enables you to track the time it takes to complete a range of elements in a process instance. Within a process template, you can set more than one timer using the same SLA AgileExtender shape.

Properties for This AgilePart

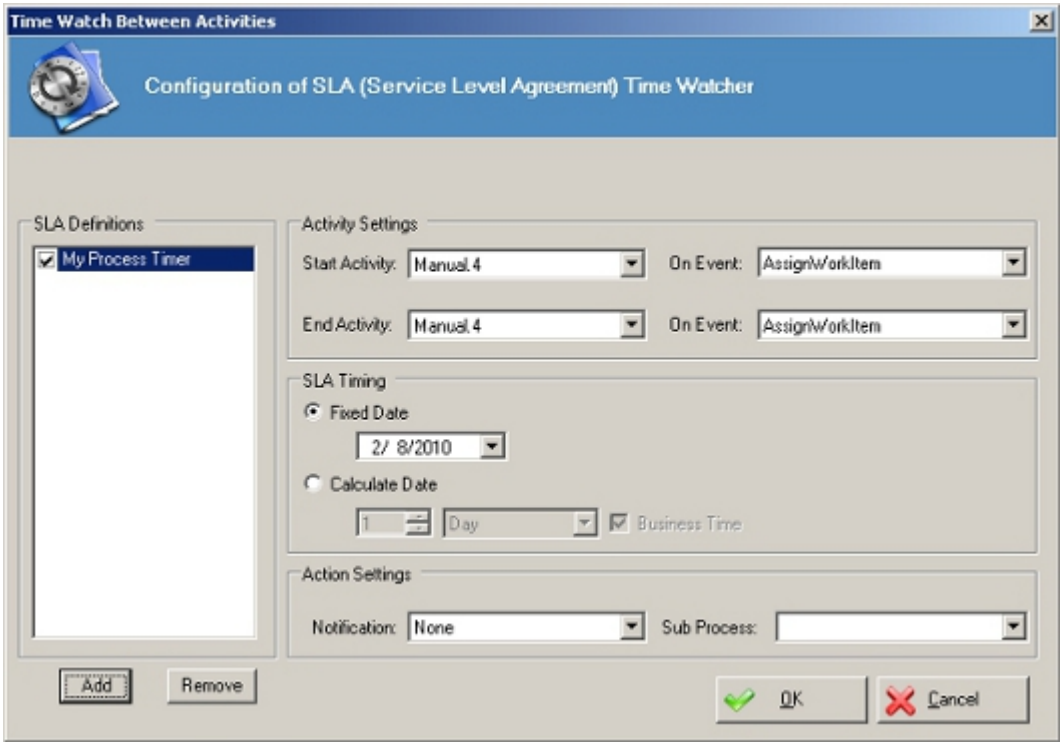
Field Name	Definition
SLA Timer	Opens the Time Watch Between Activities dialog box, where you can configure the SLA timer, including the range of AgileShapes you want to time.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Time Watch Between Activities Window

This window enables you to configure the SLA timer, including the range of AgileShapes you want to time.



Field Definitions

Field Name	Definition
Add	Creates a new timer with a name you specify.
Remove	Deletes the selected timer.
Start Activity	The activity upon which you want to start the timer.
End Activity	The activity upon which you want to end the timer.
Fixed Date	Selects a date to expire the timer.
Calculate Date	Calculates a date to expire the timer based on the information you enter.
Notification	Optionally sends a preconfigured notification type when the timer expires.
Sub Process	Optionally starts a subprocess when the timer expires. The list is populated from the subprocesses in your process model.

Miscellaneous

This section describes the AgileShapes in the Miscellaneous stencil.

DateTimeOperation

This AgileShape can be used to perform complex date calculations within a process model using a simple graphical user interface. The DateTime Services AgilePart can manipulate the operations between two DateTime input values or add extra values (second/minute/hour/days etc) to one DateTime value.

Properties for This AgilePart

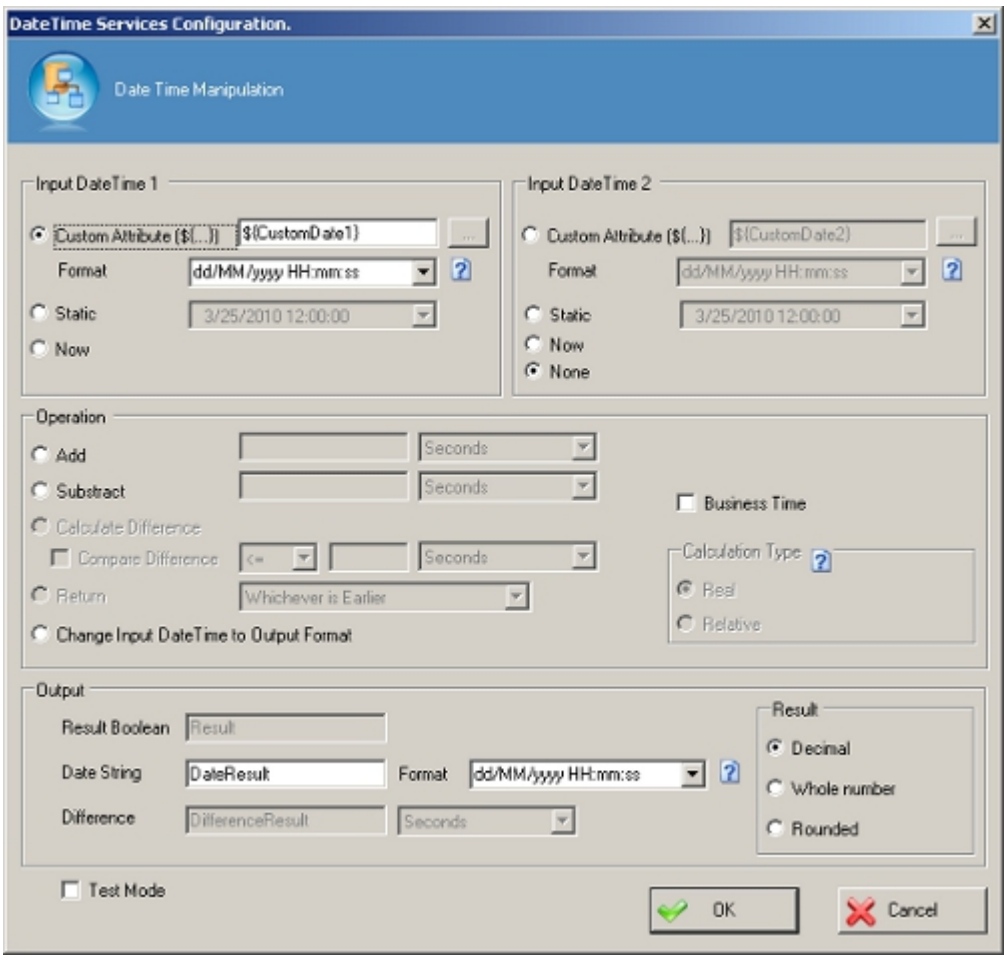
Field Name	Definition
Configuration	Opens the DateTime Services Configuration dialog box, where you can configure date calculations.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

DateTime Services Configuration Window

This window enables you to configure date calculations.



Field Definitions

Field Name	Definition
Input DateTime	Specifies 1 or 2 dates to use as input values. You can select a **Custom Attribute**, a **Static** date and time, or the date and time **Now** (when the DateTime AgilePart is initiated).
Add	Specifies an amount of time to add to the Input DateTime.
Subtract	Specifies an amount of time to subtract from the Input DateTime.
Compare Difference	Indicates whether to compare the difference between the two Input DateTime values.
Return	Specifies whether to pass the earlier or later value based on the comparison.

Field Name	Definition
	Change Input DateTime to Output Format Indicates that the Input DateTime format will be converted to the Output.
Business Time	Specifies that the AgilePoint work calendar is taken into account for calculations.
Calculation Type	Specifies whether to calculate or compare the difference between Input DateTime 1 and Input DateTime 2. You can specify the following types of calculations: ● **Real** - The actual difference between the two input DateTimes. The result depends on the setting for the **Result** option. ● **Relative** - This setting is useful for situations such as when an action is allowed once per month. The "real" difference between the last day of one month and the first day of following month is 0 months. However, in "relative" mode, this difference is calculated as one month because the dates are in adjacent months. This returns the relative number of time units (days, weeks, months, years) between the two input DateTimes. For example, the Relative differences between Sat 29-Dec-2007 23:59:59 and Wed 02-Jan-2008 00:00:00 are 4 days or 1 week or 1 month or 1 year, depending upon the time unit specified.
Result	Specifies the type of value to return for calculations where the **Calculation Type** is **Real**: ● **Decimal** - Returns the difference as is, including any decimals. ● **Whole Number** - Returns the integer part of the result by removing the decimal part. ● **Rounded** - Rounds up (>=0.5) or rounds down (<0.5) the result.
Result Boolean	If **Compare Difference** is enabled, the difference will be evaluated as a Boolean (True/False) result, and the Boolean value will be associated with the text that appears in this field.

Field Name	Definition
Date String	If based on the operation performed, the output is of type DateTime, the result will be converted to a string and stored in the format provided in the Format list, and stored associated with the text that appears in this field.
Difference	If **Compare Difference** is enabled, the difference will be stored as a NameValue where the name is the text that appears in this field, and the value is the output value.

HTTP Post

This AgileShape can be used to post data from a client machine to a Web application which is predefined. The client receives response from the Web application. It also supports custom attributes and https and web proxy.

Properties for This AgilePart

Field Name	Definition
HttpPost	Opens the Http Post Configuration dialog box, where you can configure an HTTP post action.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Http Post Configuration Window

This window enables you to configure an HTTP post action.

Field Definitions

Field Name	Definition
Credential	The HTTP page URL section should contain a valid URL such as http://MachineName:PortNumber/WebApplication.aspx.

Field Name	Definition
	The Authentication section allows you to specify the authentication for doing the Http post function. Do one of the following: ● Specify an account by Domain\\username and password. You can validate whether this account is valid by clicking on the Test button. ● Use the AgilePoint System User at runtime, that means it will impersonate the system account of AgilePoint. ● Use the default credential, this means it will use the account credentials that are used when logging into the Web application.
Request	This tab allows you to specify a custom header by clicking on the **ellipses** button. You can add parameters that will be used while posting to a Web application, for example: ● **Schema** - You can attach a Xpath if the process is based on a template with a associated schema. ● **Add** - Append a new row in a table. ● **Remove** - Delete the current row in a table. ● **Remove All** - Remove all rows in a table.
Response	This tab allows you to bind a response. You can bind the response in two ways. One is to bind the response with an AgilePoint Schema, the other is to store it in a custom attribute. If the Web application that is called is based on Base64 Encode, make sure to select this option.
Security	This tab allows you to enable SSL Authentication. If SSL Authentication is checked, you can add client certificates by clicking the **ellipses** button.
ProxyServer	This tab allows you to specify whether a proxy can be used during the execution of the Http Post.

PDF Converter

This AgileShape can be used to automatically convert multiple formatted files to PDF files. In this version only files in the file system can be converted.

Properties for This AgilePart

Field Name	Definition
Destination	The destination (folder and file path) for the file output. Click the **Ellipses** (...) to select a custom attribute.
Destination Repository	Default value: FileSystem The repository of the destination file.
Filter	This property specifies the filename (or a filename filter containing wildcards) that will be acted upon -- for example, downloaded by the Download Files AgilePart, uploaded by the Upload Files AgilePart, or converted to PDF by the Convert to PDF AgilePart. The action is taken in the location specified by the associated URL -- either Local Path or AbsoluteURL, depending upon the AgileShape. If the location is a folder, only the specified file types will be acted upon. Some examples of possible values for this property are listed below: ● ***.*** - This value indicates that all files (located at the source location) will be affected. ● ***.XML** - This value indicates that all files (located at the source location) that have the ".XML" file extension will be affected. ● ***.doc** - This value indicates that all files (located at the source location) that have the ".DOC" file extension will be affected. ● **MyFile.xml** - This value indicates that only the specific file (located at the source location) named MyFile.xml will be affected.
OverWriteFile	Default value: False

Field Name	Definition
	This property specifies whether the AgileShape should overwrite the existing file(s) if they already exist at the specified destination. This property can be set to the following specific values: • **False** - This value indicates that the AgileShape will not overwrite any existing file(s). • **True** - This value indicates that the AgileShape will overwrite any existing file(s).
Recursive	Default value: False This property specifies whether the AgileShape should affect files contained in any subfolders located under the library (or folder) in the specified location. This property can be set to the following specific values: • **False** - This value indicates that the AgileShape will only affect files located in the specified folder only. • **True** - This value indicates that the AgileShape will affect files located directly under the specified folder, and also files in any subfolders.
Source	The source file or folder.
Source Repository	Default value: FileSystem The repository of the source file.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Read File

This AgileShape can be used to upload contains of any file to a selected schema node of an ASP.NET application.

The process using UpLoad File AgilePart should have an associated schema.

Properties for This AgilePart

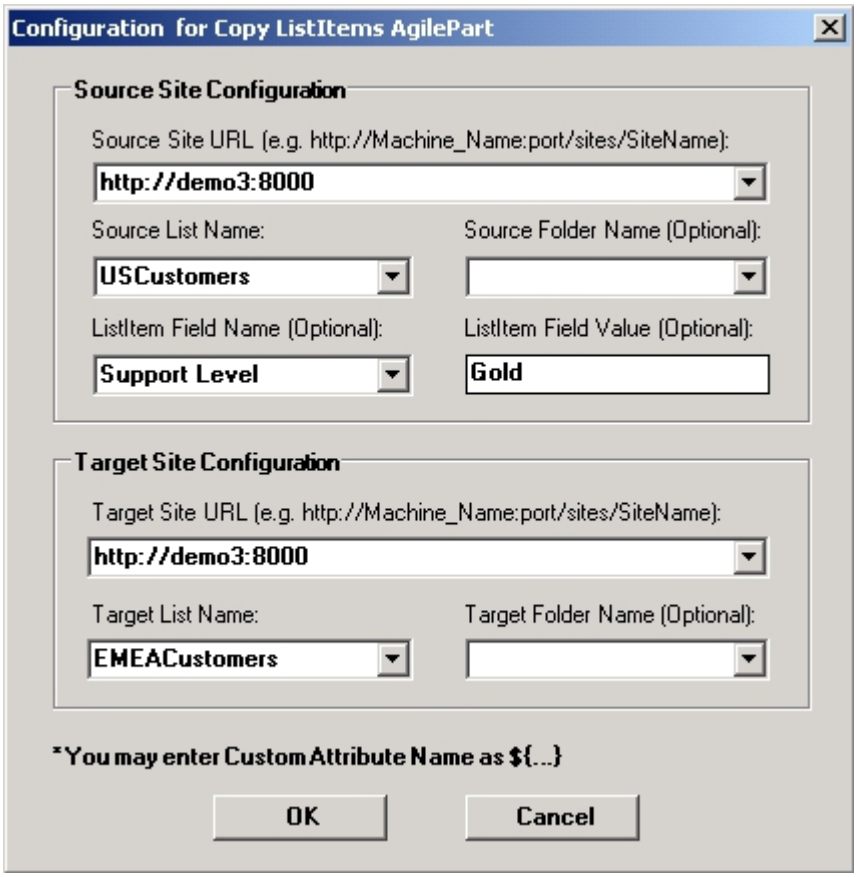
Field Name	Definition
Configure	Opens the Read File Configuration dialog box, where you can configure a read file action.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Read File Configuration Window

This window enables you to configure a read file action.



Field Definitions

Field Name	Definition
Schema Node	The schema node for which to upload the file data.
File Path	The path to the file on the local file system that includes the contents for which to upload to the schema node.

Text File Writer

This AgileShape enables functionality such as to extract the part/full content of a Business Process, save the content part of a Business Process into file, define the file name, file format, folder name, and define a location like UNC/FTP. It also provides the option of debugging mode, option of overwriting the existing file, and validation of the process at design time.

Properties for This AgilePart

Field Name	Definition
Configuration	Opens the Configure Text File dialog box, where you can configure a text file.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Configure Text File Window

Use this window to configure a text file.

Field Definitions

Field Name	Definition
UNC	The destination address of the file. Additional behavior options are available.
File Content	The content of the file. Additional behavior options are available.

Word

This AgileShape can be used to create Word documents (.doc or .docx files) or PDF files from Word templates (.dot or .dotx files), populating Mail Merge fields in the template with values you specify in the generated document.

Properties for This AgilePart

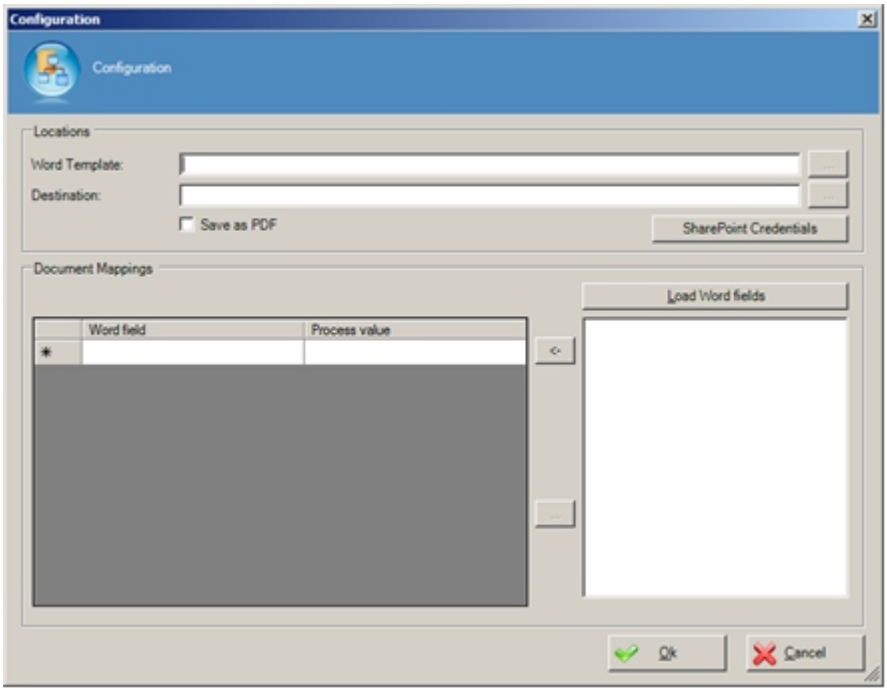
Field Name	Definition
Configuration	Opens the Configuration dialog box, where you can configure a Word template conversion.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Word Configuration Window

This property enables you to configure a Word template conversion. Click the **Ellipses** button to open the Configuration dialog box.



Field Definitions

Field Name	Definition
Word Template	Enter the location for a Word template file, or click the **Ellipses** to select a custom attribute.
Destination	The destination (folder and file path) for the file output. Click the **Ellipses** (...) to select a custom attribute.
Save as PDF	Indicates that the generated file will be saved as a PDF file, instead of a Word document.
SharePoint Credentials	Click this button to enter the SharePoint logon credentials required to create the file.
Load Word Fields	Click this button to load the list on the right with the dynamic fields from the Word document. Select the field names in this list, and click the left arrow (**<-**) button to add the fields to the list on the left.
Process value	For each field in the Word template, select this column, and click the **Ellipses** (...) button. In the pop-up, select the value you want for the selected Word field.

XML Manipulation

This AgileShape can be used to calculate the values in XML by formula or custom expression.

Properties for This AgilePart

Field Name	Definition
Configure	The configuration window allows you to define the formula to be calculated at run-time. You can add multiple formulas for XML calculation by clicking the **Add** button. You can also use an attribute or a field in the XML as a function to calculate.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Active Directory

This section describes the AgileShapes in the Active Directory stencil.

Create User

This AgileShape can be used to create a user in Active Directory.

Properties for This AgilePart

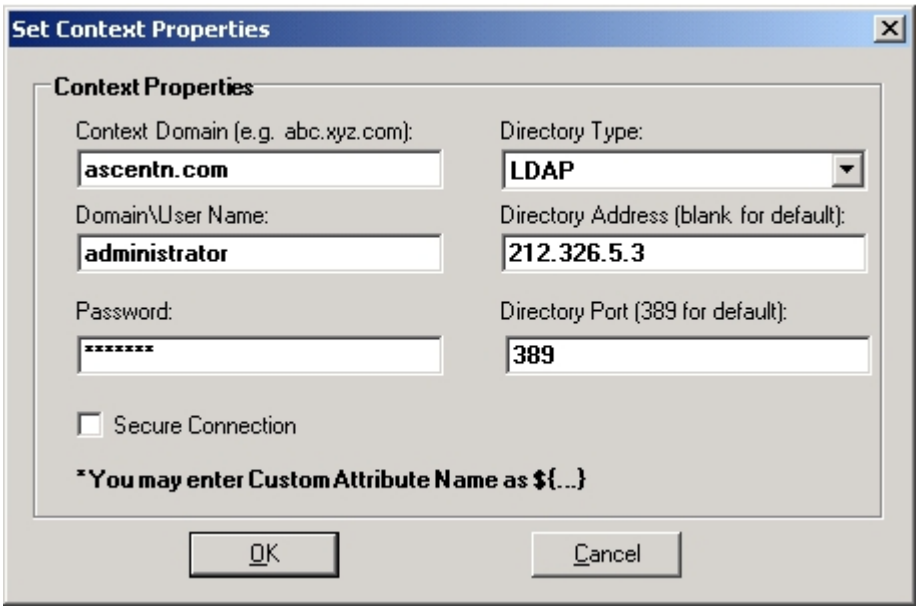
Field Name	Definition
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.
NewUserConfiguration	Specifies the user information to create in Active Directory.

AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Context Domain	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory.
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Update User

This AgileShape can be used to update user information in Active Directory.

Properties for This AgilePart

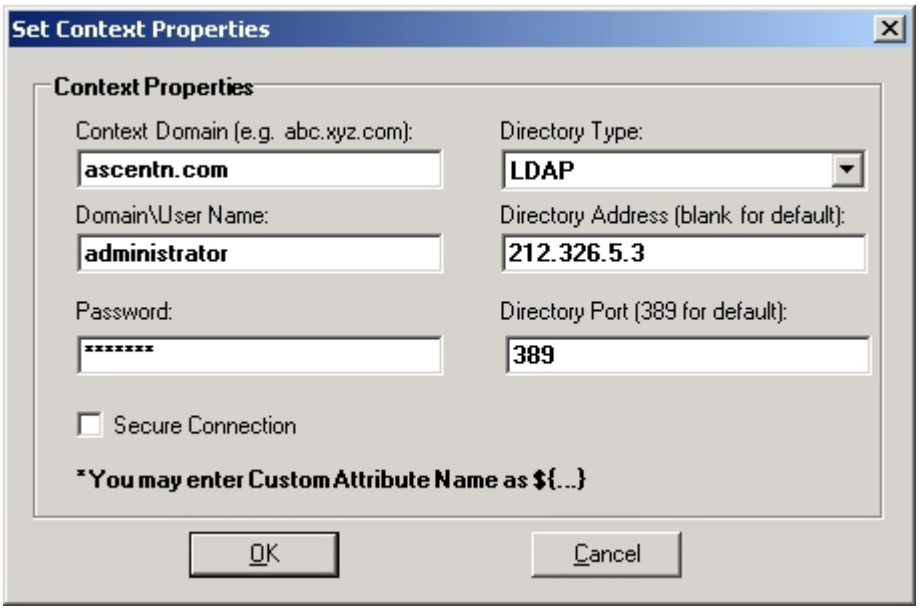
Field Name	Definition
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.
UserInfo	Allows for the update of user information and organization details. There are several ways to update user information in Active Directory: • Enter the user name manually. • Click the **Search** button and select the user name from the list that is populated. • Search for a user name that is a custom attribute. The format of the custom attribute should be as follows:$ \{CustomAttributeName\} • Update user information via an Xpath. This is done by clicking the Schema button, and selecting a node. The user name will be obtained via the Xpath at run time.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Context Domain	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory.
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Remove User

This AgileShape can be used to remove a user(s) from AD. The user name(s) can be a real name, custom attribute, or schema.

Properties for This AgilePart

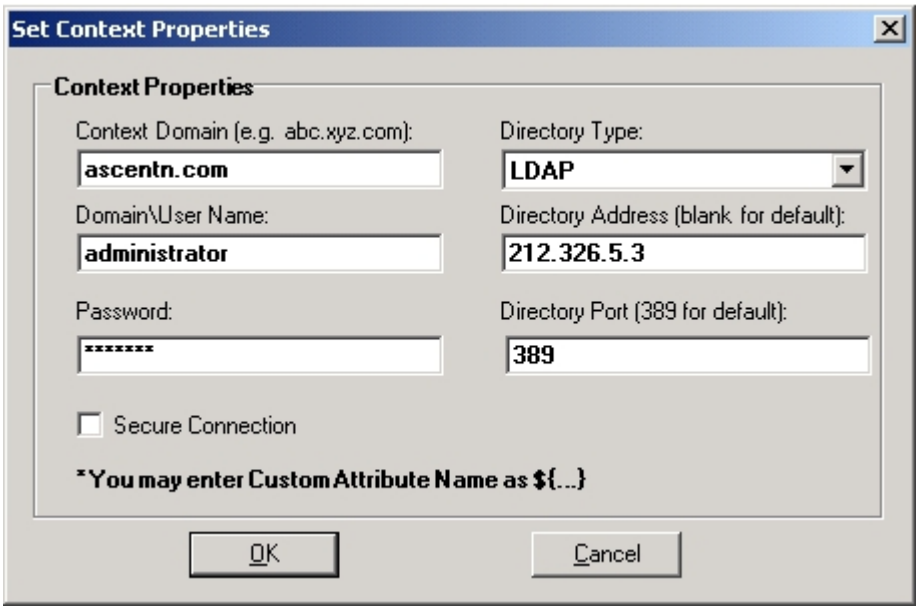
Field Name	Definition
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.
UserNames	Specifies the user information to be affected (e.g., used or disabled) from Active Directory. When you need to affect multiple users, the user names should be separated by a semicolon. There are several ways to specify user names to be affected in Active Directory: • Enter the user name manually. • Click the **Search** button and select the user name from the list that is populated. • Remove a user name that is a custom attribute. The format of the custom attribute should be as follows:$ \{CustomAttributeName\} • Remove a user name via an Xpath. This is done by clicking the **Schema** button, and selecting a node. The user name will be obtained via the Xpath at run time.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Context Domain	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory.
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Disable User

This AgileShape can be used to disable users from AD. The user name can be a real name, custom attribute, or schema.

Properties for This AgilePart

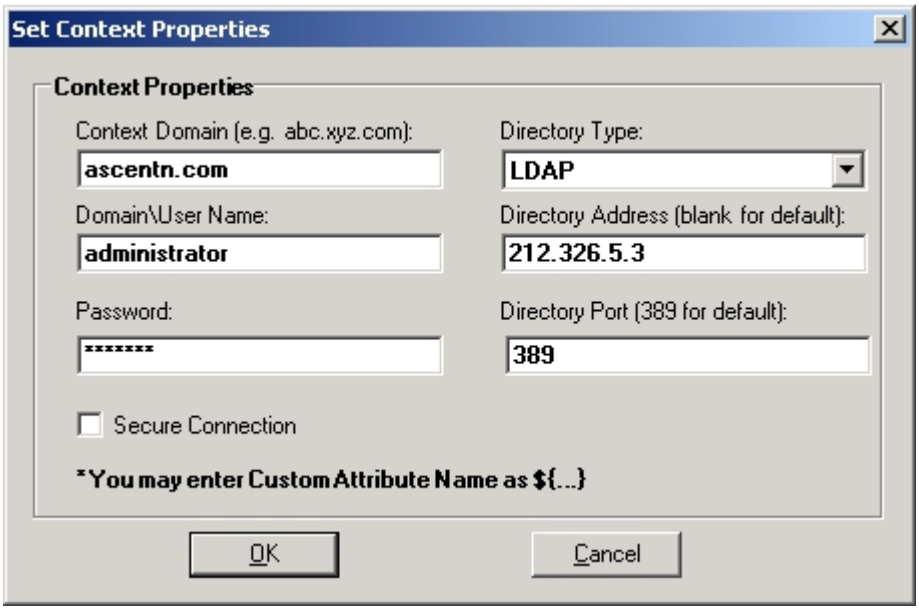
Field Name	Definition
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.
UserNames	Specifies the user information to be affected (e.g., used or disabled) from Active Directory. When you need to affect multiple users, the user names should be separated by a semicolon. There are several ways to specify user names to be affected in Active Directory: • Enter the user name manually. • Click the **Search** button and select the user name from the list that is populated. • Remove a user name that is a custom attribute. The format of the custom attribute should be as follows:$ \{CustomAttributeName\} • Remove a user name via an Xpath. This is done by clicking the **Schema** button, and selecting a node. The user name will be obtained via the Xpath at run time.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Context Domain	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory.
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Create Group

This AgileShape can be used to create a group in Active Directory. The group can be a real name, custom attribute, or schema.

Properties for This AgilePart

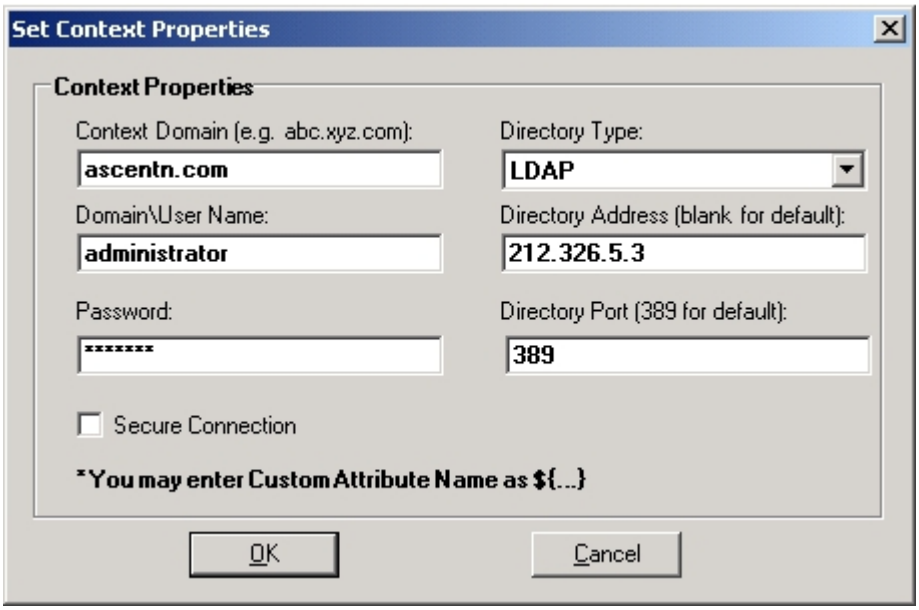
Field Name	Definition
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
Create Group	Opens the Create Group window, where you can specify the group information to create in Active Directory. If the process template is associated with a schema, the Schema buttons will appear allowing you to select an Xpath. Custom attributes are also supported.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.

AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Context Domain	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory.
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Create Group Window

Specifies the group information to create in Active Directory. If the process template is associated with a schema, the Schema buttons will appear allowing you to select an Xpath. Custom attributes are also supported.

Field Definitions

Field Name	Definition
Group Name	Specifies the affected group name (the group name to be created, removed, etc.). The Group Name cannot be duplicated in the domain. Also, once the Group is created, it cannot be changed.
Group Name (Pre-Windows 2000)	Specifies the log name of the account, the difference between the Group Name above and this field is it can be modified after it has been created.
Email Address	Specifies the email address of the group.
Verify Group	This button verifies the availability of the group name. The button is available just for the context domain if the context is reachable at design time. For example, if the context domain binds with a custom attribute, and the value depends on it at run time, in this case, the button is unavailable.
Group Scope	Refers to the profile of Group Scope in Active Directory.
GroupType	Refers to the profile of Group Type in Active Directory.

Remove Group

This AgileShape can be used to remove groups in AD. The group can be a real name, custom attribute, or schema.

Properties for This AgilePart

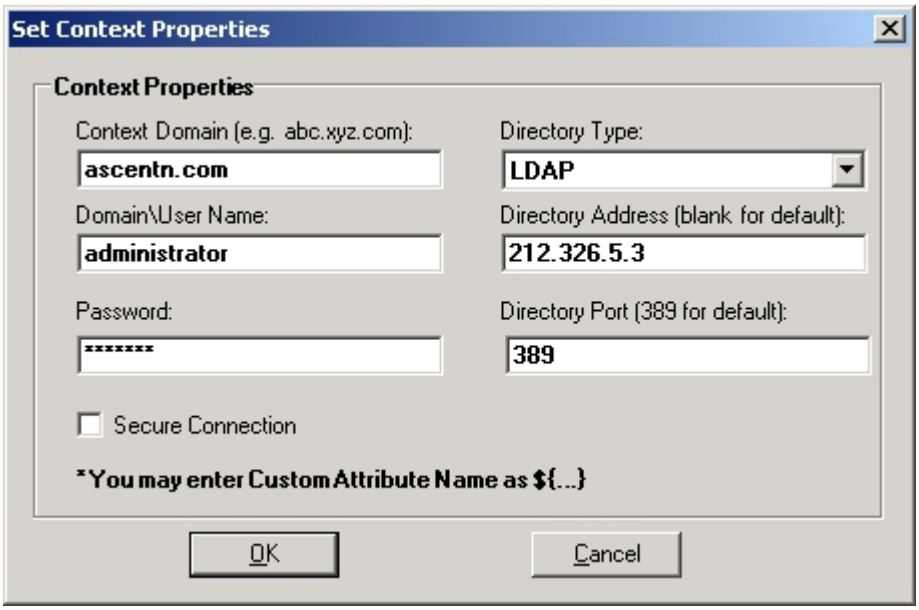
Field Name	Definition
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.
Remove Group	Specifies the group names to be removed from Active Directory. When you need to remove multiple groups, the group names should be separated by a semicolon. There are several ways to specify group names to be removed from Active Directory: • Enter the group name manually. • Click the Search button and select the group name from the list that is populated. • Remove a group name that is a custom attribute. The format of the custom attribute should be as follows:$ \{CustomAttributeName\} • Remove a group name via an Xpath. This is done by clicking the **Schema** button, and selecting a node. The group name will be obtained via the Xpath at run time.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Context Domain	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory.
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Remove User from Group

This AgileShape can be used to remove user(s) from a group in AD. The group or user name(s) can be a real name, custom attribute, or schema.

Properties for This AgilePart

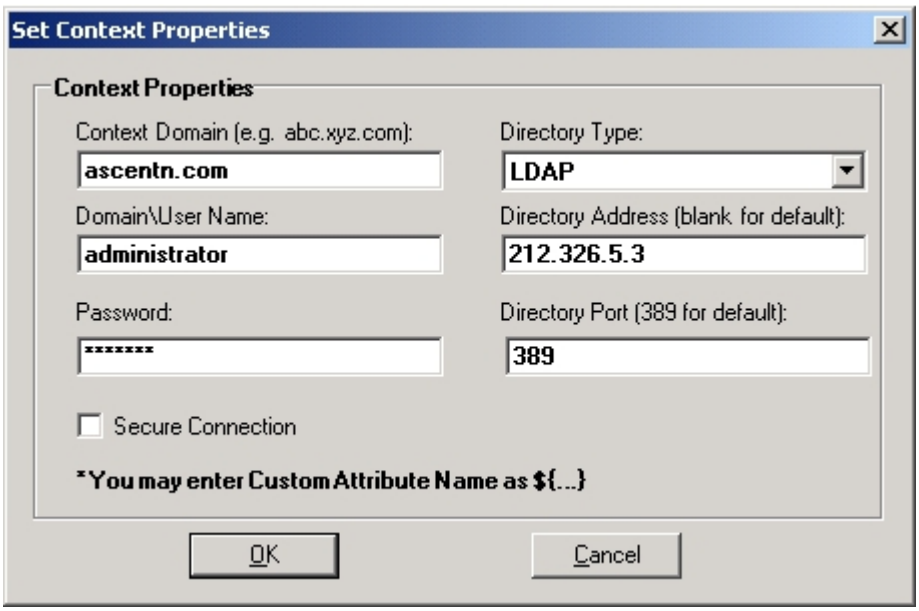
Field Name	Definition
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.
RemoveUserFromGroup	Specifies the information for user name and group to be removed from Active Directory. When you need to remove multiple users, the user names should be separated by a semicolon. There are several ways to specify group names to be removed from Active Directory: • Enter the Group Name and User Name(s) manually. • Click the **Search** button and select the Group Name and User Name(s) from the list that is populated. • Enter a custom attribute name for a Group Name and User Names(s). The format of the custom attribute should be as follows:$ \{CustomAttributeName\} • Remove a group name via an Xpath. This is done by clicking the **Schema** button, and selecting a node. The group name will be obtained via the Xpath at run time.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Context Domain	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory.
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.

Field Name	Definition
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Retrieve User Information

This AgileShape can be used to retrieve user information from AD. The user name can be a real name, custom attribute, or schema.

Properties for This AgilePart

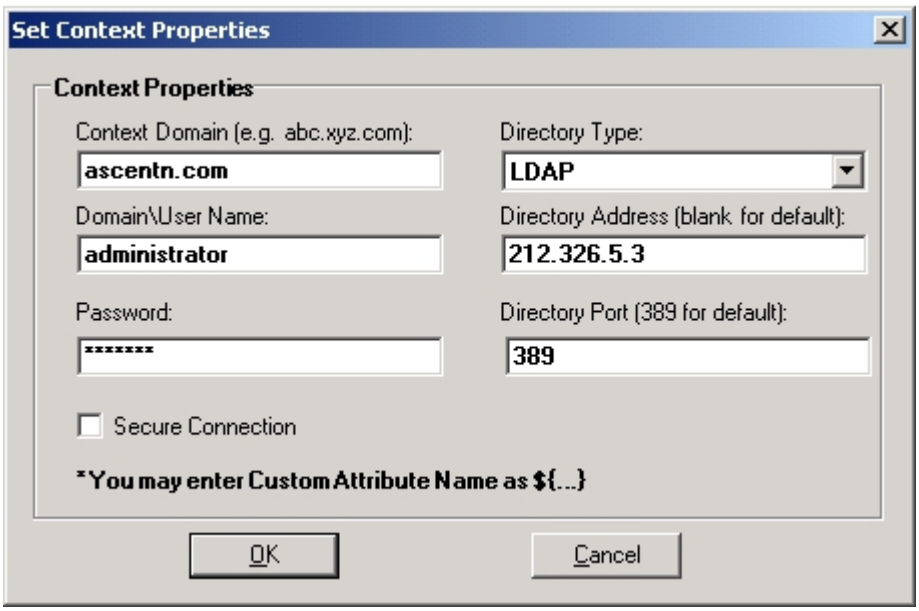
Field Name	Definition
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.
UserInfo	Allows for the update of user information and organization details. There are several ways to update user information in Active Directory: • Enter the user name manually. • Click the **Search** button and select the user name from the list that is populated. • Search for a user name that is a custom attribute. The format of the custom attribute should be as follows:$ \{CustomAttributeName\} • Update user information via an Xpath. This is done by clicking the Schema button, and selecting a node. The user name will be obtained via the Xpath at run time.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Context Domain	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory.
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.

Field Name	Definition
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Add User to Group

This AgileShape can be used to add a user to a group in AD.

Properties for This AgilePart

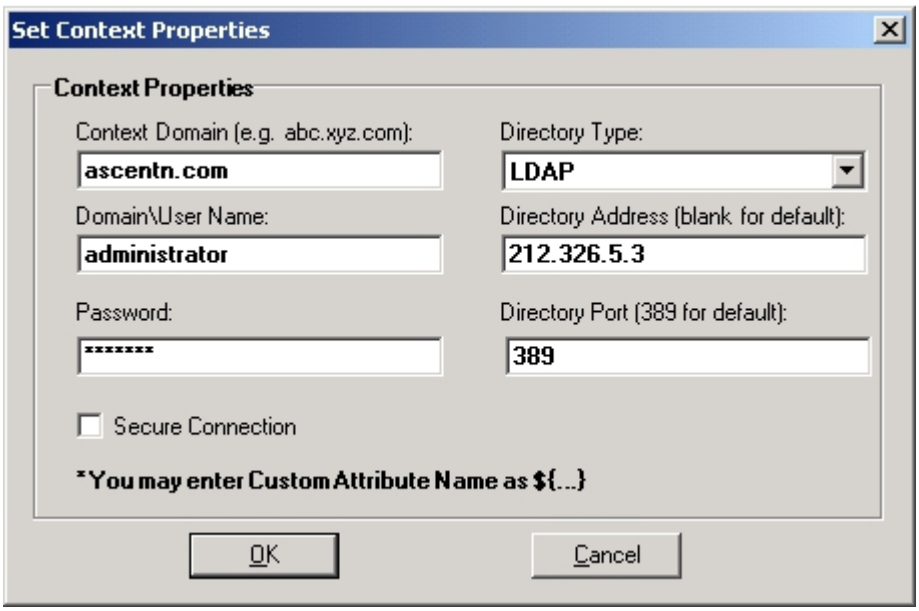
Field Name	Definition
AddUserToGroup	Allows for the configuration of user information to be added to a group in Active Directory. There are several ways to specify user names to be added to a group in Active Directory: • Enter the user name manually. • Click the Search button and select the user name from the list that is populated. • Add a user name that is a custom attribute. The format of the custom attribute should be as follows:$\{CustomAttributeName\} • Add a user name via an Xpath. This is done by clicking the Schema button, and selecting a node. The user name will be obtained via the Xpath at run time.
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Context Domain	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory.
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.

Field Name	Definition
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

SAP Integration

This section describes the AgileShapes in the SAP Integration stencil. These AgileShapes enable integration between SAP and AgilePoint.

Configuring iNet BPS

The iNetServer component of ERP Link must be installed on one of the machines in the network. Once the iNetServer components are installed, the connections to SAP systems are configured using the Connection Server Console.

See the document iNetConnectorAdminGuide.chm for details regarding setting up connection pools and other components. This help file is included with the ERP-Link software.

To configure the iNET BPS:

1. Click **Start > All Programs > iNetServer > Administration Console**.
2. On the **iNet Connection Server** window, complete the following fields:

Field Name	Definition
Connection Pool	Identifies the connection pool for the SAP system. The first time you set up the SAP AgileConnector, you must select one of the "unconfigured" default connection pools, and then configure it to meet your needs.
Description	A free text description of the connection pool.
Destination String	• ASHOST - IP address or host name of the SAP server. • SYSNR - The system number the SAP server.
Connection mode	Determines the manner in which AgilePoint connects to SAP. Select **Shared & anonymous**.
Client	The SAP client number.

Field Name	Definition
User	The SAP user name.
Password	The SAP password.
Language	The language abbreviation for your SAP language. The default value is **EN**.
Pool size	• Max - **10** • Min - **1**

3. Click **Validate**.

   A "Validation succeeded" message displays in the bottom field, and the **System** field auto-populates.

4. Click **Save**.
5. On the pop-up, click **Yes** to restart the SAP connection service.
6. Once the status field shows the "restarted" message, click **Exit**.

SAP Integration AgileConnector

This AgilePoint Server extension (AgileConnector) enables you to run the SAP Integration component of the AgilePoint BPMS Suite.

Enabling the SAP AgileConnector

To configure the SAP AgileConnector, do the following.

Navigation

Navigate to the Extensions Tab:

1. Click **Start > All Programs > AgilePoint > AgilePoint Configuration**.
2. On the **AgilePoint Server Configuration Tool** window, click the **Extensions** tab.

Instructions

1. On the **Extensions** tab, click **Add**.
2. Browse to the assembly **[AgilePoint Server Installation]\bin \Ascentn.AgileConnector.SAPIntegration.dll**, and then click **OK** to add this extension to AgilePoint Server.

Configuring the SAP AgileConnector

To throttle the number of concurrent connections that are made to SAP, do the following.

Navigation

Navigate to the Extensions Tab:

1. Click **Start > All Programs > AgilePoint > AgilePoint Configuration**.
2. On the **AgilePoint Server Configuration Tool** window, click the **Extensions** tab.

Instructions

1. On the **Extensions** tab, select the **SAPIntegration** AgileConnector.
2. Click the **Configure** button.
3. In the configuration window for the SAP Integration AgileConnector, change the number of concurrent threads as required.

Call SAP Function

An AgilePart that calls a function in an SAP database. This AgilePart can be used alone to call a single function, or with other Call SAP Function AgileParts and Start and End SAP Transaction AgileParts to create a more complex transaction. For more information, see the *AgilePoint BPMS User's Guide*.

Properties for This AgilePart

Field Name	Definition
Configuration	Opens the SAP Connection Browser window, where you can set up and select a connection to an SAP system. You can use this window to access the configuration for an SAP function.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

SAP Connection Browser

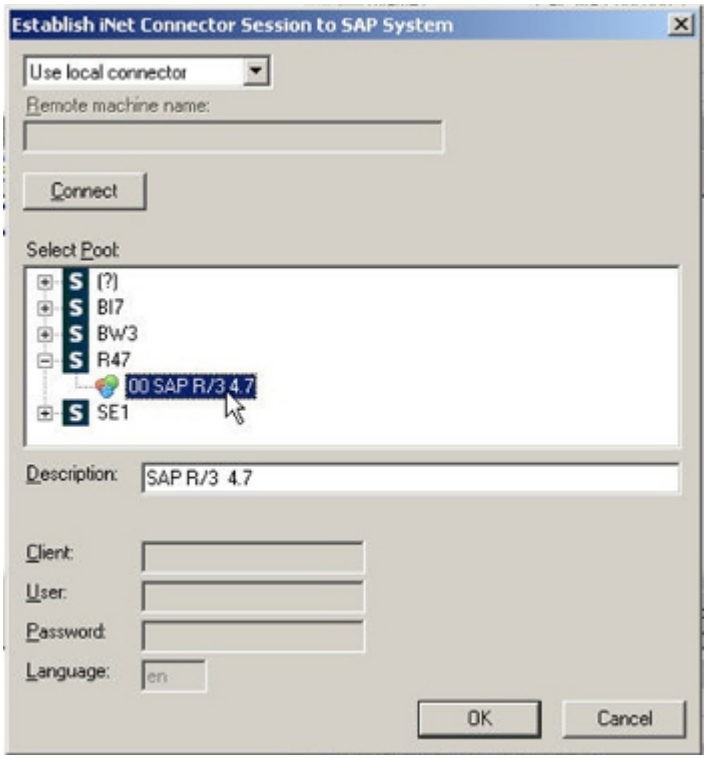
The SAP Connection Browser window enables you to set up and select a connection to an SAP system. You can use this screen to access the configuration for an SAP function.

To configure an SAP connection and map the SAP data to your schema, do the following:

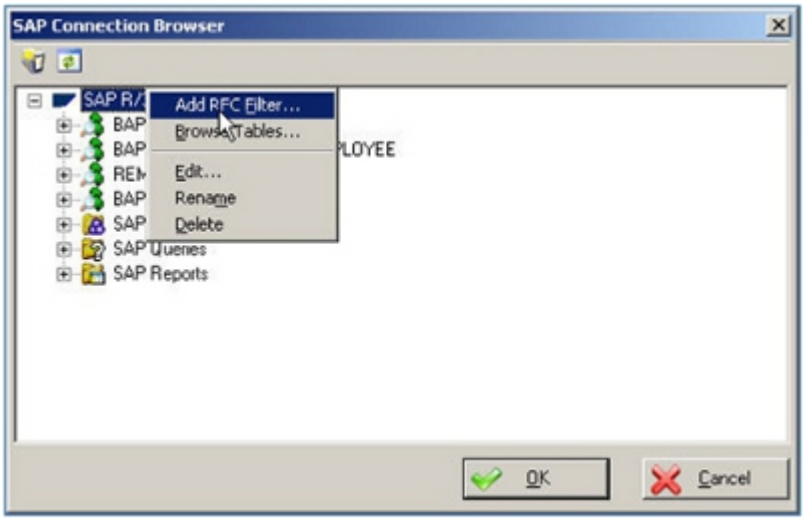
1. In AgilePoint Envision, create or open a process model of any type.
2. Add a **Call SAP Function** AgilePart to your process model from the **SAP Integration** stencil.
3. Select the **Call SAP Function** AgilePart. In the Configuration field, click the **Ellipses** .

4. In the **SAP Connection Browser** window, click the **Add SAP System** icon.

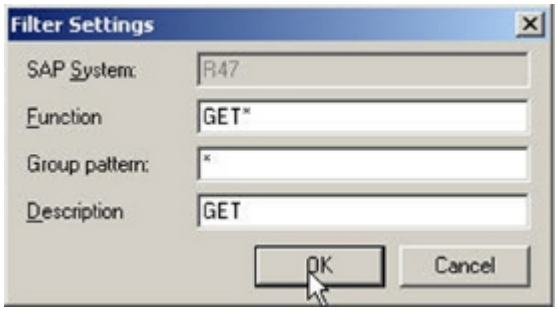
5. In the **Establish iNet Connector Session to SAP System** window, select the SAP server you set up through iNet BPS. The exact steps vary based on your configuration. When you have finished, click **OK**.



6. If you want to filter the functions for your connection, in the **SAP Connection Browser** window right-click the server name, and click **Add RFC Filter**.

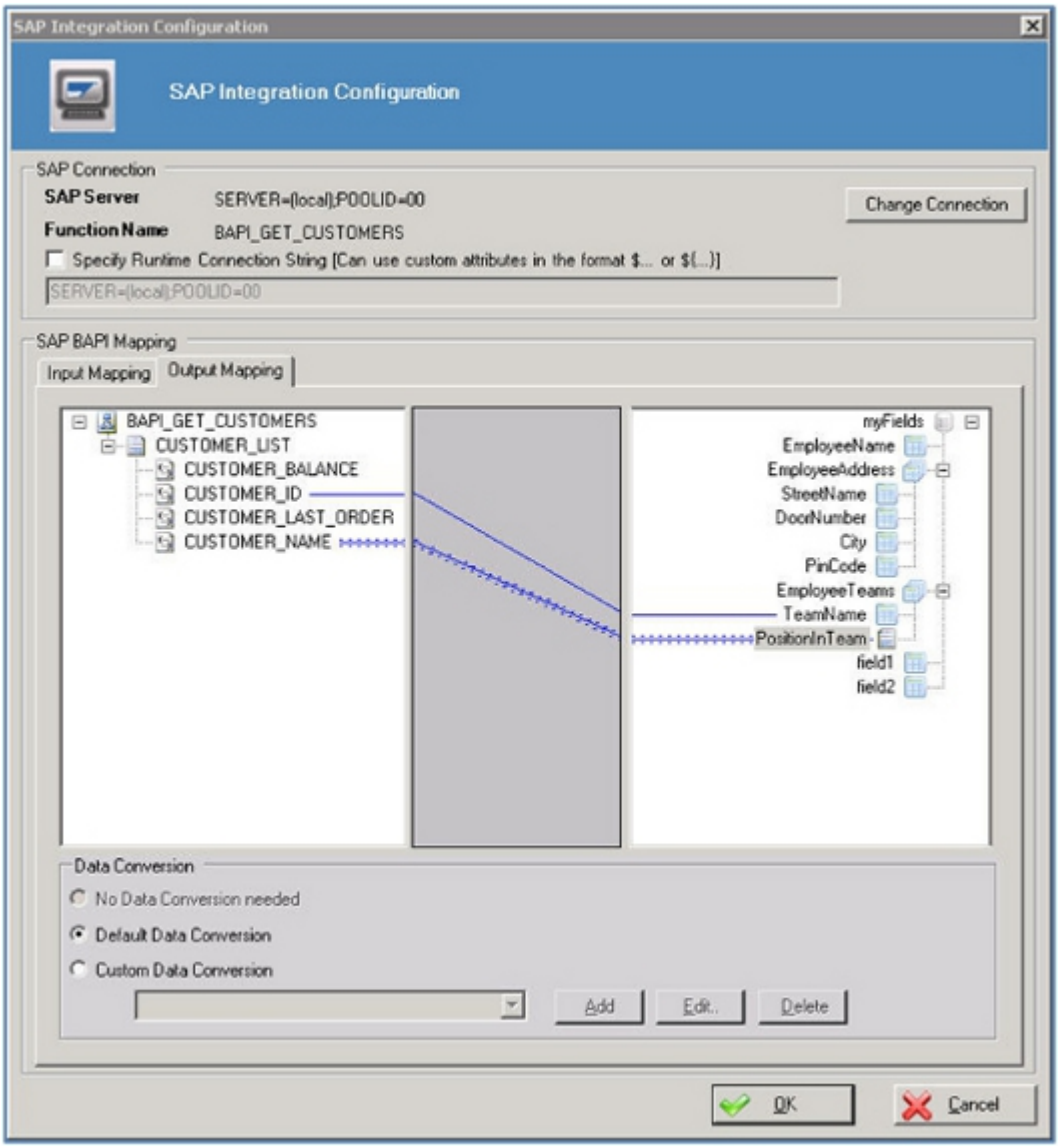


7. In the **RFC Filter** window, in the **Function** field, enter a wildcard search term. For example, to retrieve all the functions that start with GET, you can enter **GET***.



8. In the **Description** field, enter a name for the filter.
9. When you have finished creating the filter, click **OK**.
10. In the **SAP Connection Browser** window, select the SAP function you want, and click **OK**. The **SAP Integration Configuration** window opens.
11. (Optional) On the **SAP Integration Configuration** window, specify a runtime connection string.
12. (Optional) Click **Change Connection** to select a different SAP database. (This starts the procedure over.)
13. (SAP Queries Only) If you are configuring an SAP query, on the **Query Filter** tab, enter the following information in the fields provided:
    - **Query column**
    - **Comparison operator**
    - **Value**
    - **Conjunction**

14. (SAP BAPI Only) If you are configuring an SAP BAPI, on the **Input Mapping** tab, enter map the fields in your schema to the SAP fields.
15. (Queries or BAPI) On the **Output Mapping** tab, enter map the fields in your schema to the SAP fields.



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

Begin SAP Transaction

An AgilePart that starts an SAP Transaction. This AgilePart is used with two or more Call SAP Function AgileParts and an End SAP Transaction AgilePart to create a complex SAP transaction. For more information, see the *AgilePoint BPMS User's Guide*.

TransactionName

A unique name that identifies the transaction. To complete a transaction, the value of this property must match the value of the TransactionName property for an End SAP Transaction AgilePart.

Properties for This AgilePart

Field Name	Definition
TransactionName	A unique name that identifies the transaction. To complete a transaction, the values of this property in the Begin SAP Transaction and End SAP Transaction AgileParts must match.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

End SAP Transaction

An AgilePart that ends an SAP Transaction. This AgilePart is used with two or more Call SAP Function AgileParts and Begin SAP Transaction AgilePart to create a complex SAP transaction. For more information, see the *AgilePoint BPMS User's Guide*.

TransactionName

A unique name that identifies the transaction. To complete a transaction, the value of this property must match the value of the TransactionName property for an Begin SAP Transaction AgilePart.

Properties for This AgilePart

Field Name	Definition
TransactionName	A unique name that identifies the transaction. To complete a transaction, the values of this property in the Begin SAP Transaction and End SAP Transaction AgileParts must match.

Common AgilePart Properties

The properties of the basic AgilePart AgileShape are also included in this AgileShape. For more information, see AgilePart on the AgilePoint Support Portal.

AgileForms Stencil

This section describes the AgileShapes in the AgileForms stencil.

AgileForm Shape

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

Properties for This AgilePart

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

Field Name	Definition
Export Library	Saves the form as an AgileForms XML form library file.
Import Library	Imports an AgileForms XML form library file.

AgileWork Properties

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

AgileForm Serial

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

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

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

Properties for This AgilePart

Field Name	Definition
Approvers	Default value: $Approvers This property specifies the name of the custom attribute that (initially) contains the user names of the approvers. The usernames should be separated by a semicolon. Each time this AgileShape is entered at runtime, the AgileShape will assign a task to the first username specified by this property. Then the custom attribute associated with this property will be modified to remove the username so that the next username will be assigned the task during the next iteration through the loop.
LoopCondition	Default value: $HasMoreApprover This property specifies the name of the custom attribute that will be updated each time the AgileShape is exited to indicate whether more Approvers are still waiting to be assigned the

Field Name	Definition
	task. The value of the specified custom attribute should be checked (using a SingleCondition AgileShape within the loop) to determine whether the loop should be exited or not.
Configuration	This property allows the process modeler to configure the participants for the approval task. Click the Ellipses button to open the configuration dialog.
Edit Form	Opens the AgileForms form editor, which enables you to edit the form. For detailed information about editing forms in AgileForms, see the AgileForms online help.
Export Form	Saves the form as an AgileForms XML form file.
Import Form	Imports an AgileForms XML form file, and replaces the form for this shape with the imported one. All fields from the imported form are added to the form library for the current process.
Preview Form	Opens the AgileForms preview window, where you can preview the form.
SubmitStep	Default value: False This property should be set to 'True' if the Form is used as the Submit step (i.e. the first step where you are creating the list item).
Transfer Form	Transfers a form from one AgileForm AgileShape to another within a process. If you transfer a form to an AgileShape the current form is overwritten with the one that is transferred.
Edit Library	Opens the AgileForms form library editor. Each field you add to an AgileForm is added to the form library for the process. The fields in a form library are available for use for to all forms within a process.
Export Library	Saves the form as an AgileForms XML form library file.
Import Library	Imports an AgileForms XML form library file.

AgileWork Properties

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

AgileForm Parallel

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

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

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

Properties for This AgilePart

Field Name	Definition
Configuration	Opens the AgileForm Parallel Configuration Window, where you can configure an AgileForm Parallel approval.
Edit Library	Opens the AgileForms form library editor. Each field you add to an AgileForm is added to the form library for the process. The fields in a form library are available for use for to all forms within a process.
Export Library	Saves the form as an AgileForms XML form library file.
Import Library	Imports an AgileForms XML form library file.

AgileWork Properties

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

AgileForm Parallel Configuration Window

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

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

Field Definitions

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

AgileForm Dynamic Group

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

Properties for This AgilePart

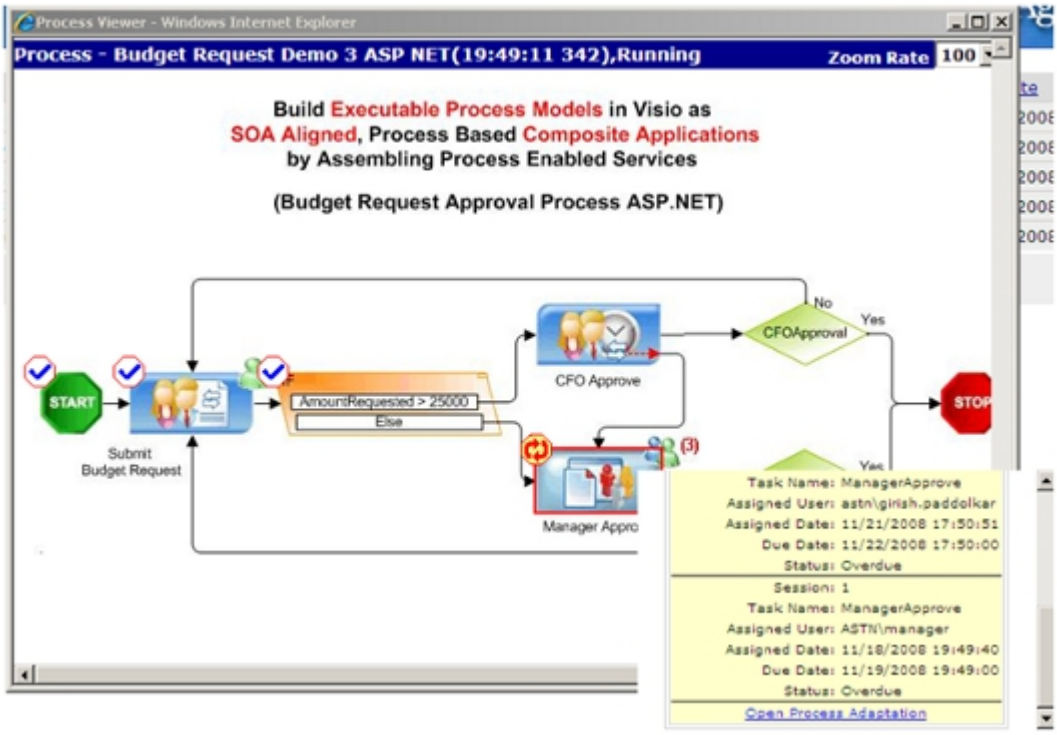
Field Name	Definition
Group/Role	Default value: AgilePointGroup Specifies whether an AgilePoint Group or an AgilePoint Role will be used to perform the work.
Group/RoleName	Specifies the name of the AgilePoint Group or AgilePoint Role that will be used to perform the work.

AgileWork Properties

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

AgileForm Process Adaptation

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



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

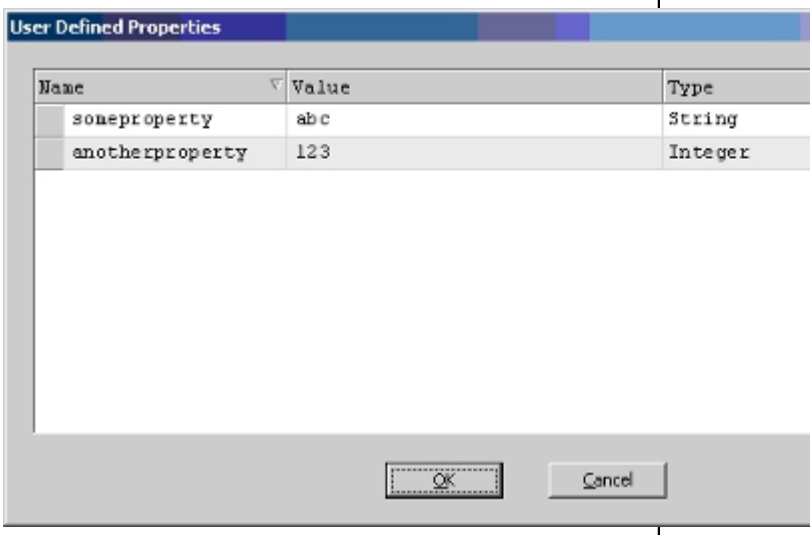
```
<appSettings>
         <add key="ProcessAdaptationUrl"
              value="http://[hostname]:[port]/EnterpriseManager/
ProcessAdaptation/LinkedTasks.aspx"/>
</appSettings>
```

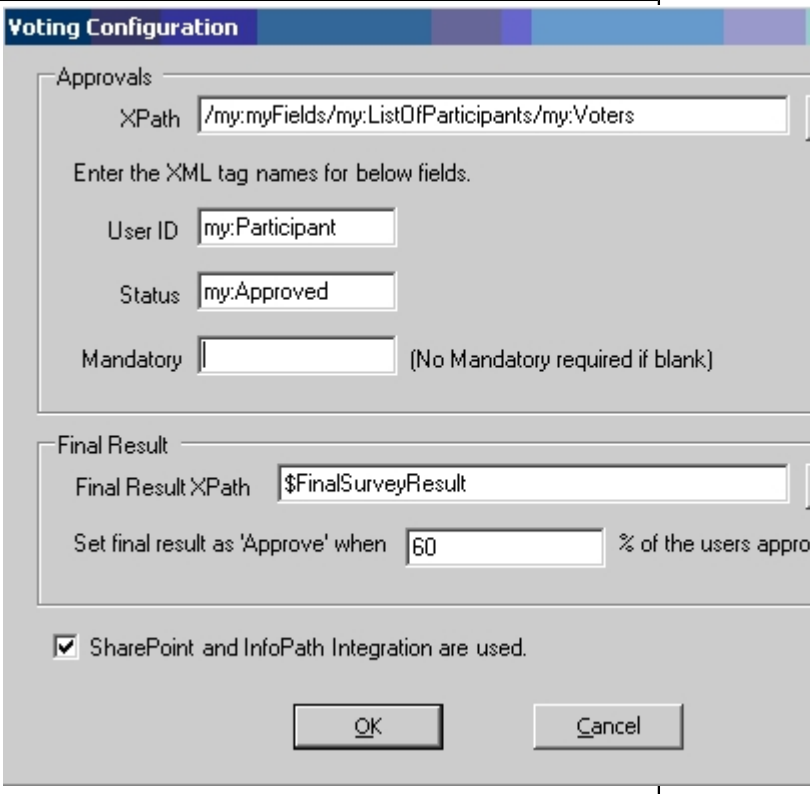
The value for the Process Adaptation is the URL of the process adaptation URL in AgilePoint Enterprise Manager.

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

Properties for This AgilePart

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

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

Field Name	Definition
	
ApprovalType	The property can be set to Sequential or Parallel at design time. This property determines a runtime whether the task will be delivered in a sequential or parallel fashion to the participants of the task. This can be changed at runtime via AgilePoint Enterprise Manager or the Process Viewer. 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.
UpdateCustomAttribute	This property allows the process modeler to configure an update to a custom attribute value based on an event type.

AgileWork Properties

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

Menu Options Overview

This section provides an overview of AgilePoint Envision's menu commands. Since AgilePoint Envision is a Microsoft Visio add-in, most of the available menu commands in AgilePoint Envision function the same as in Microsoft Visio. This section only covers menu items that are unique to AgilePoint Envision.

File Menu Options

The following menu options are available from the File menu in AgilePoint Envision.

File > **New** > **Generic**

This option allows the user to create a new process model based on the Generic process template.

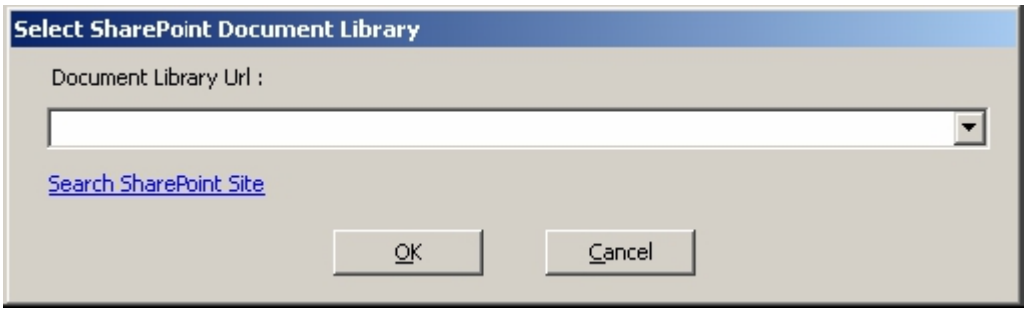
File > **New** > **Microsoft InfoPath**

This option allows the user to create a new process model based on the Microsoft InfoPath process template.

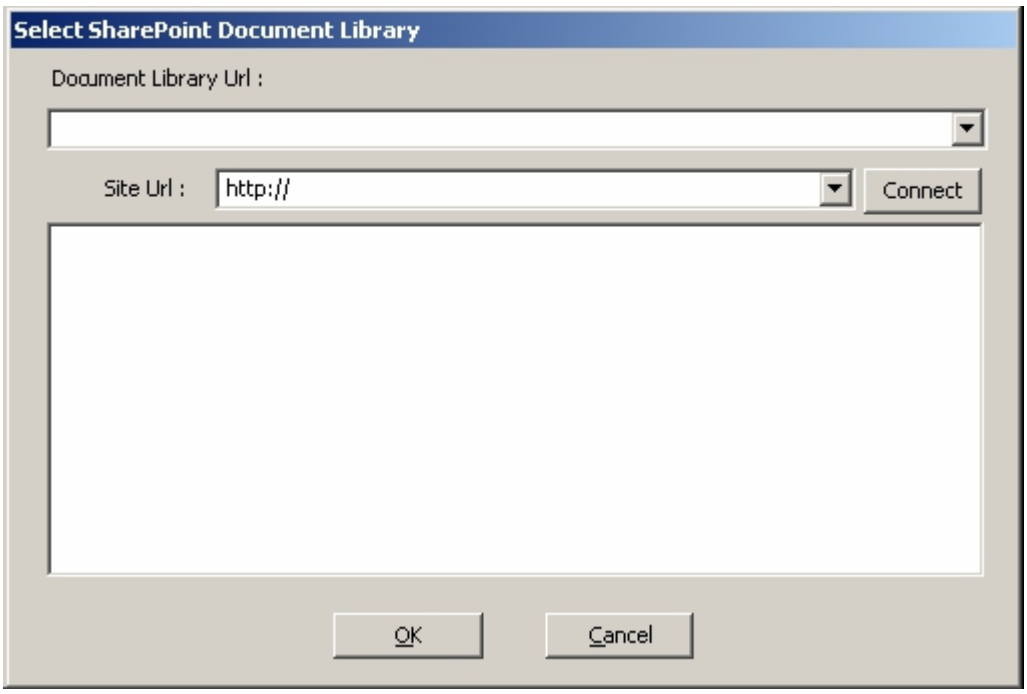
After selecting this option, you will be asked to choose the InfoPath form that will be associated with the process model.

File > **New** > **Microsoft SPDoc**

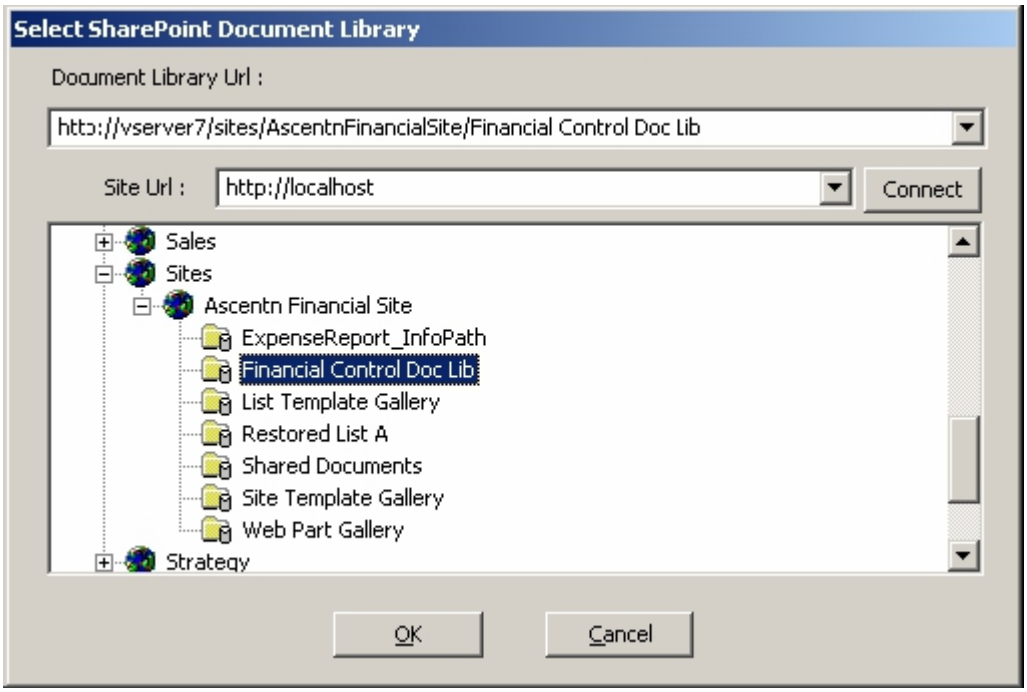
This option allows the user to create a new process model based on the Microsoft SharePoint Document Library process template. After selection this option, you will be asked to choose the SharePoint Document Library that the process model will be associated with.



If you don't know the exact URL of the Document Library, you can click the **Search SharePoint Site** link to select the Document Library.



Type or select the **SharePoint Site URL** and click **Connect**. The directories available within that site appear.

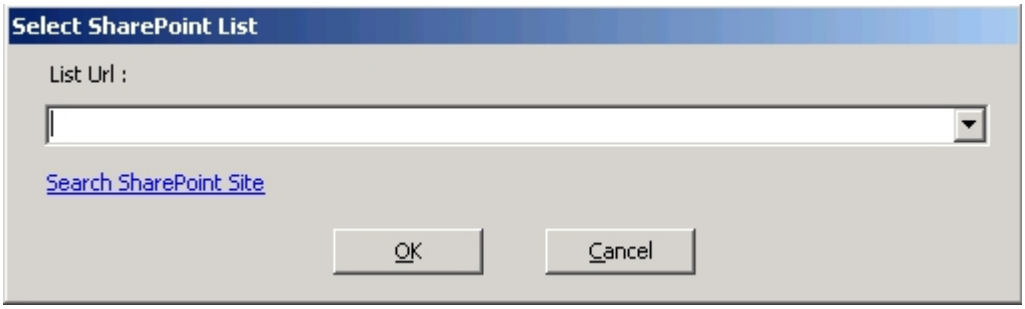


Click on the Document Library for which you would like to associate with the process model and click **OK**.

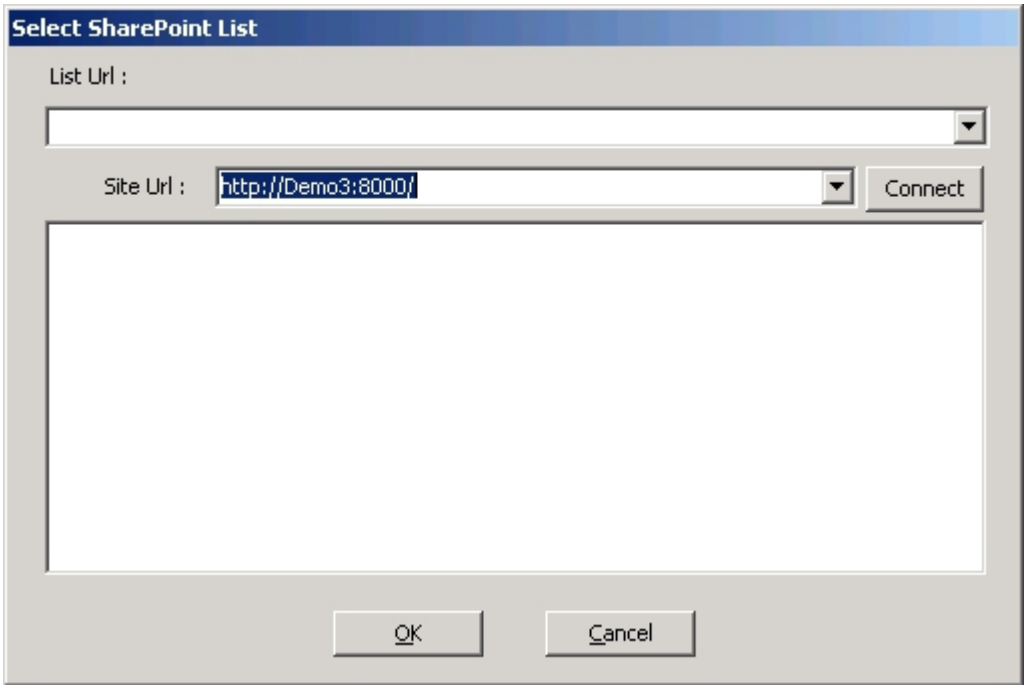
File > **New** > **Microsoft SPList**

This option allows the user to create a new process model based on the Microsoft SharePoint List template.

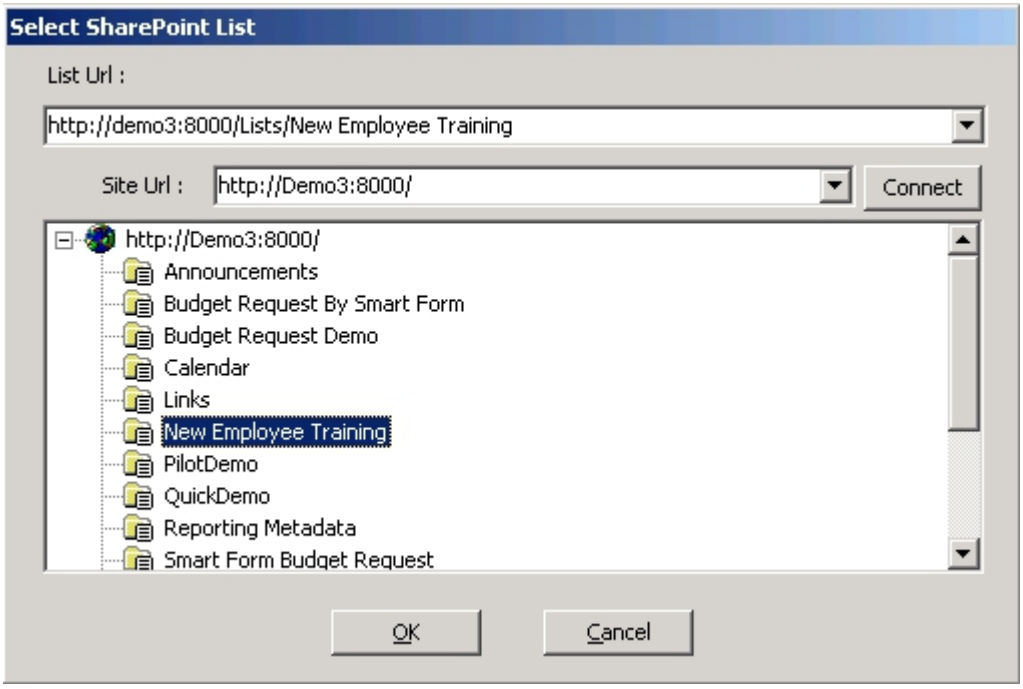
After selection this option, you will be asked to choose the SharePoint List that the process model will be associated with.



If you don't know the exact URL of the List, you can click the **Search SharePoint Site** link to select the List.

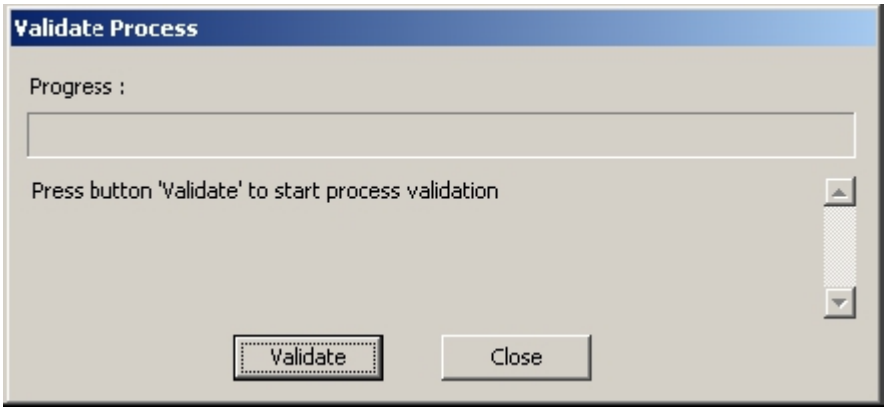


Type or select the SharePoint Site URL and click **Connect**. The directories available within that site appear.



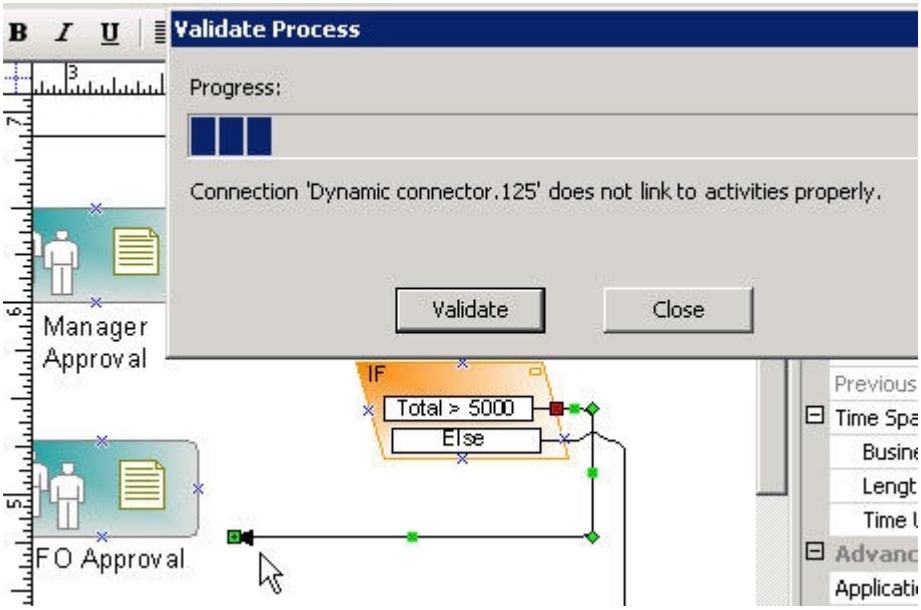
File > **Validate Process**

This option validates the contents of a process template and can be used to detect certain types of common errors, such as incorrectly connected AgileShapes. After choosing this option, the validation dialog will be displayed.



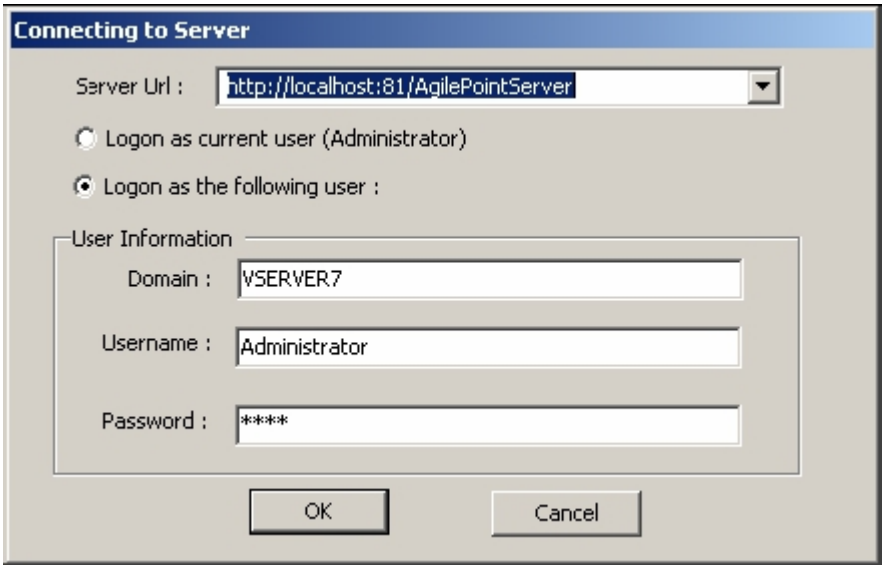
Click **Validate** to begin the validation process.

If the process template contains an error, a message will appear with information about the error and Envision will also show the source of the error highlighted in the process template so that you can correct it.

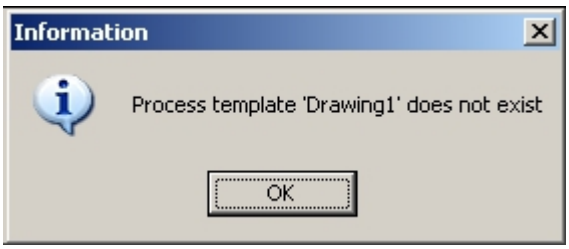


File > **Update Server** > **Check out Process**

This option allows you to connect to an AgilePoint Server directly from AgilePoint Envision, and then check out the currently opened process model. This prevents more than one user from updating the same process template at the same time.

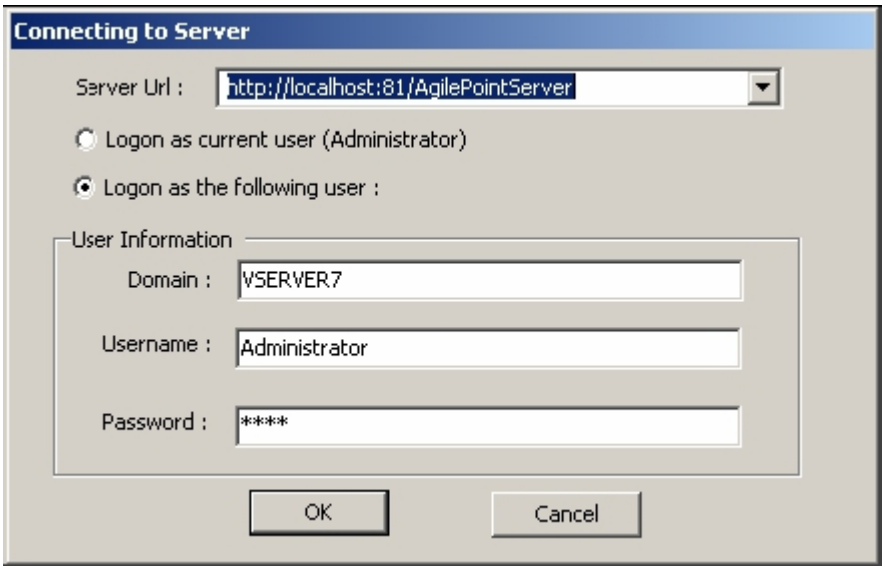


If the process template has not been previously deployed to the AgilePoint Server, the command will fail.



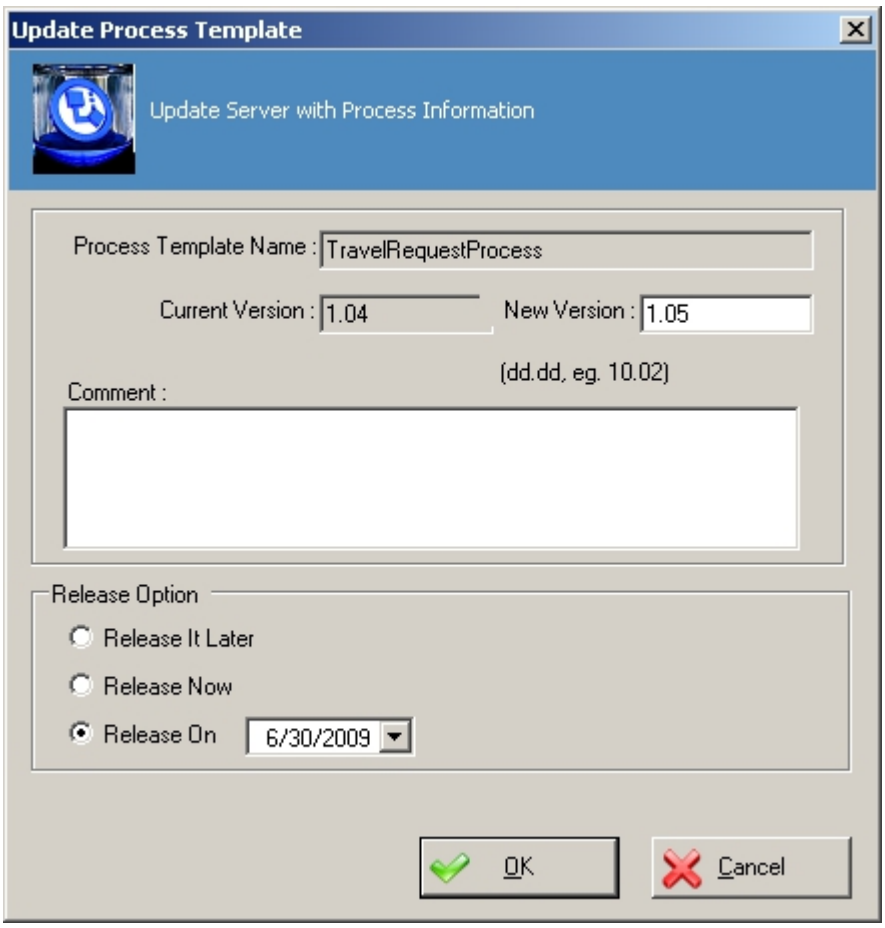
File > **Update Server** > **Create or Checkin, and Release Process**

This option allows you to connect to an AgilePoint Server directly from AgilePoint Envision and deploy the currently opened process model to the AgilePoint Server. To successfully deploy a process template to an AgilePoint Server, the process template must be valid (i.e. no invalid AgileShape connections, etc.), and any custom AgilePoint modules (e.g. AgileParts, AgileWorks, AgileStubs, etc.) used in the process template must already be deployed to the AgilePoint Server. After selecting this option, the Connecting to Server window appears where you will first need to connect to an AgilePoint Server.

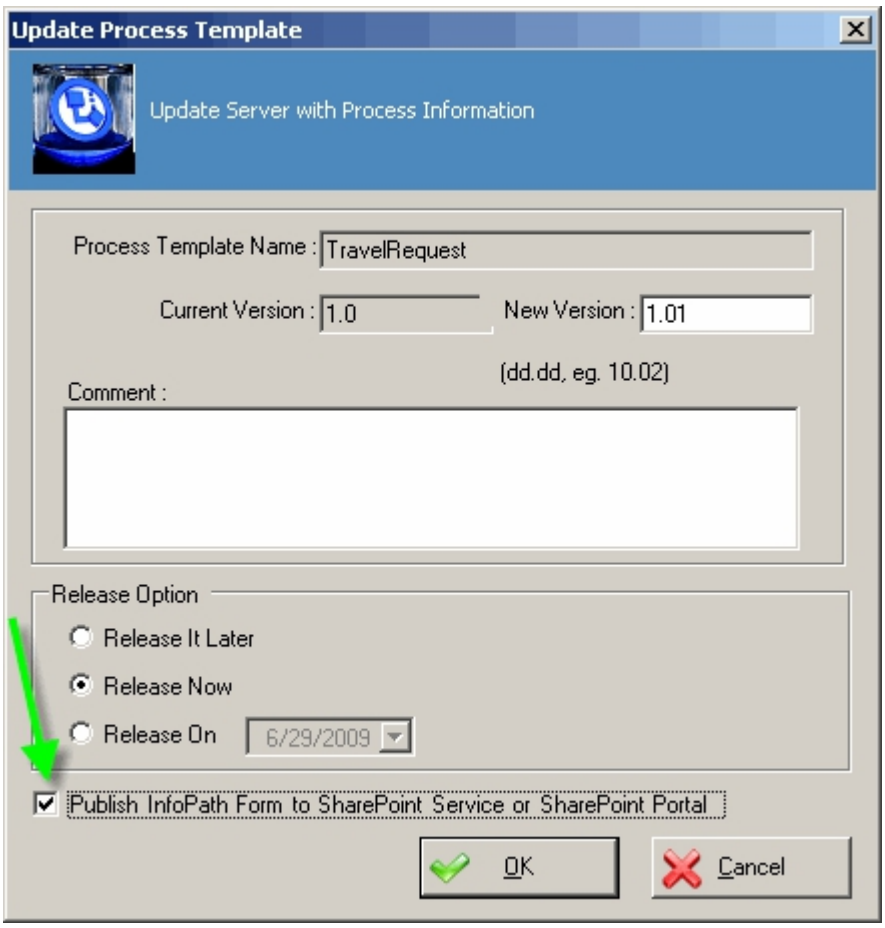


You will need to specify the URL location of the AgilePoint Server, and the Windows Authentication credentials that will be used to access the AgilePoint Server. The Logon as current user option will use your own Windows user account information to access the AgilePoint Server, or you can specify the Domain, Username, and Password of a different user account (e.g. you could use the credentials of the user account that the AgilePoint Server is configured to use as the System User).

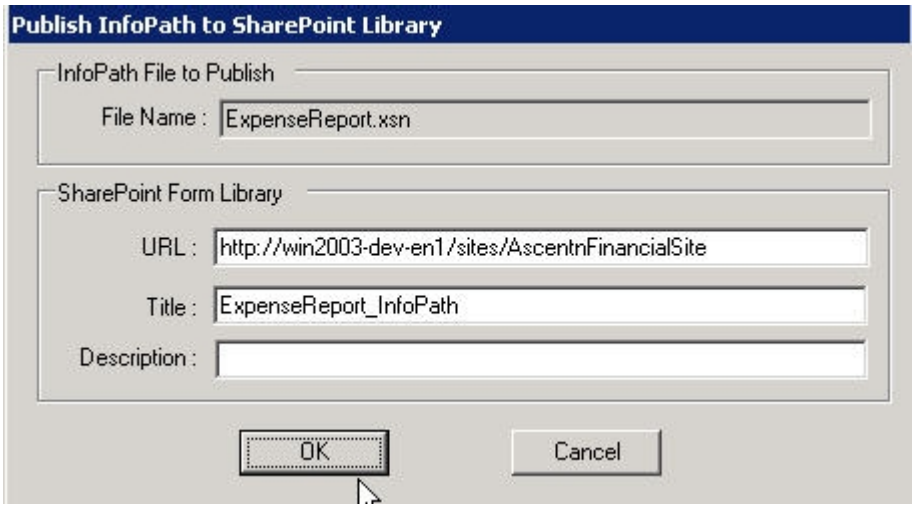
After you have successfully connected to an AgilePoint Server, you may specify a version number, comment, and release schedule for the process model.



If you are deploying a Microsoft Info process template, you will see a dialog similar to the one below.



The check box at the bottom of the window allows you to publish the process template's associated InfoPath form (to Microsoft SharePoint) directly from AgilePoint Envision. If you check the check box, you will see a window similar to the one below:



Enter the URL of the SharePoint site where you want this InfoPath form to be published and the Title for the Form Library name. Then click **OK** to publish the form to SharePoint. After clicking the final **OK** button (in either of the above windows), the process template will be validated. If validation succeeds, the process template will be deployed to the specified AgilePoint Server. If validation fails, the process template will not be deployed and you will need to fix any errors in the process template (and/or deploy any custom modules to the AgilePoint Server) before deploying the process template.

File > **Export & Import** > **Save As Deploying File(xml)**

This option converts your current process template to an XML file that can be used to deploy the process to an AgilePoint Server using AgilePoint Enterprise Manager (instead of using AgilePoint Envision). This method is most often used as an alternative in cases where AgilePoint Envision cannot connect to AgilePoint Server to deploy a process template. This method involves using AgilePoint Envision to convert your current process template to an XML file that can be deployed to AgilePoint Server using AgilePoint Enterprise Manager (instead of using AgilePoint Envision).

File > **Export & Import** > **Convert To …** > **Generic**

This option converts your current process model's underlying process template to a Generic process template. This option is not available when working with a process model based on the Generic process template.

File > **Export & Import** > **Convert To …** > **SharePoint Document**

This option converts your current process model's underlying process template to a Microsoft SPDoc process template. This option is not available when working with a process model based on the Microsoft SPDoc process template.

File > **Export & Import** > **Convert To …** > **InfoPath**

This option converts your current process model's underlying process template to a Microsoft InfoPath process template. This option is not available when working with a process model based on the Microsoft InfoPath process template.

File > **Export & Import** > **Generate Report**

This option allows you to create a HTML-formatted report for a process template. The generated report can be viewed in a Web browser. After activating this command, select the folder where you want to save the report and then click **OK**. The process definition and process diagram will be converted to HTM and GIF files, and saved to the selected folder.

File > **Export & Import** > **Import Existing Visio file**

This option creates a new AgilePoint Envision Generic process model based upon an existing Microsoft Visio diagram. The Visio shapes, connectors, etc. that are imported from the Visio diagram can then be converted into AgileShapes in order to create a working process model.

File > **Export & Import** > **Import Process Template XML**

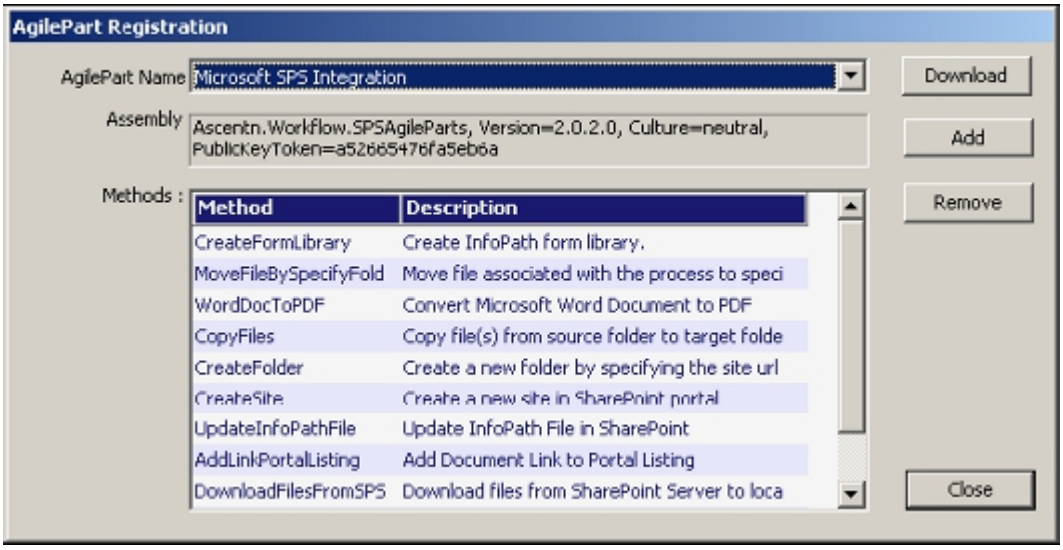
This option allows for the Process Template XML to be imported from AgilePoint Enterprise Manager into AgilePoint Envision and saved as a .vsd file. This can be helpful if you have lost your master process template .vsd and want to recover it.

File > **Process Simulation**

This option allows you to run a simulation of how a process model will behave at runtime.

File > **Extend AgilePoint** > **Register AgilePart**

This option registers a custom AgilePart component with AgilePoint Envision. Custom AgilePart components must be registered before they can be used in a process template. After selecting this option, the AgilePart Registration window appears.



To download and register an AgilePart that has already deployed to AgilePoint Server:

1. Click the **Download** button.
2. Connect to the AgilePoint Server.
3. Select an AgilePart that is available on the server and click **OK**.

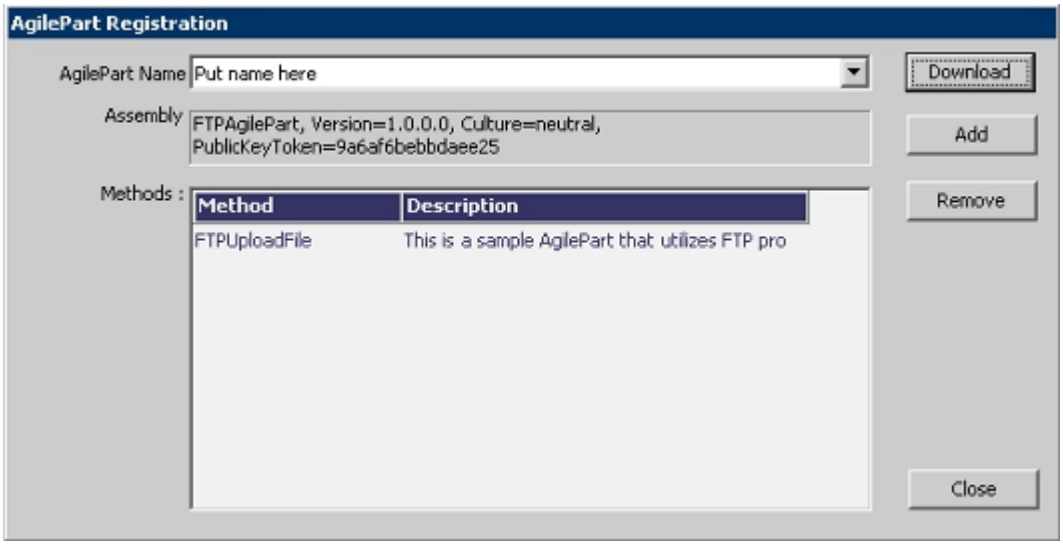
   If a previous version of the assembly was already loaded into memory by AgilePoint Server, any changes to the assembly would not take effect until after AgilePoint Server is restarted. Modifying any file in the bin directory will automatically cause IIS to restart AgilePoint Server.

   However, modifying the assembly will not automatically cause a restart, so if you want any DLL changes to take effect immediately, you would need to restart IIS or the AgilePoint Server.

To register an AgilePart DLL that is located on your computer's file system:

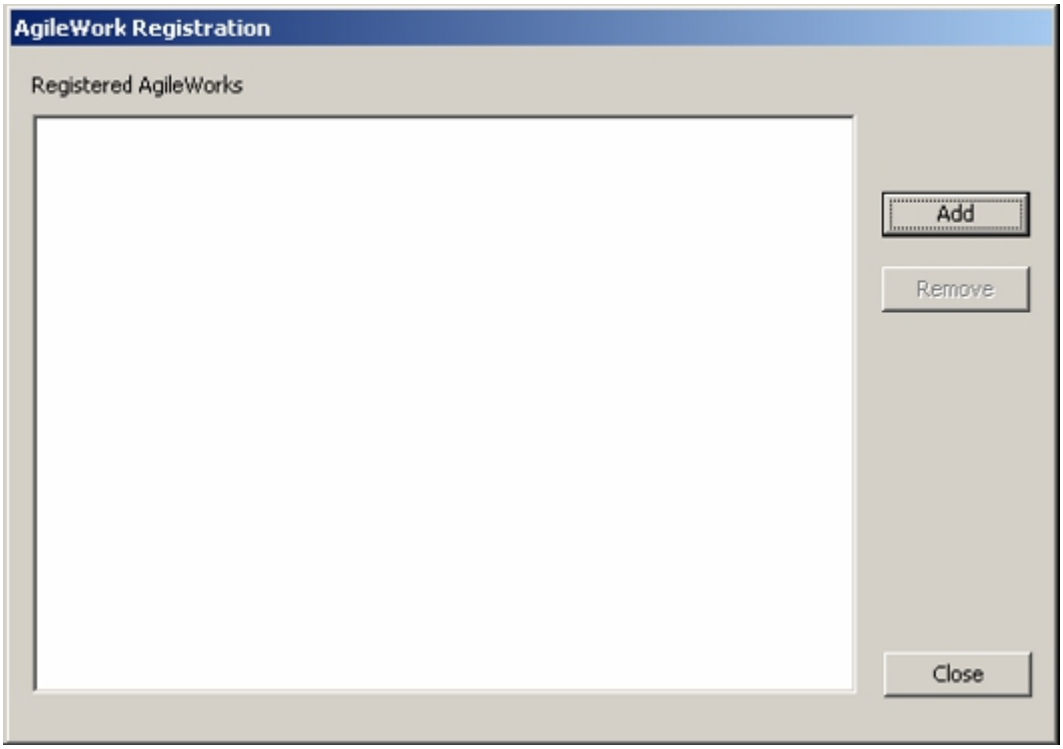
1. Click the **Add** button.
2. Select the appropriate DLL file and click **Open**.

   Once an AgilePart assembly has been registered, the AgilePart and its methods will be displayed in the AgilePart Registration window (as shown below) and they can be used in process templates.



File > **Extend AgilePoint** > **Register AgileWork**

This command registers a custom AgileWork component with AgilePoint Envision. Custom AgileWork components must be registered before they can be used in a process template. After selecting this option, the registration dialog will be displayed (as shown below).



To register an AgileWork DLL that is located on your computer's file system:

1. Click the **Add** button.

2. Select the appropriate DLL file and click **Open**.

   Once an AgileWork assembly has been registered, the AgileWork and its methods will be displayed in the AgileWork Registration window (see above) and they can be used in process templates.

Registering an AgileExtender in Envision

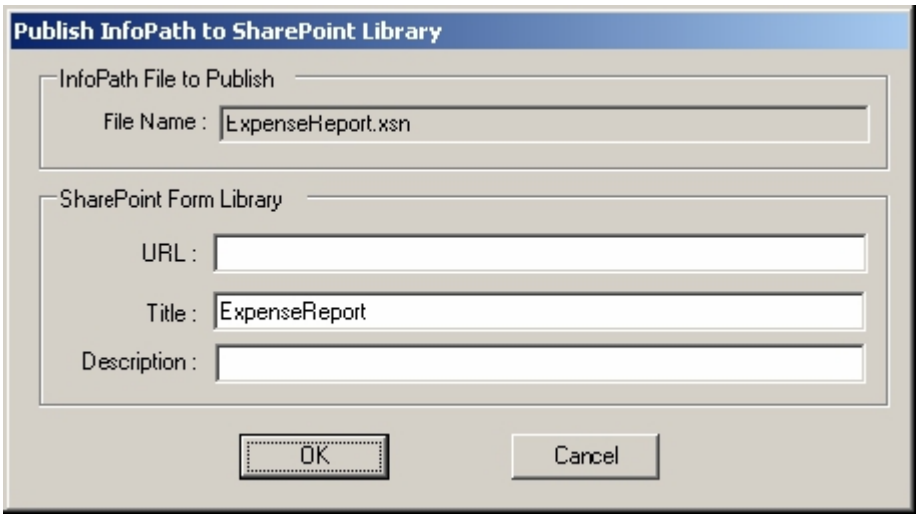
This command registers a custom AgileExtender component with AgilePoint Envision. Custom AgileExtender components must be registered before they can be used in a process template. After selecting this option, the registration dialog will be displayed.

1. In Envision, click **File > Extend AgilePoint > Register AgileExtender**.
2. On the **AgileExtender Registration** dialog box, click **Add**.
3. Select the DLL file for the AgileExtender , and click **Open**.

Once an AgileExtender assembly has been registered, the AgileExtender and its methods will be displayed in the AgileExtender Registration dialog, and the methods can be used in process templates.

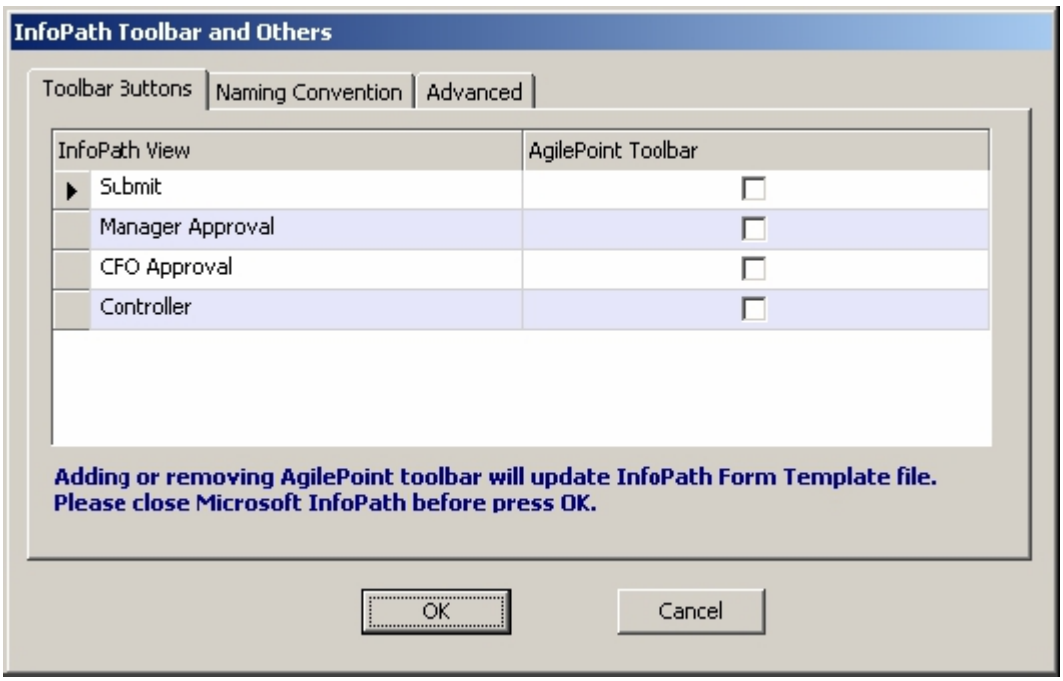
File > **InfoPath** > **Publish InfoPath to SharePoint Library**

This option is only available when working with a process model based on the Microsoft InfoPath process template. This command allows you to publish the InfoPath form associated with your process model to a Microsoft SharePoint Form Library directly from AgilePoint Envision.

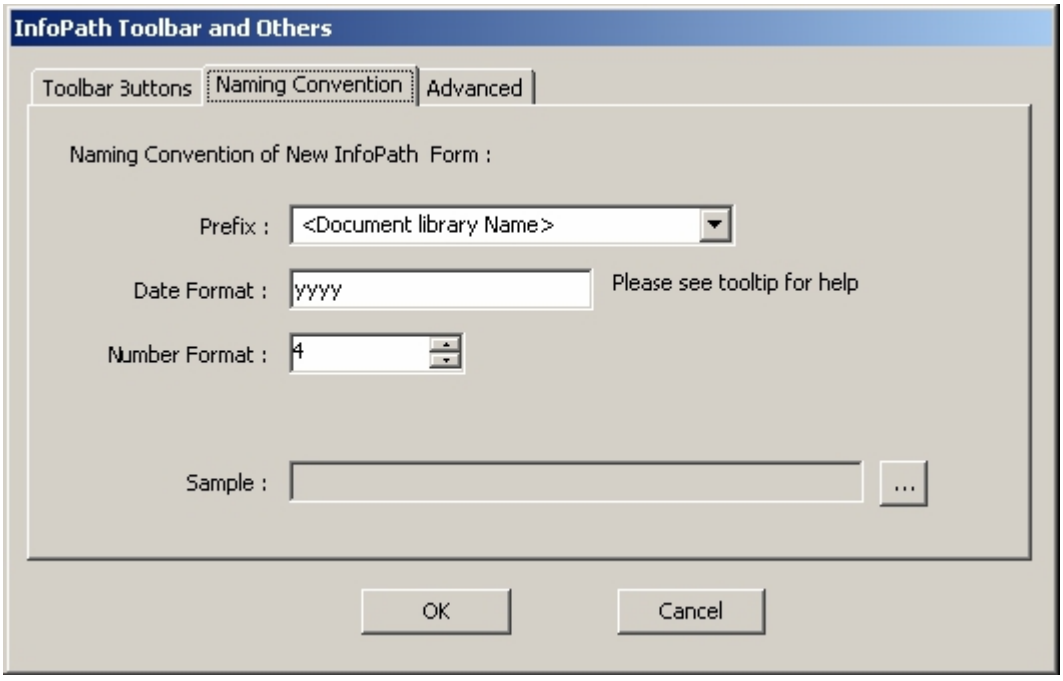


File > **InfoPath** > **InfoPath Toolbar, Auto Naming and Others**

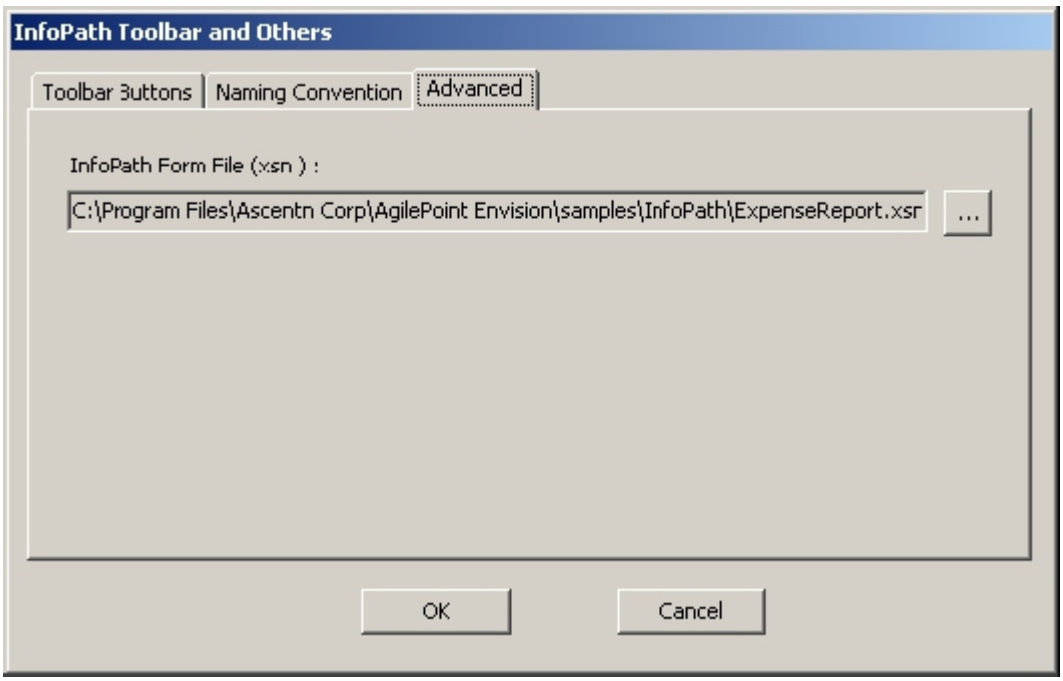
This option is only available when working with a process model based on the Microsoft InfoPath process template. This option allows you to configure various InfoPath-specific properties of your process template. The Toolbar Buttons tab allows you to configure which views (in your InfoPath form) will display the AgilePoint Toolbar. The AgilePoint Toolbar displays the **Submit and Close** button when the InfoPath form is open.



The **Naming Convention** tab allows you to configure how filenames are generated for new documents in the SharePoint Form Library associated with your process template's InfoPath form.



The **Advanced** tab allows you to associate your existing process template with a different InfoPath form.



File > **SharePoint …** > **Change Document Library**

This option is only available when working with a process model based on the Microsoft SPDoc process template. This option allows you to associate your existing process template with a different SharePoint Document Library.

File > **SharePoint …** > **Retrieve Meta Data Schema**

This option is only available when working with a process model based on the Microsoft SPDoc process template. This option allows you to retrieve information about the metadata columns of the SharePoint Document Library associated with the current process model. This option is most often used when you add a new metadata column to SharePoint and want to bind to it from an existing process template.

File > **Shapes** > **Generic**

This option displays the **Generic** Visio Stencil (i.e. Shapes window) containing the basic AgilePoint AgileShapes.

File > **Shapes** > **Microsoft SPS**

This option displays the **Microsoft SPS** Visio Stencil (i.e. Shapes window) containing the predefined AgilePoint AgileShapes related to Microsoft SharePoint functionality.

File > **Shapes** > **Premier**

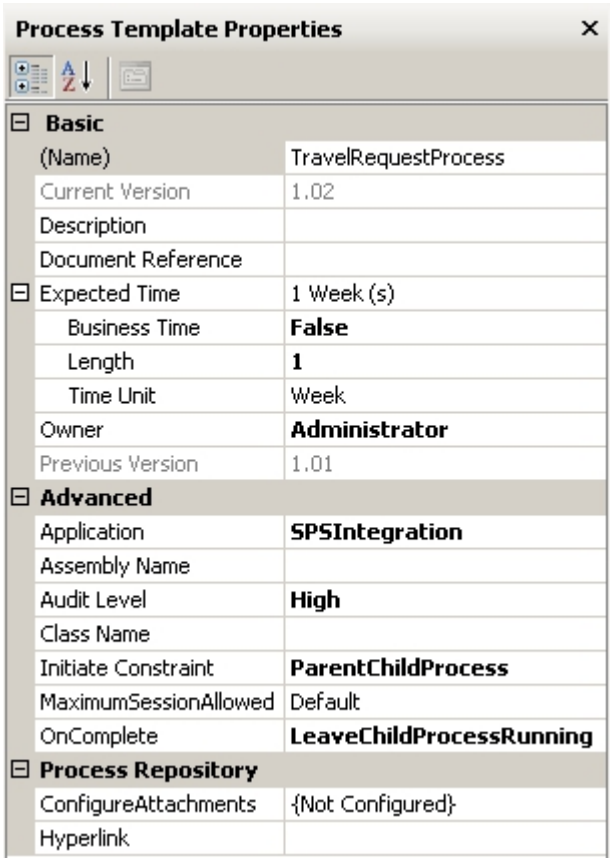
This option displays the **Premier Extension** Visio Stencil (i.e. Shapes window) containing additional predefined AgilePoint AgileShapes. These AgileShapes are used for various purposes, including database access, database updates, Web service calls, etc.

View Menu Options

The following menu options are available from the View menu in AgilePoint Envision.

View > **Process Template Properties**

This option displays the Process Template Properties pane. This pane displays the design-time properties of the process or the selected AgileShape. This option is most often used if the properties window has been closed.

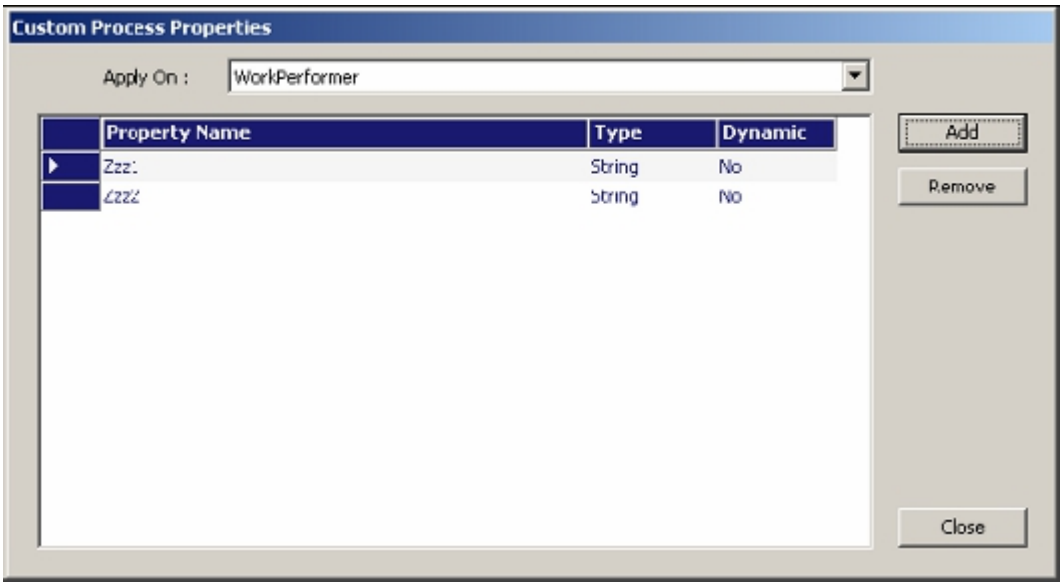


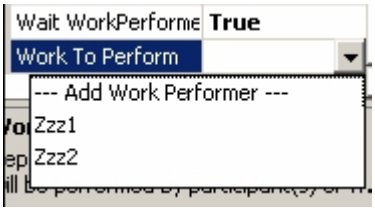
View > **Email Templates Wizard**

This option displays the Email Templates Wizard. The wizard allows you to create, modify, and/or delete the email notification templates that can be used within a process template.

View > **Custom Process Properties**

This option displays the Custom Process Properties window. This window provides a convenient way to review all of the different values used within the entire process from a single location. It also allows you to add and/or remove custom values to the drop-down lists displayed (in the Activity Properties toolbar) next to certain AgileShape properties. Adding custom process property values provides a convenient way to easily define common values that will be used (for certain AgileShape properties) in multiple AgileShapes. For example, adding two new **WorkPerformer** values (as shown below) will cause both values to appear in the drop-down list for the Work To Perform property (as shown below) for all of the Manual and Manual with Timeout AgileShapes in the process template.



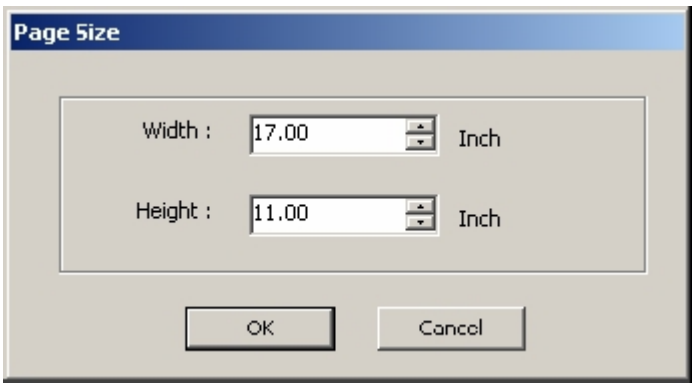


Shape Menu Options

The following menu options are available from the Shape menu in AgilePoint Envision.

Shape > **Actions** > **Page Size**

This option allows you to change the size of your process template. This option is not available when you have an AgileShape selected.



Help Menu Options

The following menu options are available from the Help menu in AgilePoint Envision.

Help > **AgilePoint Envision Help**

This command opens the Help file for AgilePoint Envision.

Process Templates

AgilePoint process templates are created using one of the special AgilePoint business process model templates built into AgilePoint Envision. These process templates are different than regular Visio templates in that they can be deployed directly to AgilePoint Server to execute the workflow process they model.

Process Template Types

The process template types in this section are available in AgilePoint Envision.

Generic Process Template

Generic is the simplest type of process template. This type of process model can be used to represent virtually any business process. However, certain specific types of business processes may be more easily modeled using one of the more specialized process template.

Microsoft InfoPath Process Template

The Microsoft InfoPath process template can be used to represent a business process where the entire process is associated with a single Microsoft SharePoint Form Library (and the Microsoft InfoPath form associated with that Form Library). Each runtime process instance will be associated with a specific copy of that InfoPath form. For this type of process model, the views of the InfoPath form are used as the user interface for any of the process' manual tasks, and user input is stored directly within the form's XML schema.

Microsoft SPDoc Process Template

The Microsoft SPDoc process template can be used to represent a business process where the entire process is associated with a specific Microsoft SharePoint Document Library. Each runtime process instance will be associated with a specific item (i.e. document) within the specified Document Library. This type of process model is typically used to create workflow solutions for document control and management. This type of process model allows the library's metadata columns to be bound directly to the process so that the documents' metadata values can be easily used within the process model.

For this type of process model, the user interfaces for any of the process' manual tasks are usually implemented as ASP.NET pages that can be placed in and accessed from the same SharePoint site that contains the Document Library.

Microsoft SPList Process Template

The Microsoft SPList process template can be used to represent a business process where the entire process is associated with a specific Microsoft SharePoint List. Each runtime process instance will be associated with a specific list item within the specified List.

This type of process model allows the list's metadata columns to be bound directly to the process so that the lists' metadata values can be easily used within the process model. A typical usage scenario would be to initiate a process with a new list item, then use a sub process to implement forms interaction.

AgileForms Process Template

The AgileForms process template can be used to represent a business process that uses AgileForms. To use this template, you must have the AgileForms Envision Add-On installed.

Select a Process Template Type

To begin creating an AgilePoint process, you must first select an AgilePoint process template type:

1. Click **File > New > AgilePoint > [Process Model Type]**.

Open an existing Process Template

To create an existing process template, start AgilePoint Envision, then use the **File > Open** menu command to open the VSD file that contains the process template.

Convert a Visio Diagram to a Process Model

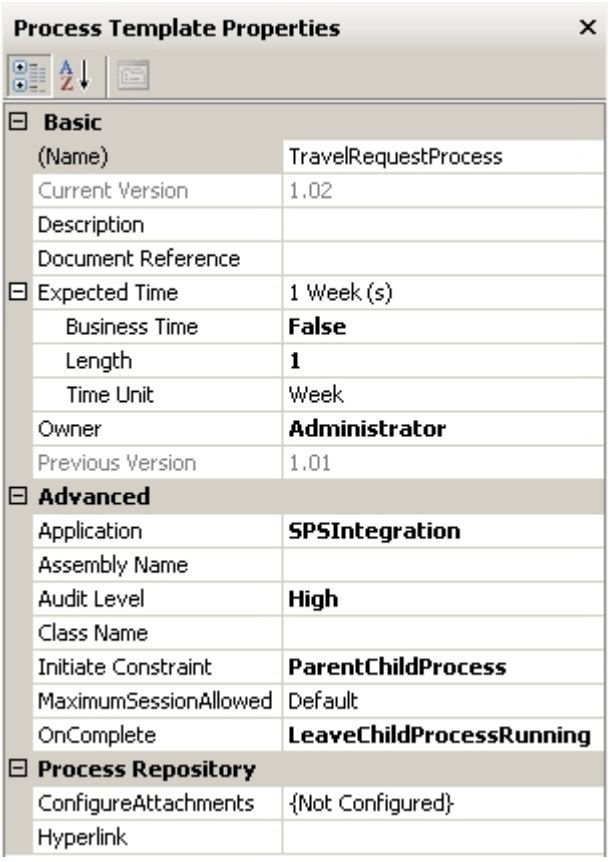
To convert an existing Visio diagram into a process template:

1. Start AgilePoint Envision.
2. Create (or open) a process template.
3. Click **File** > **Export & Import** > **Import Existing Visio file**.
4. Select the VSD file that contains the Visio diagram you want to convert. This will import the contents of the selected Visio diagram into your process template.
5. Once the diagram's contents are imported, convert the Visio shapes into AgilePoint AgileShapes. Once all of the imported shapes and connectors are completely converted and integrated into the process template, you can continue to work on the process template like you would normally.

Process Template Properties

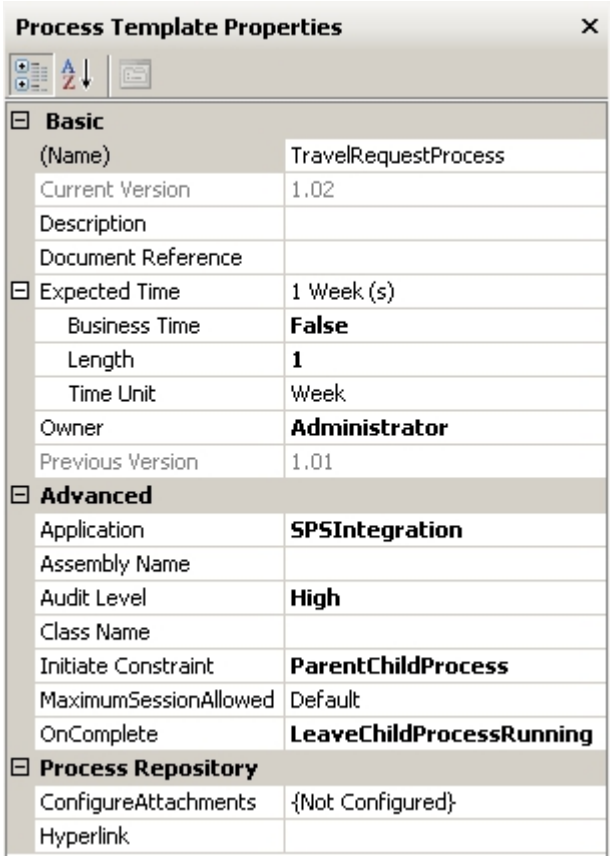
Process Template Properties Overview

The following properties are available at the process template level in AgilePoint Envision.



Process Template Properties

The following AgileShapes belong to the Premier Extension Stencil Pane in AgilePoint Envision. The Process Template Properties are visible when no activities are selected in the process model. A definition for each property can be found below.



Design-Time Properties

(Name)

The actual name of the process template that AgilePoint retains.

Current Version

The current version of the process template. The next time the process template is deployed to AgilePoint Server, the process version will be updated.

Description

Provides a text box pop for which to enter a description for the process template.

Document Reference

A reference to a document associated with the process template.

Expected Time

The amount of time that is configured for the process to complete.

Business Time

Specifies if the expected completion time will be based on business days. This property can be set to the following specific values:

- **True** - This value indicates that the expected time will be based on business days, where 5 days is equal to 1 week.

- **False** - This value indicates that the expected time will be not be based on business days, where 7 days is equal to 1 week.

Length

The number of time units for the expected time (e.g. 1 second, minute, hour, etc.).

Time Unit

The unit of time to be used for the expected time.

Owner

A name given to the owner of the process template.

Previous Version

The previous version of the process template.

Application

The process template application type (e.g. SPSIntegration for SharePoint based process templates that will be associated with a SharePoint library or list, or a custom name given as the name of an ASP.NET application).

Assembly Name

The name of the custom assembly that the process template is associated with.

Audit Level

Default value: High

This property determines the amount of process related data that is recorded to the workflow database. This property can be set at either the Process Template Properties layer or at the individual AgileShape layer. This property allows you to control the level of granularity in terms of the amount of process related data that is recorded to the workflow database. This property can be set to the following specific values:

- **High** - This value indicates that AgilePoint will record all data about the activity or process to the database.
- **Low** - This value indicates that AgilePoint will only allow a certain amount of data to be recorded to the database. This option provides a level of control over the granularity of AgilePoint process-related data that is stored in the AgilePoint workflow database, giving some flexibility in the audit trail records by filtering out unnecessary data.

Class Name

The name of the custom class that the process template is associated with.

Initiate Constraint

The type of process model. This determines the category for which this process model is associated under the license model. If the process model is of type ChildProcess, it cannot be initiated as a stand alone process. A ParentChildProcess can be initiated as either a Parent or Child process, it counts as a Parent process.

MaximumSessionAllowed

MaximumSessionAllowed allows you to set the MaxloopAllowed at the process model level to avoid an infinite loop scenario. Now you can set the MaxLoop to a number where the engine will then mark the process as suspended. The process level MaxLoop setting overwrites the global/server level

setting in the Netflow.cfg file. If this property is set to the 'Default' the process will inherit the global global/server level setting in the NetFlow.cfg.

OnComplete

Determines the fate of the child process once the parent process completes. This property can be set to the following specific values:

- **LeaveChildProcessRunning** - This value indicates that the child process will continue to run after the parent process completes.
- **CancelChildProcesses** - This value indicates that child processes will be canceled once the parent process completes.
- **InheritParentProcess** - This value indicates that child processes will inherit the OnComplete properties of the parent process.

ConfigureAttachments

Allows you to attach documents at the process model level that are accessed from the process repository. For more information, see Process Repository on the AgilePoint Support Portal.

Reference URL

Allows you to associate an URL at the process model level that is used in the process repository. For more information, see Process Repository on the AgilePoint Support Portal.

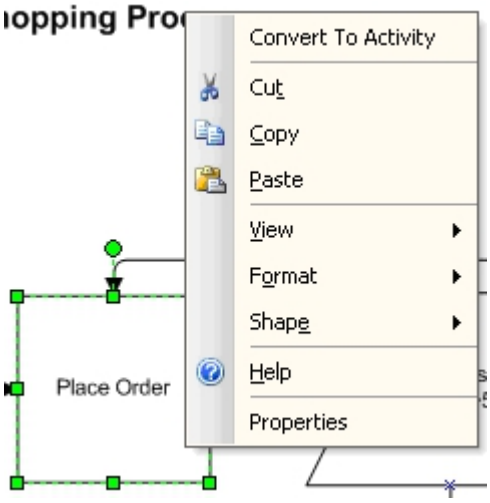
Convert a Visio Shape to an AgileShape

When you import an existing Visio diagram or copy a regular Visio shape and paste it into a process template, you will need to convert the Visio shape(s) into one or more AgileShapes before those shapes can be a part of the Process Model.

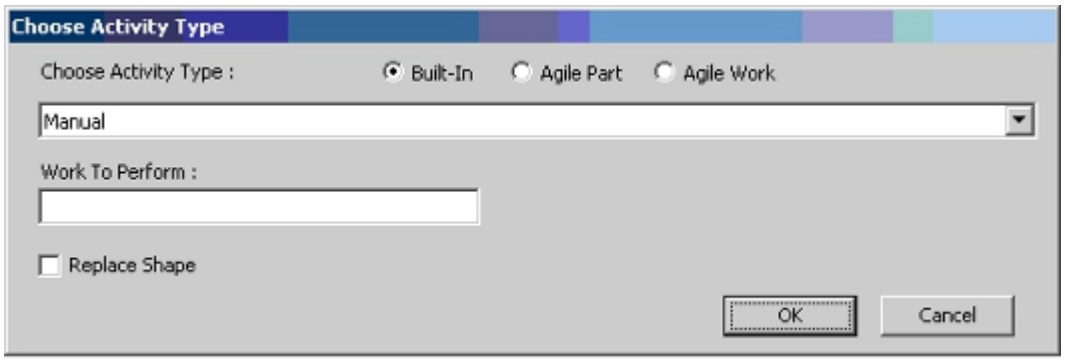
Visio shapes larger than 1.5 inches x 1.5 inches cannot be directly converted into an AgileShape, and will need to be replaced with (rather than converted into) an AgileShape.

Visio shapes that do not represent an "activity" (e.g. flowchart shapes that represent conditional logic or decisions) cannot be directly converted into an AgileShape, and will need to be replaced with (rather than converted into) an AgileShape (see below).

1. Click on the shape you want to convert to select it.
2. Right-click the selected shape and click **Convert to Activity**.



3. In the Choose Activity Type window, select the type of AgileShape the shape should be converted into.



See Process Template AgileShapes for more information about the types of AgileShapes and how the Work To Perform property is used for each type of AgileShape.

4. (Optional) Check the "Replace Shape" check box if you want the converted shape to appear like the type of AgileShape you selected. Uncheck the "Replace Shape" check box if you want the converted shape to be displayed in the process model with the same graphical appearance as it had prior to conversion.
5. Click the **OK** button.
6. (Optional) Configure additional properties of the converted AgileShape as you would for a normal AgileShape (i.e. using the Activity Properties window).

To replace a Visio shape with an AgileShape:

1. Add one or more AgileShapes to your process template, and configure them as appropriate.
2. Change any connectors that are connected to the Visio shape so that they are now connected to the AgileShapes you just added.
3. Remove/delete the Visio shape from the process template.

Add an AgileShape to a Process Model

Adding an AgileShape to a Process Model is the same as adding a Visio shape to a Visio diagram. Simply click and drag an AgileShape (from a stencil in the Shapes window) onto your process template.

Remove an AgileShape from a Process Model

Removing an AgileShape from a Process Model is the same as removing a Visio shape from a Visio diagram. Simply click the AgileShape to select it, and then press the delete key.

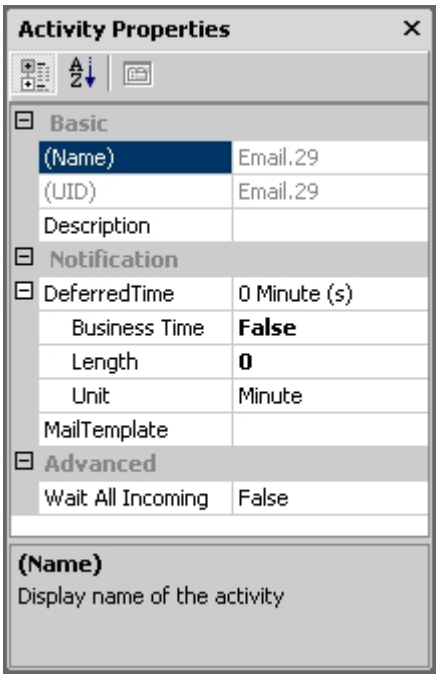
Change an AgileShape's Display Name

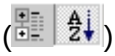
To change an AgileShape display name:

1. Double-click the AgileShape, and then type a new name.

Configure AgileShape Properties

To configure the properties of an AgileShape instance, first click the AgileShape to select it. Then use the Activity Properties toolbar (shown below) to modify any of the AgileShape's configurable properties.



You can switch between the view using the toggle buttons () at the top of the toolbar. See Process Template AgileShapes for more information about each of the properties listed in the Activity Properties toolbar.

Connecting AgileShapes To Each Other

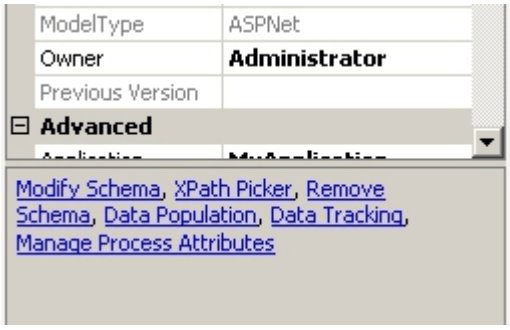
Connecting AgileShapes in a process template is similar to the process of connecting Visio shapes in a Visio diagram. First you would select Visio's Connector Tool ( ). Next you would click and hold on to an Out Connection Point of an AgileShape, and then drag the mouse pointer to an In Connection Point of another AgileShape (and then release the mouse button).

Some AgileShapes have Connection Points that can be used as either an In Connection Point or an Out Connection Point, while others have Connection Points that may only be used in a specific direction. For example, the Single Condition AgileShape has 2 Connection Points labeled Yes and No. These 2 Connection Points must always be used as Out Connection Points, while the unlabeled Connection Points must always be used as In Connection Points. However, you can configure which side the labeled points are positioned on by Right-Clicking and selecting **Flip Yes** or **Flip No**.

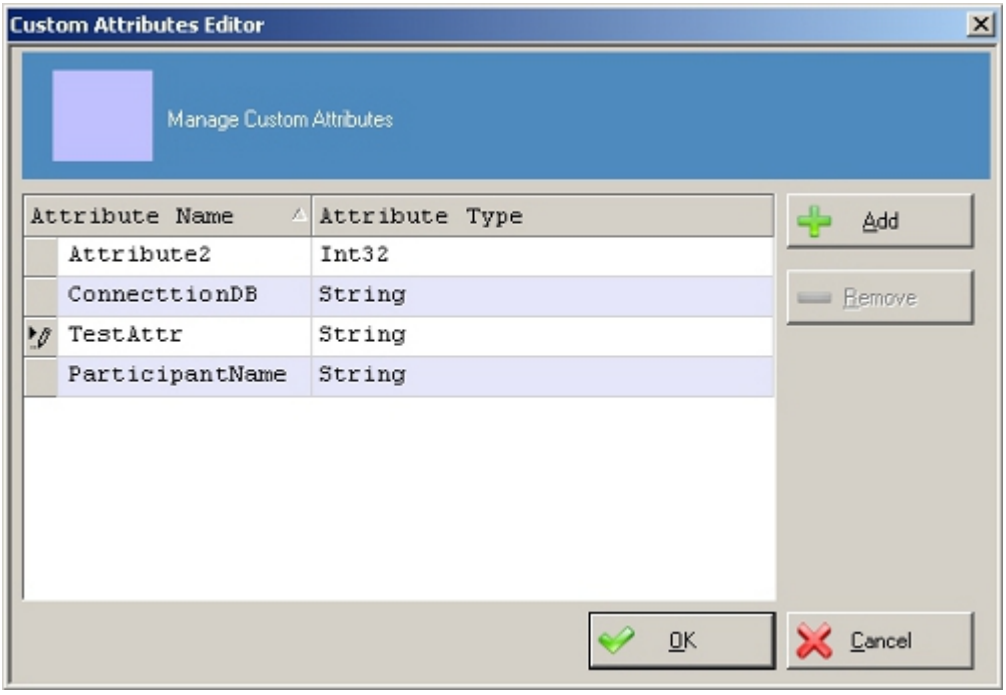
Manage Process Attributes

You can define custom attributes in your process by selecting them from a common reference point in a dialog box, rather than typing the exact name in the data binding field. This additional setup step declares your attributes in a common location in the process template, but it can save you time and effort if you want to use many custom attributes in your process.

1. Declare your custom attributes for use throughout the process template:
    a. In AgilePoint Envision, open a process template, and select the process template to display its properties in the right pane.
    b. Below the properties box, click the **Manage Process Attributes** link.



    c. In the **Manage Custom Attributes** window, click **Add**.



d. In the **Attribute Name** column, enter the name of the attribute you want to create.

e. In the **Attribute Type** column, select the data type for the attribute.

f. When you have finished adding all attributes you want to create, click **OK**.

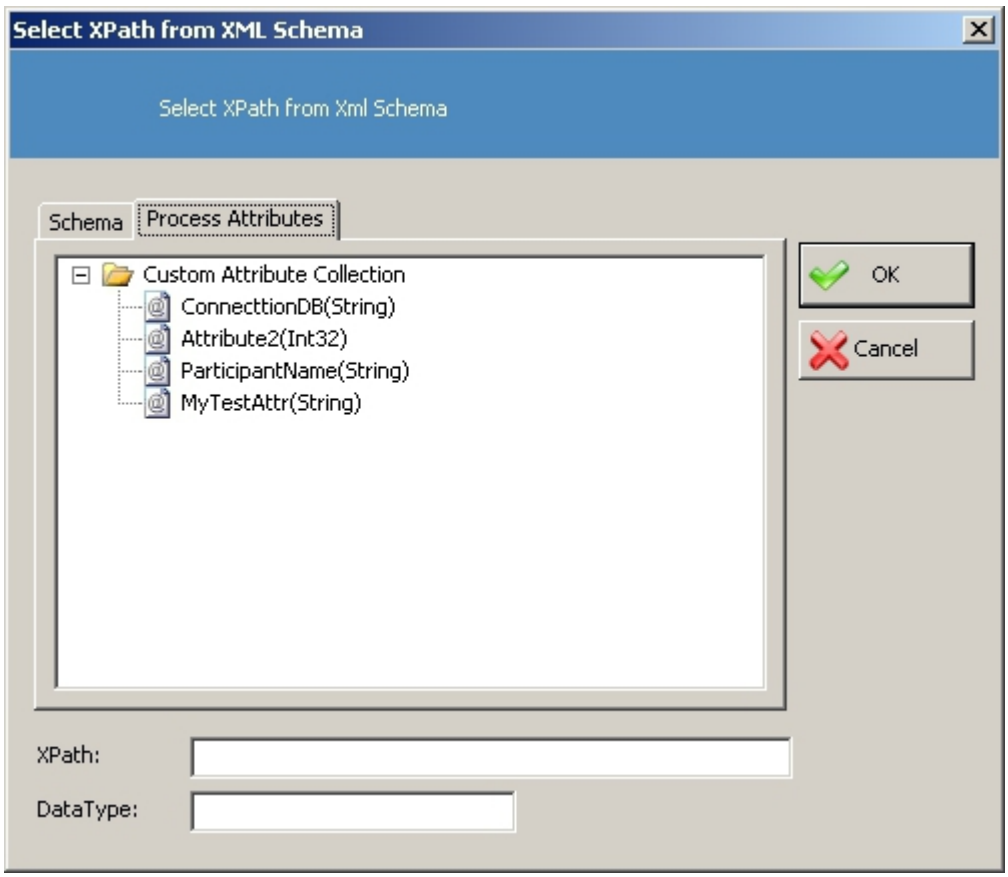
2. Select the custom attributes you want to use:

a. Drag any AgileShape that uses data binding onto your process template – for example, the **Participants** property in a **Manual** activity.

b. Select the shape you added. In the property where you want to use the custom attribute, click the appropriate field to open the schema binding dialog box. (From the previous example, for a **Manual** activity, in the **Participants** list, click **Add Participant**.)

c. In the **Data Binding** field, click the **Ellipses** (…) button.

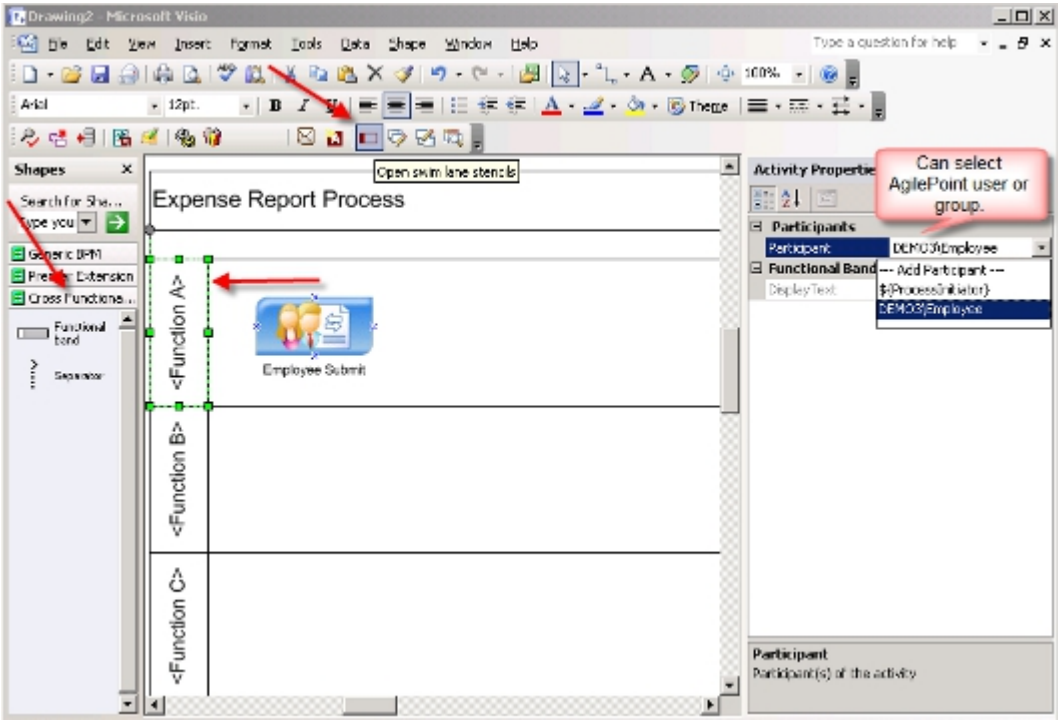
d. On the **Select XPath from XML Schema** dialog box, click the **Process Attributes** tab.



e. In the **Custom Attribute Collection** list, select the attribute you want to use, and click **OK**.

Using Swim Lanes in Envision

Swim Lanes allow for blocks to be added to the modeling canvas that belong to a particular AgilePoint group, role, or a single participant. When a manual activity is added to a Swim Lane, the AgilePoint group, role, or participant is automatically assigned based on which Swim Lane the manual activity is dropped (i.e. where Swim Lanes are tied to participant(s).



Registering a custom AgileShape

Custom AgilePart and AgileWork components must be registered before they can be used in a process template. Registration requires that a .NET assembly (containing at least one AgilePart and/or AgileWork component) be imported into AgilePoint Envision.

To register a custom AgilePart:

1. Use the **File > Extend AgilePoint > Register AgilePart** menu command.

To register a custom AgileWork:

1. Use the **File > Extend AgilePoint > Register AgileWork** menu command.

Applying Process Attributes

Process attributes can be initialized, updated, and/or retrieved directly from within the process model. For example, the Single Condition and Multiple Condition AgileShapes allow you to route the process flow based on whether the current value(s) of specified process attributes match criteria defined by the process modeler from within AgilePoint Envision.

Furthermore, several built-in AgileShapes allow the process modeler to initialize and/or modify the value(s) of one or more process attributes. For example, the C# Snippet AgileShape allows the process modeler to initialize and/or modify the value(s) of one or more process attributes to a value derived by executing a specified fragment of C# code at run time. This allows even non-developers to update the values of process attributes to values as simple as a literal value (e.g. a number, date, or string). With very minimal training, it also allows for more complex and dynamic functionality such as increasing a numeric attribute's value by 1, setting a date attribute to the current time, etc.

As another example, the SubProcess AgileShape allows the modeler to specify values for "initial attributes" that will be pre-initialized for the sub process instance that will be created at run time. Other AgileShapes also provide ways for non-developers to configure process attributes, and custom AgileShapes allow you to add virtually any type of additional "data field" configuration capabilities you may require directly into the process modeling environment.

Data Services

This section provides information and instructions about how AgilePoint Data Services is used to collect and track application data.

The Data Services includes two core components:

- **Data Population** - Data Population allows you to write to a database the desired application data values. The data can then be used for reporting purposes.
- **Data Tracking** - Data Tracking provides the functionality to set up fields in AgilePoint Envision to be monitored for changes to application data, for example you can see for a specific field on a form, the **Old Value** and if the data changes, the **New Value**. This viewpoint is provided via the AgilePoint Enterprise Manager Data Tracking tab.

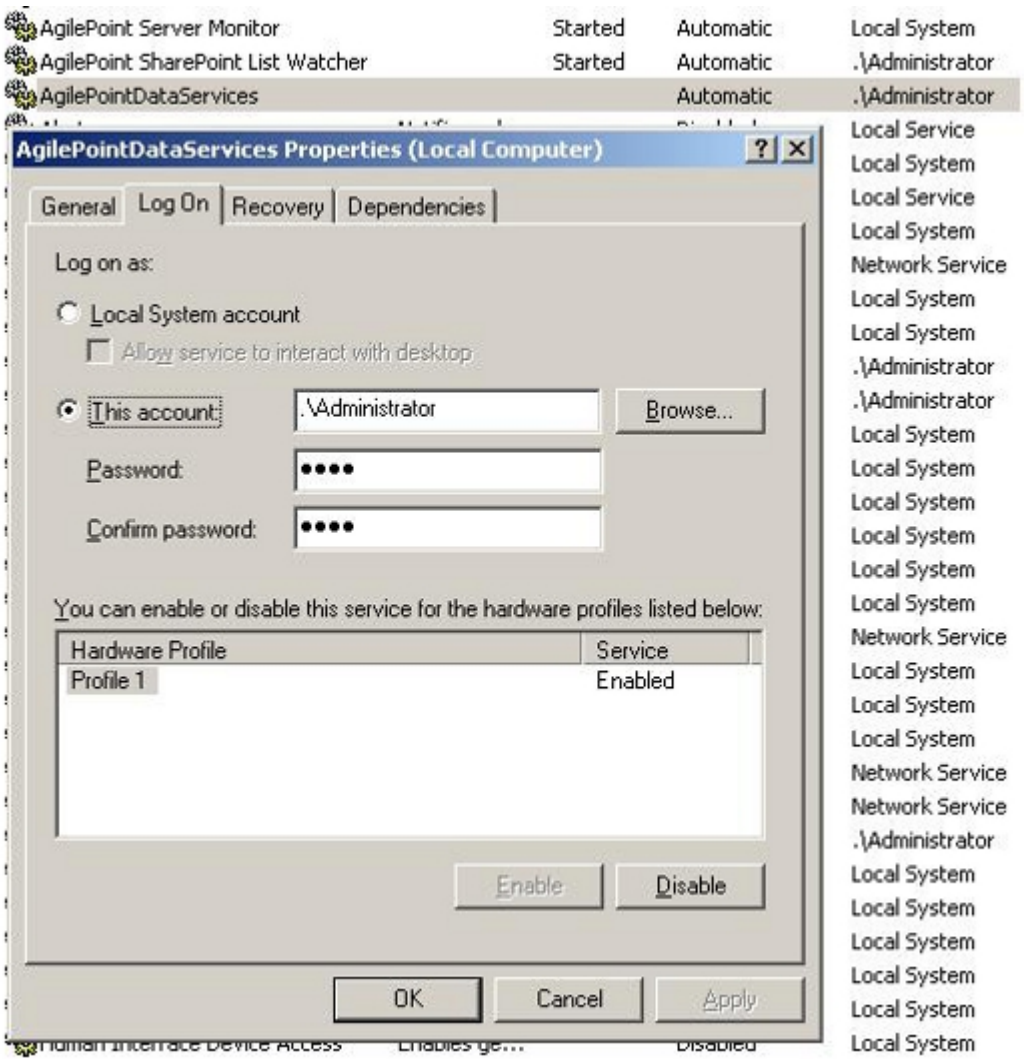
Configure the Windows Service for Data Services

1. Open the **DataServicesWindowsService.exe.config** at C:\Program Files\AgilePoint\AgilePoint Data Services and change the following properties accordingly:
   - **DbConnectionString:** This connection string should point to the Database which contains the **WF_DATA_TRACKING** table where the output of the data tracking is stored.
   - **TempDbConnectionString:** This connection string should point to the Database which contains **WF_DATA_SERVICE_TEMPDB** which is populated by the AgileConnector with the before and after XML values. Set this to the same value that is configured for the Agileconnector.
   - **EnableDataPopulation:** Set this to **true** to enable Data Population.
   - **EnableDataTracking:** Set this to **true** to enable Data Tracking.
   - **TimerInterval:** This is the timer interval used by the Windows Service to check for any new entries in the Temporary database. On a production system, this can be set to a high interval like 3600 (i.e. one hour).

Change the Logon Credentials

Before starting the Windows Service, change the Log On credentials to Administrator (as the Local Service account which is the default used by the Windows Service does not have enough access privileges to AgilePoint Server). This can be done as follows:

1. Open the Services console.
2. Right-click on the **AgilePointDataServices** and open the Properties window.
3. On **Log On** tab, select **This account**, and enter the Administrator account information as follows:



4. When finished, click **OK**.
5. Start the Windows Service.

Modify the Enterprise Manager web.config

1. Add the following element under **<AppSettings>** in the Enterprise Manager **web.config** file:

```
<add key="DataTrackingConnectionString"
  value="<Connection string>" />
```

Add a valid connection string depending on your database that is used for data tracking.

Example:

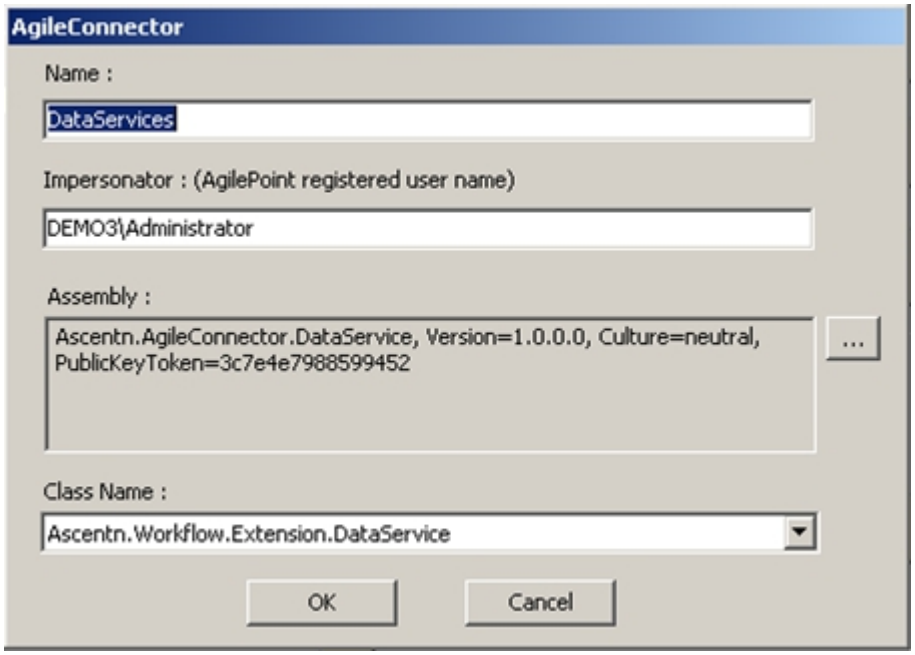
```
<add key="DataTrackingConnectionString"

 value="server=[hostname];database=AgilePointTracking;trusted_connection=true"
    />
```

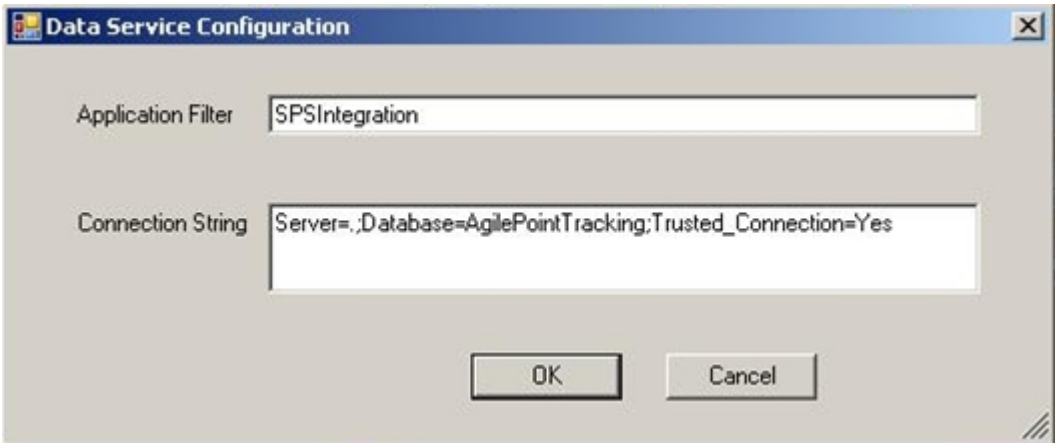
The web.config file for Enterprise Manager can be located at: C:\<AgilePointServer>\EnterpriseManager

Enable the Server Extension

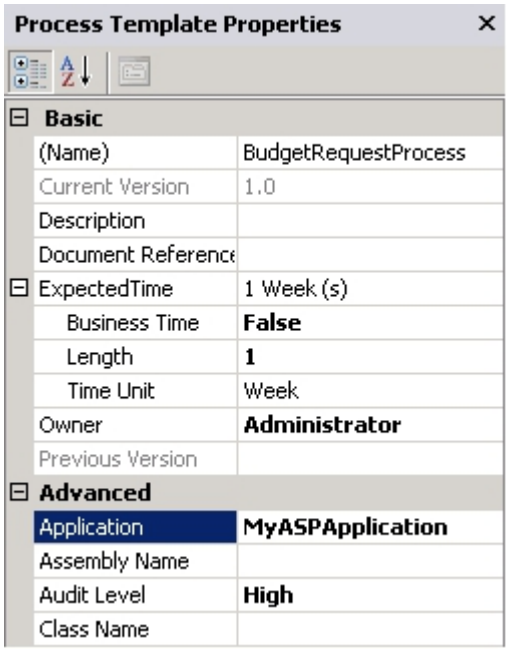
1. Open the AgilePoint Server Configuration utility and go to the Extension window.
2. Click the **Add** button.
3. Click the **Ellipses** button on the **Extension** window and add the following assembly: **…\AgilePointServer\bin\Ascentn.AgileConnector.DataService.dll**



4. Give the AgileConnector a unique name based on the Application for which it will be associated.
5. Click **OK**.
6. Click the Configure button and configure the Data Service as shown in the following screen capture.



7. The Application Filter field should be set to SPSIntegration for InfoPath applications, for ASP.NET applications, set the Application Filter name to the Application name specified in the Process Template (e.g. MyASPApplication as shown below).



8. Ensure that the Connection String points to a valid database that contains the Temporary tracking table for the Data Services.
9. Click **OK**.

Data Population

Data Population allows you to write to a database (SQL or Oracle) the desired application data values. The data can then be used for reporting purposes. For Data Population, the data tracking database

that is created should include table columns based on the fields from the form, the Primary Key should be the Process Instance ID.

The configuration is done via AgilePoint Envision.

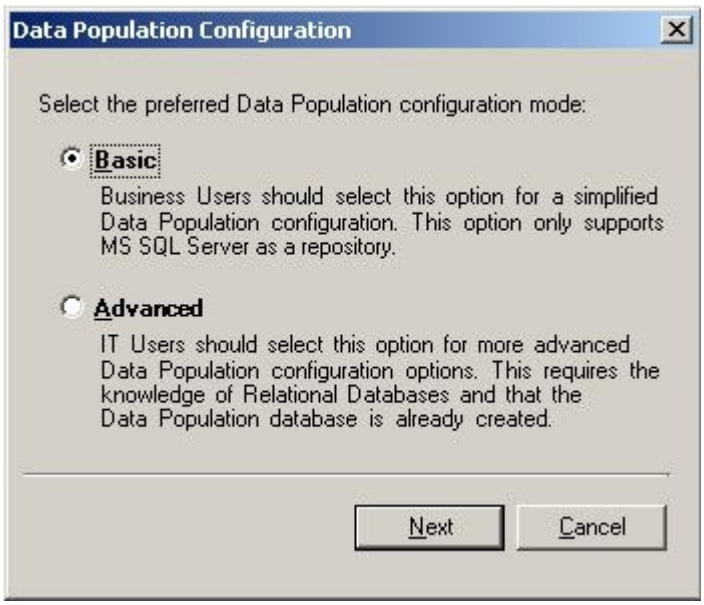
To setup the Data Population:

1. Click the **Data Population** link in the Process Templates Properties pane.

   The Connecting to Server window appears.

2. Select the Logon type and click **OK**.

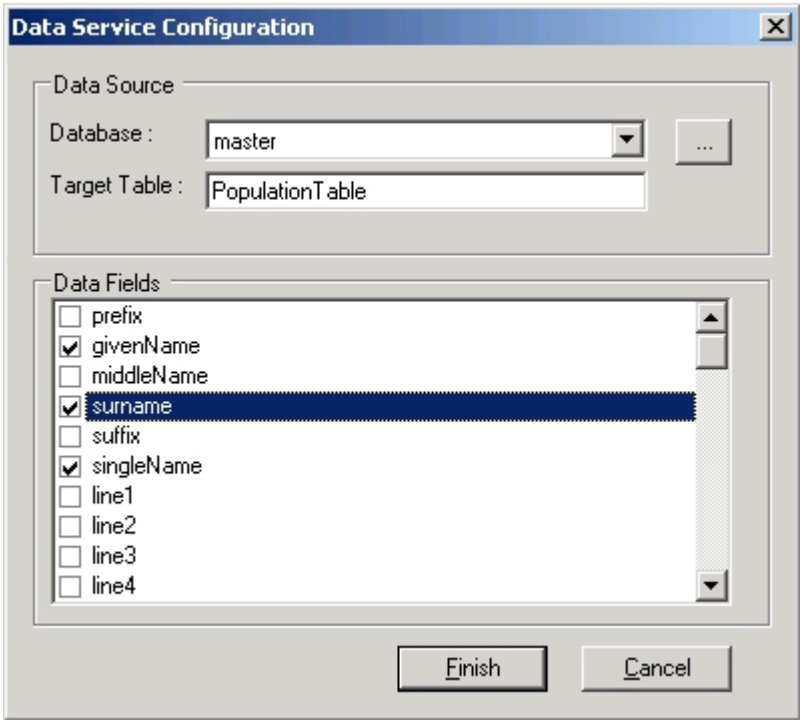
   The Data Population Configuration window appears. This windows allows you to select either a **Basic** or **Advanced** way of configuring the repository and setting up the mapping for data population.



3. Select one of the following:

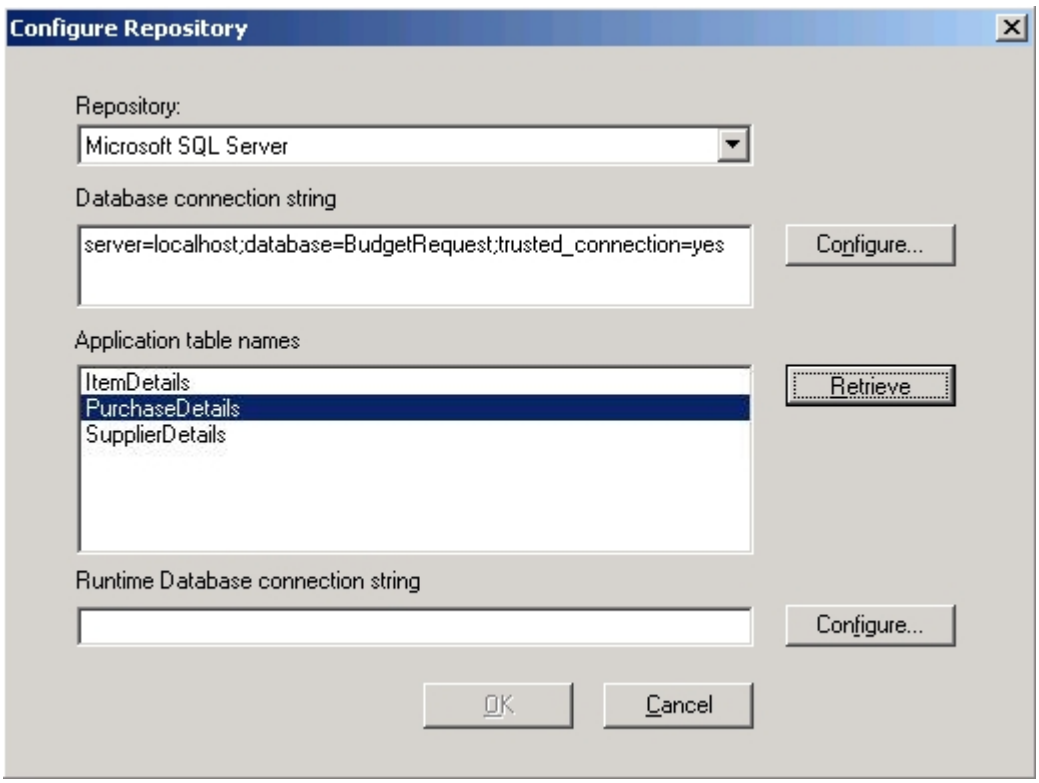
- **Basic** - Suitable only for development environments where the data source resides on the same machine as the AgilePoint Envision client.
- **Advanced** - Suitable for environments where the data source resides on a separate machine from the AgilePoint Envision client.

If you selected the **Basic** option, the Data Service Configuration window appears.



1. Click the **Ellipses** button to populate the database list with all the databases on the server.
2. (Optional) Change the **Target Table** name if desired.
3. Select the Data Fields from the forms schema for which to populate data to the database.
4. Click **Finish**.

If you selected the **Advanced** option, the Configuration Repository window appears.



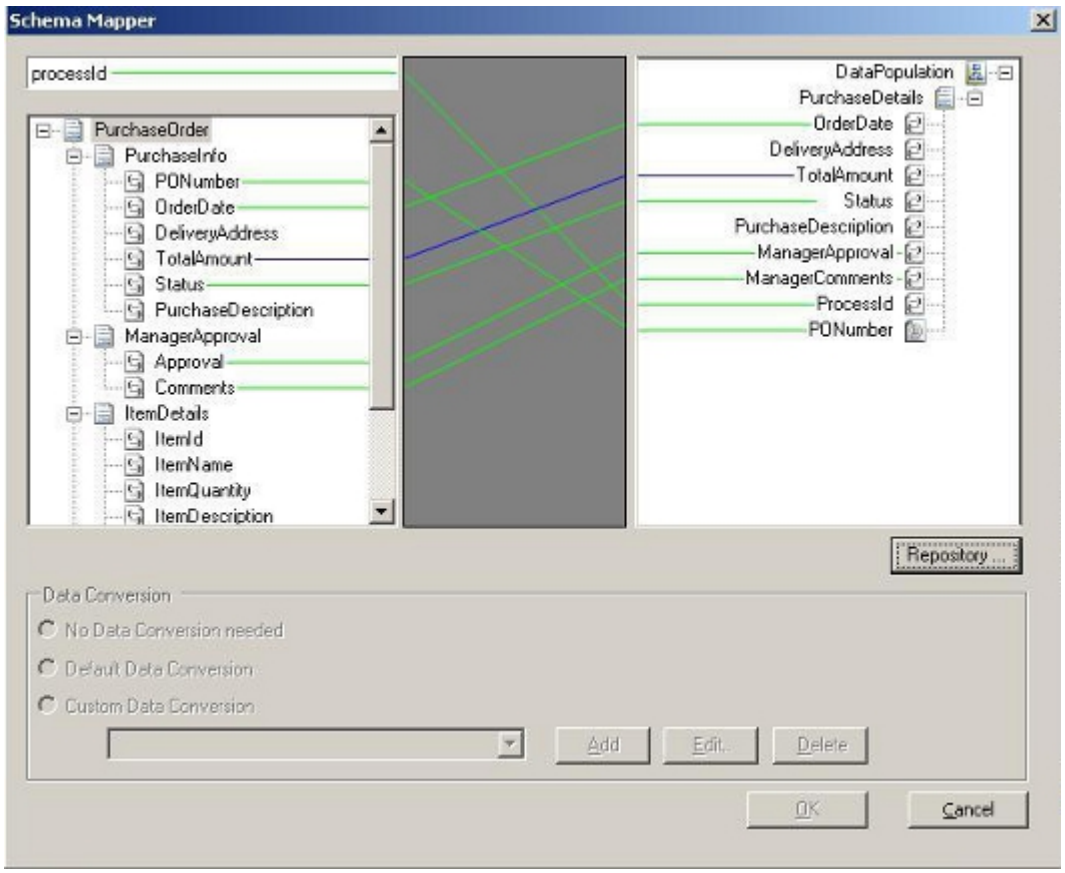
1. In the **Repository** field, select either Microsoft SQL Server or Oracle to write the data to a database, or SharePoint list to write the data to a SharePoint list.
2. Do one of the following:

- If you have chose to write the data to a database:

1. Click the **Configure** button to configure the database connection details.
2. Click the **Retrieve** button to retrieve the database table names.
3. (Optional) In the **Runtime Database connection string** field, enter the database connection string that will be used at runtime.
4. Click **OK**.

- If you have chosen to write data to a SharePoint list:

1. In the **Site URL** field, enter the SharePoint Site URL for the list and click the green arrow to sync with the list.
2. In the **List Name** field, select the list(s) name(s) for which to populate data. Also select the Primary Key to be used for each list.
3. (Optional) In the **Runtime Server URL** field, enter the SharePoint site URL that will be used at runtime.
4. Click **OK**. The Schema Mapper window appears.



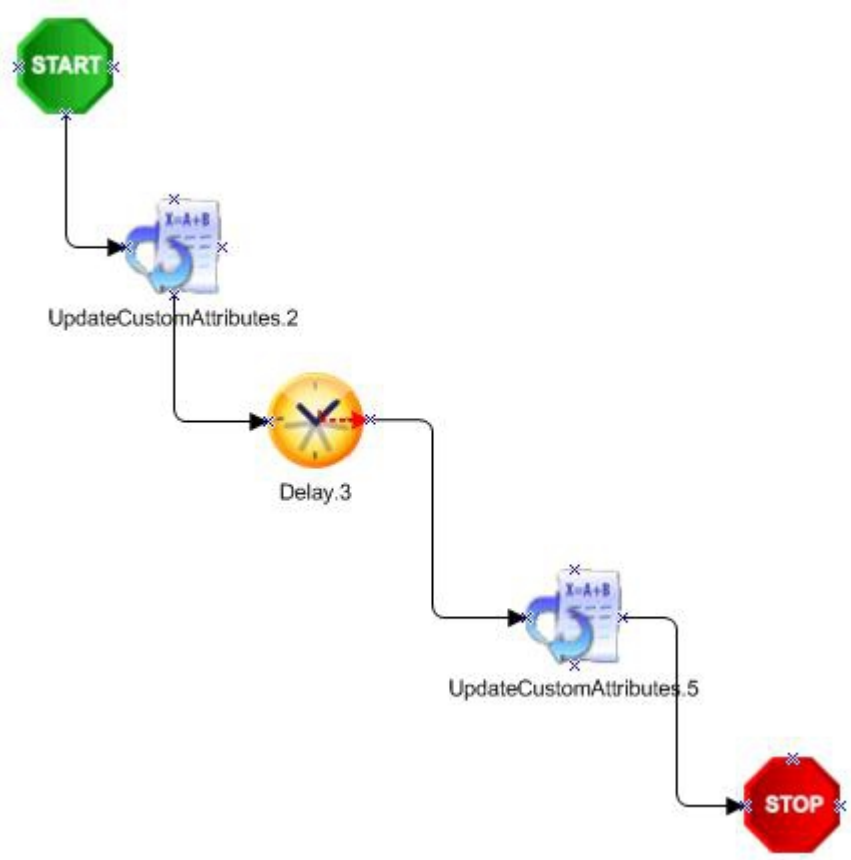
The left window pane shows the form's Schema, the right side shows the database structure.

5. Map the fields accordingly from the form's schema on the left to the database fields (and all the attributes on the right). To map an element to the processId drag and drop as usual to the respective field, while mapping to a processed, the right element must be of type string, else it will give an error message.
6. You will see the connection lines appear as shown above. The connection lines may show different colors based on the compatibility of the data types as follows:
   - **Green** - The data type matches.
   - **Blue** - The data type does not match, the system will handle the conversion.
   - **Red** - The data type does not match, custom data conversion is required. In this case, click the Add button and add the custom mapping code as necessary to handle the data conversion.
7. After the mapping is complete, click **OK** to save the mapping and close. At runtime, the database or SharePoint List is populated with the values of the form fields.

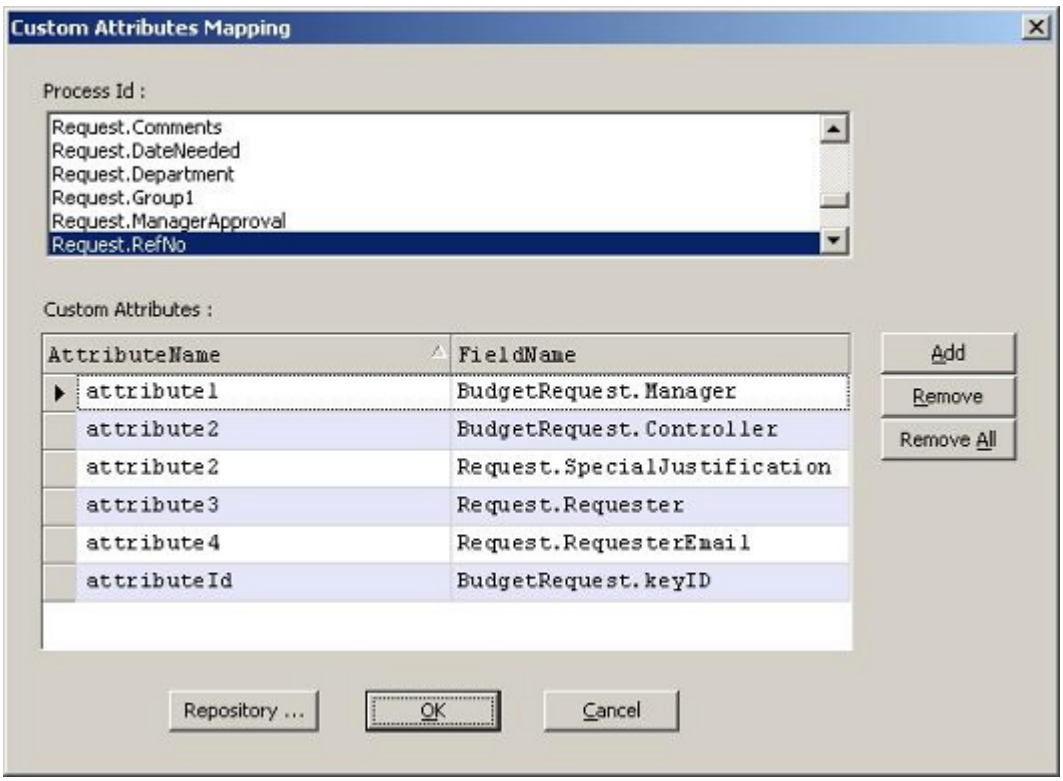
Mapping Custom Attributes to Multiple Tables

The following instructions are a use case for mapping custom attributes to multiple tables.

1. Create a Generic AgilePoint application without a schema.
2. Add a couple of Update Custom Attribute activities to change the Custom Attribute values. Add a Delay shape in between to observe the changes. The AgilePoint process will look something like this:



3. Click the **Data Population** link to open the Configure Repository dialog. Select the **Database as Repository** and set the Database connection string and click the **Connect** button to display the list of tables present in the specified database.
4. Select the tables that are required and set the **Runtime address string** (optional), then click **OK**.
5. In the **Custom Attributes Mapping** window, enter the attribute name in the **AttributeName** column and select the **FieldName** to which the attribute has to be mapped.



Data Tracking

Use this procedure to set up the Data Tracking.

1. Click the **Modify Tracking** link in the Process Templates Properties pane.

   The **Attributes Tracking Dialog** appears.

2. The **Conditional Data Tracking** field can be used to enable conditional data tracking and would take an expression (e.g. enter ${ to bring up the list of friendly names, select Amount and type >500 to track the data only if the Amount is greater than 500).

3. In the **Attributes to be tracked** box, select the fields for which to track from the schema.

   This information is then provided via the AgilePoint Enterprise Manager **Data Tracking** tab.

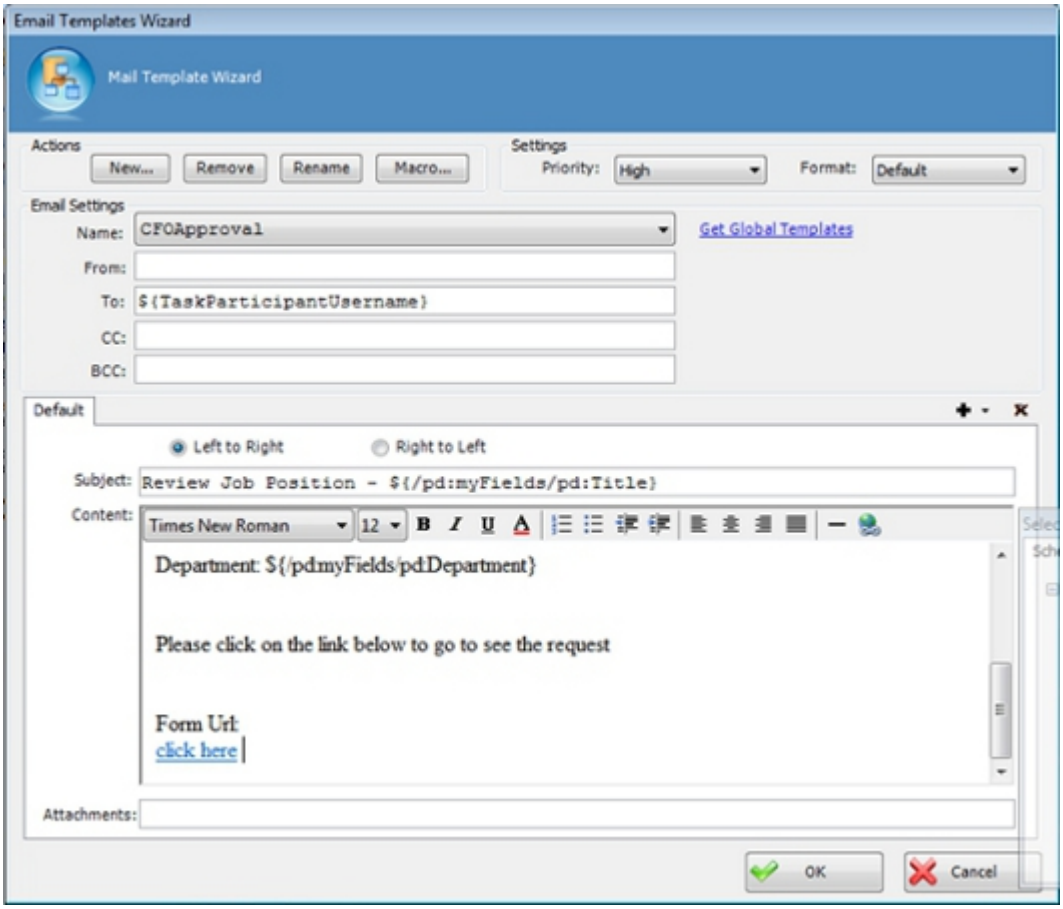
Email Templates and Notifications

Email notifications are dynamically constructed and sent at runtime using the specified Email Template in the Activity Properties toolbar. An activity can have more than one email related property. For example, an activity can have multiple email notifications related to the different stages of the activity. This allows different types of email notifications to be sent out during the different stages of an activity. The different types of email notifications include:

- **Activity Entry Email** - Email that is dynamically constructed and sent automatically to the participant(s) defined in the email template notifying them when the activity is entered.
- **Activity Exit Email** - Email that is dynamically constructed and sent automatically to the recipient(s) defined in the email template notifying them when the activity is exited.
- **Task Reassigned Email** - Email that is dynamically constructed and sent automatically to the participant(s) defined in the email template notifying them that the activity has been reassigned.
- **Activity Timeout Email** - (Available only for the Manual with Timeout activity) Email that is dynamically constructed and sent automatically to the participant(s) defined in the email template notifying them when the activity pasts its due date.
- **Reminder Email** - Email that is dynamically constructed and sent automatically to the recipient(s) defined in the email template reminding them of an activity to complete. The Reminder Email Notification can be configured to be sent at recurring intervals.

Email Template Window

This section provides information and instructions about how to use the fields in the Email Template. The fields in the Email Template are used to specify what the participant(s) will see when the Email Notification is opened.



In addition to manually typing in the value of a field, most of the fields in the Email Template allow you to also select from a list of process attributes to dynamically populate that field at run time. To bring up the list of available process attributes, type ${ in the text box and select the process attribute for which you would like to use in that field. For example, you may want to select ${TaskParticipantUserName} in the **To** field of your Email Template. The **To** field will be populated with the user name of the task's participant.

Incoming and Reminder Emails are sent separately for each participant, while Activity Exit Emails are sent per activity (regardless of number of participants). Therefore, if your email address is in the **To** or **CC** field of the email template associated with the Activity Entry Email, you will get X number of copies of the email. If the entire list of (potential) participants is in the **To** or **CC** field, then all of the (potential) participants will receive X number of copies of the email. If you use the **${TaskParticipantUserName}** process attribute in the **To** field instead of specifying the entire list of participants in the **To** field, then for each participant, a separate email will be sent, and none of the participants will receive duplicate copies of the email.

If you want to send a single email to all of the (potential) participants (instead of separate messages), you could use the Email AgileShape to send a single email, instead of associating your template with the Activity Entry Email property of a multi-participant manual activity.

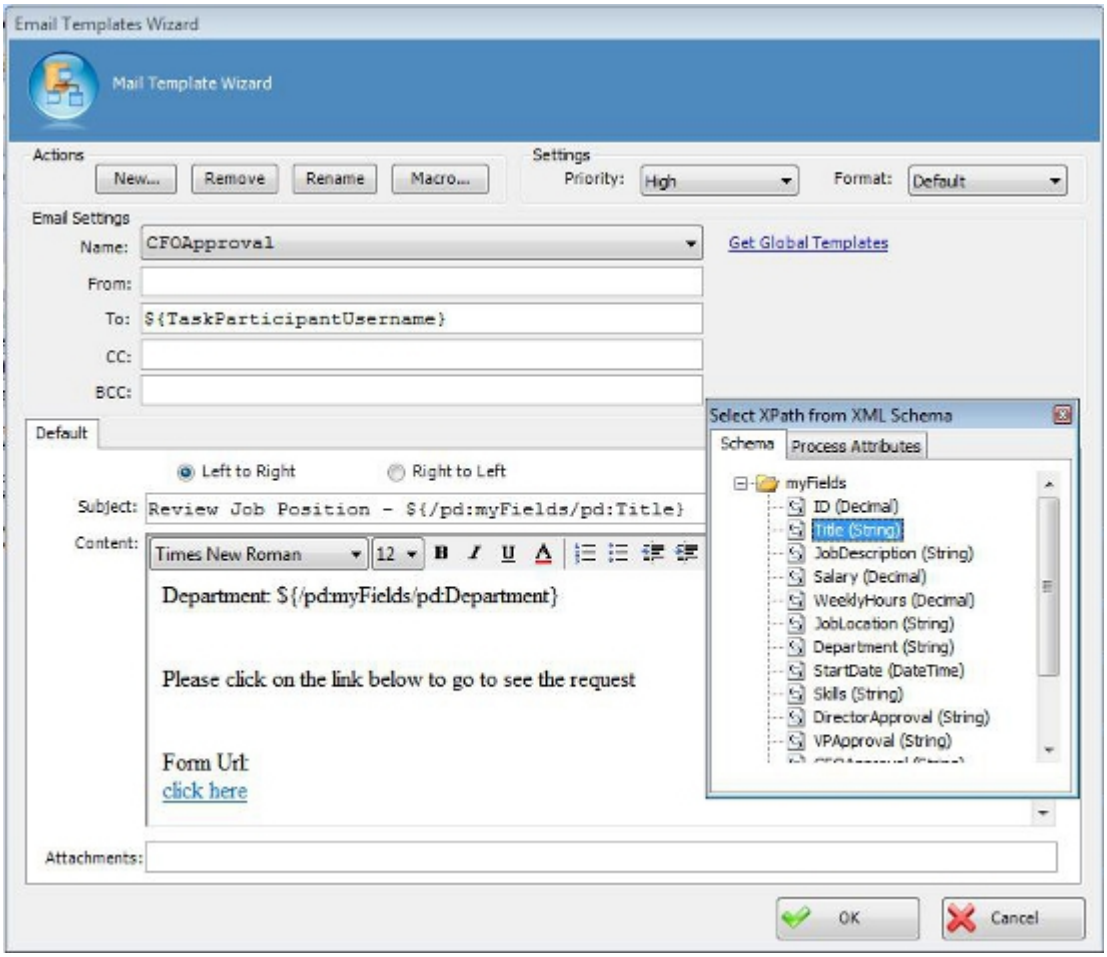
Field Definitions

Field Name	Definition
Name	The Name field is used to display the name of an Email Template. The name specified should be meaningful to the process modeler.
From	The From field is used to specify what gets displayed in the From field of the Email Notification. This field supports the use of pre-defined process attributes. When a pre-defined process attribute is used, the "domain\username" will be converted automatically.
To	The To field is used to specify what gets displayed in the To field of the Email Notification. This field supports the use of pre-defined process attributes. When a pre-defined process attribute is used, the "domain\username" will be converted automatically. You can add multiple entries by separating them with a semicolon.
CC	The CC field is used to specify what gets displayed in the CC field of the Email Notification. This field supports the use of pre-defined process attributes. When a pre-defined process attribute is used, the "domain\username" will be converted automatically. You can add multiple entries by separating them with a semicolon.
Subject	The Subject field is used to specify what gets displayed in the Subject field of the Email Notification. This field supports the use of pre-defined process attributes.
Priority	The Priority field is used to specify the priority setting of the Email Notification. Valid values for this field include: Normal, High, and Low.
Format	The Format field is used to specify the format for which the content of the email will be displayed. Both HTML and plain text are supported formats for email. HTML is set as the default as part of the SMTP settings during the Server Configuration process. To send email in plain text format, select Text from the drop-down list.

Field Name	Definition
Left to Right/Right to Left	The Left to Right and Right to Left option buttons allow you to change the alignment for which text is inserted into the content section of the Email Template.
Content	The Content field is used to type the custom message to be displayed in the body of the Email Notification. This field supports the use of pre-defined process attributes. In order to show a URL link as a clickable HTML link in the email notification, the URL link must be entered into the email template with the HTML tags. The following is an example of how to include an URL link with HTML tags: Please click this link to invoke the Request Form. </br>
Attachments	The Attachments field is used to specify any files that you would like to include in the Email Notification. To attach a file to the notification, type in the full path of the file e.g., C:\My Documents\sample.doc. You can also use a custom attribute to attach a file to the notification e.g., ${AttachDoc} or ${HomeDirectory}\...

Email Template Process Attributes

When you create an email template, you can select from a list of built-in process attributes to automatically populate a field in your email template. A built-in process attribute is simply a name that has been assigned to represent a specific variable in a process. For example, you can select ${ProcessInitiator} in the **From** field of your email template. This way, the user name of the Process Initiator will be used in the **From** field of your email.



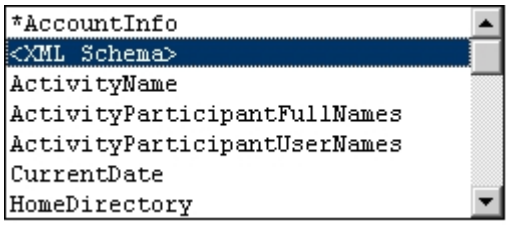
Data Binding in an Email Template

AgilePoint allows you to use built-in process attributes that access InfoPath XML Schema or SPDoc metadata. In InfoPath based process instances, you can access all or part of the form's XML. Using the special $/ attribute contains the XML of the entire InfoPath form. By specifying an XPath expression $/{XPathExpression} (in place of a custom attribute name), you can access a specific section or element of the XML.

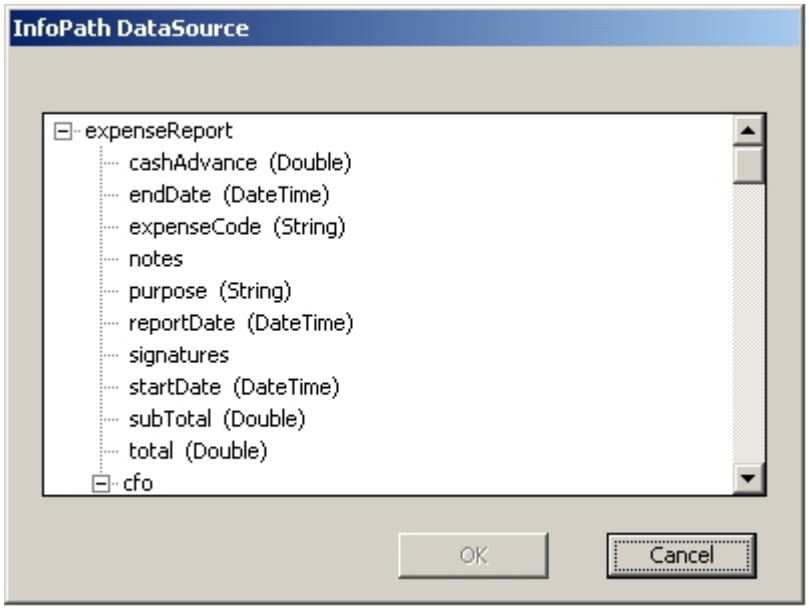
E.g. $/*, $//*, $/exp:expenseReport, ${/exp:expenseReport/exp:startDate}

To access an InfoPath Form's XML Schema or SPDoc metadata:

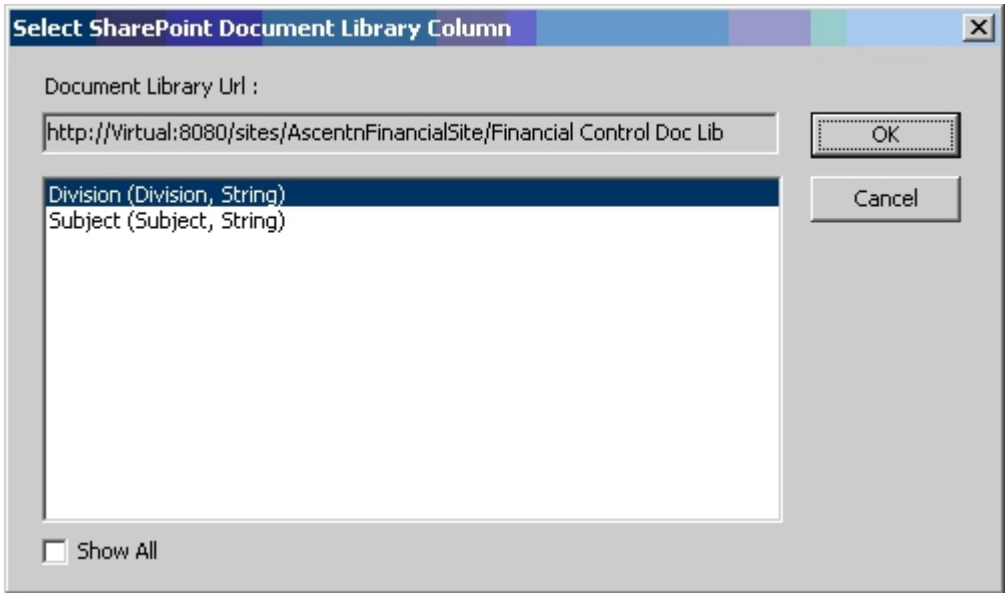
1. Type **${** in the body of the email template to bring up the list of available process attributes.



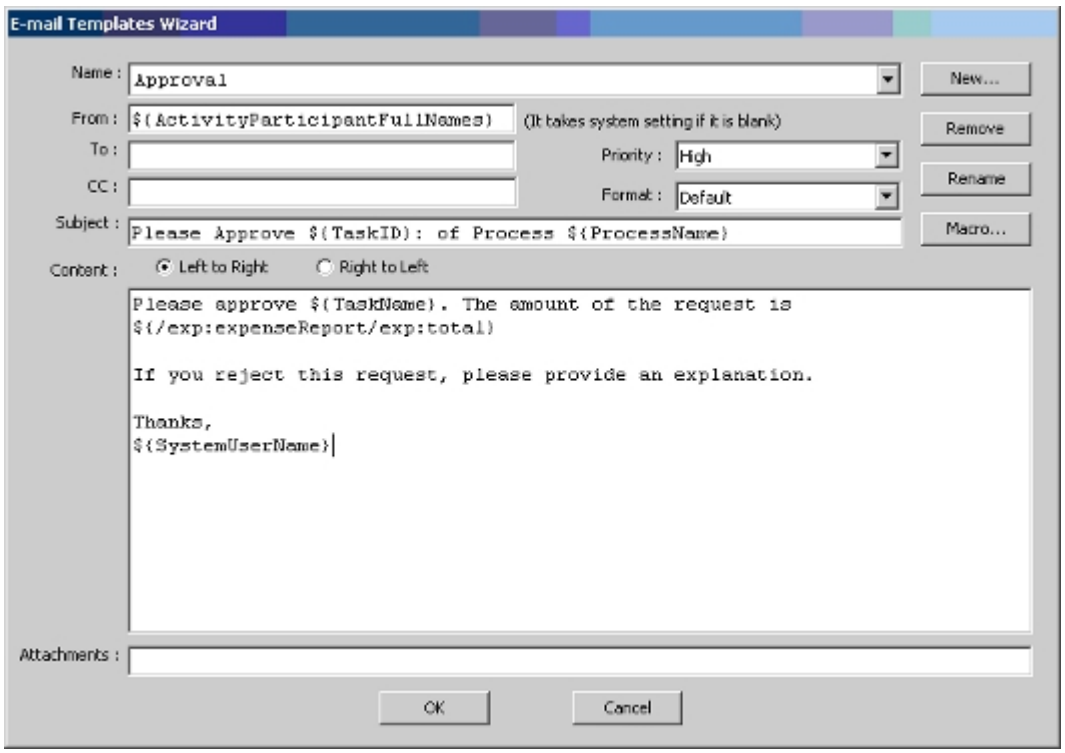
2. Select **<XML Schema>** from the list. The InfoPath DataSource window appears.



For SPDoc, the Select SharePoint Document Library Column window appears.

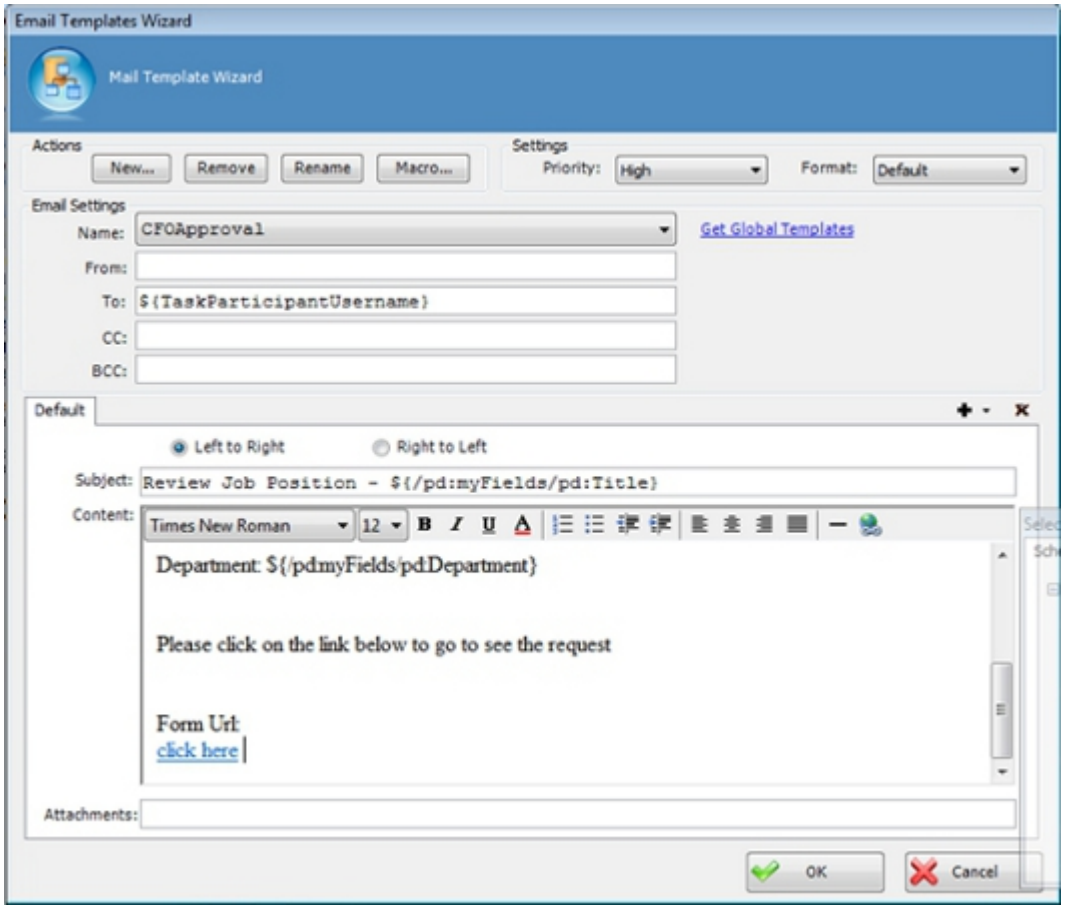


3. Select the data column for which you would like to associate.
4. Click **OK**. The association is shown below.

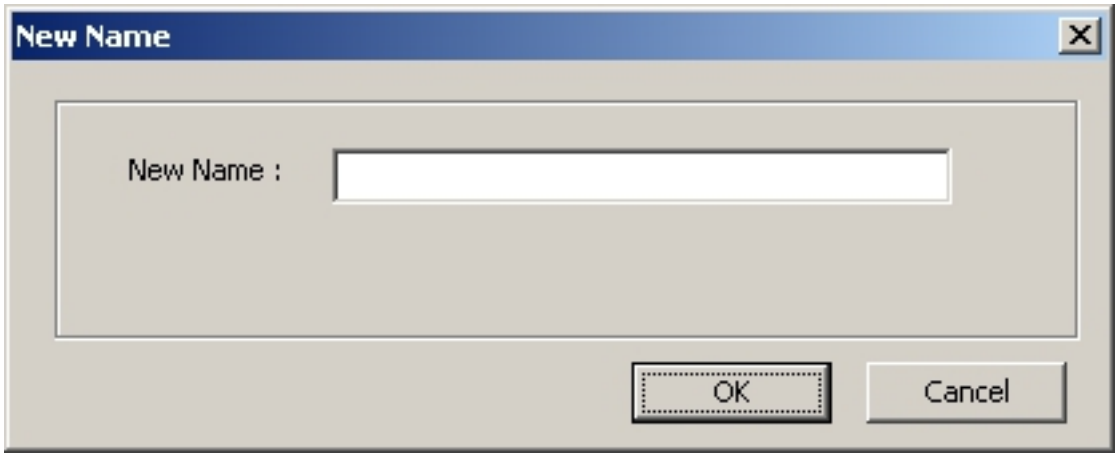


Create a new Activity Entry Email Notification

1. Access the Email Templates Wizard. The Email Templates Wizard can be accessed using the **View > Email Templates Wizard** menu command. It can also be accessed by selecting the **Add Mail Template** option (shown below) in the Activity Properties toolbar.



2. Click the **New** button. The New Name window appears.

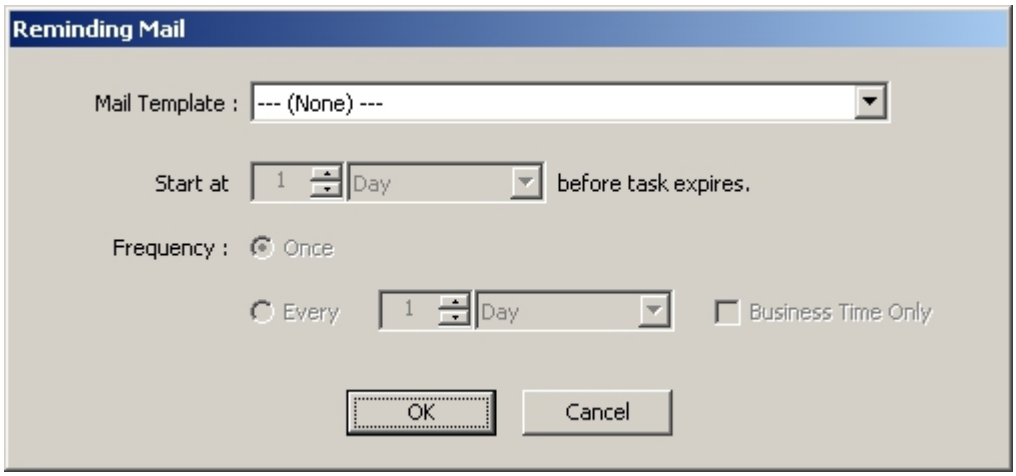


3. Type a name for the new email template and click the **OK** button. The Email Templates Wizard reappears with the name of the new email template.
4. Complete the **From**, **To**, **CC**, and **Subject** fields. For more information, see Email Template Fields.

5. Select the priority to be assigned to the email. **Normal** is set as the default.
6. Select the format for which the email content will be displayed. Both HTML and plain text formats are supported.
7. Type the content of the message. The **Left to Right** and **Right to Left** option buttons allow you to customize the alignment of the content.
8. (Optional) To attach a file to the email, type the full path of the file in the **Attachments** text box (e.g., C:\My Documents\sample.doc). To attach multiple files, use a semicolon.
9. Click the **OK** button. The Email Notification is now part of the process. The same steps can be repeated to create Outgoing, Reassigning, and Activity Timeout Email Notifications. For more information, see Email Template Window on the AgilePoint Support Portal.

Create a Reminder Email Notification

1. In the **Activities Toolbar**, place your cursor in the **Reminder Email** text box and click the button to open the Reminding Mail window.



2. Select a specific Email Template that should be used to generate the reminder email notification(s).
3. Configure the start time (relative to the activity's expiration) and the frequency of recurrence for which the email notification(s) will be sent.
4. Click **OK**. The Reminder Email Template is now part of the process.

Approval Email Templates

You can create an email template for the Activity Entry Email that participants will use to indicate approvals.

Create a Text-Based Approval Email Template

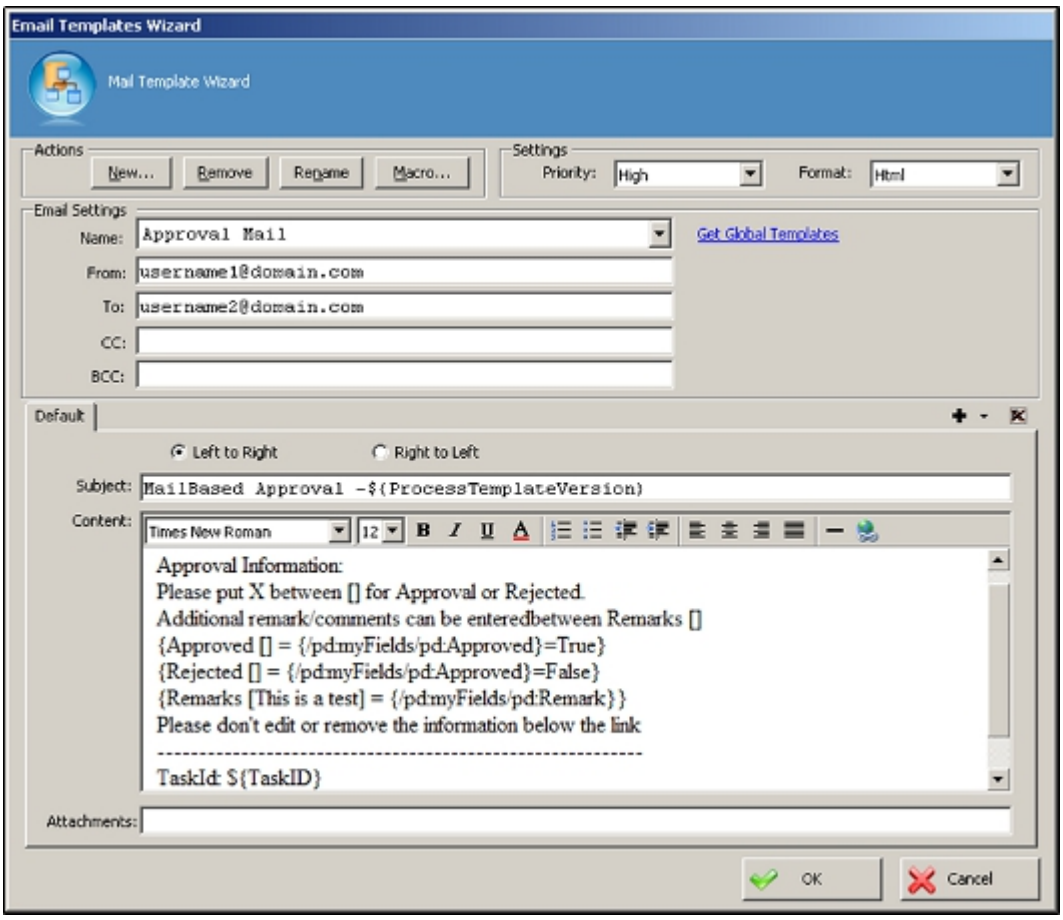
You can create an email template for the Activity Entry Email that participants will use to approve a request using a text-only format.

In the email body, include the following information. Note that the terms used in the email can follow the format approved/rejected, or yes/no.

Approval Keywords	Rejection Keywords
{Approve [] = {*Xpath-Node*}=*Value*}	{Reject [] = {*Xpath-Node*}=*Value*}
{Approved [] = {*Xpath-Node*}=*Value*}	{Rejected [] = {*Xpath-Node*}=*Value*}
{Yes [] = {*Xpath-Node*}=*Value*}	{No[] = {*Xpath-Node*}=*Value*}

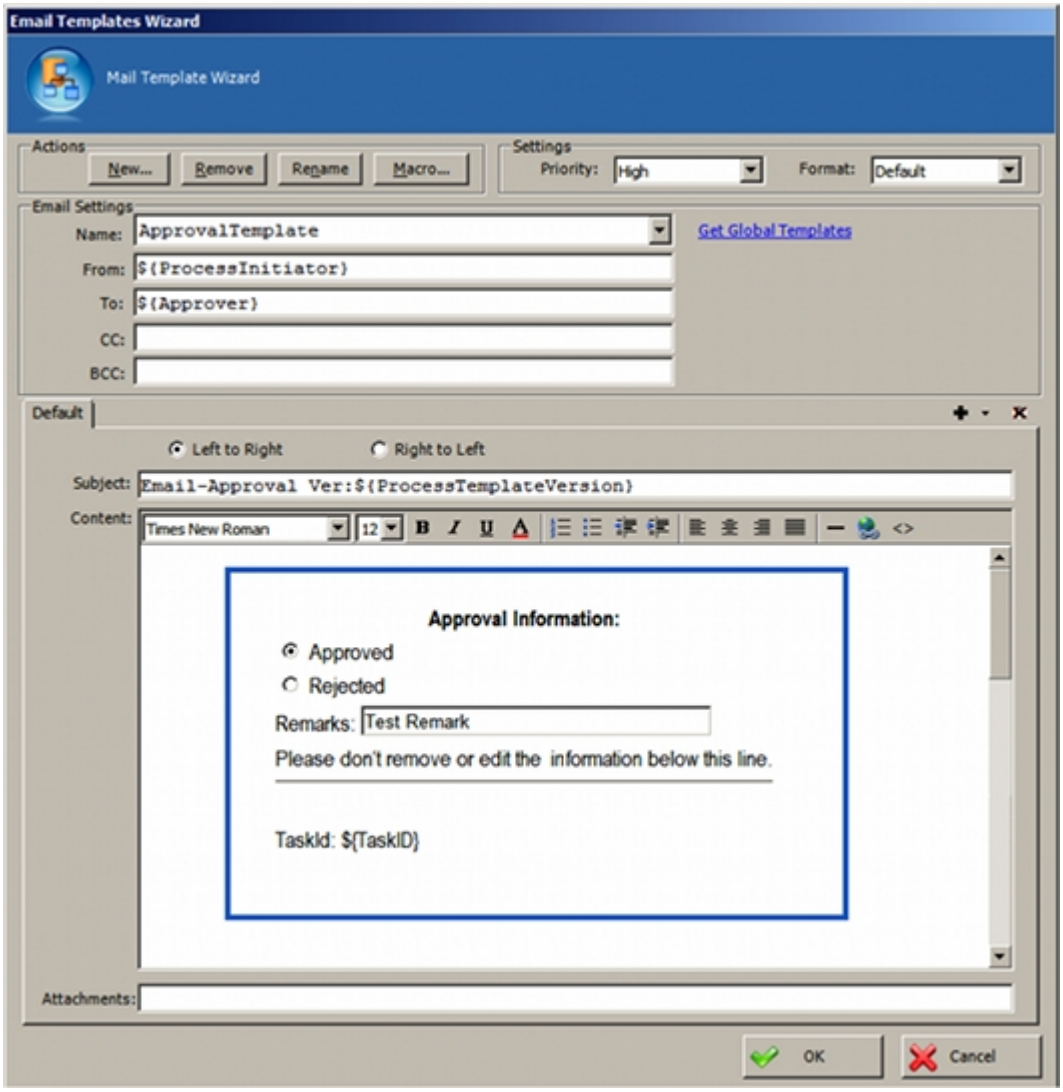
{Remarks [] = {*Xpath-Node*}}

- ***Xpath-Node*** represents a valid Xpath node -- for example, {/pd:MyFields/pd:Approval}
- ***Value*** represents the value you want to pass when the user selects this option. A common usage is True or False. The action that is selected with the X will be processed along with any information in the remarks section.



Create an HTML-Based Approval Email Template

You can create an HTML-based email template for the Activity Entry Email that participants will use to approve a request.



To create an HTML-based email templates for approval:

1. In the **Email Templates Wizard**, click the **HTML code** button (**< >**).
2. In the email body, paste the following HTML code.

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
<HTML><HEAD><TITLE></TITLE>
<META http-equiv=Content-Type content="text/html; charset=utf-8">
<META content="MSHTML 6.00.6001.18319" name=GENERATOR>
   </META></HEAD>
<BODY bgColor=#ffffff>
<STYLE type=text/css>
<!--
p.one
{border-left-color:#397dd0;
border-bottom-color:#397dd0;
margin-left:50px;
width:500px;
border-top-style:solid;
```

```
border-top-color:#397dd0;
border-right-style:solid;
border-left-style:solid;
height:225px;
border-right-color:#397dd0;
border-bottom-style:solid}
-->
</STYLE>
<P class=one style="WIDTH: 444px;
   HEIGHT: 257px"><BR>
<TABLE name="ApprovalInfo">
<COLGROUP width=25></COLGROUP>
<TBODY>
<TR>
<TD></TD>
<TH><SPAN style="FONT-FAMILY: Arial Narrow">
   Approval Information:</SPAN></TH></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">
   <INPUT type=radio CHECKED
   name={/pd:myFields/pd:Approved}> Approved</INPUT>
   </SPAN></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">
   <INPUT type=radio  name={/pd:myFields/pd:Approved}>
   Rejected</SPAN></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">Remarks:
   </SPAN><INPUT
style="WIDTH: 250px" size=25 value="Test Remark"
name={/pd:myFields/pd:Remarks}></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">Please
   don't remove or edit the information below this line.
   </SPAN></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">
<HR>
</SPAN></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">
   TaskId: ${TaskID}</SPAN></TD>
</TR>
<TR></TR>
<TR></TR>
</TBODY>
</TABLE></P></BODY></HTML>
```

3. Modify the text of the email template as required.

4. When you have finished modifying the email template, click **OK**.

Email Approval on Mobile Devices

If an approver is using a mobile device, he or she cannot use the standard email approval methods because it is not possible to edit email histories on many mobile email applications.

As an alternative to the standard text or HTML email approval methods, an approver can reply to the approval email with one of the following keywords as the **first word in the email body**.

Approval Keywords	Rejection Keywords
Approve	Reject
Approved	Rejected
Yes	No

Custom Macros

A custom macro is used to simplify the data entry task when constructing an email notification by using a single attribute name (or macro) to refer to a combination of process attributes. Custom macros are stored in the process attribute list with a "*" for easy identification and can be reused when constructing additional email notification templates in the future.

In the steps below, a macro has been created called **AccountInfo** that has been defined as:

```
${ActivityName}<br>${ActivityParticipantFullNames}
```

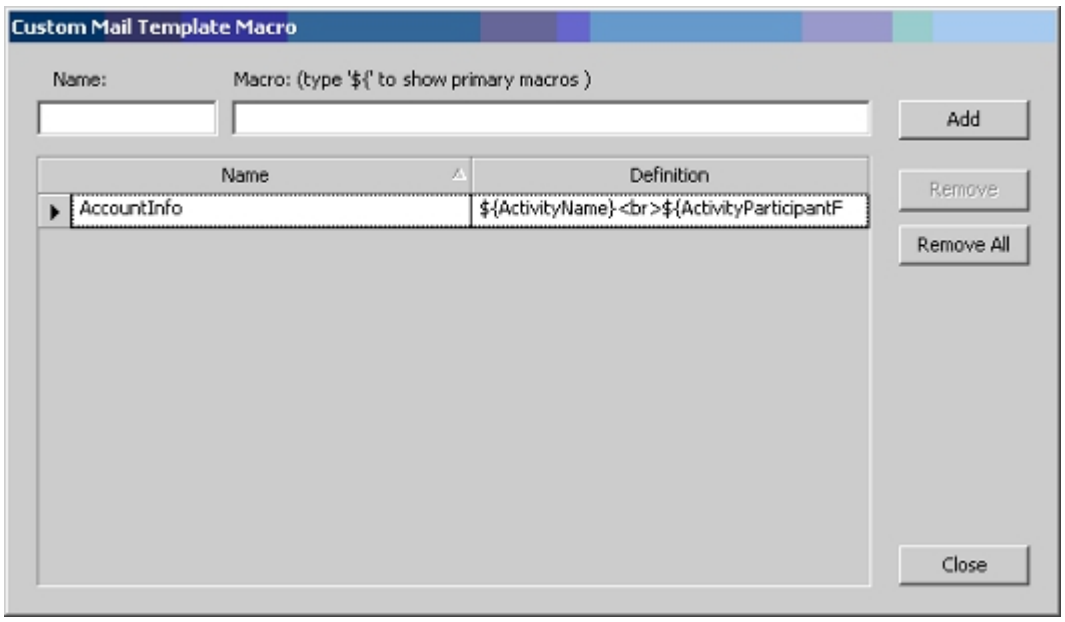
When ***AccountInfo** is selected from the process attribute list,

```
${ActivityName}<br>${ActivityParticipantFullNames}
```

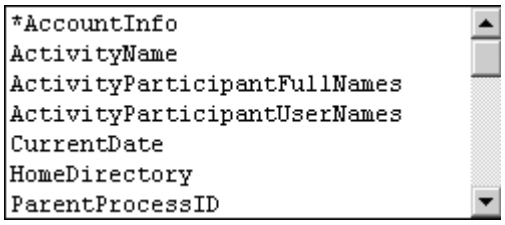
is displayed. Follow the steps below to create and use this custom macro in an email template.

To create a custom macro:

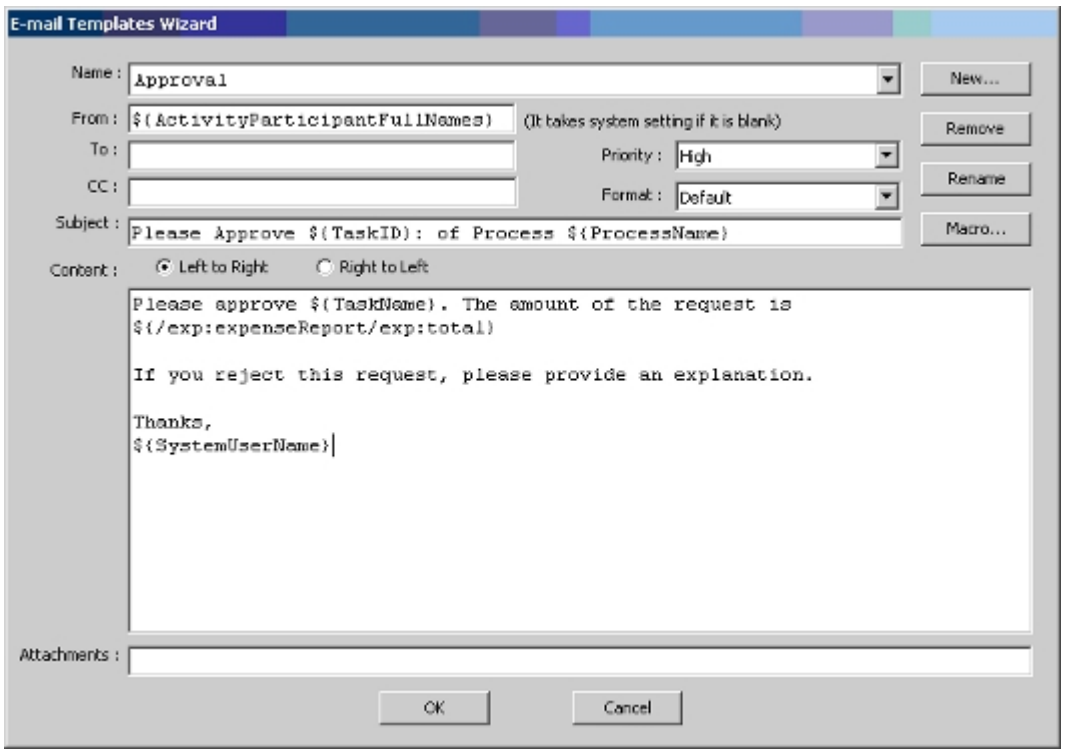
1. From the E-mail Templates Wizard, click the **Macro** button. The Custom Mail Template Macro window appears.



2. Type a name for the macro in the "Name" text box.
3. Define your custom macro in the "Macro" text box. You can use the list of process attributes to build your custom macro. In the window capture above, a custom macro called "Account Info" has been created so that when the AccountInfo macro is selected, the Activity Name and Activity Participant Full Name are inserted.
4. Click the **Add** button. The custom macro is added to the list.
5. Click the **Close** button to return to the E-mail Templates Wizard.
6. When it is time to use the macro, type **${**, the custom macro that you have created will be available in the list. Notice that the macro has a "*" next to it to identify it as a custom macro.



7. To use this custom macro, in the body of the email template, type **${** and select *AccountInfo. The macro definition is inserted as shown below.


E-mail Templates Wizard
Name :
Approval
New...
From :
$(ActivityParticipantFullNames)
(It takes system setting if it is blank)
Remove
To :
Priority :
High
CC :
Format :
Default
Rename
Subject :
Please Approve $(TaskID): of Process $(ProcessName)
Macro...
Content :
Left to Right
Right to Left
Please approve $(TaskName). The amount of the request is
$(/exp:expenseReport/exp:total)
If you reject this request, please provide an explanation.
Thanks,
$(SystemUserName)
Attachments :
OK
Cancel

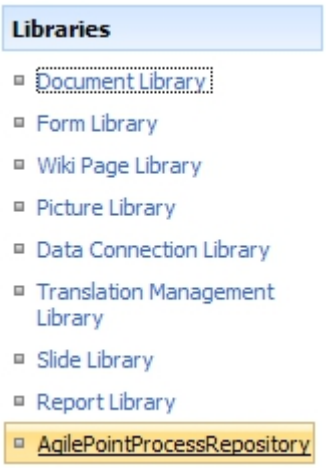
Process Repository

Process Repository enhances collaboration and process documentation where you store the .vsd file to a SharePoint Document Library, and also attach documents or a URL hyperlink to any AgilePart or AgileWork. Also supported is the ability to attach process documentation at the process level. SharePoint is used as the process repository where all artifacts of a process can be accessed.

In order to utilize the Process Repository functionality, first verify that the AgilePointProcessRepository template is available in SharePoint.

Verify the ProcessRepository Template Exists

1. On the SharePoint site, click **Site Actions > Create**.
2. Verify that AgilePointProcessRepository is available under the Libraries section.



3. You will use this template to create the process repository in SharePoint. If the site template is not shown in the list, your SharePoint site administrator will need to deploy the ProcessRepository.stp template file.

   For more information, see Deploying a SharePoint Site Template File on the AgilePoint Support Portal.

Set Up a Process Repository

To setup Process Repository in SharePoint:

1. Create a new SharePoint library and select the **AgilePointProcessRepository** template type.
2. Name the new library **AgilePointProcessRepository** or give it a desired name.

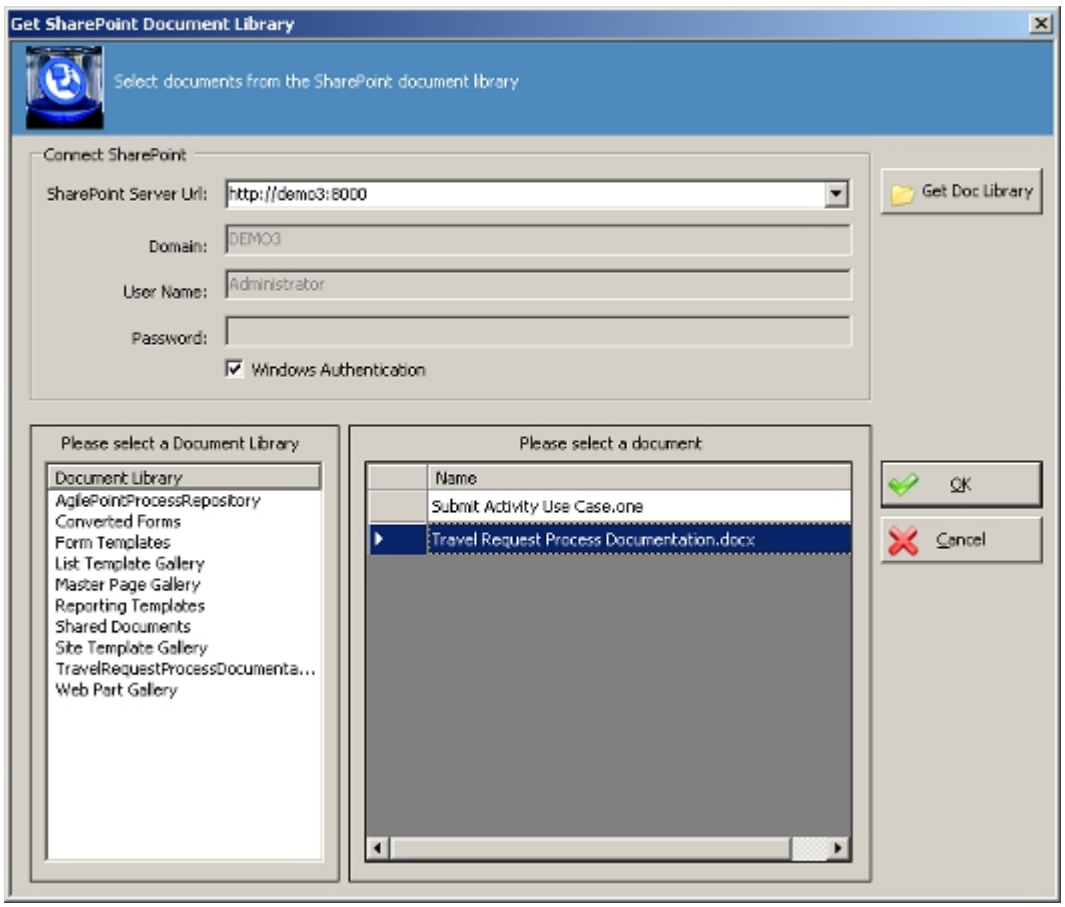
3. The AgilePointProcessRepository library is now created for you, you will use this repository to publish the .vsd (AgilePoint Process Model) for collaboration, and also access the process documentation.
4. AgilePoint Envision allows you to attach documents or a hyperlink at the process model level, and/or at the activity level (i.e. AgileParts and AgileWorks). The documents are to be stored in a SharePoint document library. If you would like to attach documents to the process, create a document library in SharePoint (e.g. Travel Request Process Documentation) to store the process documentation.

Setup Process Discovery in AgilePoint Envision

AgilePoint Envision allows you to attach documents or a hyperlink at the process model level, and/or at the activity level (i.e. AgileParts and AgileWorks).

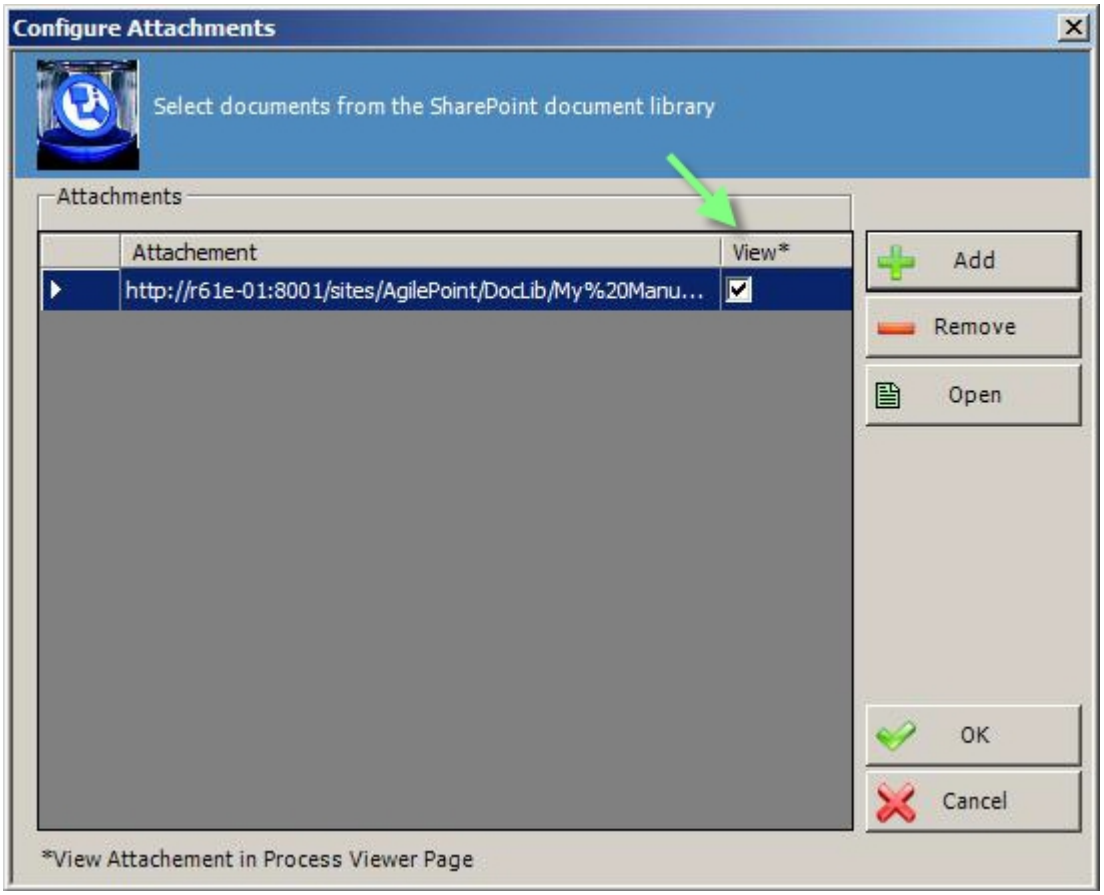
Associate Process Documentation at the Process Model Level

1. Ensure that no activities are selected and the Process Template properties are visible.
2. In the **ProcessRepository** section, click the ConfigureAttachments property and click the **ellipses** button to open the Configure Attachments window. The Configure Attachments window appears.
3. Click **Add > SharePoint Document Library**. The Get SharePoint Document Library window appears.
4. In the SharePoint Server URL, type in the SharePoint URL and click **Get Doc Lib**.
5. Check the Windows Authentication check box to allow the OS to authenticate you in SharePoint or provide alternative credentials in the text boxes provided to connect to SharePoint. Once connected, the Document Libraries are populated in the list.
6. Select the Document Library where your documents are stored, select the document and click **OK**.



7. The Configure Attachments window appears and the document now shows in the list of attachments. To add another document click **Add**. To remove a document click the document and click **Remove**. To open the document select the document and click **Open**.

Select the check box in the View column to enable the attachment to be viewed directly from the process model diagram.



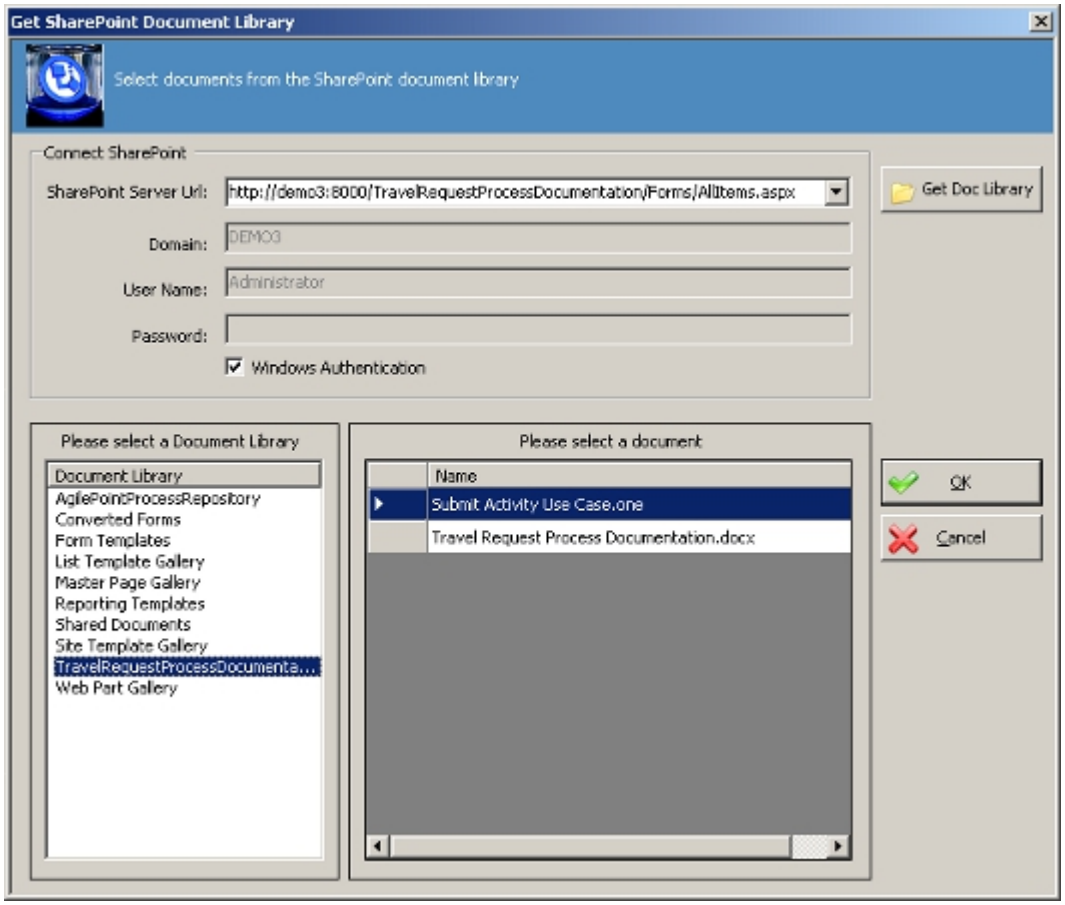
You can also add a hyperlink to any online artifact by right-clicking and pasting the URL into the **Reference URL** property.

Process Repository	
Configure Attachments	{Configured}
Reference URL	**http://www.departments.dsu.ec**

Associate Process Documentation at the Activity Level

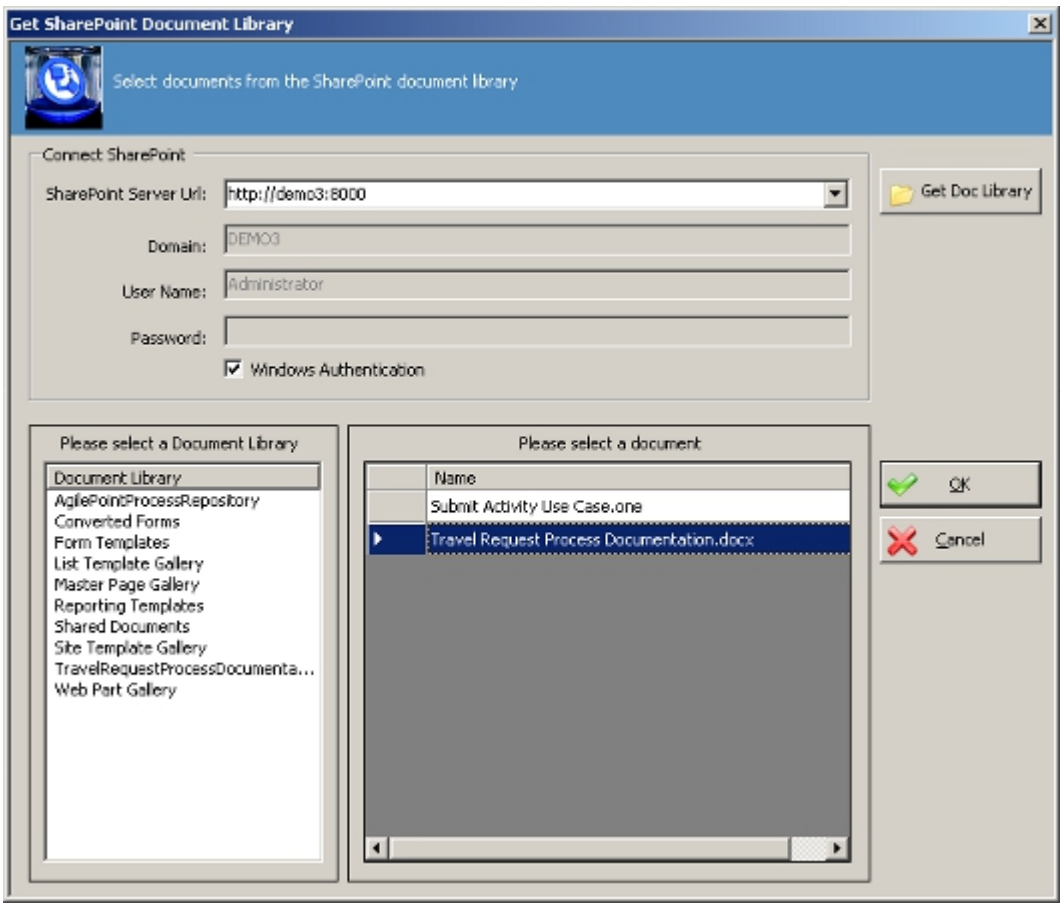
1. In a process model, click an AgilePart or AgileWork for which you would like to associate process documentation.
2. In the **ProcessRepository** section, click the **ConfigureAttachments** property and click the **ellipses** button to open the Configure Attachments window. The Configure Attachments window appears.
3. Click **Add > SharePoint Document Library**. The Get SharePoint Document Library window appears.
4. In the **SharePoint Server URL**, type in the SharePoint URL and click **Get Doc Lib**.

5. Check the Windows Authentication to allow the OS to authenticate you in SharePoint or provide alternative credentials in the text boxes provided to connect to SharePoint. Once connected, the Document Libraries are populated in the list.
6. Select the Document Library where your documents are stored, select the document and click **OK**.

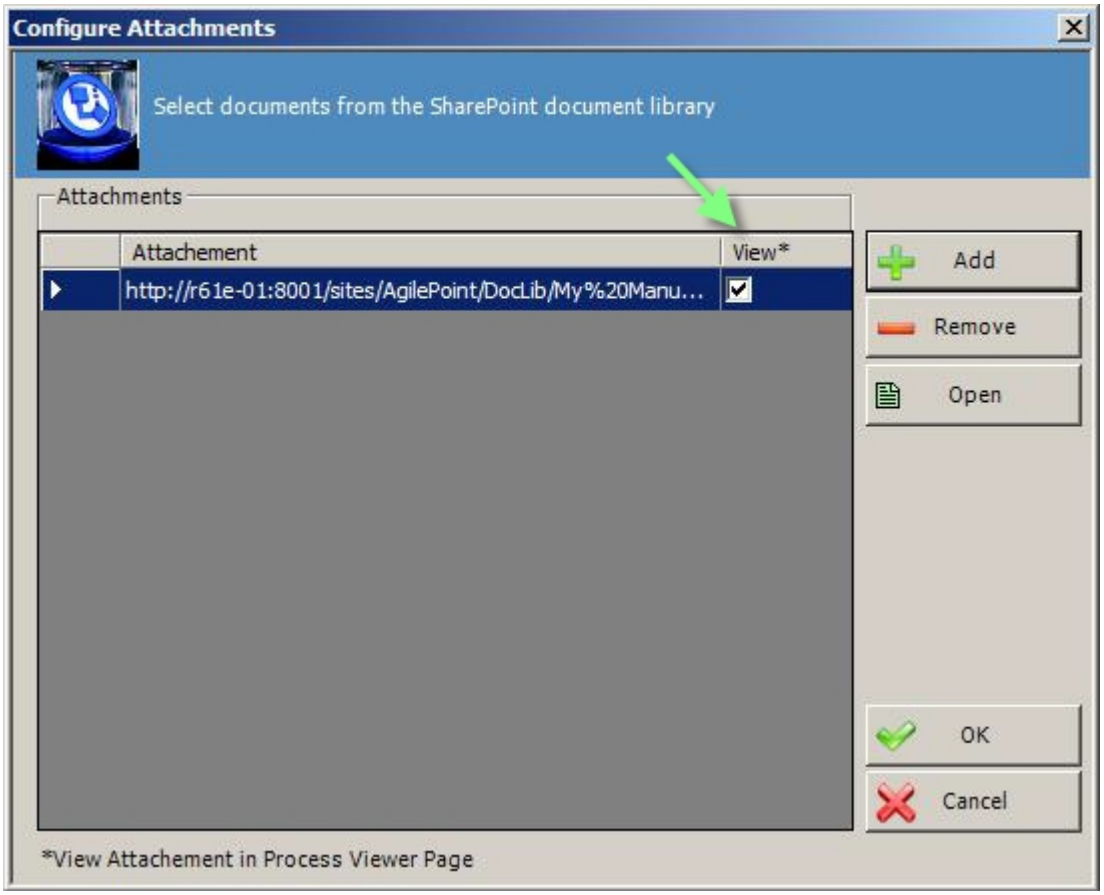


7. The Configure Attachments window appears and the document now shows in the list of attachments. To add another document, click **Add**. To remove a document click the document and click **Remove**. To open the document select the document and click **Open**.

Select the check box in the **View** column to enable the attachment to be viewed directly from the process model diagram.



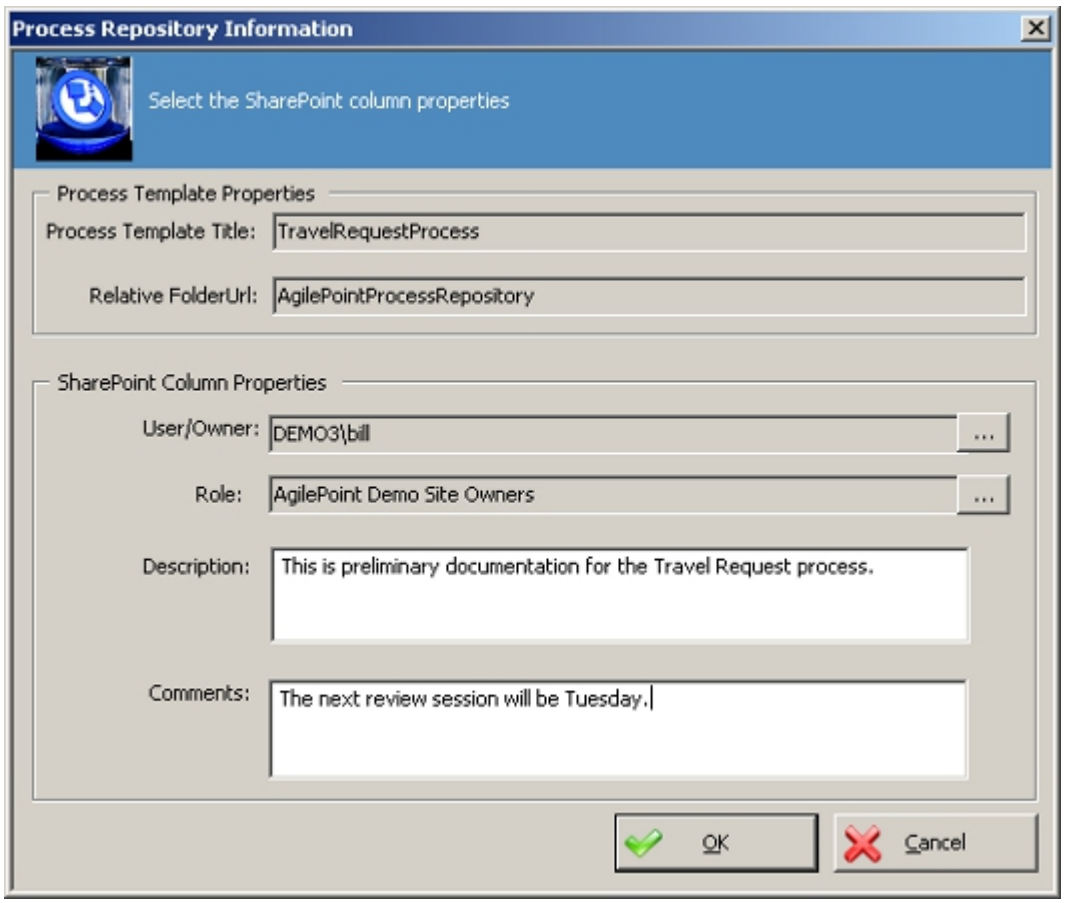
You can also add a hyperlink to any online artifact by right-clicking and pasting the URL into the **Reference URL** property.



Publish Process Documentation to SharePoint

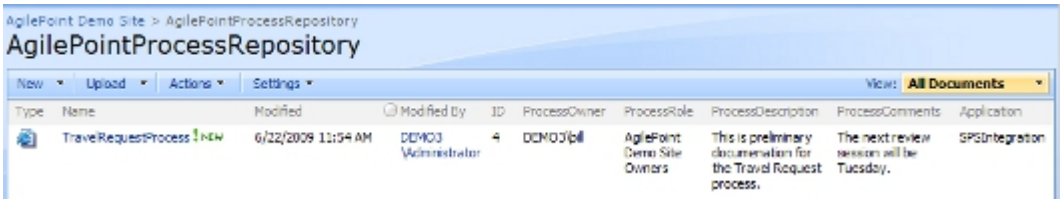
This section provides information about the publishing the process documentation to SharePoint.

1. Click **File** > **Update Server** > **Publish Process Documentation to SharePoint**. The SharePoint Process Repository window appears.
2. Enter the **SharePoint Site URL** and click **Connect**.
3. Select the **SharePoint Document Library** and click **Show Folder Tree**.
4. Select the SharePoint document repository, or click **Add Folder** to add a folder to use as the process repository and click **OK**. The Process Repository Information window appears.



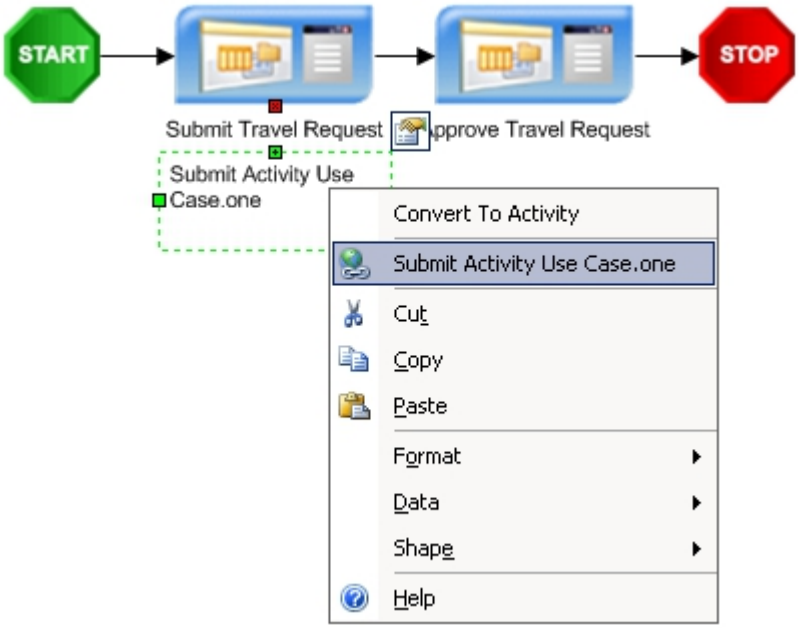
The information entered in this window will be shown as metadata columns in the SharePoint process repository.

5. Click the **User/Owner** ellipses button and select the SharePoint user that is the manager or owner of this process.
6. Click the **Role** ellipses button and select the SharePoint role associated with the User/Owner.
7. Enter a description for this process and any comments and click **OK**. The process model .vsd and associated document(s) are now published to the SharePoint process repository.



Also you can see that the document association appears in the process model.

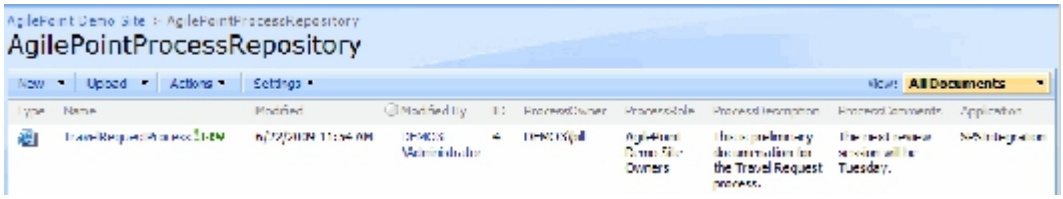
You can remove the document association text from showing in the process model, by right-clicking the activity and selecting **Hide Properties**. You can also view the document from the Envision process model by right-clicking the attachment and clicking the attachment.



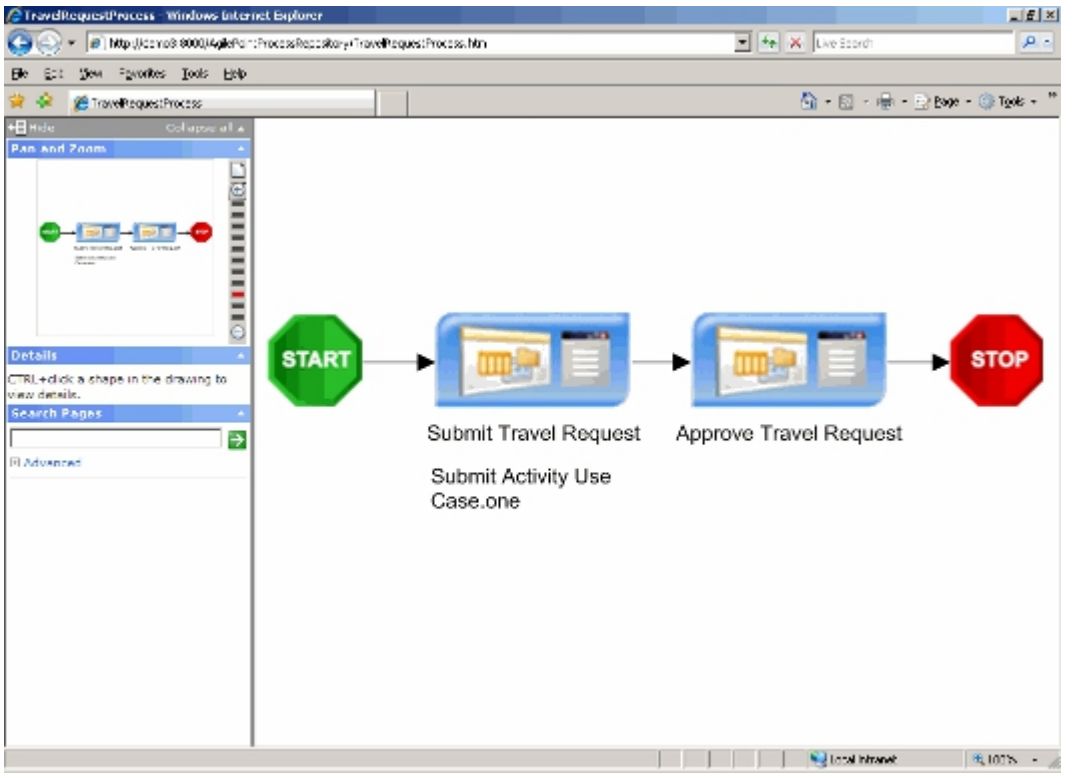
Open the Process Repository in SharePoint

Once the AgilePoint Process Repository has been setup in AgilePoint Envision and in SharePoint, you can now open the process repository in SharePoint.

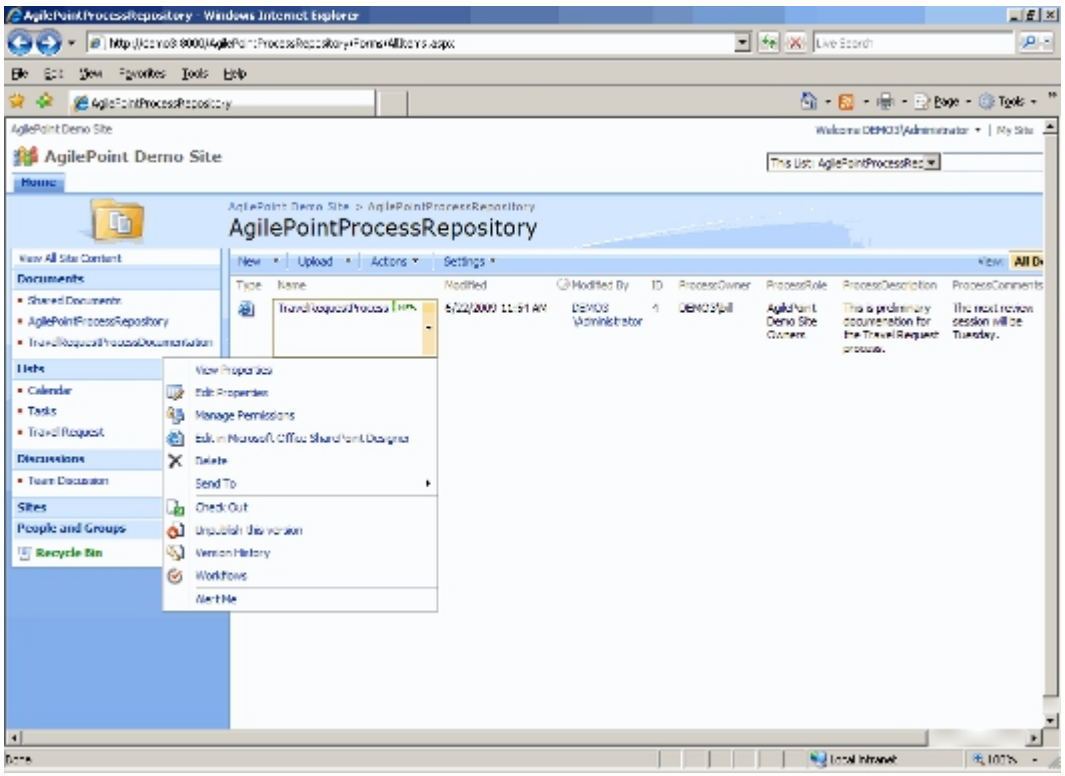
1. Open the AgilePoint Process Repository SharePoint library.



2. In the **Type** column, click the **Internet** icon. The Process Discovery page appears.



3. Click the document attachment name (e.g. Submit Activity Use Case.one) to open the document.
4. From the SharePoint process repository library, click the **Process Name** drop-down and notice that all the general SharePoint options are available for associating workflows, Check Out, etc.


AgilePoint Demo Site
AgilePointProcessRepository
New
Upload
Actions
Settings
Edit Properties
Manage Permissions
Delete
Send To
Check Out
Version History
Workflows

Edit Stencil Images

This section provides information and instructions about how to create and edit AgilePoint related stencils and their shapes in Visio, as well as how to associate shapes to AgilePoint activities. AgilePoint comes with several built-in activities that already have their own graphics and icons. You may want to substitute in your own images, or implement new stencils and shapes for your custom AgilePoint activities (e.g. AgileParts and AgileWorks). AgilePoint Envision provides you a way to customize the stencils and shapes and associate them with AgilePoint activities.

Create and Save a New Stencil

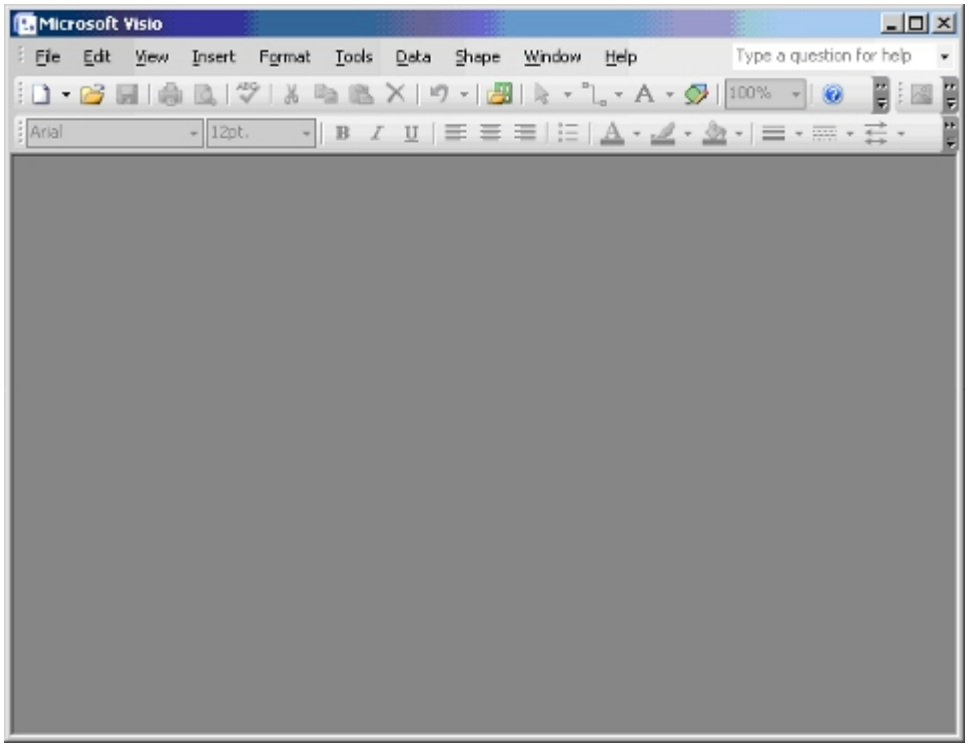
This option allows you to create a new stencil. A stencil contains a group of shapes that you can drag and drop to construct your process model. The easiest way to do this is to copy an existing AgilePoint stencil as a base and work from that.

1. In Windows Explorer navigate to **C:\Program Files\Microsoft Office\Office12\1033\Solutions \AgilePoint** or similar path depending on your environment.
2. Make a copy of the **Generic.vss** file and place it in the same folder.
3. Give the copy a descriptive name for the new stencil (e.g. IT Assets Group 1).
4. Open AgilePoint Envision, click the **Shapes** button and click **IT Assets Group 1**.
5. The stencil appears as **Generic BPM** in the stencil pane. Rename it by right-clicking on the stencil title and clicking **Edit Stencil**. The Stencil opens in edit mode.
6. Right-click again and click **Properties**.
7. In the **Title** field, type a name for the new stencil (e.g. IT Assets Group 1) and click **OK**.
8. Delete the existing icons in the new stencil so that you have a clean slate and save the stencil by clicking on the **Save** button next to the stencil. Saving as Visio 2002 will ensure backward compatibility.

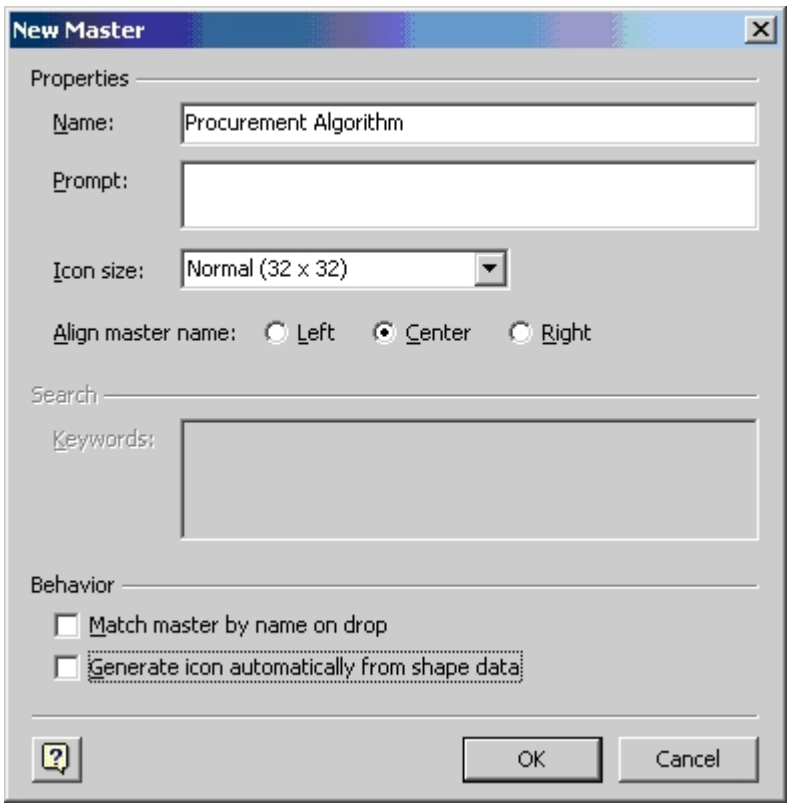
Create a New Master Icon

This part provides information for adding a new master icon to a stencil that can represent a custom AgileShape.

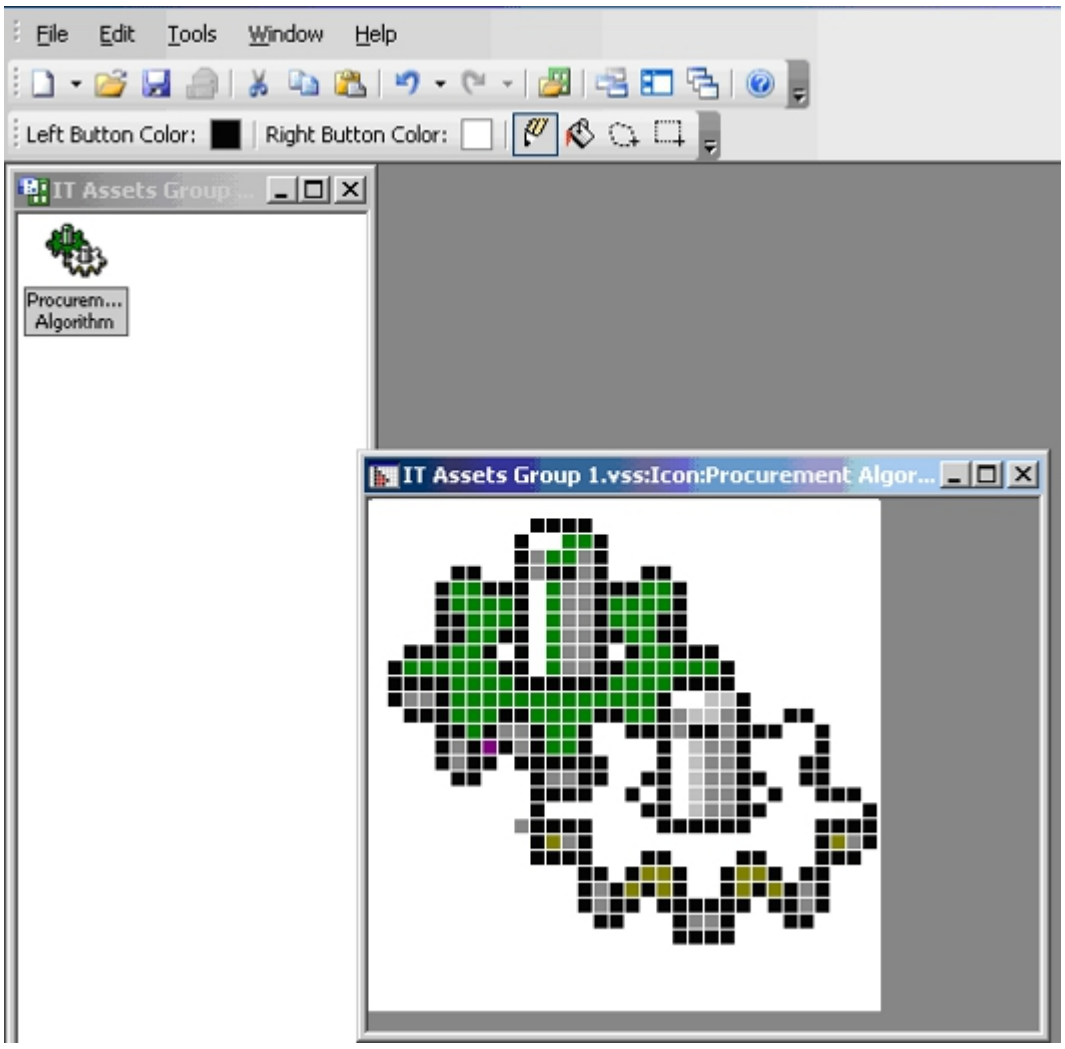
1. Close AgilePoint Envision and leave MS Visio open as shown below.



2. Click **File** > **Open**.
3. Navigate to the folder where the VSS files are stored (e.g. **C:\Program Files\Microsoft Office \Office12\1033\Solutions\AgilePoint**) and open the new stencil (i.e. IT Assets Group 1).
4. Right-click in the new stencil pane and click **New Master**.
5. Give the new master a descriptive name (e.g. Procurement Algorithm). It is recommended to choose **Normal (32 x 32)** for the icon size and to leave the behavior check boxes unchecked.



6. Click **OK**.
7. Right-click on the **Procurement Algorithm** activity in the stencil pane and click **Edit Master** > **Edit Icon Image**.
8. Either draw an icon pixel by pixel, or simply copy and existing icon and paste it here.



9. When finished, close the icon window.

Associate a Master Shape with the Icon Image

This option allows you to add a master shape that represents an AgilePoint activity on the drawing canvas.

1. Right-click on the icon image in the stencil pane and click **Edit Master** > **Edit Master Shape**.
2. Click **Insert** > **Picture** > **From File**.
3. Browse and select the image file (.bmp, .gif, jpg, etc.) to add. Proceed directly to the next step to finalize the shape.

Finalize the Shape

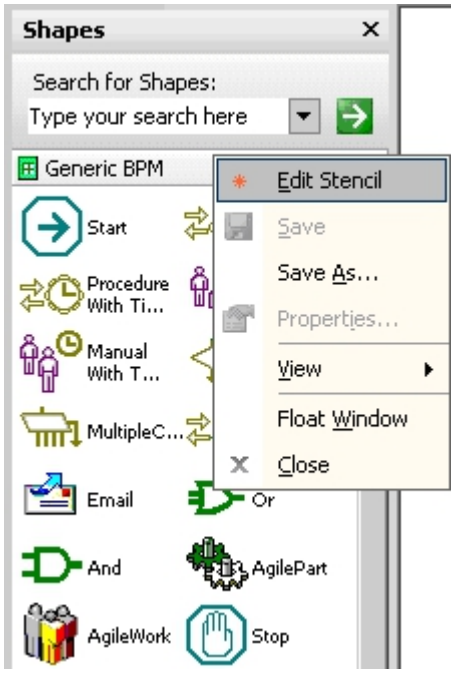
This option allows you to associate the stencil shape you just created with a custom AgilePart or AgileWork assembly.

1. Click **Tools** > **Macro** > **ThisDocument** > **FinalizeShape**. The Choose Activity Type window appears. Here are all the built in AgileShapes and custom AgileParts and AgileWorks that have been registered in AgilePoint Envision.
2. Select either **AgilePart** or **AgileWork** depending on the type of custom activity, choose the name from the list and click **OK**.

Edit an Icon Image on a Stencil

This option allows you to manually edit the icon image that displays in the stencil pane that represents an AgilePoint activity.

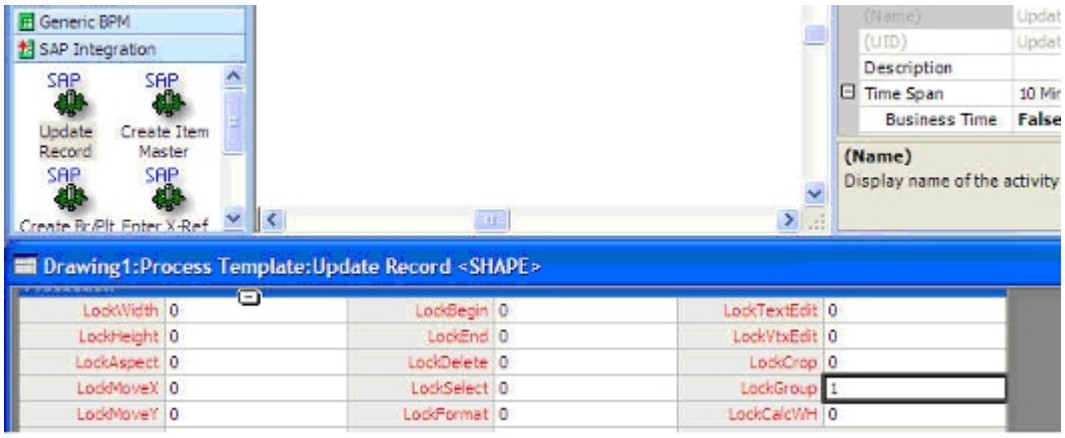
1. In AgilePoint Envision, open the stencil that includes the icon image for which you would like to edit.
2. Right-click the Stencil title (e.g. Generic) and select **Edit Stencil**. The Stencil appears in Edit mode.



3. Right-click the icon image in the stencil pane and select **Edit Master** > **Edit Icon Image**. The image file will be displayed and you can modify the icon as needed.

Edit Master Shape

1. To edit the shape itself including the label and properties of the shape, right mouse on the icon in the stencil pane and select Edit Master > Edit Master Shape. The shape image will be displayed.
2. Right-click the shape image and select **Show ShapeSheet** (you must be in the developer mode to do this).
3. In the **ShapeSheet**, look for the **LockGroup** property and change the value from 1 to **0** to unlock the group.



4. Right-click the shape image again and select **Shape** > **Ungroup**.
5. Now you can edit the image including the text in the image.

Custom Configured Stencils (My Stencil)

Envision users or administrators can modify the properties of an AgileShape, and then share them with other Envision users using a special stencil called **My Stencil**. Envision administrators can make the properties for shapes in this stencil read-only if desired.

A common use for this feature is a system administrator creating complex configuration settings for an AgileShape, where the settings are common to many users within an organization. The administrator sets up the configuration, and then shares the stencil. Business users then need only to add the shape to their process models to implement the organizational standards.

For the most part, the behavior for sharing AgileShapes in Envision is the same for sharing any shapes in Microsoft Visio. The main functionality that Envision has added are:

- Support for sharing AgileShapes, along with preconfigured properties
- Support for setting all properties collectively to read-only

Create an AgileShape with Preconfigured Properties

1. In **AgilePoint Envision**, open a process model of any type.
2. Open the stencil named **My Stencil**.
3. Drag and drop an AgileShape to the process model.
4. Modify the shape's properties as desired.
5. Drag the configured shape from the process model to **My Stencil**. You can create your own stencil or use an existing stencil. If you use an existing stencil, you will need to make it editable when prompted. When you drop the shape on the stencil, the **Edit Master Properties** dialog box appears.
6. On the **Edit Master Properties** dialog box, complete the following fields as desired:
   - **Name** – The name that appears below your shape in the stencil and by default in the process model.
   - **Tooltip Description** – The name that appears for the shape in the pop-up tooltip in a stencil.
   - **Allow everyone to edit properties** – Selected means that the shape's properties are editable by anyone. Deselected means that the shape cannot be edited, except by the creator.
7. Click **OK**.

Modify an AgileShape with Preconfigured Properties

To modify a customized AgileShape, do the following.

1. In **AgilePoint Envision**, open a process model of any type.
2. Open **My Stencil** with the customized AgileShape.

3. Drag and drop the customized shape to the process model.
4. Follow the instructions in **Creating a Customized AgileShape**.
5. Drag the modified shape from the process model back to a stencil.

Data Binding

AgilePoint allows you to bind to XML Schema or SharePoint Document Library metadata.

XML Schema Support for ASP.NET Applications

For ASP.NET applications, this feature enables the creation and manipulation of XML Data Schema within AgilePoint Envision. An AgilePoint Developer created XML Data Schema file can also be imported into AgilePoint Envision.

Schema XML Binding

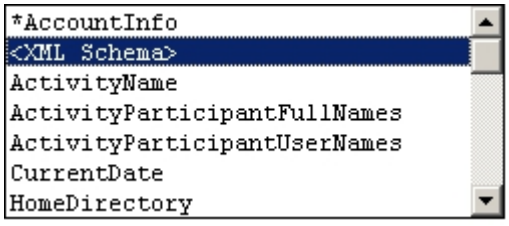
In InfoPath or ASP.NET based process templates, you can access all or part of the values stored in the schema of the form to determine the routing of your process, or to display information in an email notification. To access the InfoPath XML Schema within an email template, type ${ and select <XML Schema>. If outside an email template, such as in a Multiple Condition Activity, you can simply define the columns within the Data Binding field. You can also construct the process attribute syntax manually to access a specific section or element of the XML. This is accomplished by specifying an XPath expression ${XPathExpression} (in place of a custom attribute name). Below are a few examples that can be used:

- $/*
- $//*
- $/exp:expenseReport
- ${/exp:expenseReport/exp:startDate}

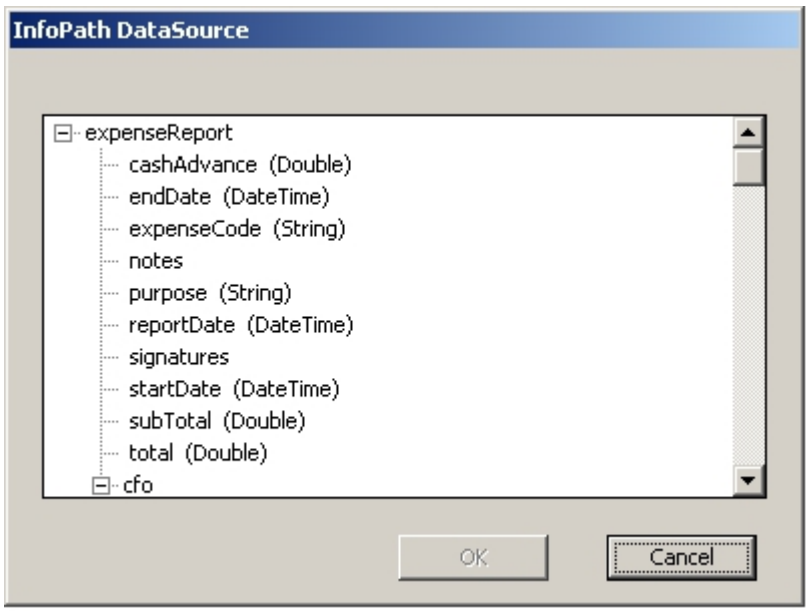
In InfoPath or ASP.NET based process instances, you can access all or part of the form's XML. Using the special $/ attribute contains the XML of the entire form. By specifying an XPath expression $/{XPathExpression} (in place of a custom attribute name), you can access a specific section or element of the XML e.g.: $/*, $//*, $/exp:expenseReport, ${/exp:expenseReport/exp:startDate}.

To access an InfoPath Form's XML Schema or SPDoc metadata:

1. Type **${** in the body of the email template to bring up the list of available process attributes.

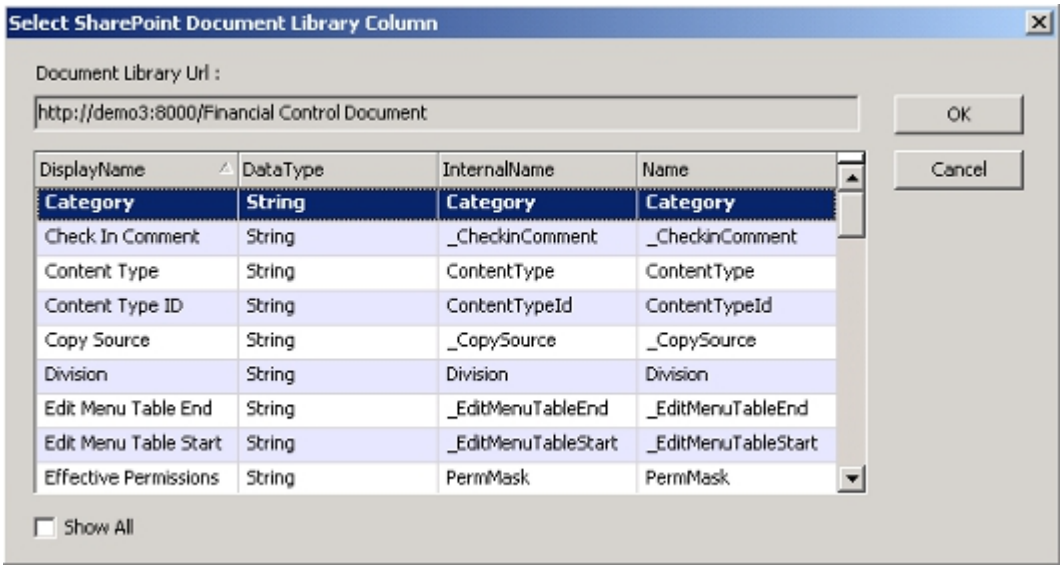


2. Select **<XML Schema>** from the list. The InfoPath DataSource window appears.

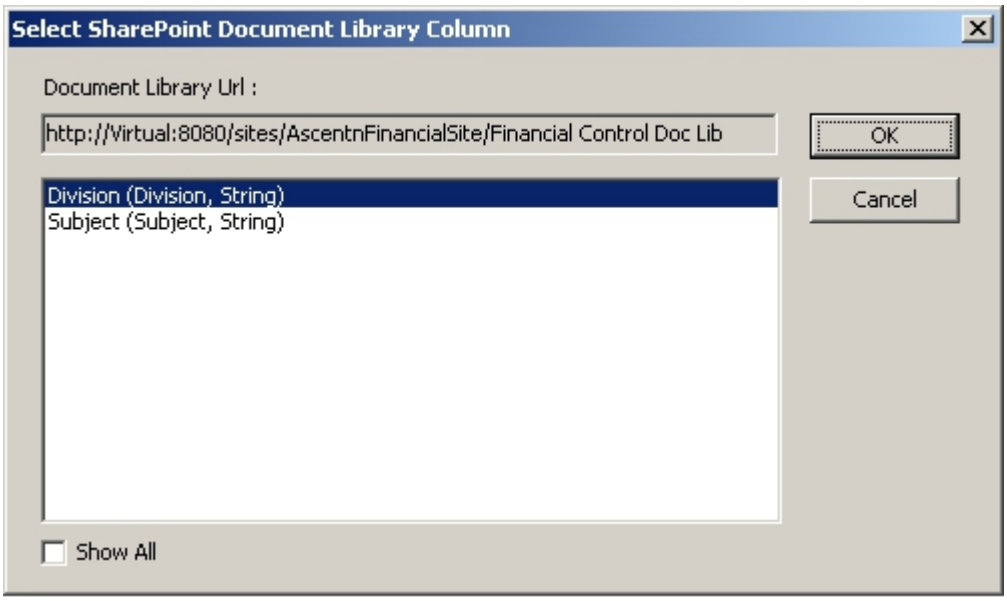


SPDoc Metadata Binding

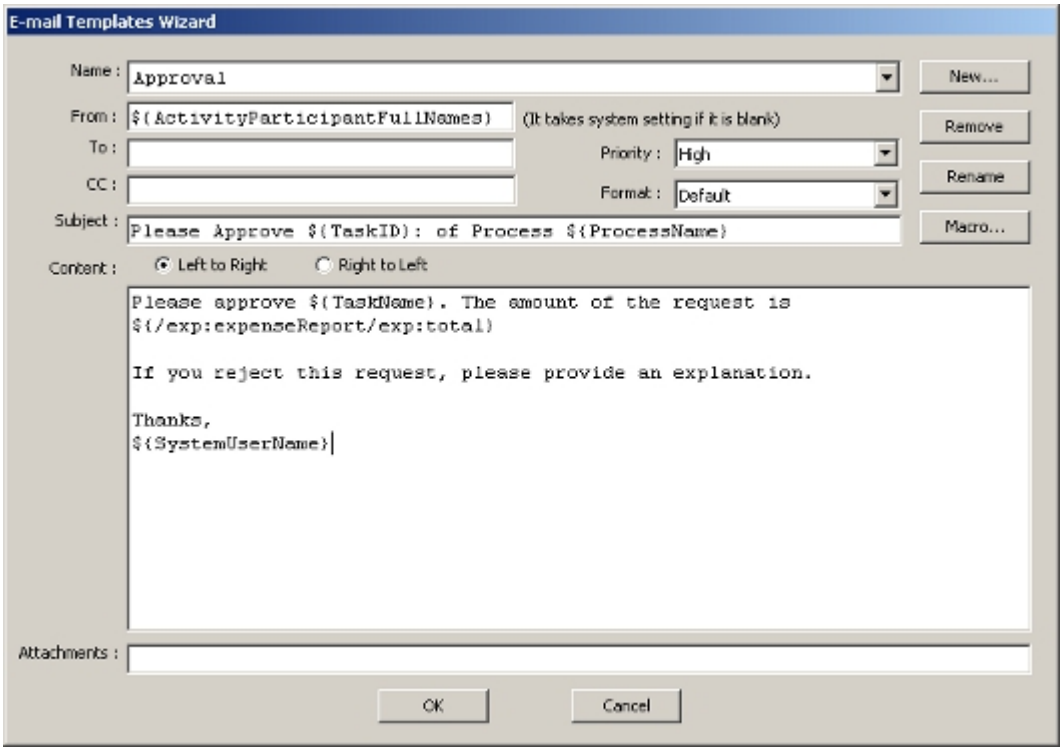
In SPDoc based process templates, you can access the values of a SharePoint Document Library's metadata columns. This data can then be used in your process (e.g. to determine the workflow in your process, or to display information in an email notification). To access the metadata column(s) within an email template, type ${ and select <XML Schema>. If outside an email template, such as in a Multiple Condition Activity, you can simply define the columns within the Data Binding field. The Show All check box allows you to see a complete list of metadata columns to choose from.



For SPDoc, the Select SharePoint Document Library Column window appears.



1. Select the data column for which you would like to associate.
2. Click **OK**. The association is shown below.



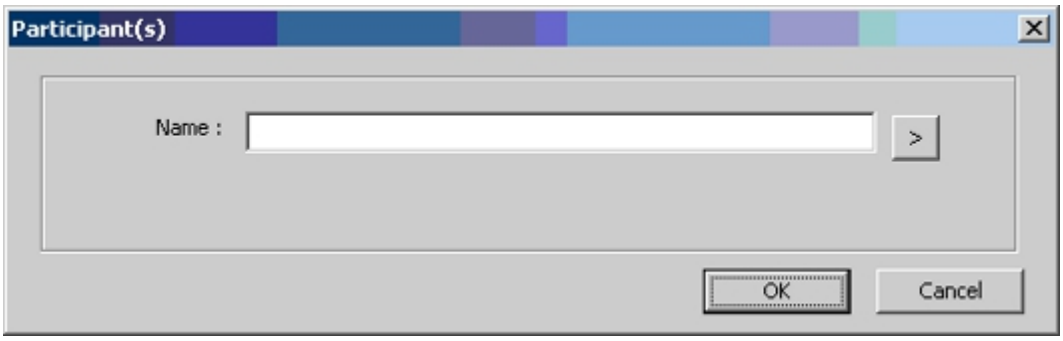
Windows

This section provides a list of pages in AgilePoint Envision.

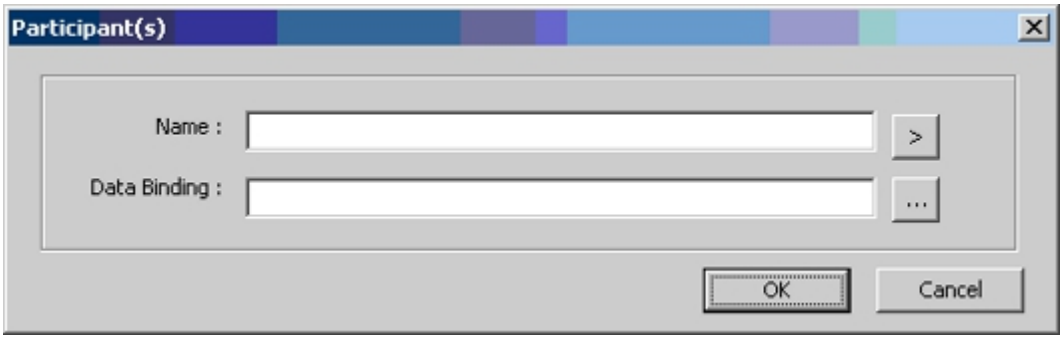
Adding Participants to an Activity

This topic describes how to add participants to an activity.

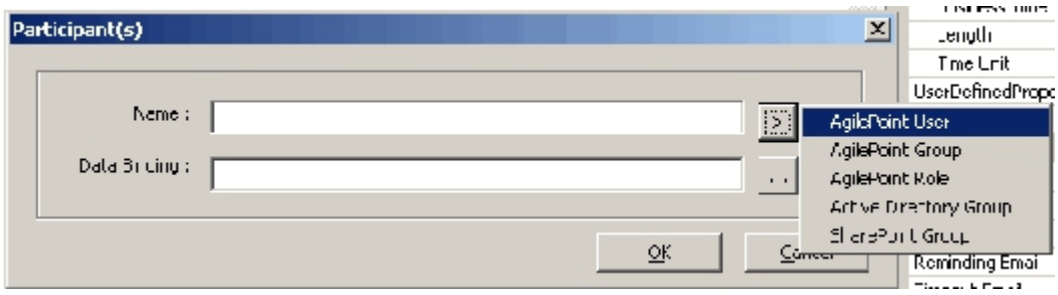
In a Generic process template:

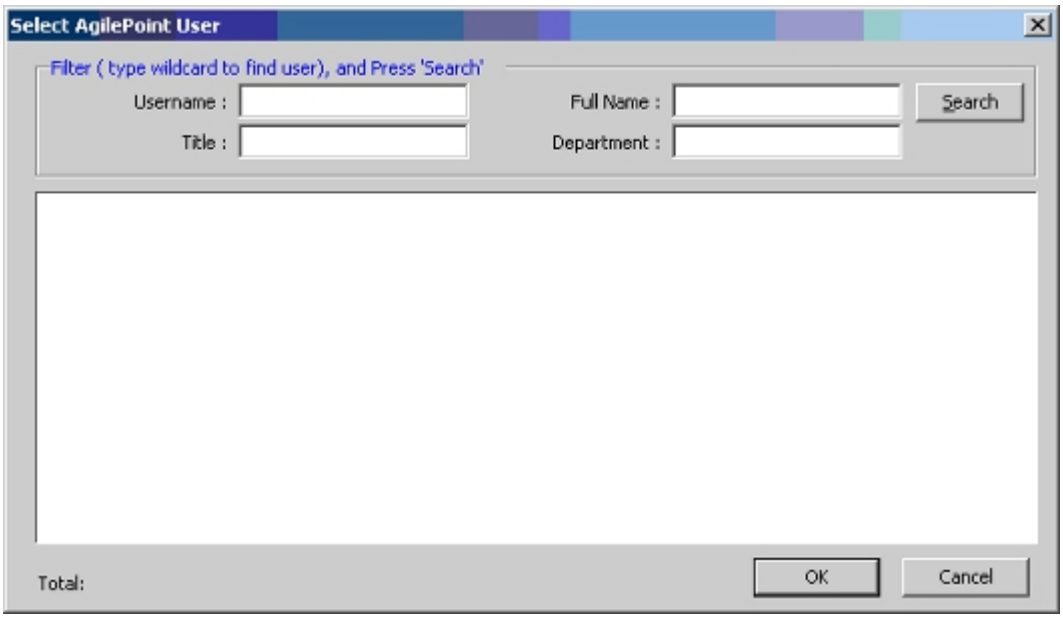


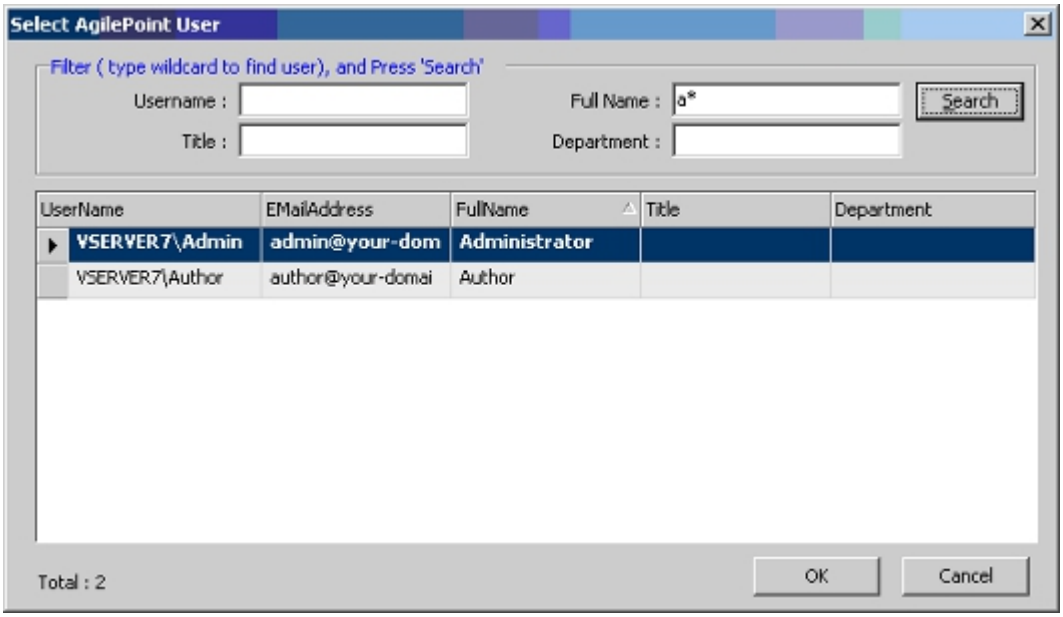
In a Microsoft InfoPath, Microsoft SPDoc, or Microsoft SPList process template:

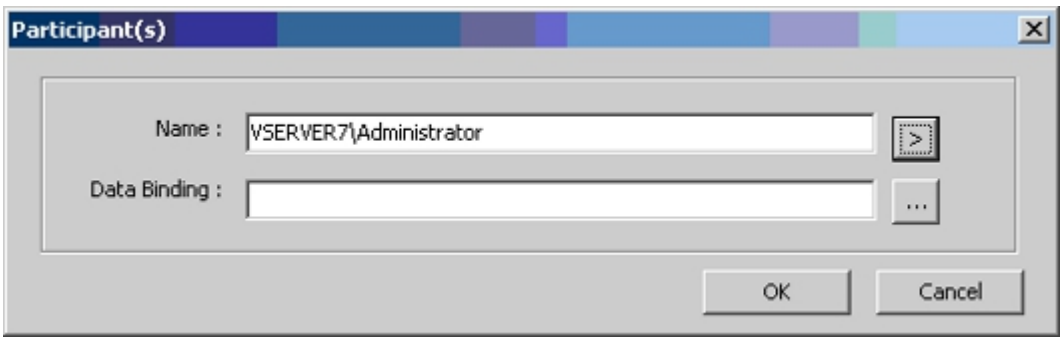


Choosing a participant from the AgilePoint User list:

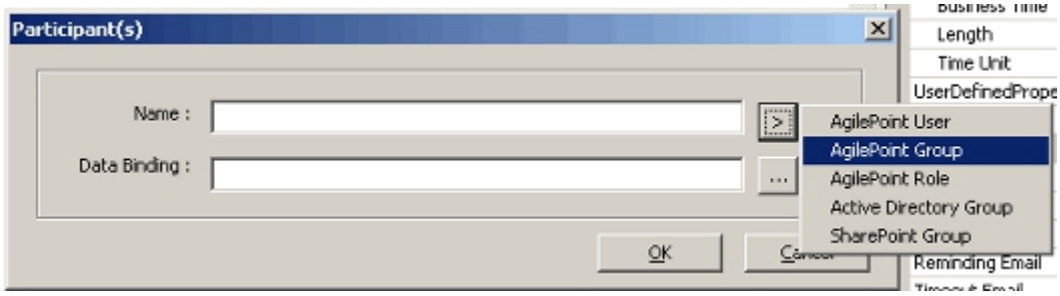

Participant(s)
Name :
Data Binding :
OK
Length
Time Unit
AgilePoint User
AgilePoint Group
AgilePoint Role
Active Directory Group
SharePoint Group
Reminding Email

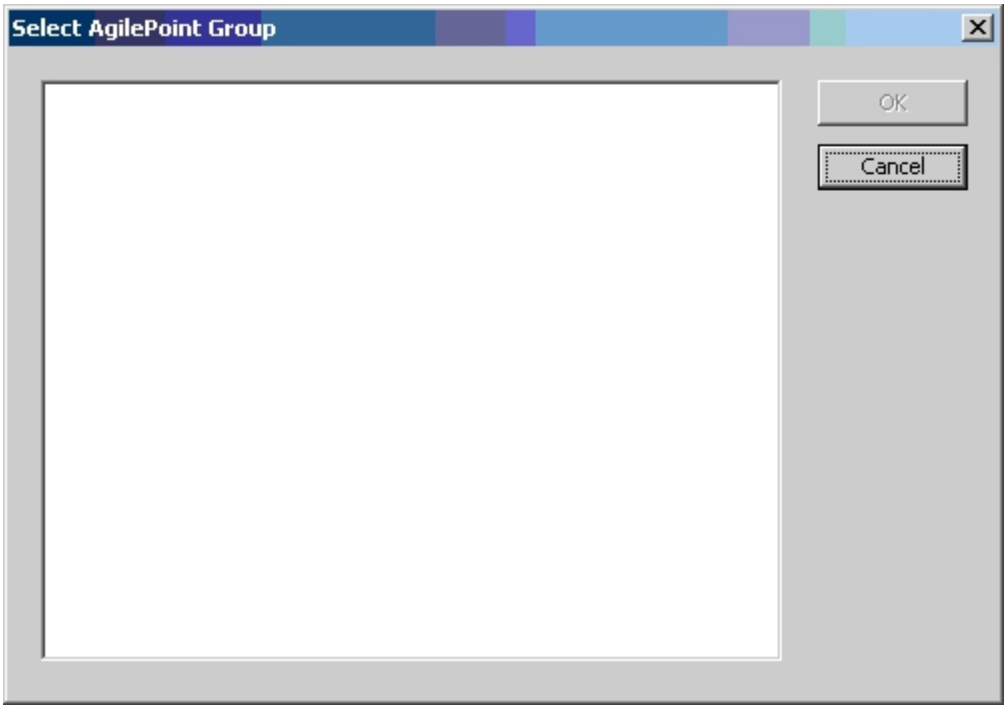

Select AgilePoint User
Filter (type wildcard to find user), and Press 'Search'
Username :
Full Name :
Search
Title :
Department :
Total:
OK
Cancel


Select AgilePoint User
Filter (type wildcard to find user), and Press 'Search'
Username :
Full Name :
a*
Search
Title :
Department :
UserName
EMailAddress
FullName
Title
Department
VSERVER7\Admin
admin@your-dom
Administrator
VSERVER7\Author
author@your-domai
Author
Total : 2
OK
Cancel

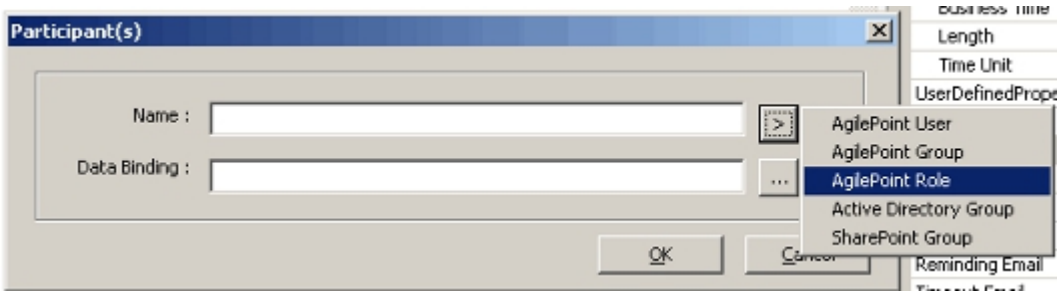


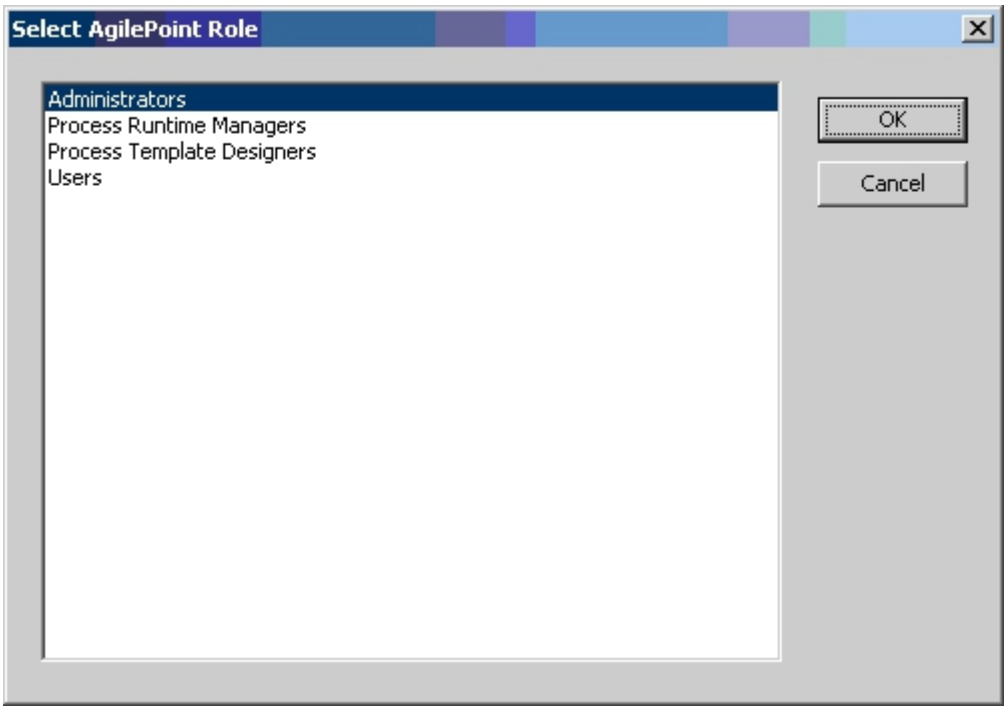
Choosing a group of participants from the AgilePoint Group list:

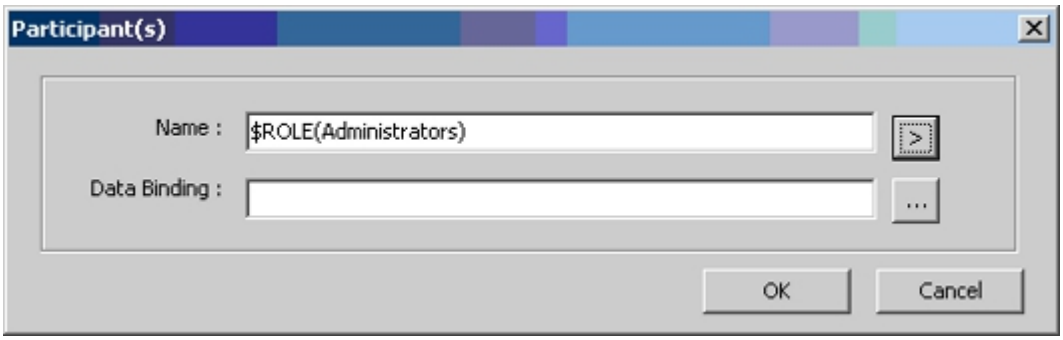




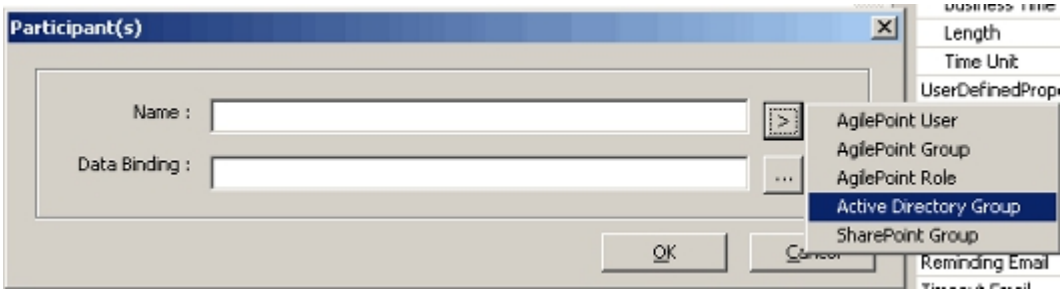
Choosing a group of participants from the AgilePoint Role list:



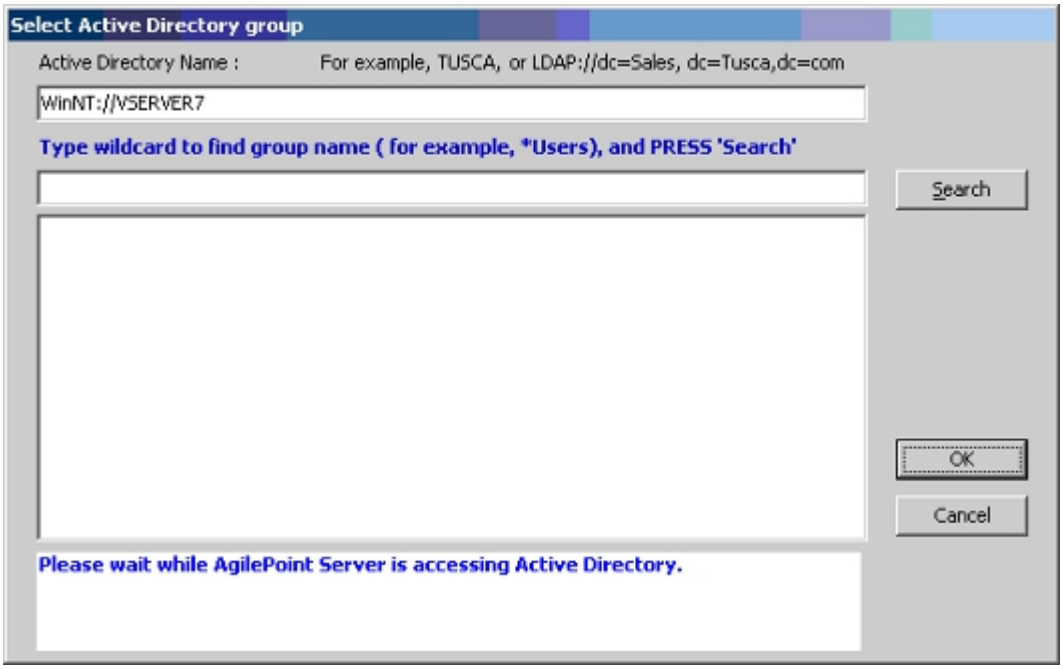




Choosing a group of participants from Active Directory:



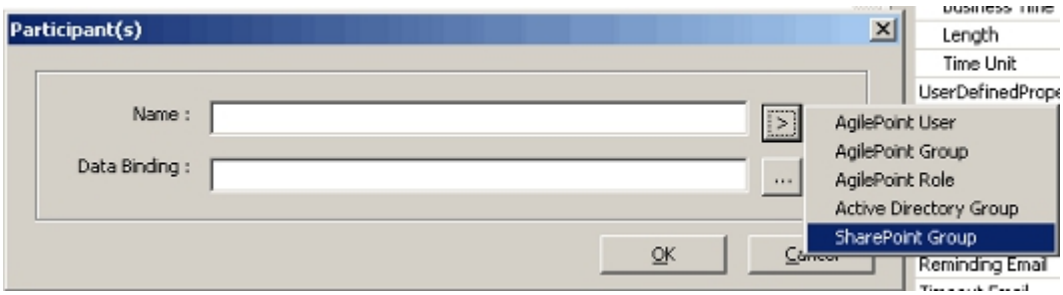
Select the AgilePoint Server URL and enter the login credential to connect to AgilePoint Server. The Select Active Directory Group window appears.



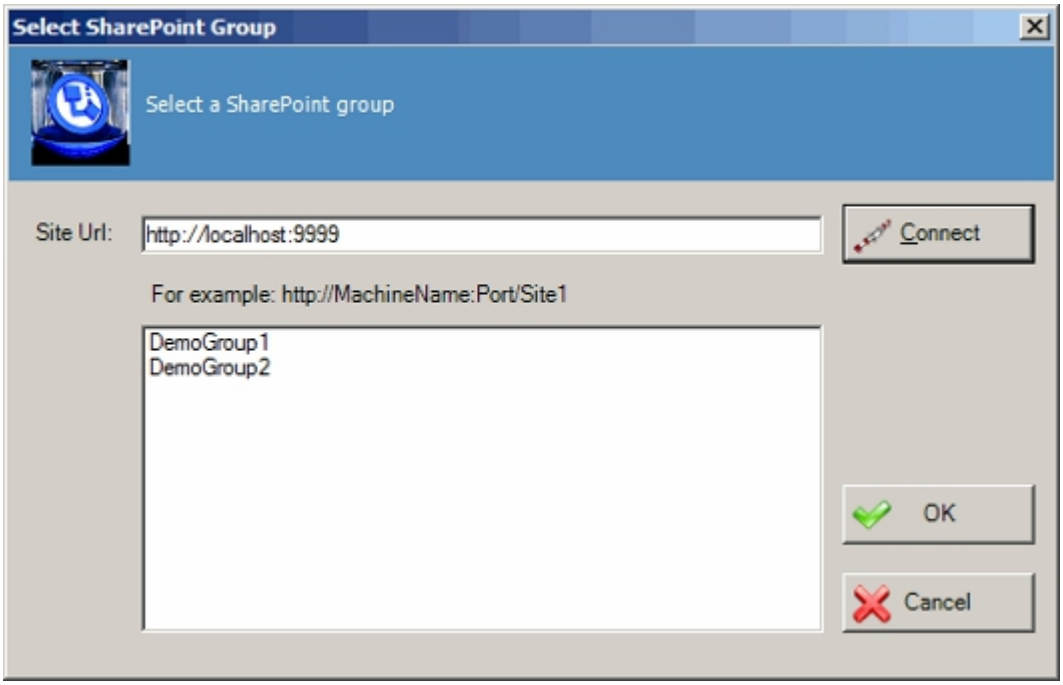
Make sure the Active Directory Name (LDAP Path) is correct, enter the search criteria and click **Search**. A list of groups from Active Directory appears. Select the group to add as the participant and click **OK** to complete.

Group names can include up to 64 characters.

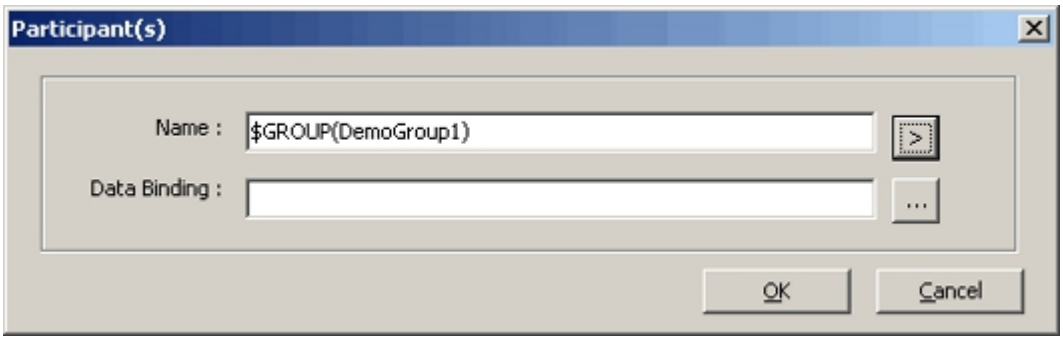
Choosing a group of participants from SharePoint:



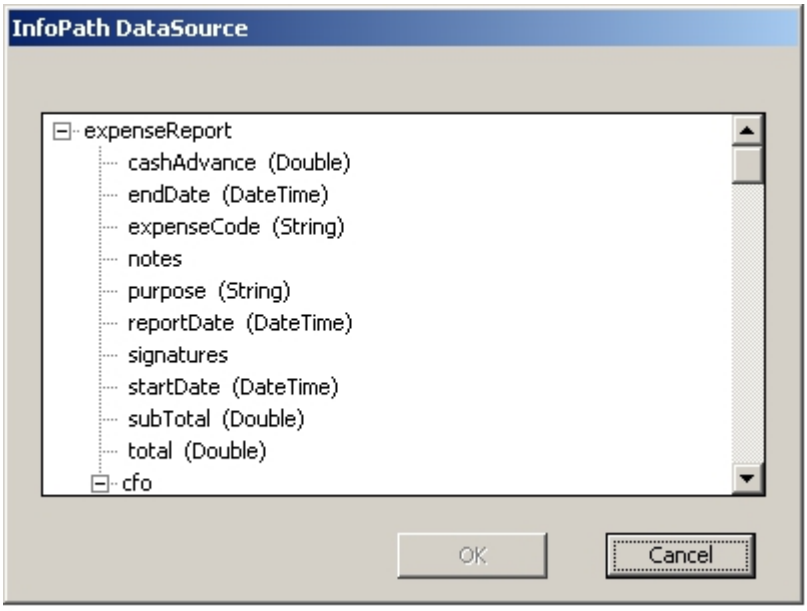
Select the AgilePoint Server URL and enter the login credential to connect to AgilePoint Server. The Select SharePoint Group window appears.

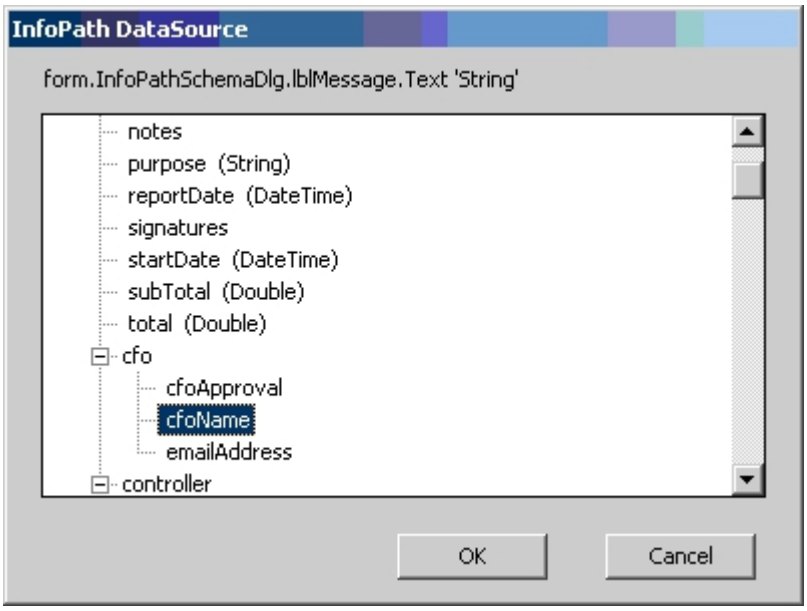


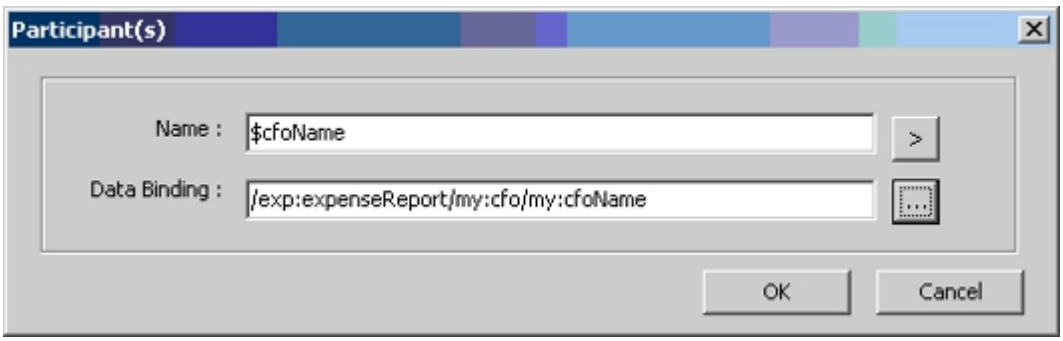
Enter the SharePoint Site URL and click **Connect**. The available groups will appear. Select the Group and click **OK**.



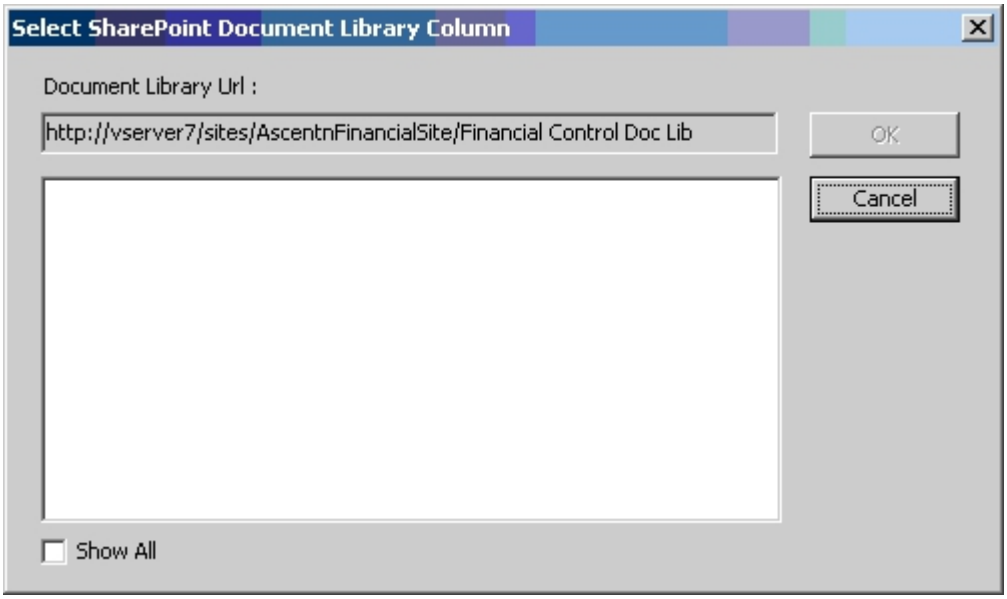
Binding the participants to an InfoPath Form's metadata:





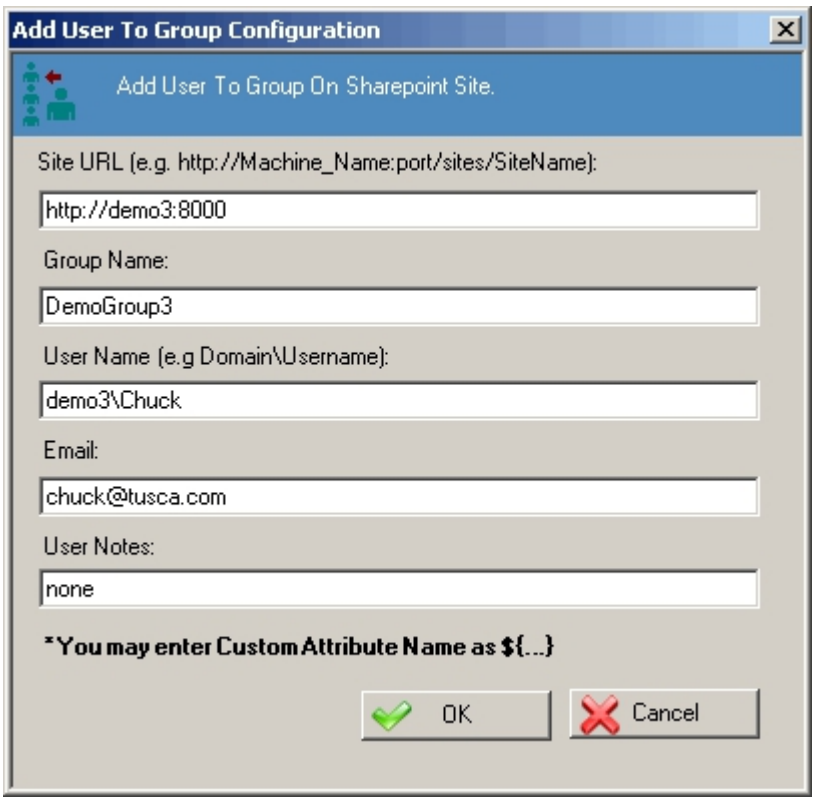


Binding the participants to a SharePoint Document Library's metadata:



Add User To Group Configuration Window

This window allows you to configure the user information to be created in SharePoint.

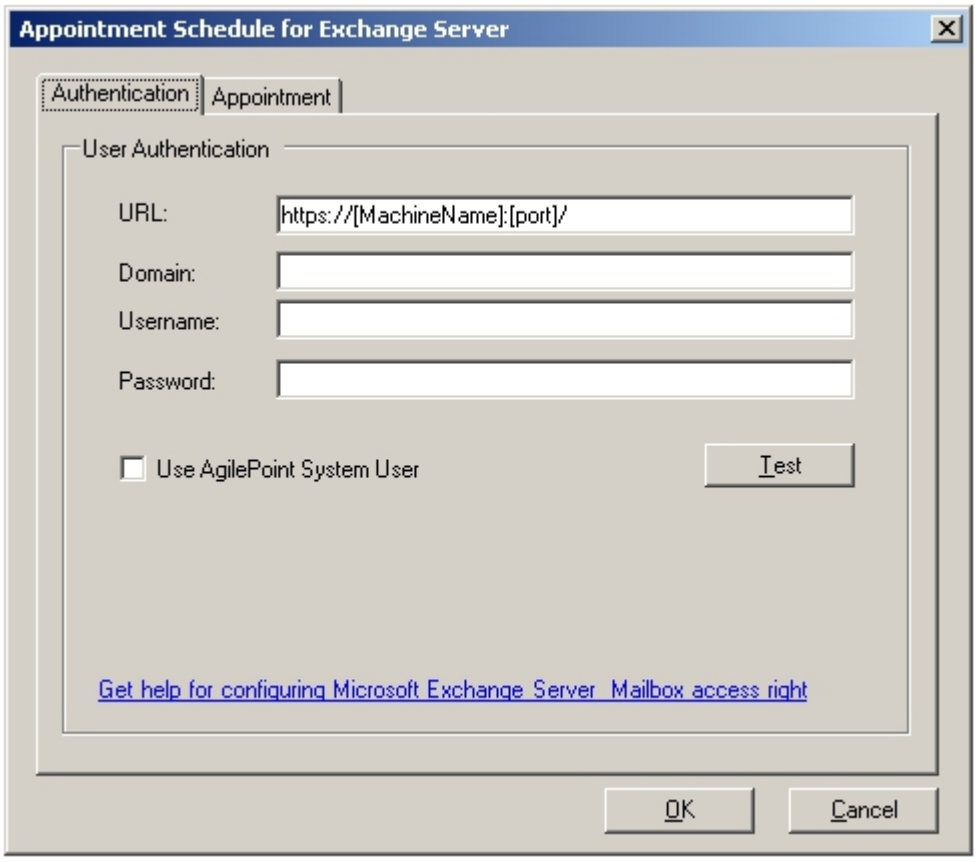


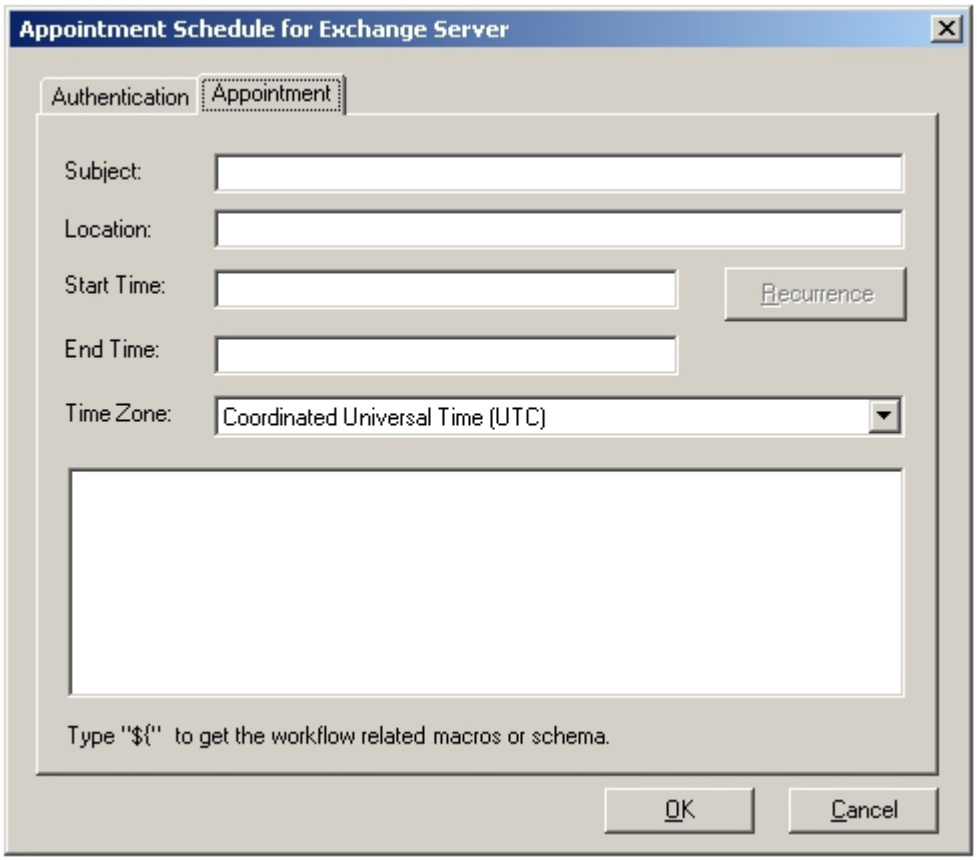
Field Definitions

Field Name	Definition
Source Site URL	Specifies the name of the list that includes the affected (copied, moved, etc.) list items.
Group Name	The name of the affected SharePoint Group (e.g., the group to be created, to be deleted, to which a user will be added, etc.).
Email	The email address for the user who will be added to the SharePoint group.
User Notes	Notes associated with the user to be added to the SharePoint group.

Appointment Schedule for Exchange Server window

Specifies the configuration for the Create Appointment AgileShape.


Appointment Schedule for Exchange Server
Authentication
Appointment
User Authentication
URL:
https://[MachineName]:[port]/
Domain:
Username:
Password:
Use AgilePoint System User
Test
Get help for configuring Microsoft Exchange Server Mailbox access right
OK
Cancel



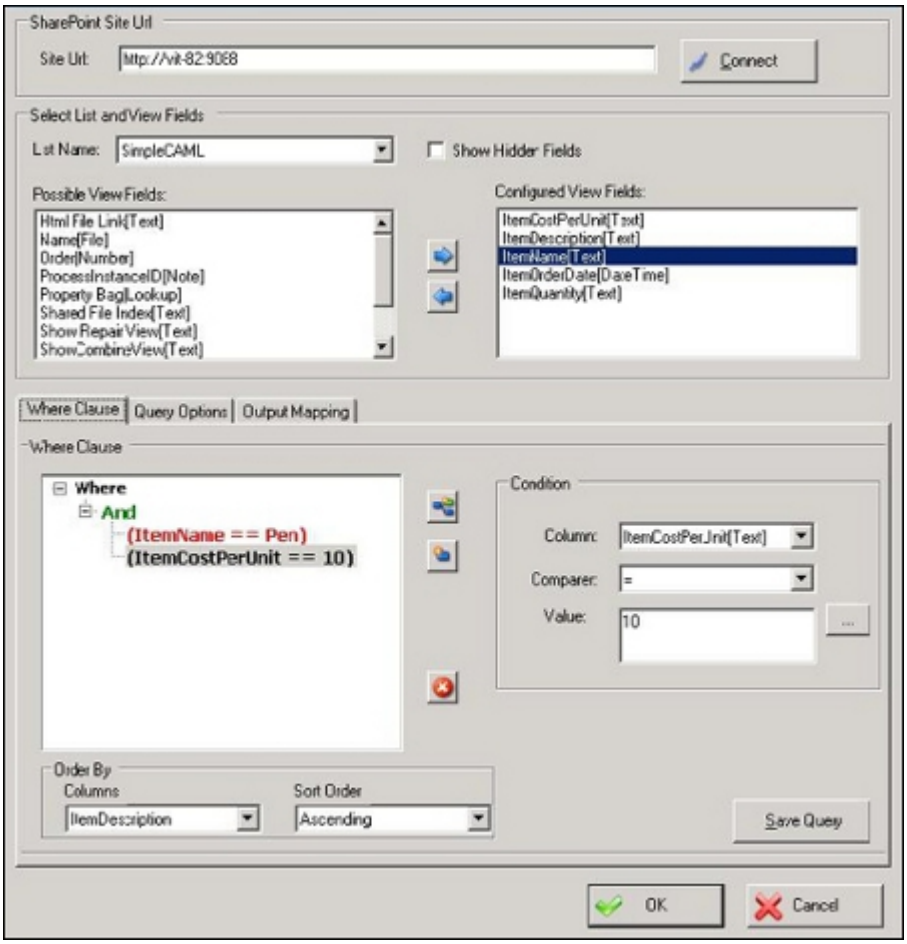
Field Definitions

Field Name	Definition
Exchange 2007 or Exchange 2010	Specifies the version of your Microsoft Exchange Server.
(Authentication) URL	Specifies the Exchange Server URL.
(Authentication) Domain, Username, Password	Determines that a specified account will be used to access the Exchange Server and what the credentials will be.
(Authentication) Use AgilePoint System User	specifies to use the AgilePoint System User credentials to access the Exchange Server. The credentials and URL can be verified by clicking the **Test** button. The **Test** button is disabled if Use **AgilePoint System User** is checked. In both cases, make sure that the user has proper access rights to the Exchange Server.

Field Name	Definition
(Appointment or Meeting) Subject, Location, Start Time, End Time, Time Zone	The details about the appointment or meeting.
(Appointment or Meeting) Body	The body of the email. Accepts custom attributes and schema by typing ${.

CAML Query Configuration

Use this window to configure a CAML query.



To configure the CAML query and create your view from available fields:

1. Enter the site URL in the **Site Url** text box and click **Connect**. The various Lists and Document libraries are loaded in the **List Name** drop-down.
2. Select **Show hidden fields** if you want to use the SharePoint hidden fields in the CAML Query.
3. Select the List. All the columns in the selected list will be loaded in the **Possible View Fields** box.

4. Move the required columns to the **Configured View Fields** list.
5. Configure the Where clause by selecting a nest type -- **And** or **Or**.
6. Select the columns required for the condition.
7. Select the **Column** to order the data by and the **Sort Type**.
8. Click the **Query Options** tab, and select options such as the maximum number of rows (Row Limit), whether to include mandatory columns, Folder location and Group By Column.
9. Click the **Output Mapping** tab, and map the nodes from SharePoint column to the InfoPath schema.

If the output type is an InfoPath form, the results from the operations performed by the CAML Query AgilePart are automatically updated in the InfoPath form. The following conditions apply:

- The InfoPath form must have a repeating table which can be mapped to the row node.
- The columns must be mapped to this repeating table.
- The ItemCount node will contain the number of rows returned by the CAML Query. This can also be mapped if required.

Configure Text File Window

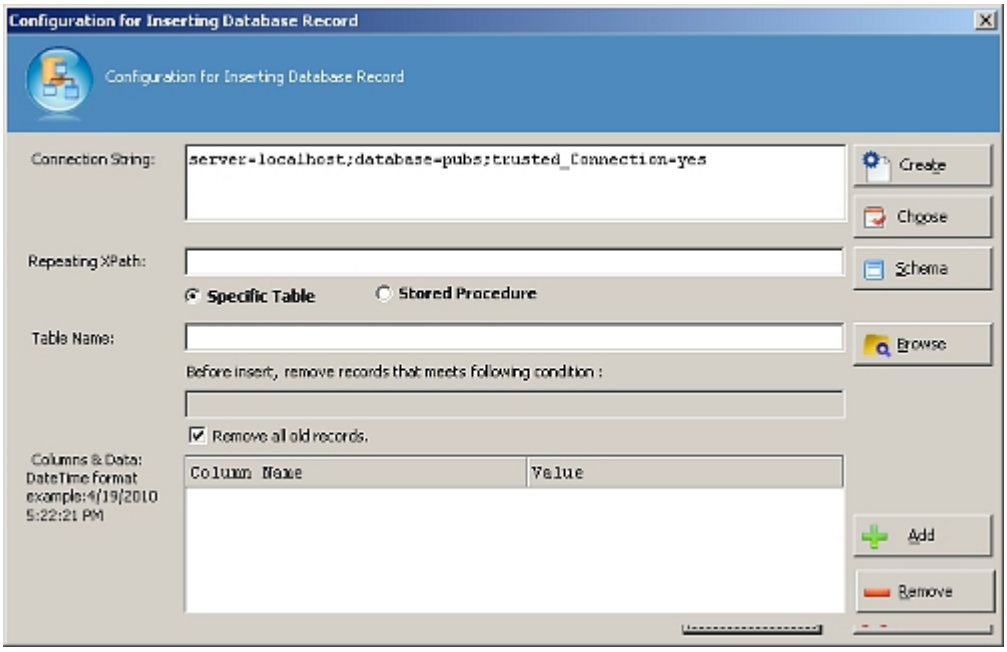
Use this window to configure a text file.

Field Definitions

Field Name	Definition
UNC	The destination address of the file. Additional behavior options are available.
File Content	The content of the file. Additional behavior options are available.

Configuration for Batch Inserting Database Record Window

This property allows the process modeler to configure where and how the new database records are inserted into the database.

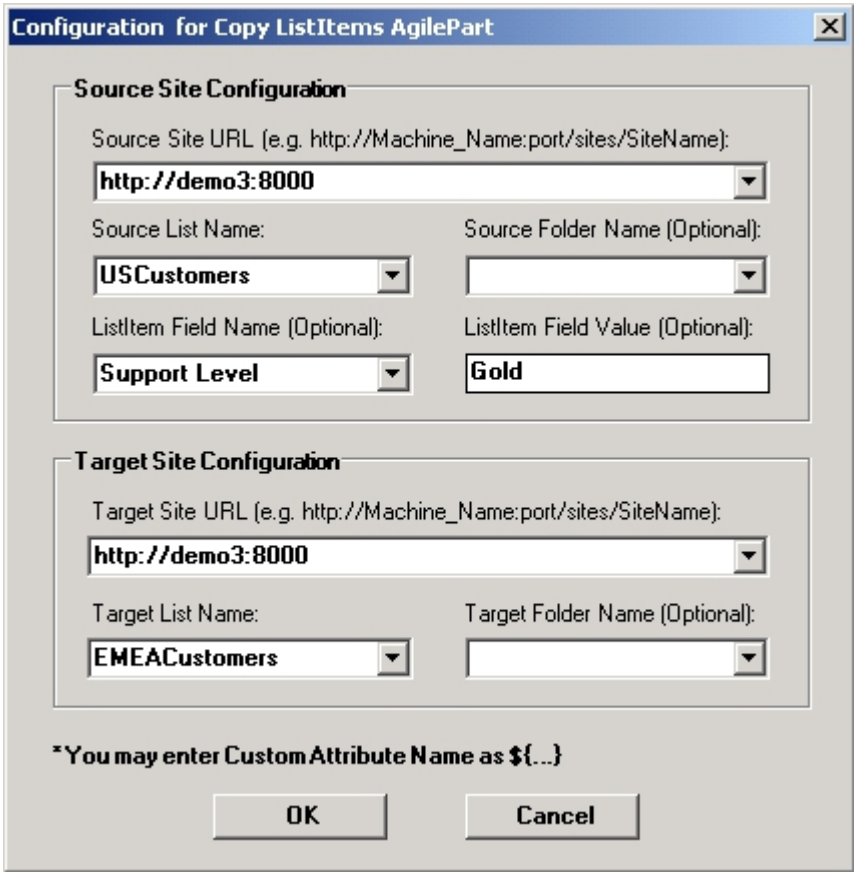


Field Definitions

Field Name	Definition
ConnectionString	The connection string that will be used to connect to the database at runtime. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. to create a new connection string.
TableName	The name of the database table where this AgileShape should insert the database record.

Configuration for Copy ListItems AgilePart

Specifies the configuration for copying list items.



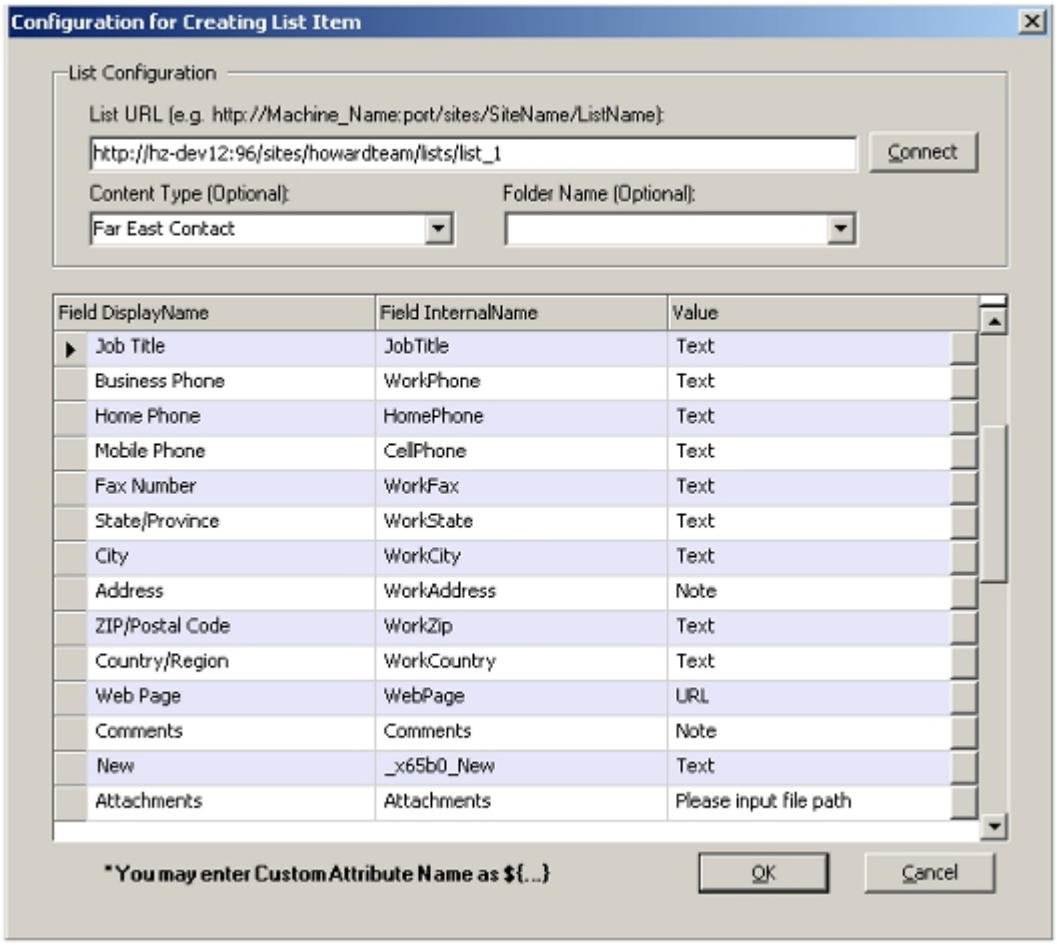
Field Definitions

Field Name	Definition
Source Site URL	Specifies the name of the list that includes the affected (copied, moved, etc.) list items.
Source List Name	Specifies the source SharePoint site URL that includes the list for which items are to be affected (copied, moved, etc.).
Source Folder Name	Specifies the name of the folder that includes the list items to be affected (copied, moved, etc.).
ListItem Field Name	Specifies the name of the list item field to be affected (copied, moved, etc.).
ListItem Field Value	Specifies the value of the field to be affected (copied, moved, etc.). This can be used as a filtering mechanism where only fields with the

Field Name	Definition
	specified value are affected. The following are sample values: • $\{ListItemID\} or $\{SubListItemID\} • list item ID
Target List Name	Specifies the name of the destination list for the affected items.
Target Folder Name	Specifies the name of the destination folder for the affected items. If the folder does not exist the system will automatically create it.
Target Site URL	Specifies the target SharePoint site URL that includes the destination list for the affected items.

Configuration for Creating List Item Window

Specifies the configuration for creating the list item.



Field Definitions

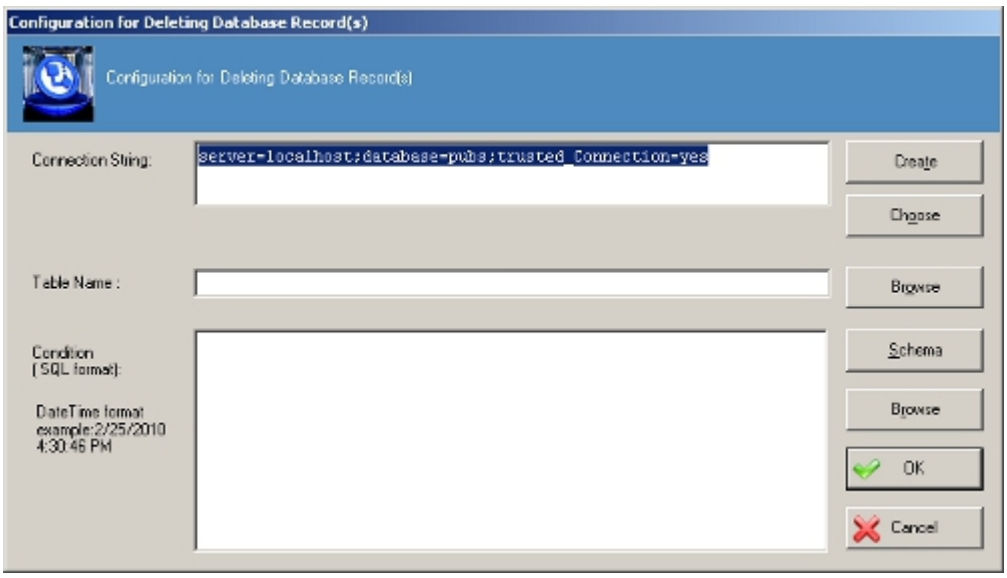
Field Name	Definition
List URL	Specifies the URL for the associated SharePoint list. A valid list URL is required, if a library URL (such as document library URL or form library URL) instead of a list URL is used, an error will occur during execution. Below are examples of a valid list URL: • http://Machine_Name:port/sites/SiteName/ListName • ${DocUrl} After entering the list URL, click the **Connect** button. Now a Content Type can be selected.

Field Name	Definition
Content Type	Specifies the Content Type for the list item. This is an optional item, the system will get a default Content Type for the configuration.

Folder Name	Specifies the folder name under which a list item will be affected (created, deleted, etc.). There are two ways to specify a folder:
	• Select a Folder Name from the drop-down list.
	• Input a Folder Name in the drop-down list, if the list doesn't contain the folder, the system will create it automatically.
	After the first section is completed, all columns (with the exception of read-only columns, e.g., Calculate) in the selected list are shown. The Value column shows the Data Type of the column. If the value is Text, input is to be a string, if it is DateTime, input is to be a valid date, etc. There are 4 ways to set the Value column:
	• Input a value (string value or datetime value etc.) or empty.
	• Input a custom attribute name ${FuLLName}.
	• Click the button at the right side to select schema metadata associated with the process model.
	• The Attachment field allows you to attach a file to the list item, there are 2 ways to do this:
	  • Local machine path, such as c: \FileName.Extension.
	  • Http path, such as Http://Url / FileName.Extesion.

Configuration for Deleting Database Record(s) Window

This property allows the process modeler to configure where and how the records are deleted from the database.

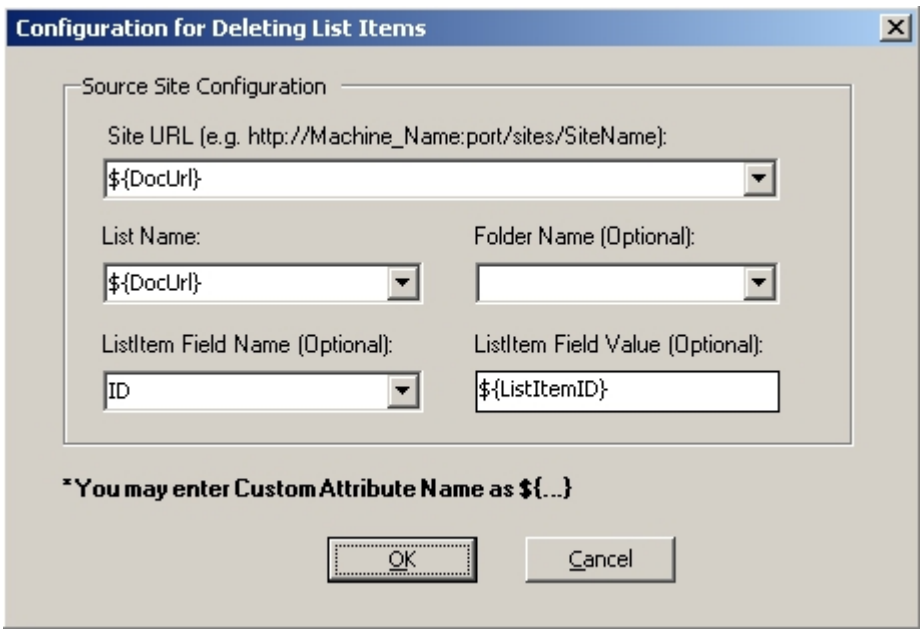


Field Definitions

Field Name	Definition
ConnectionString	The connection string that will be used to connect to the database at runtime. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. to create a new connection string.
TableName	The name of the database table where this AgileShape should insert the database record.
Condition	The SQL WHERE clause that defines which database records should be updated.

Configuration for Deleting List Items Window

This window enables you to specify the configuration for deleting list items.



Field Definitions

Field Name	Definition
SiteURL	This property specifies the URL for the new where you want to add or remove the associated item (e.g., SharePoint site, document library, site collection, user, group, etc.). Below are examples of a valid SharePoint site URL: • http://Machine_Name:port/sites/SiteName • $\{DocUrl\}
List Name	Specifies the name of the list where the list items will be deleted.
Folder Name	Specifies the folder name under which a list item will be affected (created, deleted, etc.). There are two ways to specify a folder: • Select a Folder Name from the drop-down list. • Input a Folder Name in the drop-down list, if the list doesn't contain the folder, the system will create it automatically.

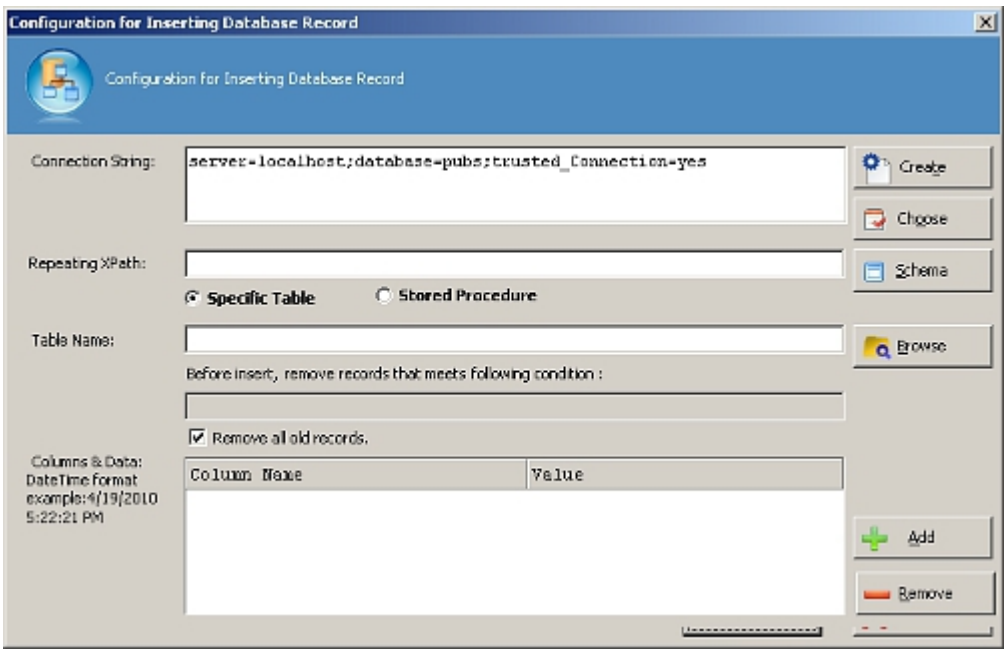
Field Name	Definition

	After the first section is completed, all columns (with the exception of read-only columns, e.g., Calculate) in the selected list are shown. The Value column shows the Data Type of the column. If the value is Text, input is to be a string, if it is DateTime, input is to be a valid date, etc. There are 4 ways to set the Value column:
	• Input a value (string value or datetime value etc.) or empty.
	• Input a custom attribute name ${FuLLName}.
	• Click the button at the right side to select schema metadata associated with the process model.
	• The Attachment field allows you to attach a file to the list item, there are 2 ways to do this:
	  • Local machine path, such as c: \FileName.Extension.
	  • Http path, such as Http://Url / FileName.Extesion.

ListItem Field Name	Specifies the name of the list item field to be deleted. This allows you to delete only one field from a list item.
ListItem Field Value	Specifies a value for which all corresponding fields will be deleted. This can be used as a filtering mechanism where only fields with the specified value are deleted.

Configuration for Inserting Database Record(s) Window

This property allows the process modeler to configure where and how the new database records are inserted into the database.

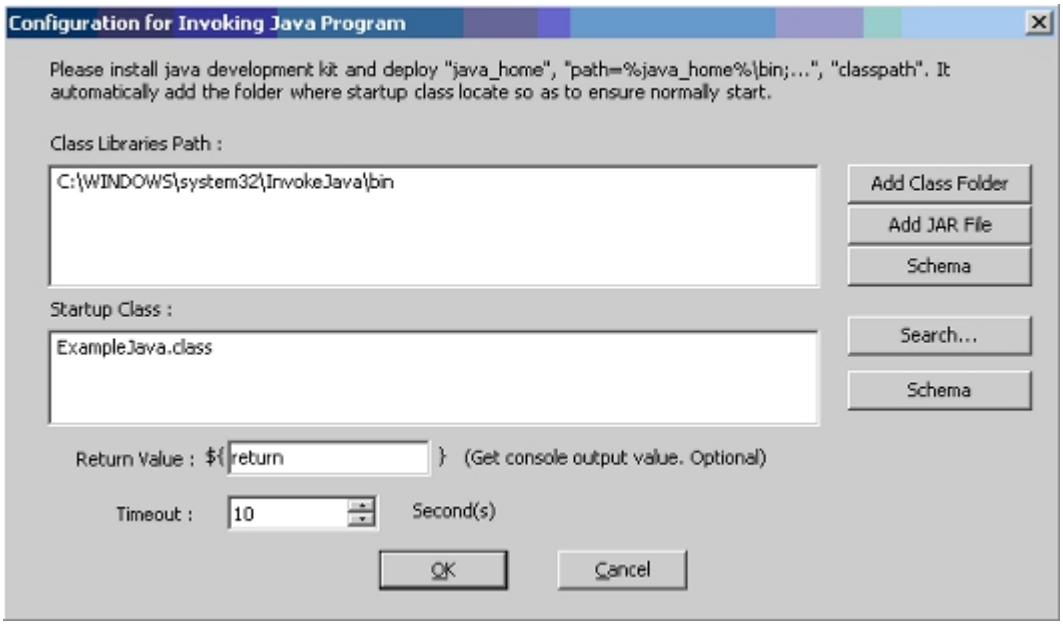


Field Definitions

Field Name	Definition
ConnectionString	The connection string that will be used to connect to the database at runtime. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. to create a new connection string.
TableName	The name of the database table where this AgileShape should insert the database record.

Configuration for Invoking Java Program Window

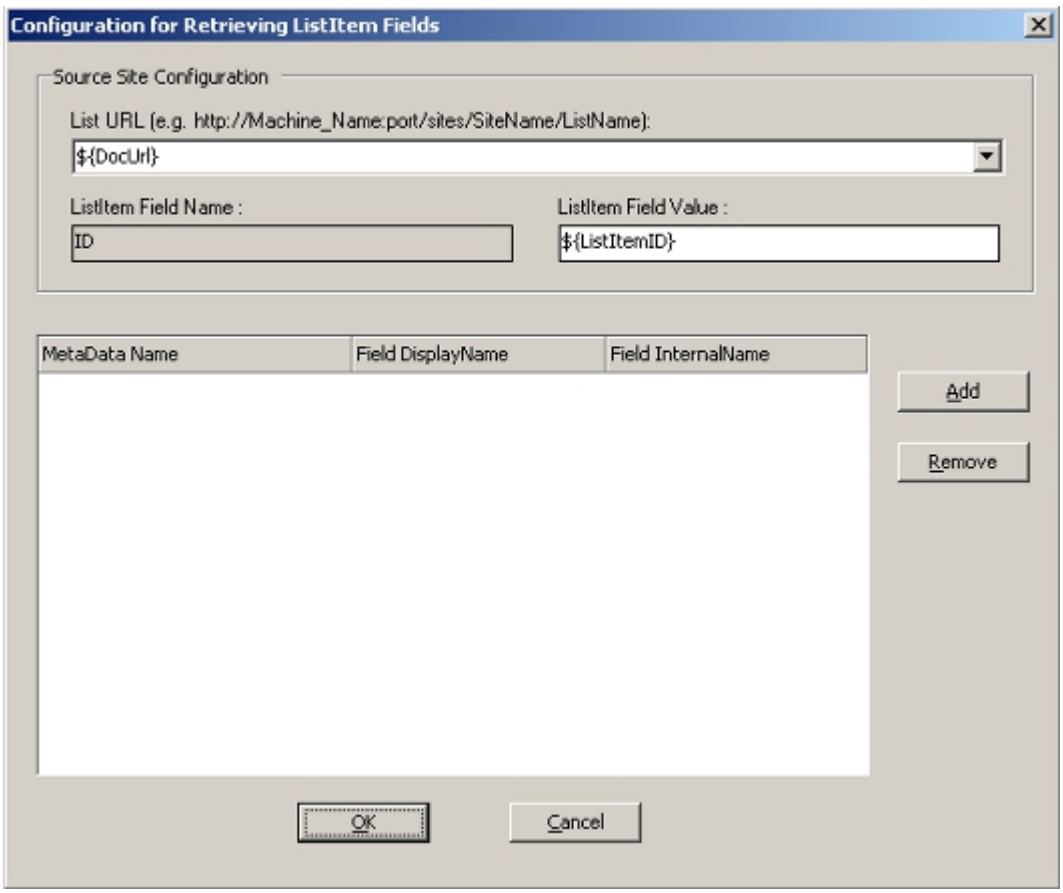
This window allows the process modeler to configure the details for invoking the Java program.



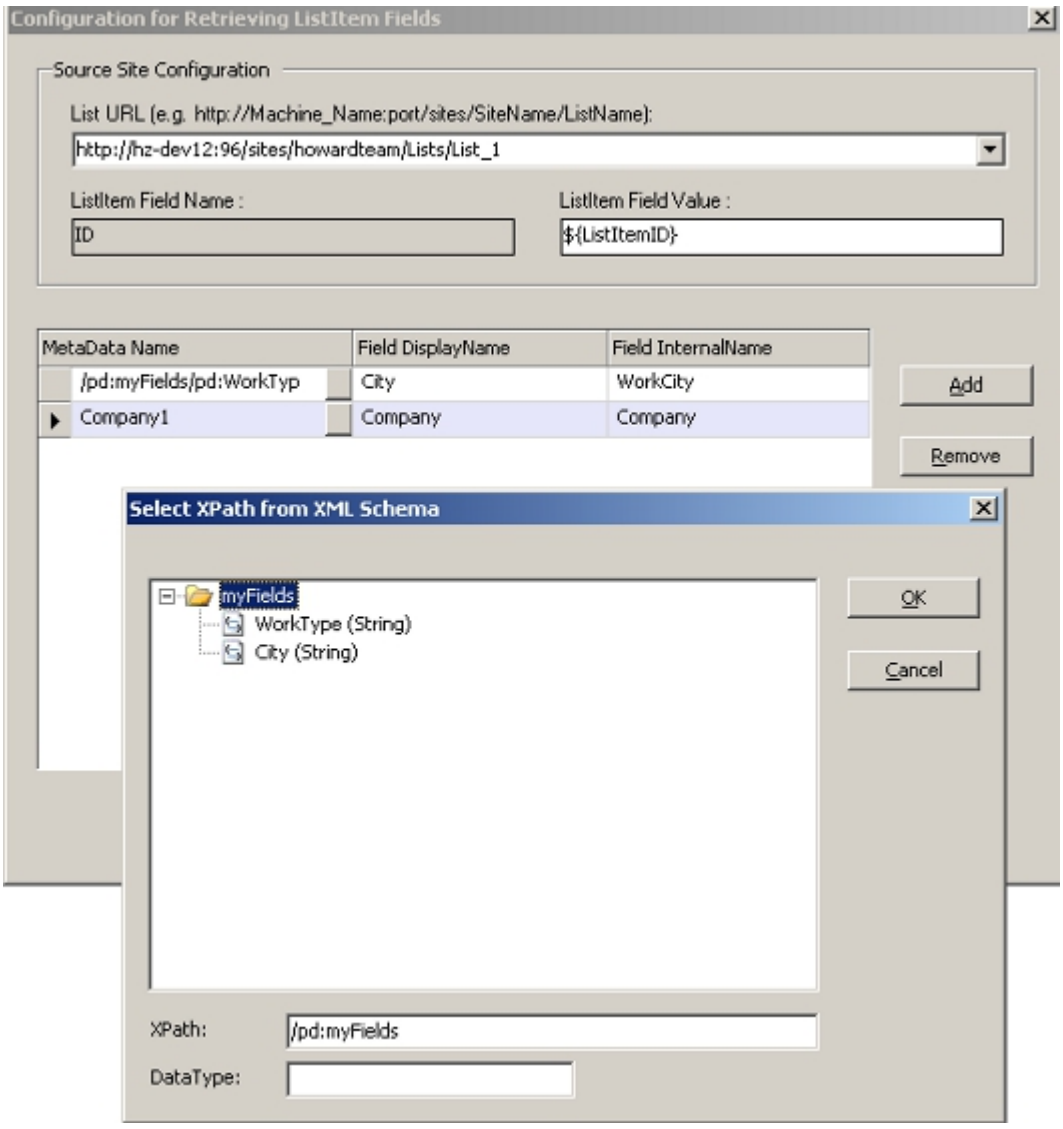
1. Click the **Search** button to add a class that contains the main method for the startup class. It automatically adds the folder where the startup class is located to ensure normal startup as shown above.
2. Add all the libraries and/or class folders that the startup class requires by clicking either the **Add Class Folder** or **Add External JAR** button.
3. Enter a custom parameter name for the output value in the **"Return Value"** text box. This is an optional step and only returns the console output value.
4. To limit the run time, input the number of seconds before timeout.
5. Click **OK** when finished with the configuration.

Configuration for Retrieving ListItem Fields Window

Specifies the configuration for retrieving list item field values and where the values will be updated in a custom attribute, schema metadata, or SharePoint metadata.



After the Source Site is configured, the configuration window will look similar to below.



The MetaData Name column is used to specify a custom attribute, schema metadata, or SharePoint metadata where the value from the list field that is retrieved will be updated to.

The MetaData Name can be configured as follows:

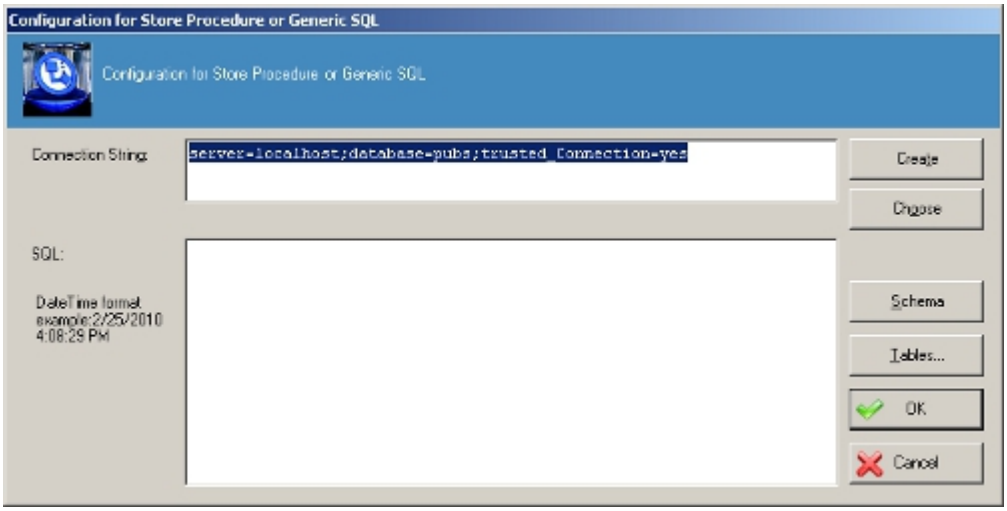
1. Use the Add button to select a SharePoint metadata item.
2. Input a custom attribute name (e.g. Company1).
3. Click the button at the right side of the field to select a schema metadata.

Field Definitions

Field Name	Definition
List URL	Specifies the URL for the associated SharePoint list. A valid list URL is required, if a library URL (such as document library URL or form library URL) instead of a list URL is used, an error will occur during execution. Below are examples of a valid list URL: • http://Machine_Name:port/sites/SiteName/ListName • ${DocUrl} After entering the list URL, click the **Connect** button. Now a Content Type can be selected.
ListItem Field Name	Specifies the name of the list item field to be affected (copied, moved, etc.).
ListItem Field Value	Specifies the value of the field to be affected (copied, moved, etc.). This can be used as a filtering mechanism where only fields with the specified value are affected. The following are sample values: • $\{ListItemID\} or $\{SubListItemID\} • list item ID

Configuration for Stored Procedure or Generic SQL Window

This property allows the process modeler to configure where and how the new database records are inserted into the database.

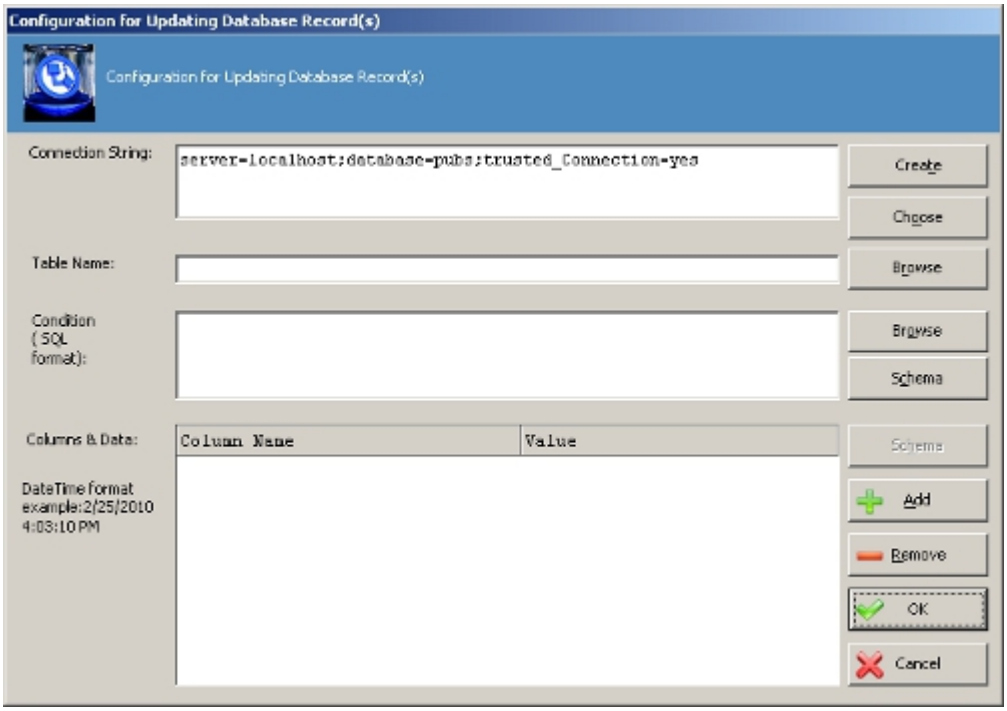


Field Definitions

Field Name	Definition
ConnectionString	The connection string that will be used to connect to the database at runtime. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. to create a new connection string.
SQL	The SQL statement that will be performed on the database by this AgileShape at runtime.

Configuration for Updating Database Record(s) Window

This property allows the process modeler to configure where and how the new database records are inserted into the database.



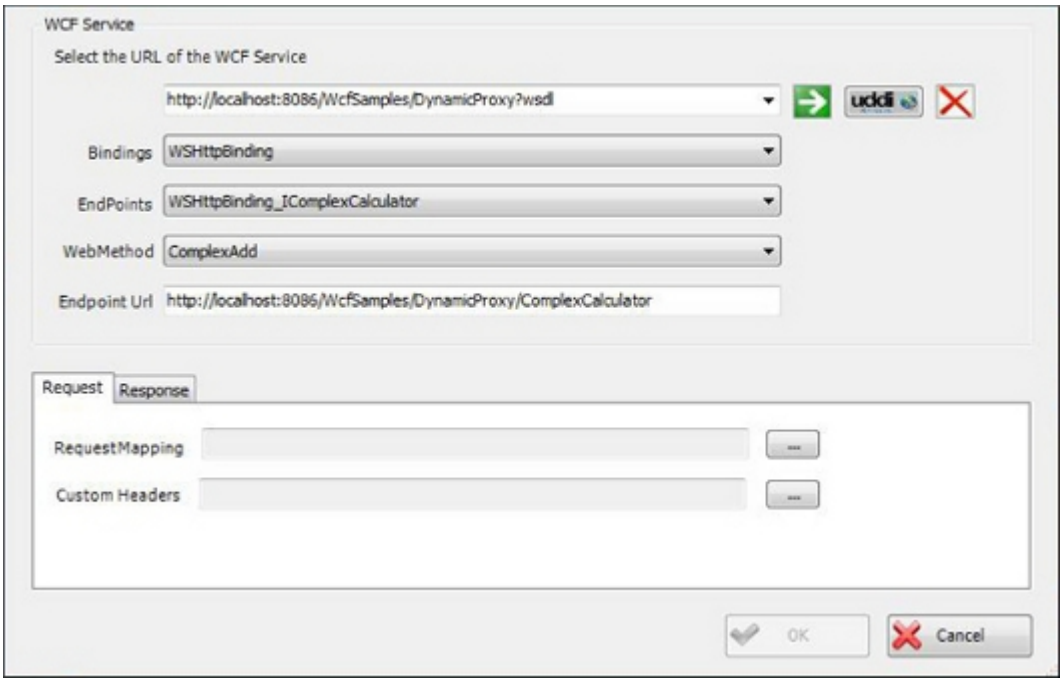
Field Definitions

Field Name	Definition
ConnectionString	The connection string that will be used to connect to the database at runtime. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. to create a new connection string.
TableName	The name of the database table where this AgileShape should insert the database record.
Condition	The SQL WHERE clause that defines which database records should be updated.

Configuration for WCF Service Window

This dialog box enables you to configure communication with a WCF service.

The values entered in the Configuration dialog box populate the **BindingName**, **EndpointName**, **MethodName**, and **URL** properties that display in the Envision Properties box.

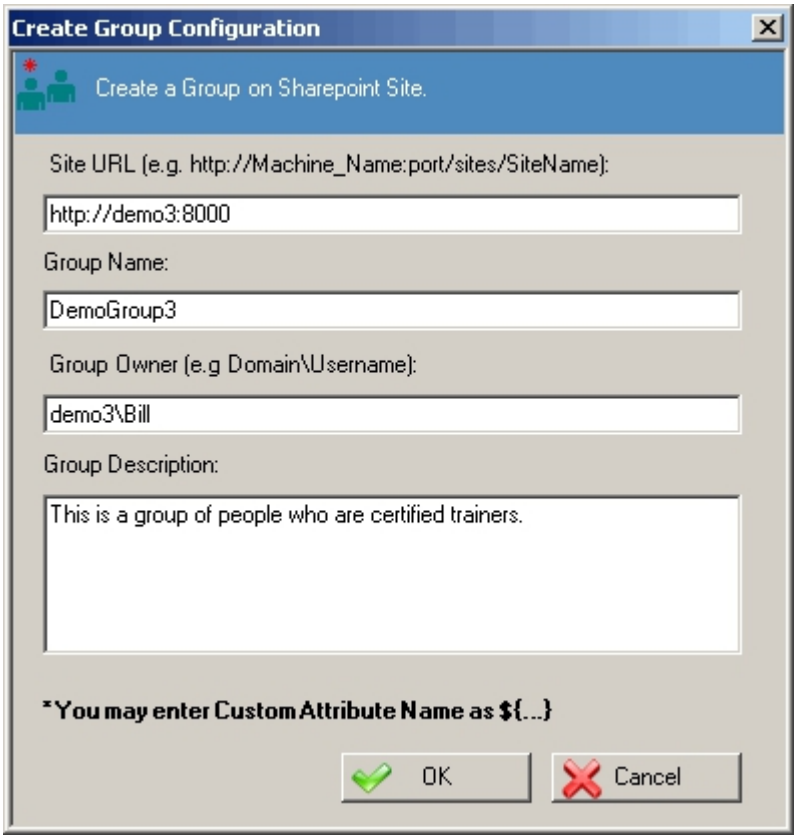


Field Definitions

Field Name	Definition
URL	URL of the item you are configuring
Bindings	Specifies the data binding you want to use.
Endpoints	Specifies the endpoint to which you want to connect.
WebMethod	Specifies a method to invoke.
Endpoint URL	The URL of the endpoint of the service to which you want to connect.
RequestMapping / ResponseMapping	Click the **Ellipses** button to map the schemas for the process model and the WCF service.
Custom Headers (Response)	Click the **Ellipses** button to map the schemas for the process model and the WCF service for a request or response, as appropriate.

Create Group Configuration Window

This property allows you to configure the new group details to be created in SharePoint.



Field Definitions

Field Name	Definition
SiteURL	This property specifies the URL for the new where you want to add or remove the associated item (e.g., SharePoint site, document library, site collection, user, group, etc.). Below are examples of a valid SharePoint site URL: • http://Machine_Name:port/sites/SiteName • $\{DocUrl\}

Field Name	Definition
Group Name	The name of the affected SharePoint Group (e.g., the group to be created, to be deleted, to which a user will be added, etc.).
Group Owner	The domain and user name of the SharePoint user who is to be the owner of the group.
Group Description	A description of the group.

Create Group Window

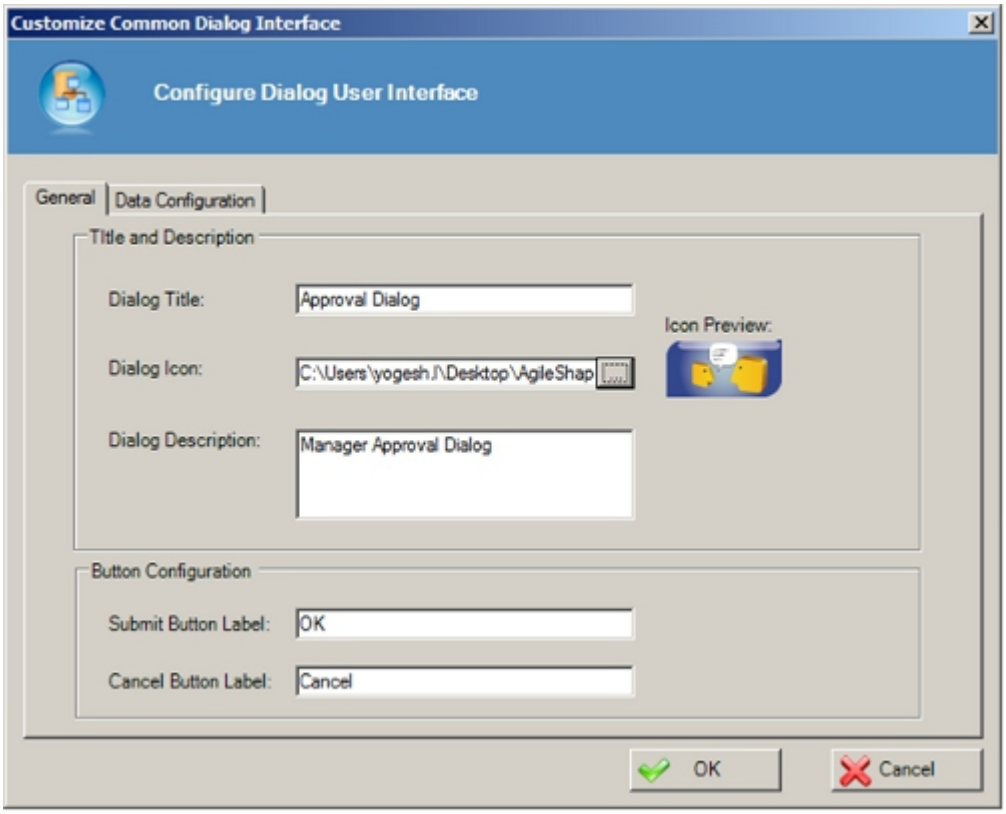
Specifies the group information to create in Active Directory. If the process template is associated with a schema, the Schema buttons will appear allowing you to select an Xpath. Custom attributes are also supported.

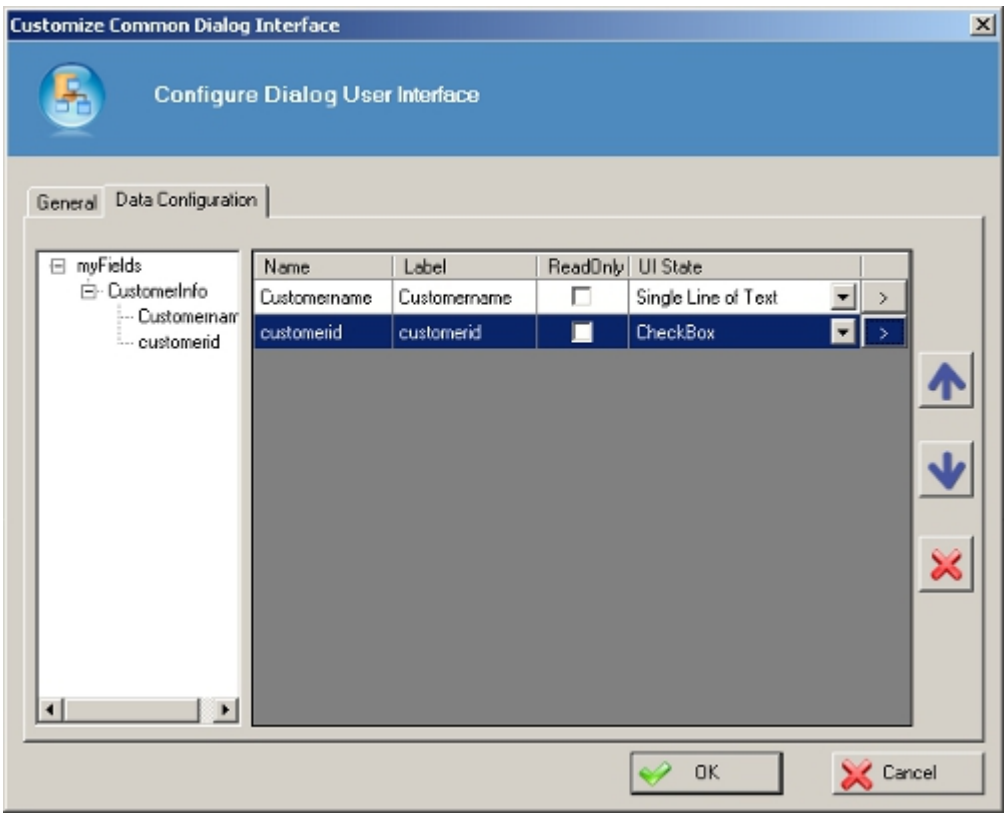
Field Definitions

Field Name	Definition
Group Name	Specifies the affected group name (the group name to be created, removed, etc.). The Group Name cannot be duplicated in the domain. Also, once the Group is created, it cannot be changed.
Group Name (Pre-Windows 2000)	Specifies the log name of the account, the difference between the Group Name above and this field is it can be modified after it has been created.
Email Address	Specifies the email address of the group.
Verify Group	This button verifies the availability of the group name. The button is available just for the context domain if the context is reachable at design time. For example, if the context domain binds with a custom attribute, and the value depends on it at run time, in this case, the button is unavailable.
Group Scope	Refers to the profile of Group Scope in Active Directory.
GroupType	Refers to the profile of Group Type in Active Directory.

Customize Common Dialog Interface Window

This window allows you to configure the dialog box you want to display in SharePoint.





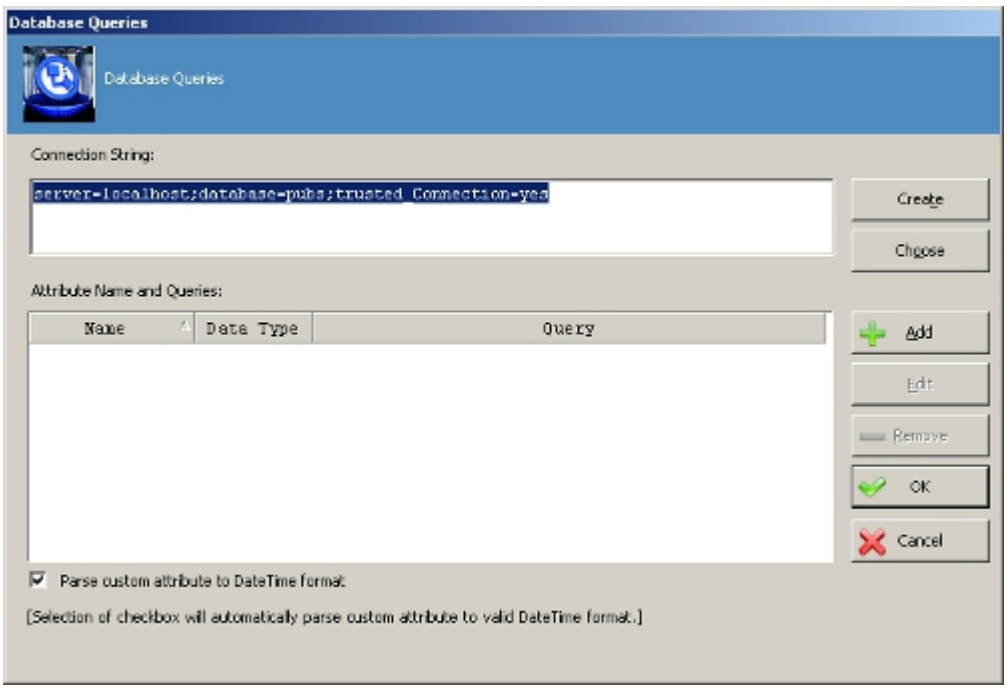
Field Definitions

Field Name	Definition
Dialog Title	The title that appears in the title bar of the dialog box.
Dialog Icon	An icon that appears at the top of the dialog box.
Dialog Description	A text description that at the top of the dialog box.
Submit Button Label	The text that appears on the button that submits the form on the dialog box and closes the dialog box. (The text is "OK" by default in Windows.)
Cancel Button Label	The text that appears on the button that closes the dialog box without submitting the form. (The text is "Cancel" by default in Windows.)
Data Configuration tab	Opens the Data Configuration tab, which enables you to define the fields on the form.

Field Name	Definition
Schema	The schema for the current process is displayed in the left pane. Drag and drop schema fields in the right pane to add them to the dialog box.
Label	The name that appears for the field in the dialog box. By default, this is the same as the field name, but this can be changed.
Name	The name of the field as it appears in the schema. This name is read-only.
ReadOnly	When selected, indicates that the field is read-only in the dialog box.
Input Type	The type of input field that appears on the dialog box.
> (Data Binding)	Opens a pop-up that enables you to modify the data binding for the field.
Up Arrow	Moves a field up in the list.
Down Arrow	Moves a field down in the list.
X	Deletes a field from the dialog box.

Database Queries Window

Use this window to configure where and how the data is retrieved from the database

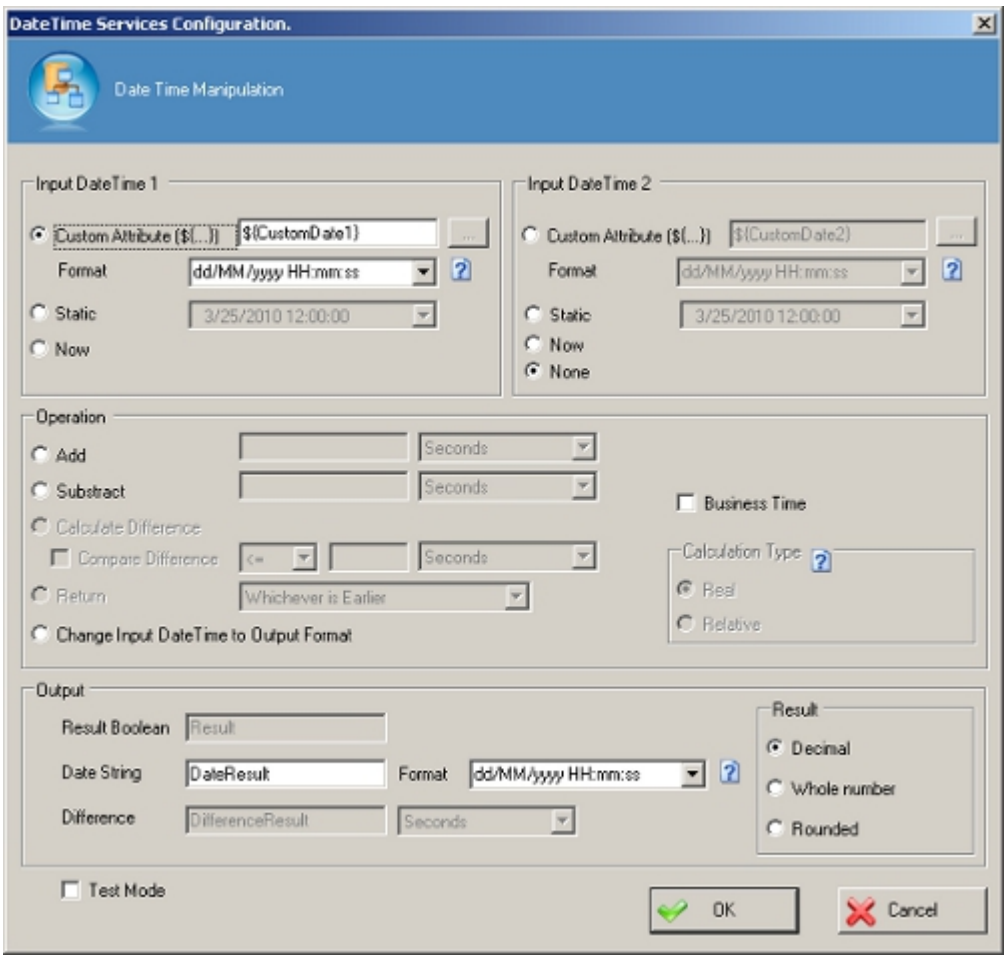


Field Definitions

Field Name	Definition
ConnectionString	The connection string that will be used to connect to the database at runtime. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. to create a new connection string.
TableName	The name of the database table where this AgileShape should insert the database record.

DateTime Services Configuration Window

This window enables you to configure date calculations.



Field Definitions

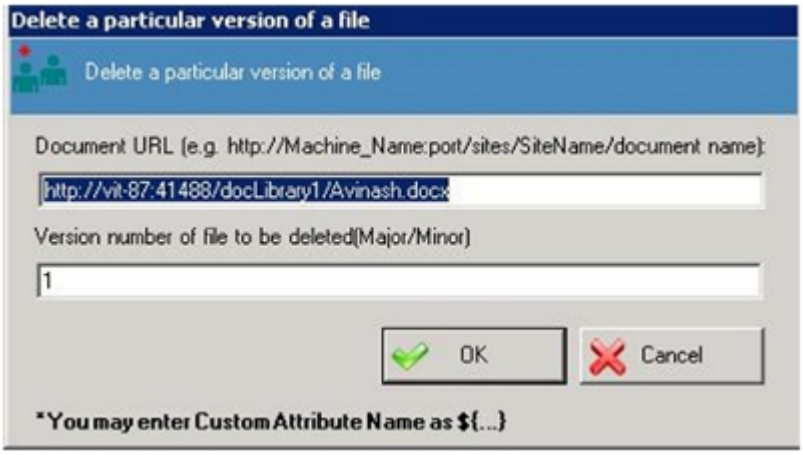
Field Name	Definition
Input DateTime	Specifies 1 or 2 dates to use as input values. You can select a **Custom Attribute**, a **Static** date and time, or the date and time **Now** (when the DateTime AgilePart is initiated).
Add	Specifies an amount of time to add to the Input DateTime.
Subtract	Specifies an amount of time to subtract from the Input DateTime.
Compare Difference	Indicates whether to compare the difference between the two Input DateTime values.

Field Name	Definition
Return	Specifies whether to pass the earlier or later value based on the comparison. Change Input DateTime to Output Format Indicates that the Input DateTime format will be converted to the Output.
Business Time	Specifies that the AgilePoint work calendar is taken into account for calculations.
Calculation Type	Specifies whether to calculate or compare the difference between Input DateTime 1 and Input DateTime 2. You can specify the following types of calculations: ● **Real** - The actual difference between the two input DateTimes. The result depends on the setting for the **Result** option. ● **Relative** - This setting is useful for situations such as when an action is allowed once per month. The "real" difference between the last day of one month and the first day of following month is 0 months. However, in "relative" mode, this difference is calculated as one month because the dates are in adjacent months. This returns the relative number of time units (days, weeks, months, years) between the two input DateTimes. For example, the Relative differences between Sat 29-Dec-2007 23:59:59 and Wed 02-Jan-2008 00:00:00 are 4 days or 1 week or 1 month or 1 year, depending upon the time unit specified.
Result	Specifies the type of value to return for calculations where the **Calculation Type** is **Real**: ● **Decimal** - Returns the difference as is, including any decimals. ● **Whole Number** - Returns the integer part of the result by removing the decimal part. ● **Rounded** - Rounds up (>=0.5) or rounds down (<0.5) the result.
Result Boolean	If **Compare Difference** is enabled, the difference will be evaluated as a Boolean (True/False)

Field Name	Definition
	result, and the Boolean value will be associated with the text that appears in this field.
Date String	If based on the operation performed, the output is of type DateTime, the result will be converted to a string and stored in the format provided in the Format list, and stored associated with the text that appears in this field.
Difference	If **Compare Difference** is enabled, the difference will be stored as a NameValue where the name is the text that appears in this field, and the value is the output value.

Delete a Particular Version of a File Window

This property enables you to configure the file version you want to delete. Click the **Ellipses** button to open and delete a particular version of a file dialog box.



Field Definitions

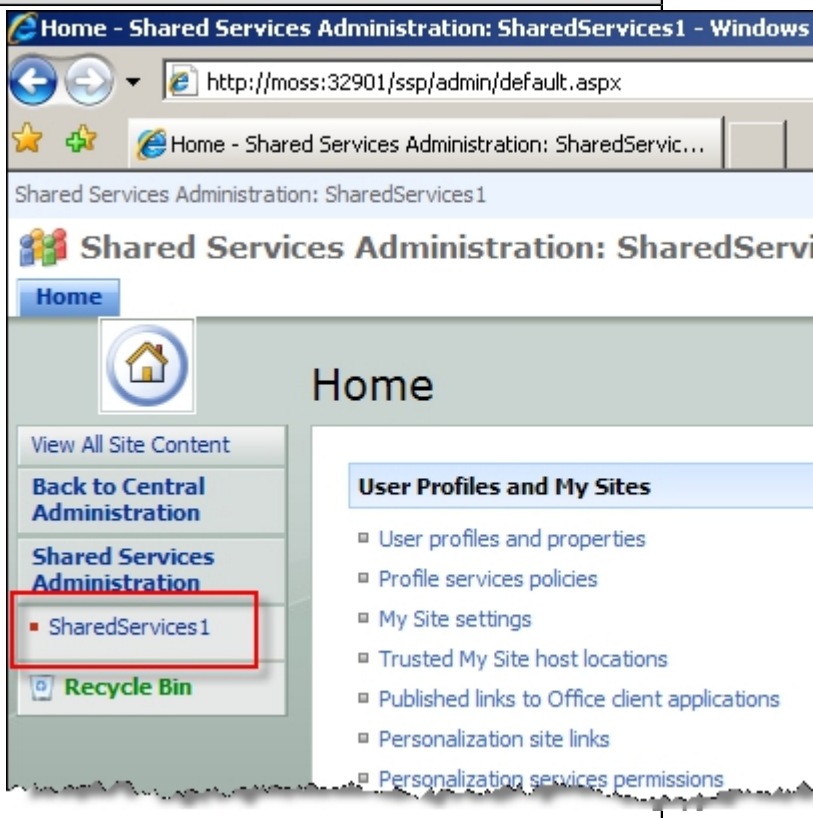
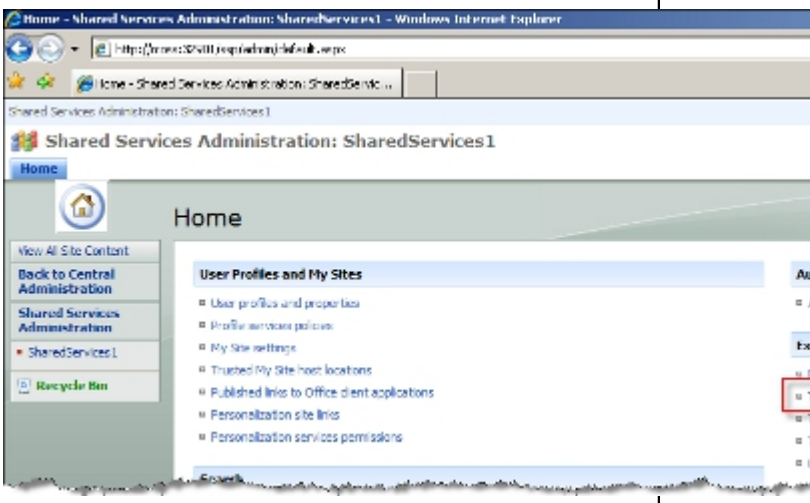
Field Name	Definition
Document URL	The URI of the file for which you want to delete a version.
Version number of file to be deleted	The URI of the file for which you want to delete a version.

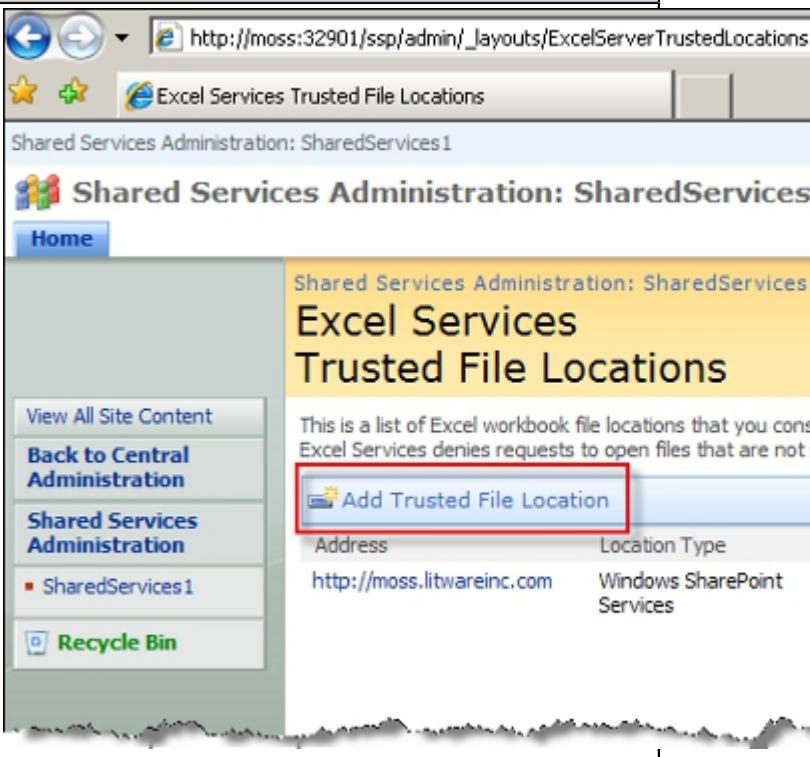
Excel Calculate Configuration Window

This window enables you to configure an Excel calculate action

Field Definitions

Field Name	Definition
Excel Services URL (Required)	The URL of the Excel Service. For example http://moss.litwareinc.com/_vti_bin/ExcelService.asmx This could include custom attributes like $\{SharePointURL\}$\{ExcelService\}. Also schema XPaths can be added using the ellipsis button.
Runtime Template (Required)	The Excel template that will be used at run-time (either .xlsx or .xltx). This document will be copied to the location as defined by the Save To parameter. This could be custom attributes like $\{SharePointURL\}$\{RuntimeTemplateLibrary\}$\{ExcelFilename\}. Also schema XPaths can be added using the ellipsis button. This file should be equivalent to the Design-time Template file with the same named fields. This document should be located in either a SharePoint Doc Library or in a shared folder. Either way, this must be added to the Trusted file locations of the Excel Services (configured in SharePoint Central Administration - Shared Services):

Field Name	Definition
	 

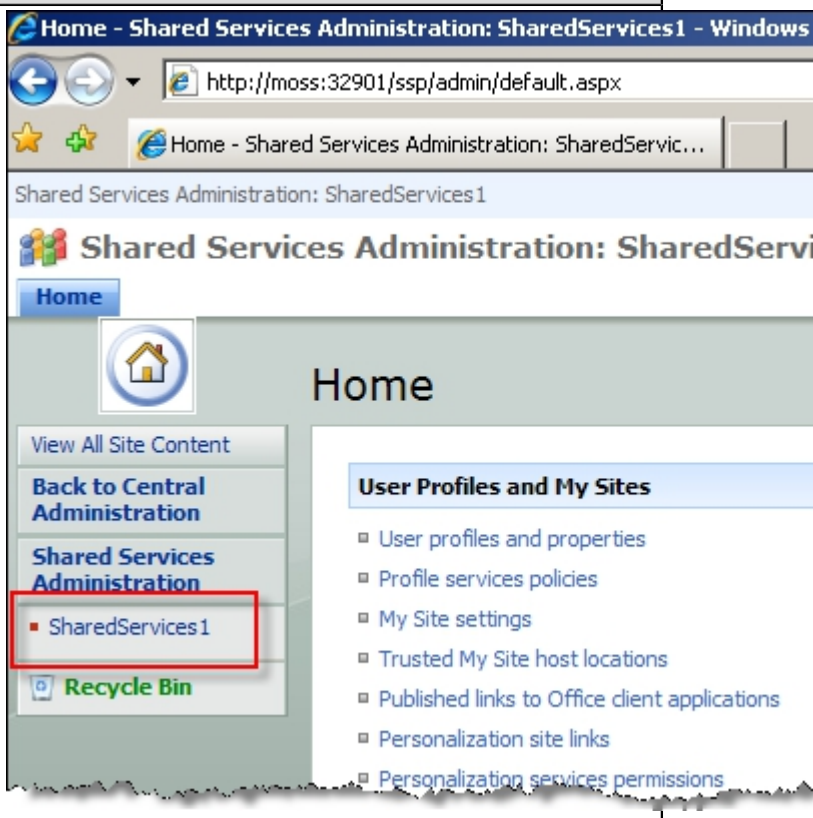
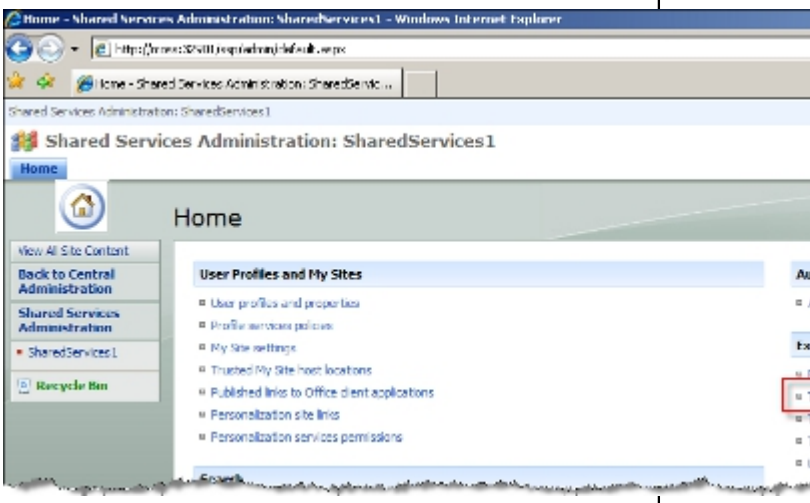
Field Name	Definition
	
Design Time Template (Required)	Excel template to use at design-time. This template document is loaded at design-time to get access to all the named fields in the Excel sheet for mapping purposes. It is not used at run-time. This file should be equivalent to the Run-time Template file with the same named fields. Also, while designing in Envision, the file should be accessible to the Process Designer from his/her PC via the Browse button.
Save To (Required)	The path and filename for saving the resulting Excel document. This can be in a SharePoint Doc library or in a directory path. This could also be an expression like $\{SharePointURL \}$\{ExcelDocLibrary\}$\{ExcelFilename\}. Also schema XPaths can be added using the ellipsis button.
Overwrite if Exists	Overwrite the Save To file if it already exists.

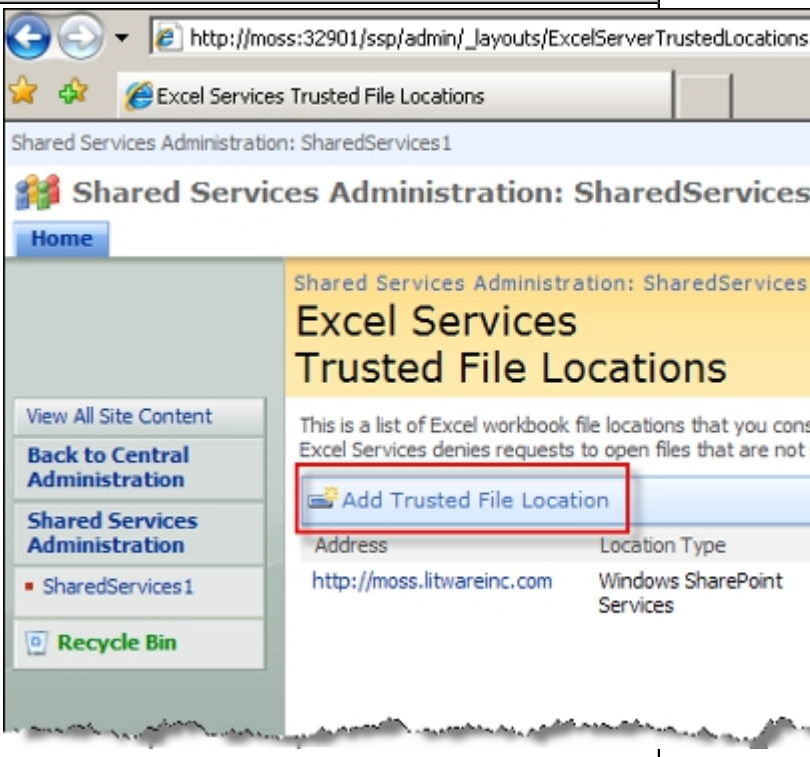
Excel Read Configuration Window

This window enables you to configure an Excel read action

Field Definitions

Field Name	Definition
Excel Services URL (Required)	The URL of the Excel Service. For example http://moss.litwareinc.com/_vti_bin/ExcelService.asmx This could include custom attributes like $\{SharePointURL\}$\{ExcelService\}. Also schema XPaths can be added using the ellipsis button.
Runtime Template (Required)	The Excel template that will be used at run-time (either .xlsx or .xltx). This document will be copied to the location as defined by the Save To parameter. This could be custom attributes like $\{SharePointURL\}$\{RuntimeTemplateLibrary\}$\{ExcelFilename\}. Also schema XPaths can be added using the ellipsis button. This file should be equivalent to the Design-time Template file with the same named fields. This document should be located in either a SharePoint Doc Library or in a shared folder. Either way, this must be added to the Trusted file locations of the Excel Services (configured in SharePoint Central Administration - Shared Services):

Field Name	Definition
	 

Field Name	Definition
	
Design Time Template (Required)	Excel template to use at design-time. This template document is loaded at design-time to get access to all the named fields in the Excel sheet for mapping purposes. It is not used at run-time. This file should be equivalent to the Run-time Template file with the same named fields. Also, while designing in Envision, the file should be accessible to the Process Designer from his/her PC via the Browse button.

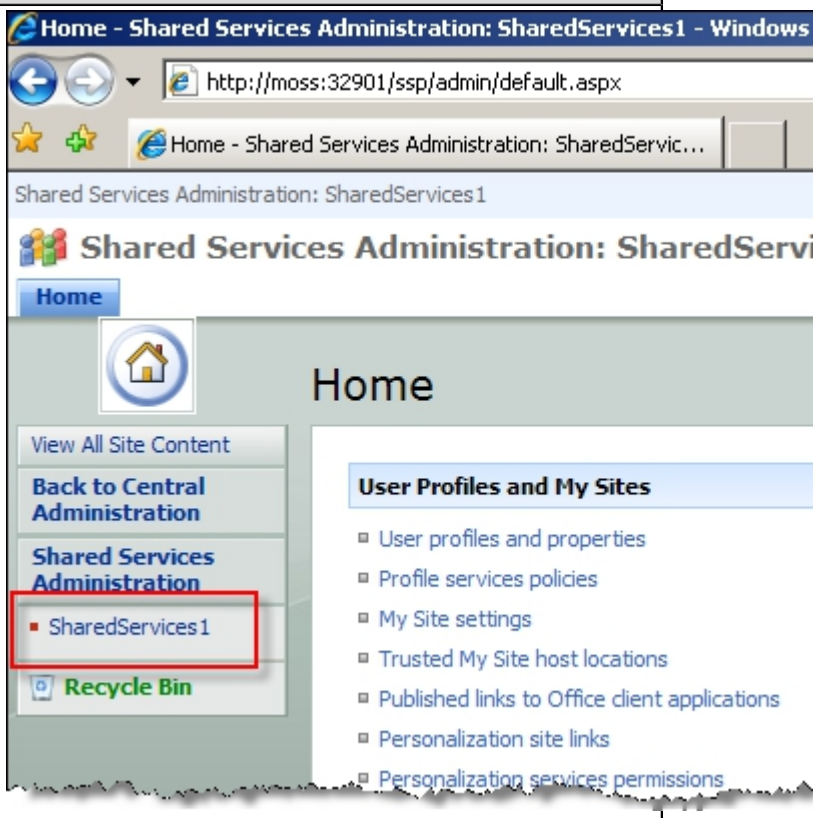
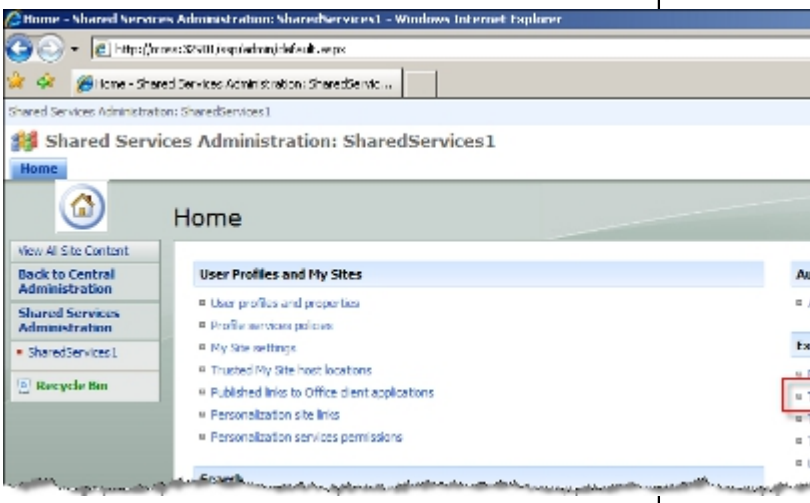
Excel Write Configuration Window

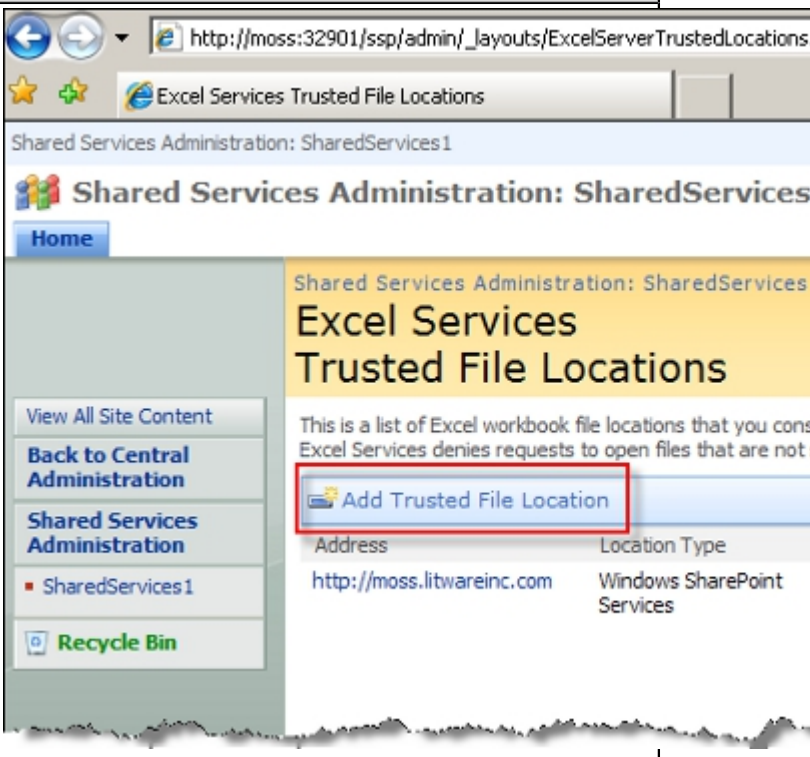
This window enables you to configure an Excel write action

Field Definitions

Field Name	Definition
Excel Services URL (Required)	The URL of the Excel Service.

Field Name	Definition
	For example http://moss.litwareinc.com/_vti_bin/ExcelService.asmx This could include custom attributes like $ \{SharePointURL\}$\{ExcelService\}. Also schema XPaths can be added using the ellipsis button.
Runtime Template (Required)	The Excel template that will be used at run-time (either .xlsx or .xltx). This document will be copied to the location as defined by the Save To parameter. This could be custom attributes like $ \{SharePointURL\}$\{RuntimeTemplateLibrary\}$ \{ExcelFilename\}. Also schema XPaths can be added using the ellipsis button. This file should be equivalent to the Design-time Template file with the same named fields. This document should be located in either a SharePoint Doc Library or in a shared folder. Either way, this must be added to the Trusted file locations of the Excel Services (configured in SharePoint Central Administration - Shared Services):

Field Name	Definition
	 

Field Name	Definition
	
Design Time Template (Required)	Excel template to use at design-time. This template document is loaded at design-time to get access to all the named fields in the Excel sheet for mapping purposes. It is not used at run-time. This file should be equivalent to the Run-time Template file with the same named fields. Also, while designing in Envision, the file should be accessible to the Process Designer from his/her PC via the Browse button.
Save To (Required)	The path and filename for saving the resulting Excel document. This can be in a SharePoint Doc library or in a directory path. This could also be an expression like $\{SharePointURL \}$\{ExcelDocLibrary\}$\{ExcelFilename\}. Also schema XPaths can be added using the ellipsis button.
Overwrite if Exists	Overwrite the Save To file if it already exists.

Http Post Configuration Window

This window enables you to configure an HTTP post action.

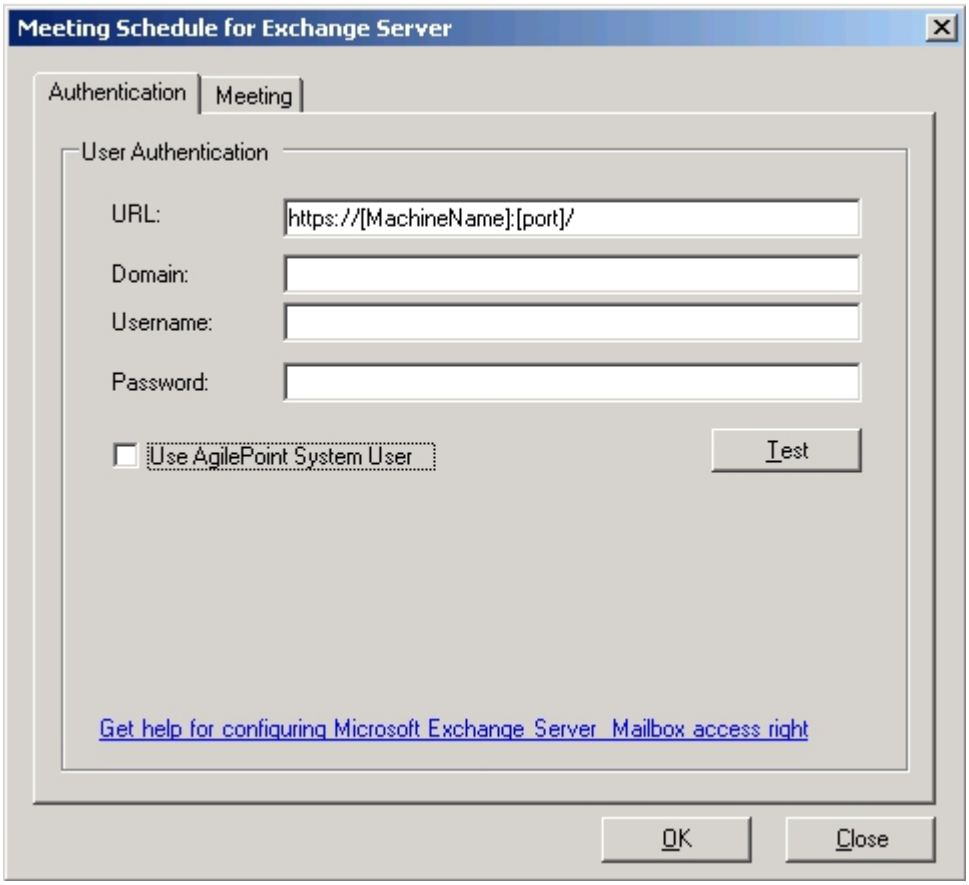
Field Definitions

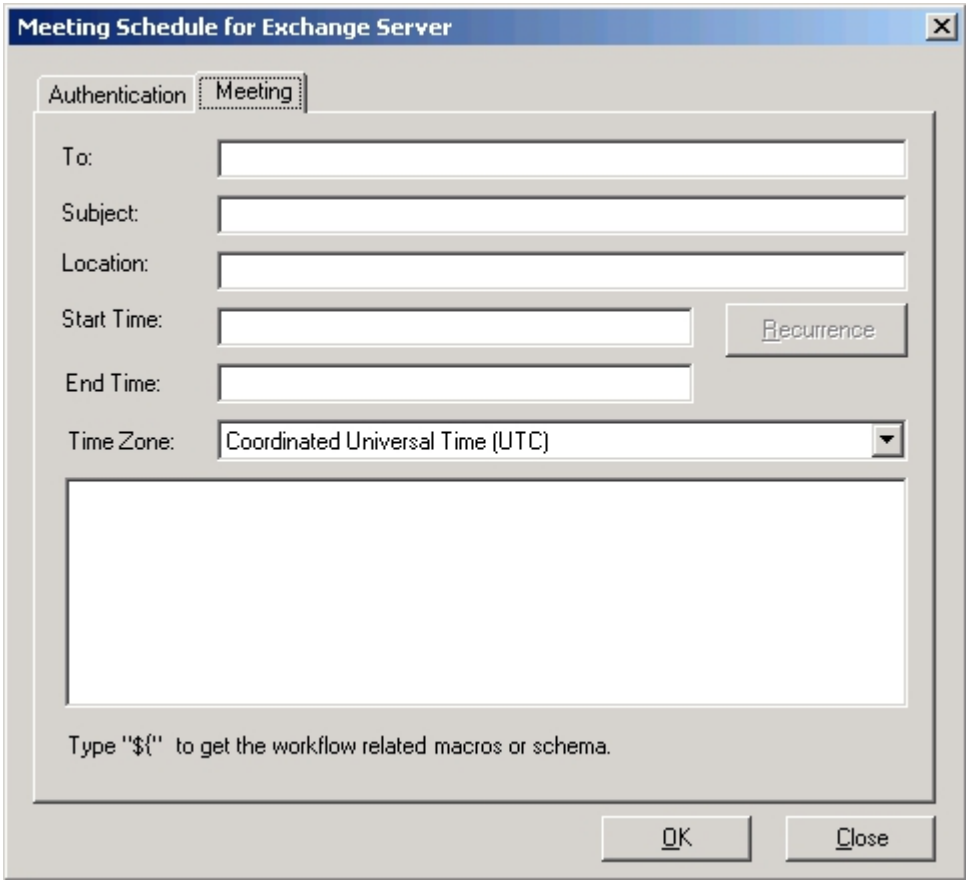
Field Name	Definition
Credential	The HTTP page URL section should contain a valid URL such as http://MachineName:PortNumber/WebApplication.aspx. The Authentication section allows you to specify the authentication for doing the Http post function. Do one of the following: • Specify an account by Domain\\username and password. You can validate whether this account is valid by clicking on the Test button. • Use the AgilePoint System User at runtime, that means it will impersonate the system account of AgilePoint. • Use the default credential, this means it will use the account credentials that are used when logging into the Web application.
Request	This tab allows you to specify a custom header by clicking on the **ellipses** button. You can add parameters that will be used while posting to a Web application, for example: • **Schema** - You can attach a Xpath if the process is based on a template with a associated schema. • **Add** - Append a new row in a table. • **Remove** - Delete the current row in a table. • **Remove All** - Remove all rows in a table.
Response	This tab allows you to bind a response. You can bind the response in two ways. One is to bind the response with an AgilePoint Schema, the

Field Name	Definition
	other is to store it in a custom attribute. If the Web application that is called is based on Base64 Encode, make sure to select this option.
Security	This tab allows you to enable SSL Authentication. If SSL Authentication is checked, you can add client certificates by clicking the **ellipses** button.
ProxyServer	This tab allows you to specify whether a proxy can be used during the execution of the Http Post.

Meeting Schedule for Exchange Server Window

Specifies the authentication mode to be used to access the Exchange Server and schedule the appointment and the appointment details.





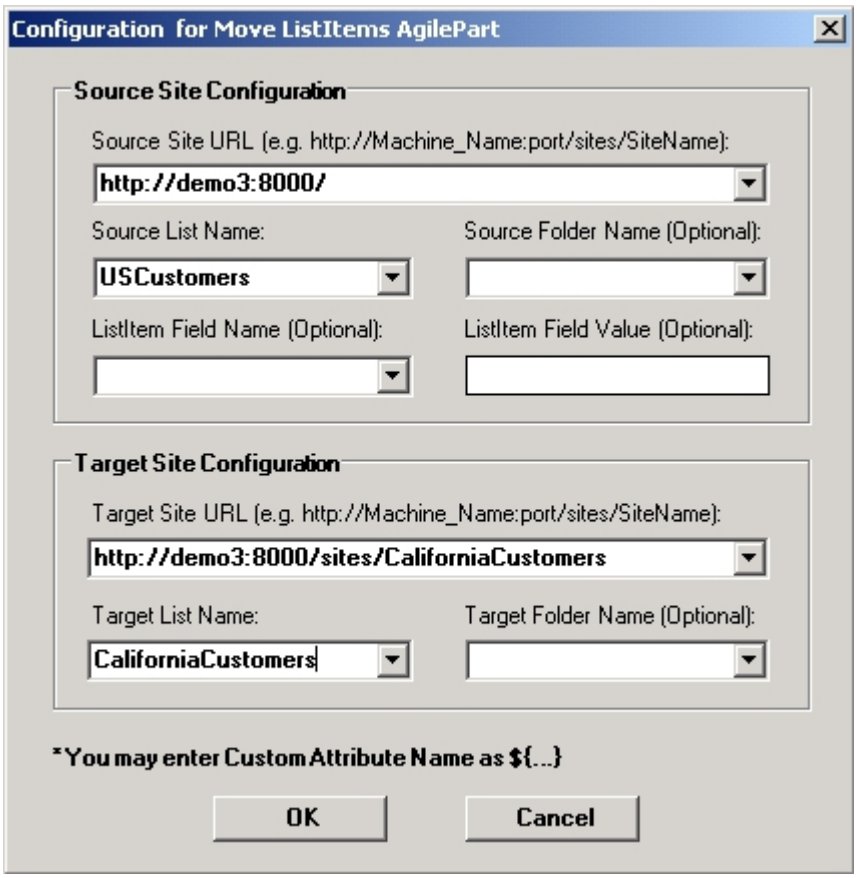
Field Definitions

Field Name	Definition
Exchange 2007 or Exchange 2010	Specifies the version of your Microsoft Exchange Server.
(Authentication) URL	Specifies the Exchange Server URL.
(Authentication) Domain, Username, Password	Determines that a specified account will be used to access the Exchange Server and what the credentials will be.
(Authentication) Use AgilePoint System User	specifies to use the AgilePoint System User credentials to access the Exchange Server. The credentials and URL can be verified by clicking the **Test** button. The **Test** button is disabled if Use **AgilePoint System User** is checked. In both cases, make sure that the user has proper access rights to the Exchange Server.

Field Name	Definition
(Appointment or Meeting) Subject, Location, Start Time, End Time, Time Zone	The details about the appointment or meeting.
(Appointment or Meeting) Body	The body of the email. Accepts custom attributes and schema by typing ${.

MoveListItemsConfiguration Window

This window enables you to specify the configuration for moving list items from one list to another.



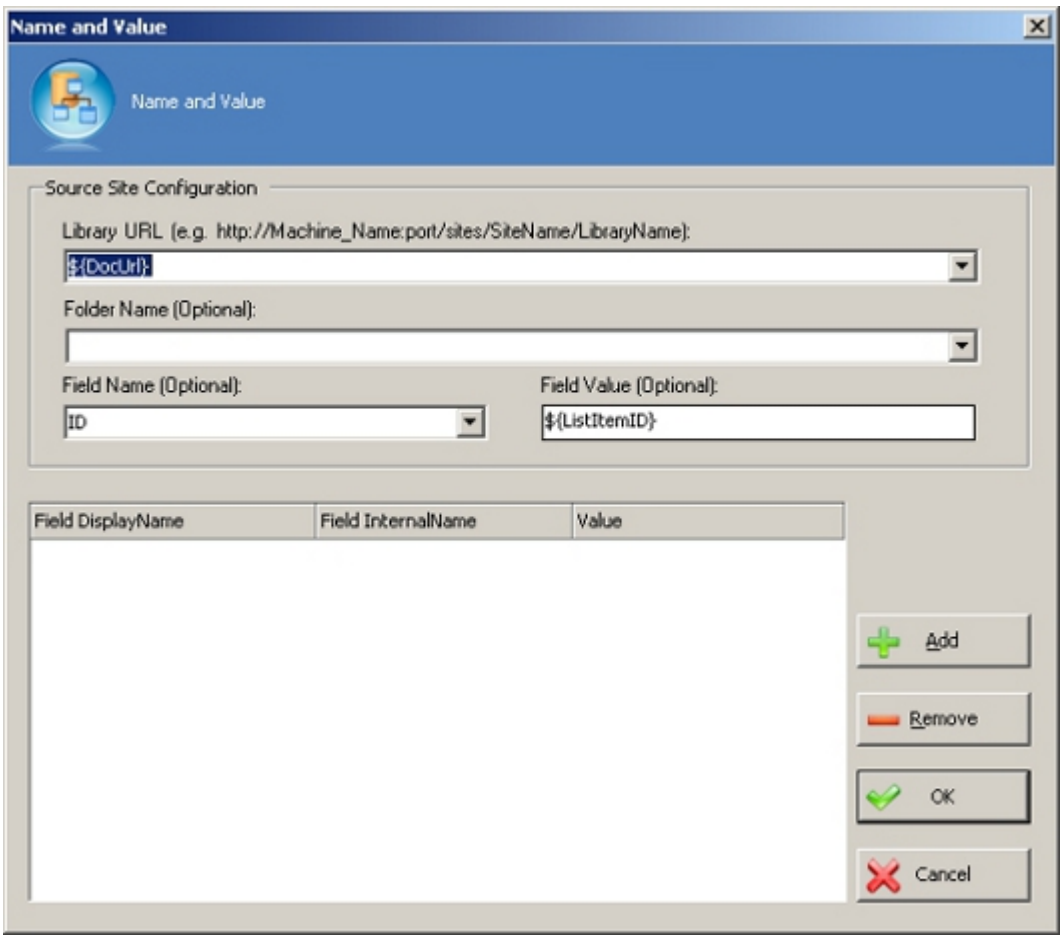
Field Definitions

Field Name	Definition
Source Site URL	Specifies the name of the list that includes the affected (copied, moved, etc.) list items.

Field Name	Definition
Source List Name	Specifies the source SharePoint site URL that includes the list for which items are to be affected (copied, moved, etc.).
Source Folder Name	Specifies the name of the folder that includes the list items to be affected (copied, moved, etc.).
ListItem Field Name	Specifies the name of the list item field to be affected (copied, moved, etc.).
ListItem Field Value	Specifies the value of the field to be affected (copied, moved, etc.). This can be used as a filtering mechanism where only fields with the specified value are affected. The following are sample values: • $\{ListItemID\} or $\{SubListItemID\} • list item ID
Target List Name	Specifies the name of the destination list for the affected items.
Target Folder Name	Specifies the name of the destination folder for the affected items. If the folder does not exist the system will automatically create it.
Target Site URL	Specifies the target SharePoint site URL that includes the destination list for the affected items.

Name and Value Window

Use the Name and Value dialog box, where you can define the field name and value you want to update within a specific SharePoint Library and folder.



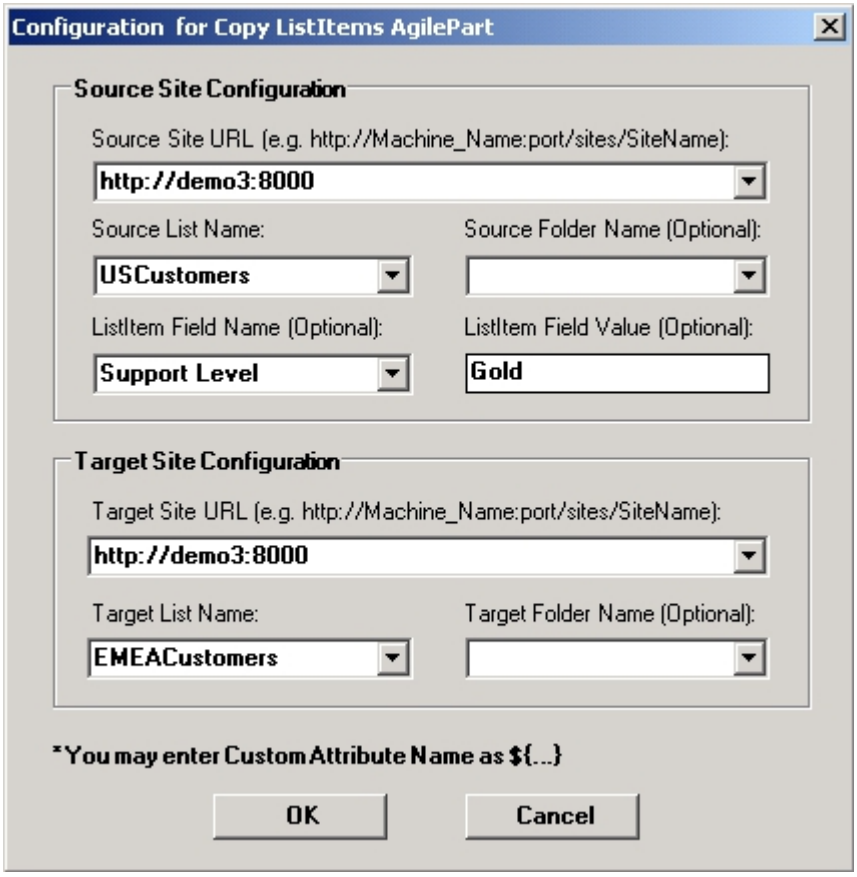
Field Definitions

Field Name	Definition
Library URL	The URL of the SharePoint Library where you want to update the metadata field name and value. Enter a valid SharePoint URL, and then expand the drop-down to select a specific list or library URL and to populate the fields for the rest of the options in the dialog box. To retrieve the metadata associated with the Library URL, you must use an actual URL. However, you can use a custom attribute at runtime. If you want to change the runtime URL, replace the URL in the Library URL field with the

Field Name	Definition
	runtime URL after you have configured the other options in the dialog box.
Folder Name	The folder within the SharePoint Library where you want to update the metadata field name and value.
Field Name	Identifies a field by which you want to restrict the metadata update.
Field Value	Identifies a value by which you want to restrict the metadata update.
Add	Opens the **Select SharePoint Library Column** dialog box. Use this dialog box to select the metadata attributes you want to update.
Remove	Removes a metadata field and value from the list of metadata values to update.
Value	A metadata value you want to update.

Read File Configuration Window

This window enables you to configure a read file action.

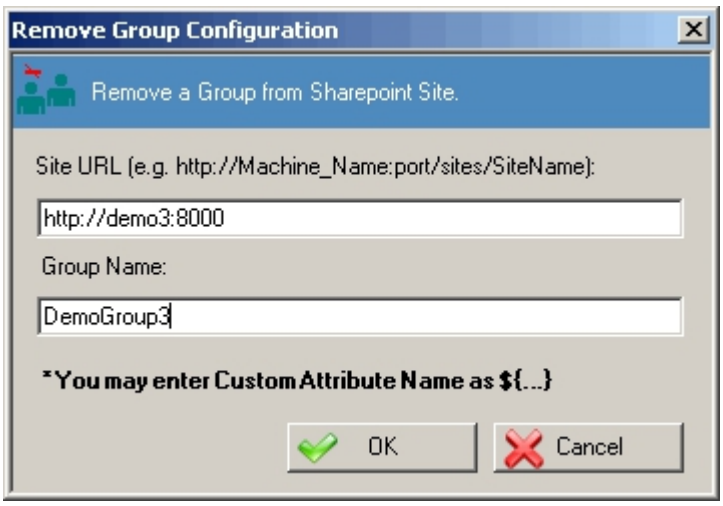


Field Definitions

Field Name	Definition
Schema Node	The schema node for which to upload the file data.
File Path	The path to the file on the local file system that includes the contents for which to upload to the schema node.

Remove Group Configuration Window

This window allows you to specify which SharePoint group to delete from a SharePoint site.

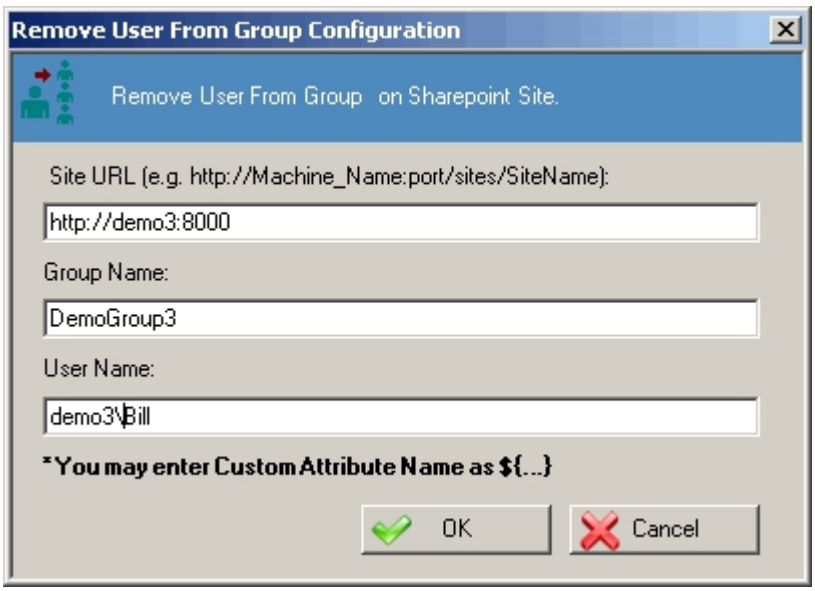


Field Definitions

Field Name	Definition
SiteURL	This property specifies the URL for the new where you want to add or remove the associated item (e.g., SharePoint site, document library, site collection, user, group, etc.). Below are examples of a valid SharePoint site URL: • http://Machine_Name:port/sites/SiteName • $\{DocUrl\}
Group Name	Specifies the affected group name (the group name to be created, removed, etc.). The Group Name cannot be duplicated in the domain. Also, once the Group is created, it cannot be changed.

Remove User From Group Configuration Window

This property allows you to remove a user from a SharePoint group.



Field Definitions

Field Name	Definition
SiteURL	This property specifies the URL for the new where you want to add or remove the associated item (e.g., SharePoint site, document library, site collection, user, group, etc.). Below are examples of a valid SharePoint site URL: • http://Machine_Name:port/sites/SiteName • $\{DocUrl\}
Group Name	Specifies the affected group name (the group name to be created, removed, etc.). The Group Name cannot be duplicated in the domain. Also, once the Group is created, it cannot be changed.
User Name	The user name you want to associate with the action.

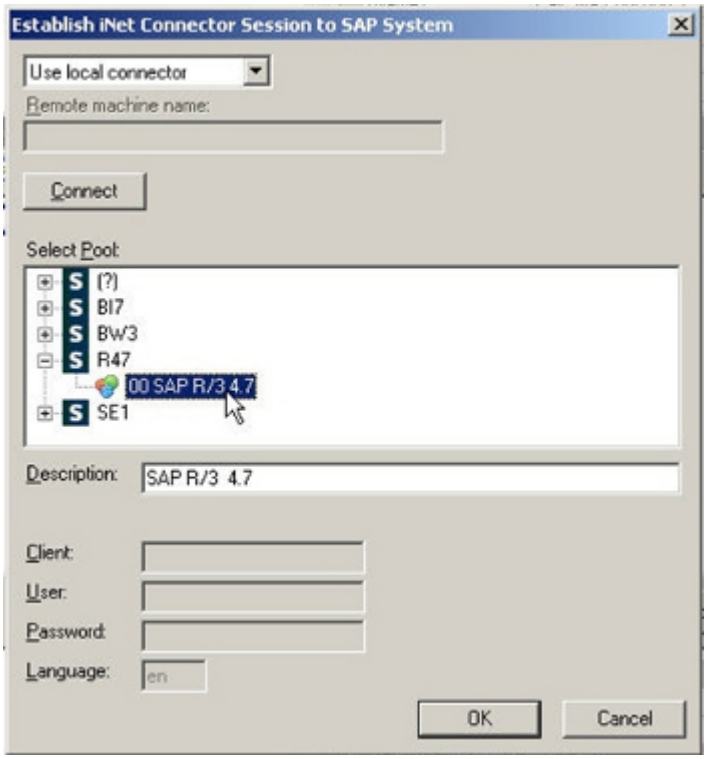
SAP Connection Browser

The SAP Connection Browser window enables you to set up and select a connection to an SAP system. You can use this screen to access the configuration for an SAP function.

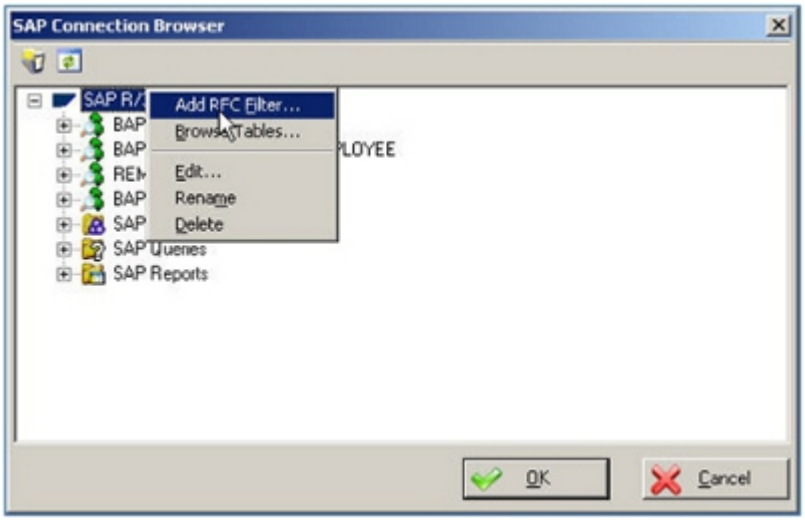
To configure an SAP connection and map the SAP data to your schema, do the following:

1. In AgilePoint Envision, create or open a process model of any type.
2. Add a **Call SAP Function** AgilePart to your process model from the **SAP Integration** stencil.
3. Select the **Call SAP Function** AgilePart. In the Configuration field, click the **Ellipses** .
4. In the **SAP Connection Browser** window, click the **Add SAP System** icon.

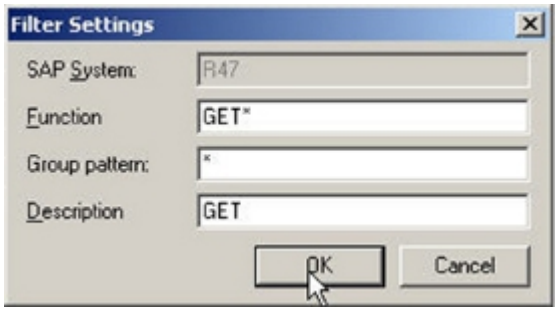
5. In the **Establish iNet Connector Session to SAP System** window, select the SAP server you set up through iNet BPS. The exact steps vary based on your configuration. When you have finished, click **OK**.



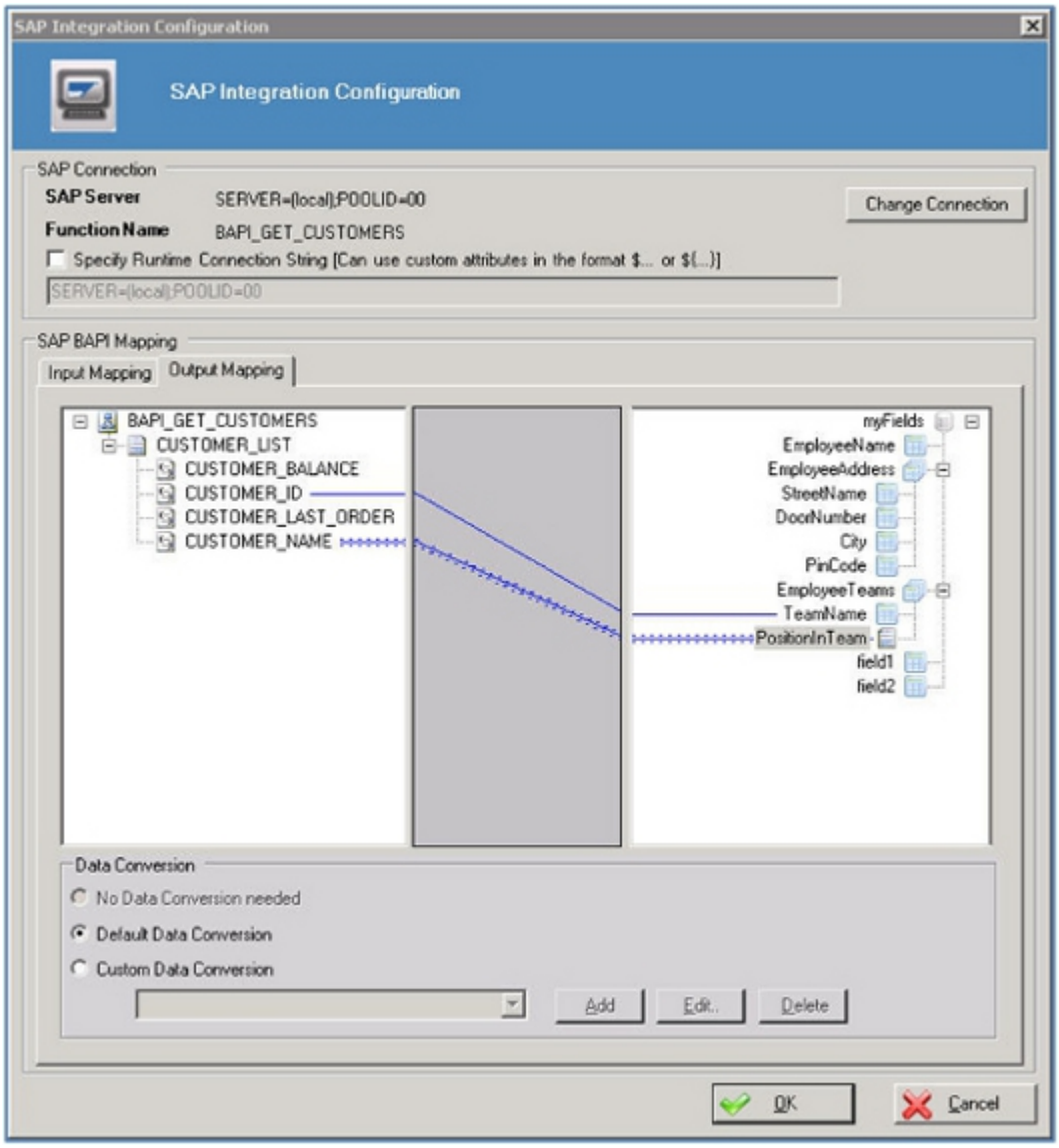
6. If you want to filter the functions for your connection, in the **SAP Connection Browser** window right-click the server name, and click **Add RFC Filter**.



7. In the **RFC Filter** window, in the **Function** field, enter a wildcard search term. For example, to retrieve all the functions that start with GET, you can enter **GET***.



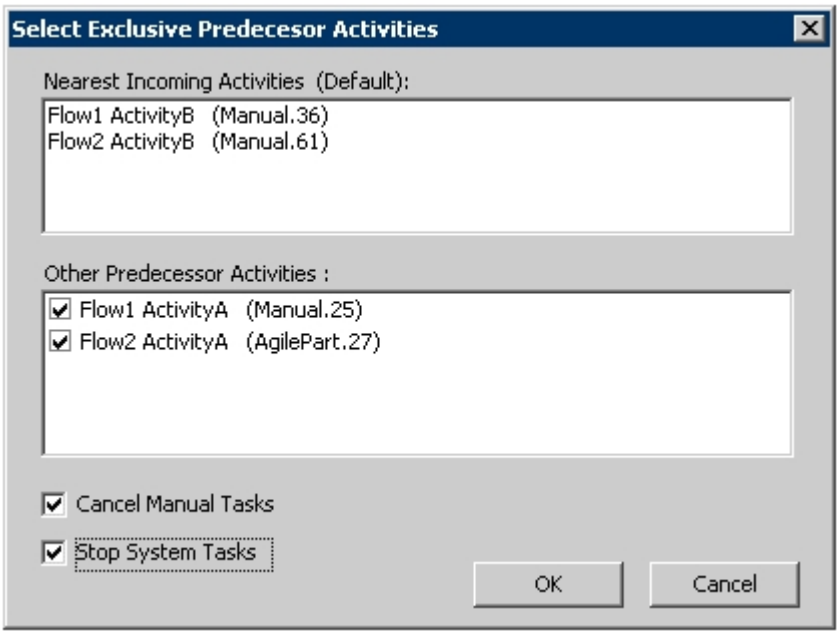
8. In the **Description** field, enter a name for the filter.
9. When you have finished creating the filter, click **OK**.
10. In the **SAP Connection Browser** window, select the SAP function you want, and click **OK**. The **SAP Integration Configuration** window opens.
11. (Optional) On the **SAP Integration Configuration** window, specify a runtime connection string.
12. (Optional) Click **Change Connection** to select a different SAP database. (This starts the procedure over.)
13. (SAP Queries Only) If you are configuring an SAP query, on the **Query Filter** tab, enter the following information in the fields provided:
    - **Query column**
    - **Comparison operator**
    - **Value**
    - **Conjunction**
14. (SAP BAPI Only) If you are configuring an SAP BAPI, on the **Input Mapping** tab, enter map the fields in your schema to the SAP fields.
15. (Queries or BAPI) On the **Output Mapping** tab, enter map the fields in your schema to the SAP fields.



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

Select Exclusive Predecessor Activities Window

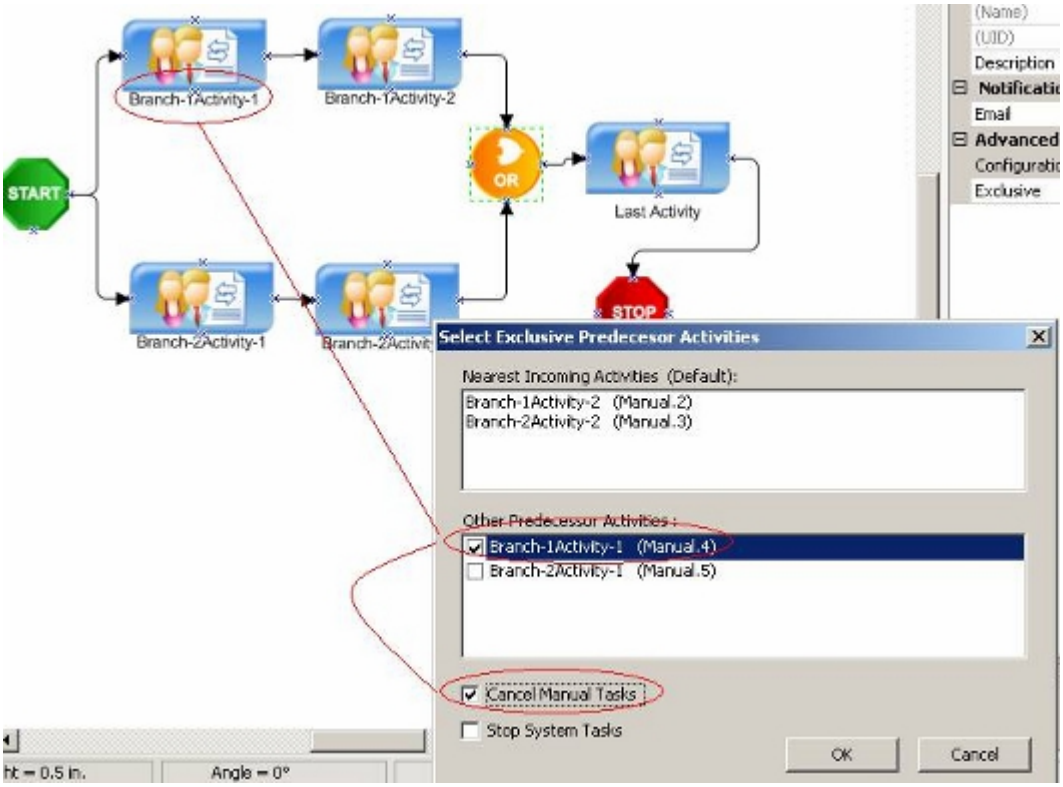
This window allows the process modeler to configure whether the activities in the parallel process flow will continue to process or be canceled once one of the process flows enters the "Or" shape.

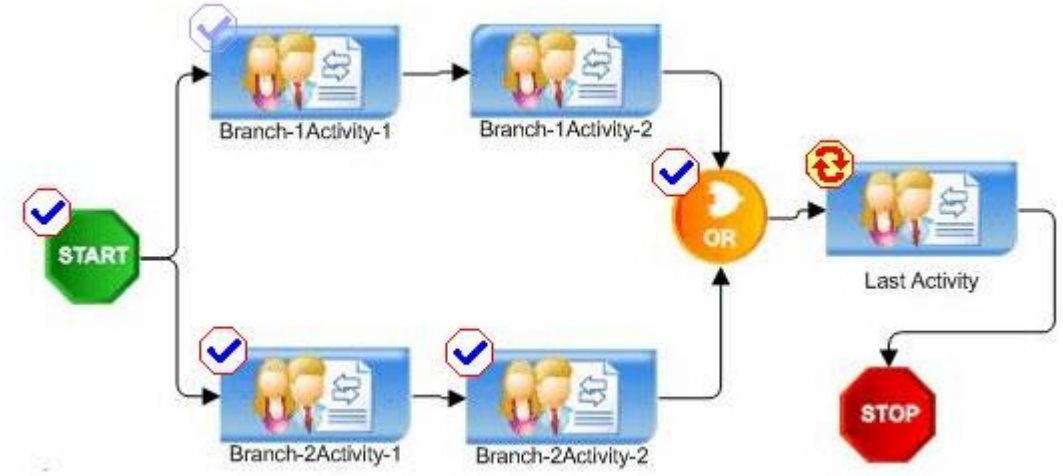


The "Nearest Incoming Activities" group box displays the activities that are nearest the "Or" AgileShape. Selecting the "Cancel Manual Tasks" and/or "Stop System Tasks" will cancel the activity that has yet to complete.

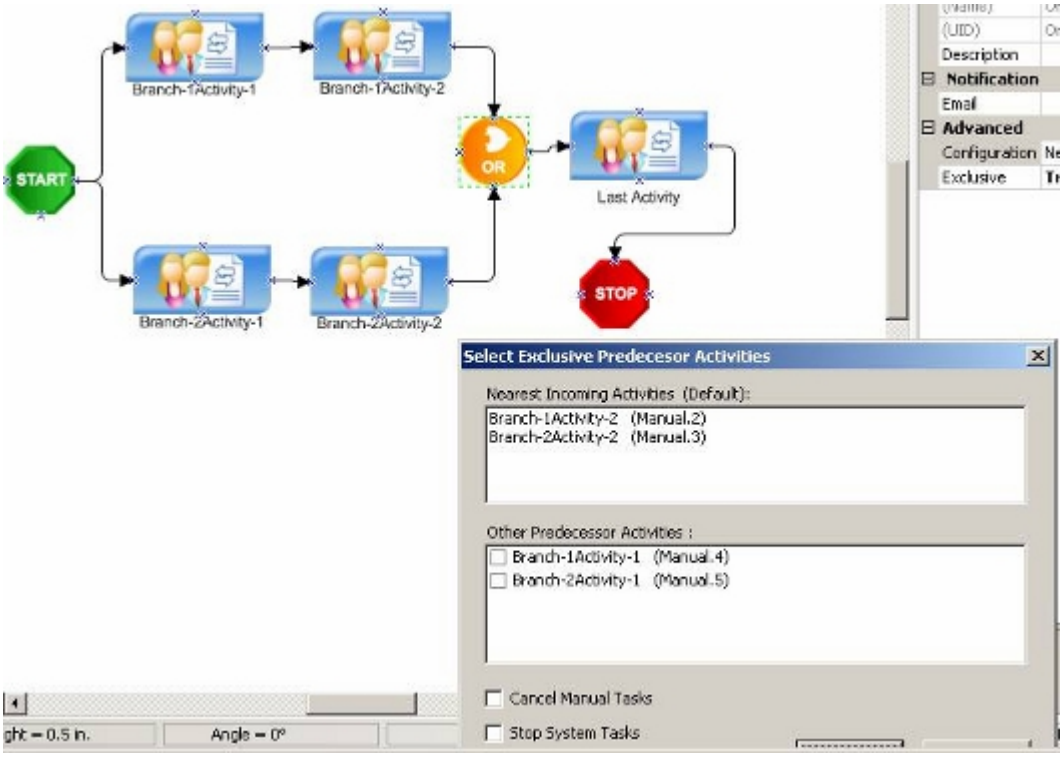
The "Other Predecessor Activities" group box displays any additional activities that are associated with a process flow leading into the "Or" AgileShape. You can select which other predecessor activities to cancel by selecting the check box. Below is a sample usage scenario that describes how this functionality would work.

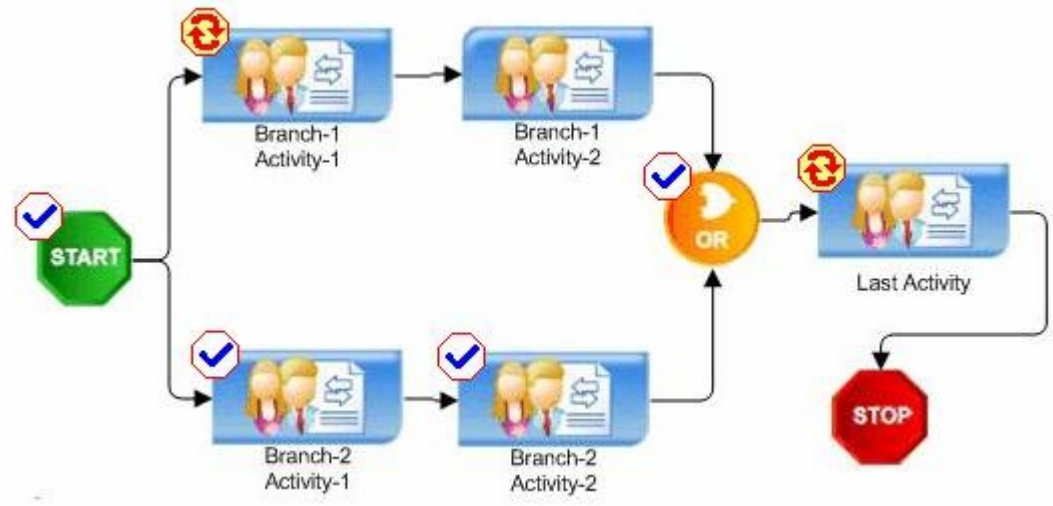
Case 1:


Branch-1Activity-1
Branch-1Activity-2
START
OR
Last Activity
Branch-2Activity-1
STOP
Select Exclusive Predecesor Activities
Nearest Incoming Activities (Default):
Branch-1Activity-2 (Manual.2)
Branch-2Activity-2 (Manual.3)
Other Predecessor Activities :
Branch-1Activity-1 (Manual.4)
Branch-2Activity-1 (Manual.5)
Cancel Manual Tasks
Stop System Tasks
OK
Cancel
(Name)
(UID)
Description
Email
Exclusive


Branch-1Activity-1
Branch-1Activity-2
START
OR
Last Activity
STOP
Branch-2Activity-1
Branch-2Activity-2

Case 2:

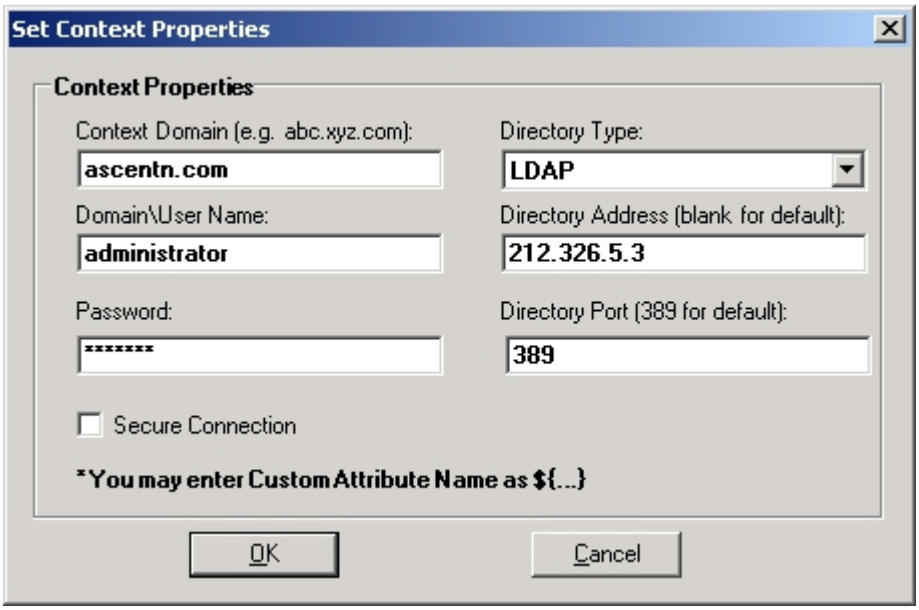




Leaving the "Cancel Manual Tasks" and/or "Stop System Tasks" blank will allow the parallel process flow(s) to continue processing once one of the process flows enters the "Or" shape. This would be the same behavior as if "False" was selected in the "Exclusive" property of the "Or" AgileShape.

Set Context Properties Window

Specifies the Active Directory properties.

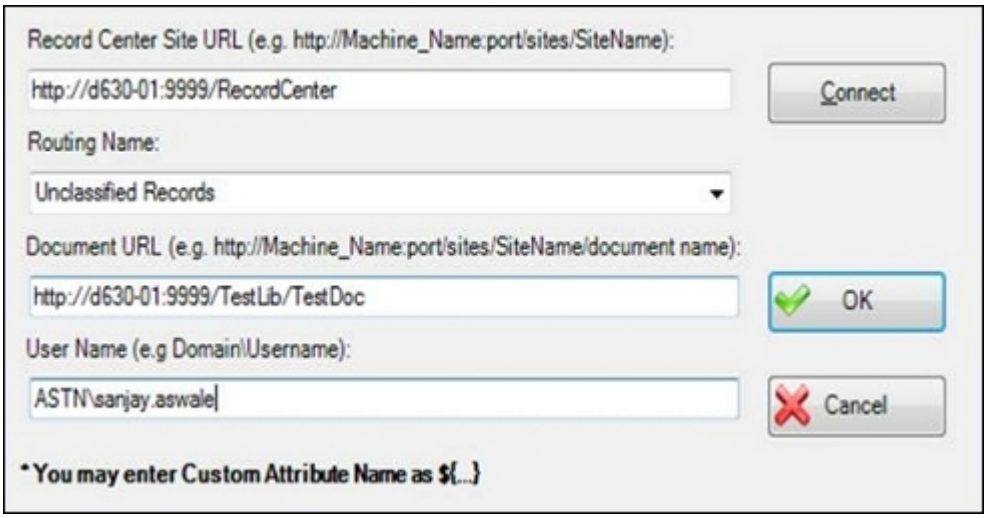


Field Definitions

Field Name	Definition
Context Domain	The domain name.
Context Domain	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory.
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Submit File To Record Center Configuration Window

Use this window to configure the record center submission.

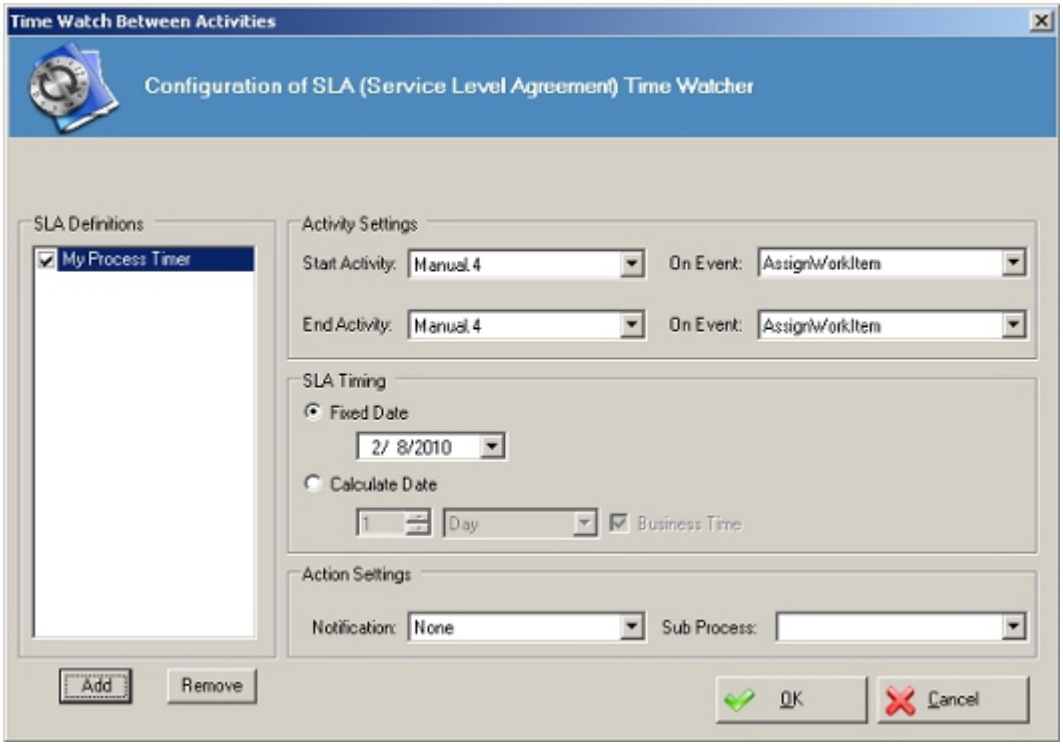


Field Definitions

Field Name	Definition
Record Center Site URL	The URL of the SharePoint Record Center where you want to submit the file. Once you have entered the URL, click **Connect** to populate the Routing Name list.
Routing Name	The Routing Name you want to use to submit the file.
DocumentURL	The URL location of the affected file (for example, the file you want to add, delete, check out, etc.).
User Name	The user name you want to associate with the action.

Time Watch Between Activities Window

This window enables you to configure the SLA timer, including the range of AgileShapes you want to time.



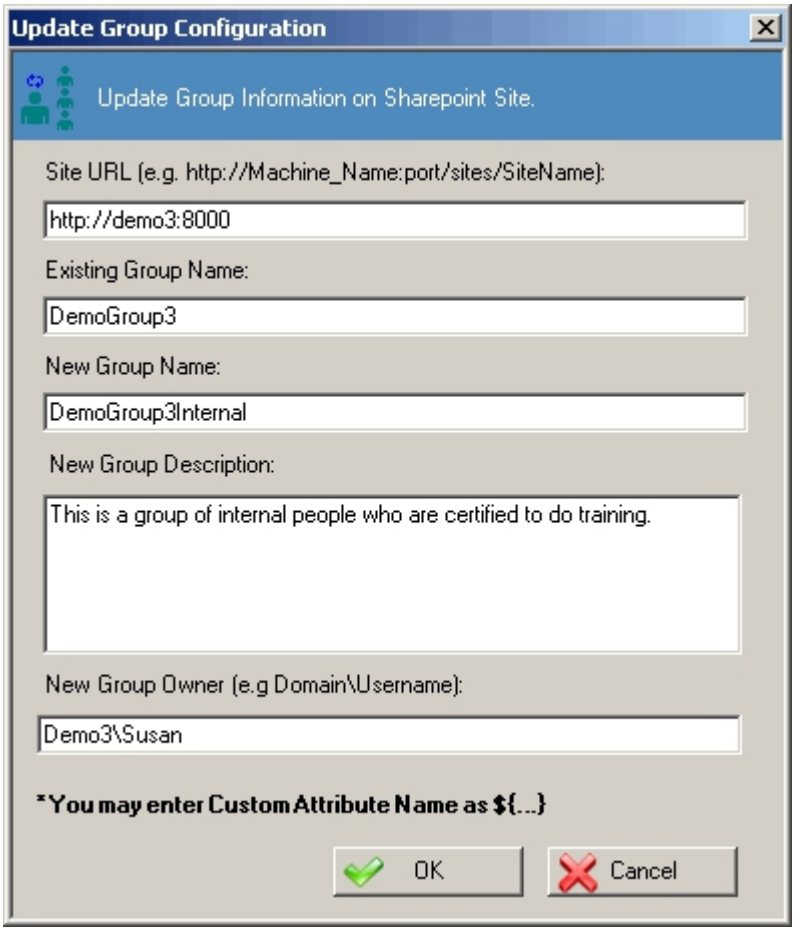
Field Definitions

Field Name	Definition
Add	Creates a new timer with a name you specify.
Remove	Deletes the selected timer.
Start Activity	The activity upon which you want to start the timer.
End Activity	The activity upon which you want to end the timer.
Fixed Date	Selects a date to expire the timer.
Calculate Date	Calculates a date to expire the timer based on the information you enter.
Notification	Optionally sends a preconfigured notification type when the timer expires.

Field Name	Definition
Sub Process	Optionally starts a subprocess when the timer expires. The list is populated from the subprocesses in your process model.

Update Group Configuration Window

This window allows you to update information for a SharePoint group.



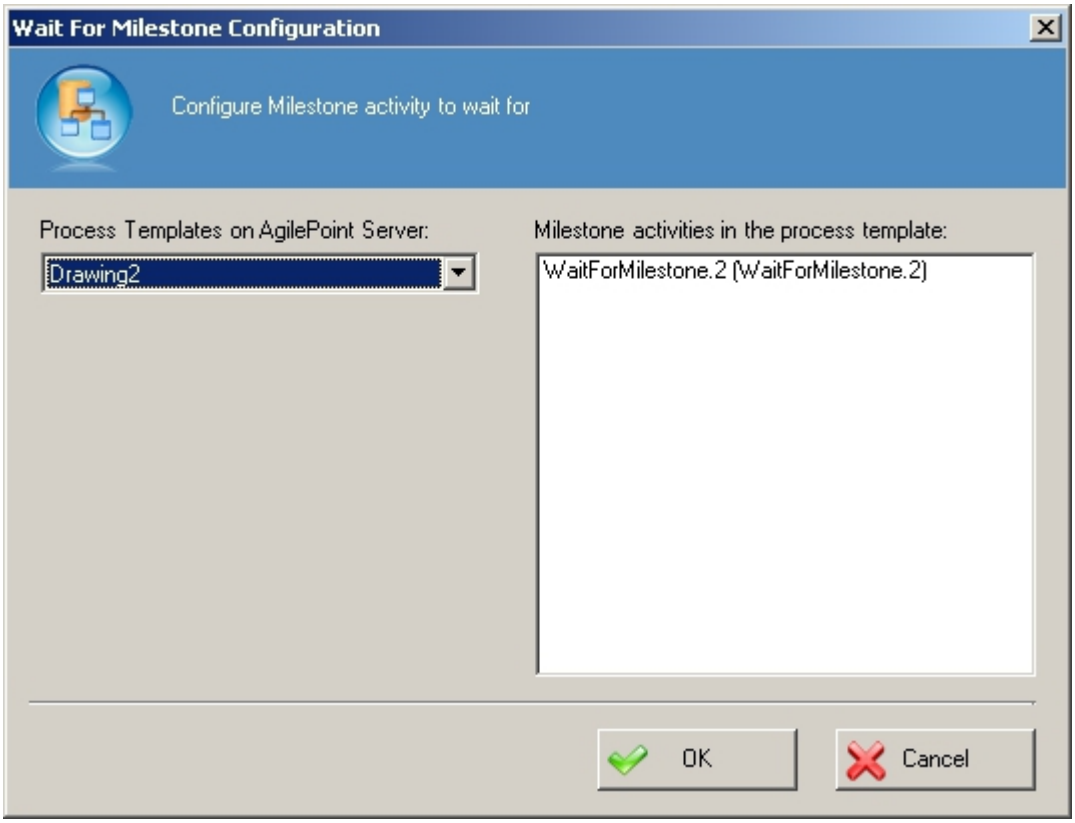
Field Definitions

Field Name	Definition
SiteURL	This property specifies the URL for the new where you want to add or remove the associated

Field Name	Definition
	item (e.g., SharePoint site, document library, site collection, user, group, etc.). Below are examples of a valid SharePoint site URL: • http://Machine_Name:port/sites/SiteName • $\{DocUrl\}
Existing Group Name	The name of the existing SharePoint Group for which you would like to change the information.
New Group Name	The new name of the SharePoint Group.
New Group Description	The new description that will overwrite the existing group description.
New Group Owner	The domain and user name for the new group owner.

Wait for Milestone Configuration Window

This dialog box enables you to configure the milestone. Click the Ellipses button to open the Wait For Milestone Configuration dialog box.

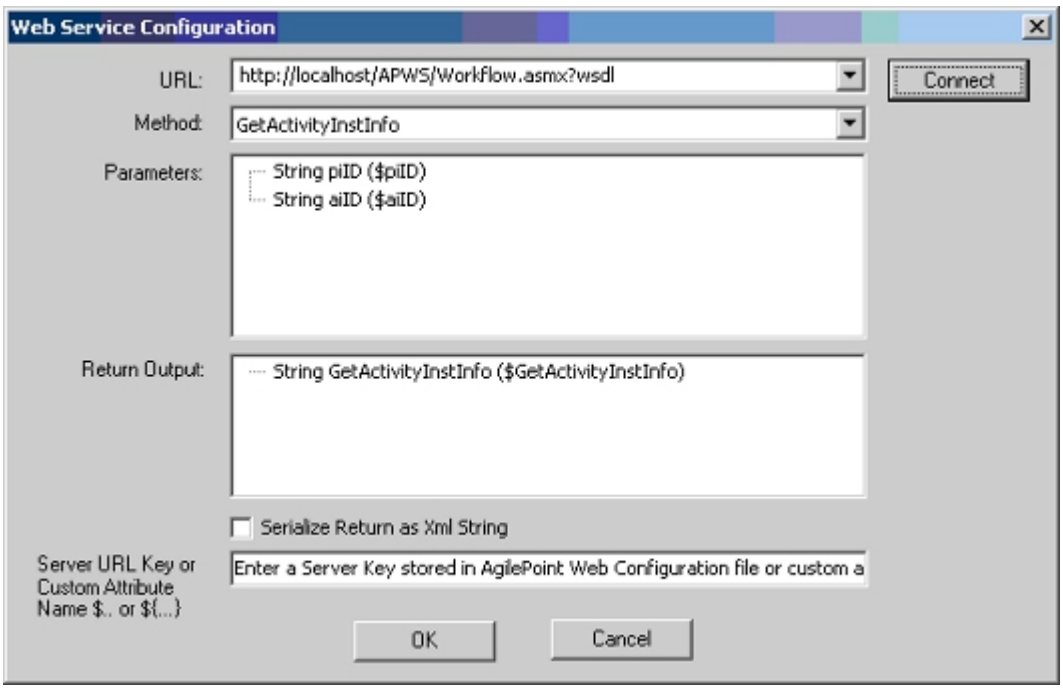


Field Definitions

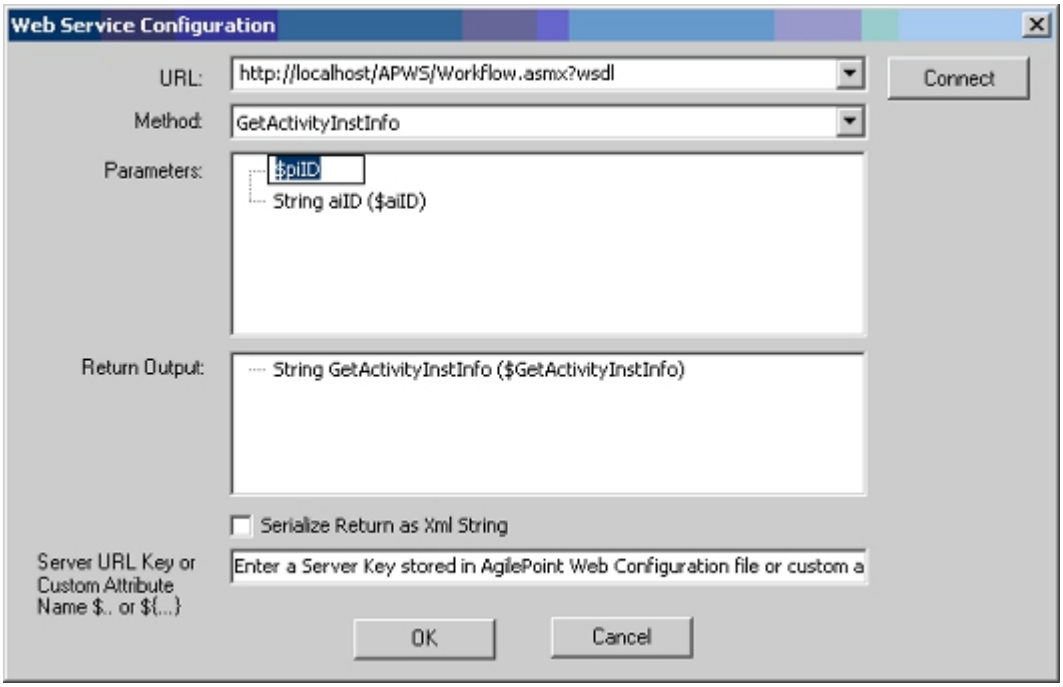
Field Name	Definition
Process Templates on AgilePoint Server	Select the process template with the Pass Milestone shape for which you want the current shape to wait.
Milestone activities in the process template	Select the specific Pass Milestone shape for which you want to wait.

Web Service Configuration Window

This window allows the process modeler to configure which Web service method should be invoked at runtime. It also allows the process modeler to configure the custom process attributes that should be associated with the Web service method's parameters (if any), and the custom process attribute that will be used to store the Web service method's return value (if any).

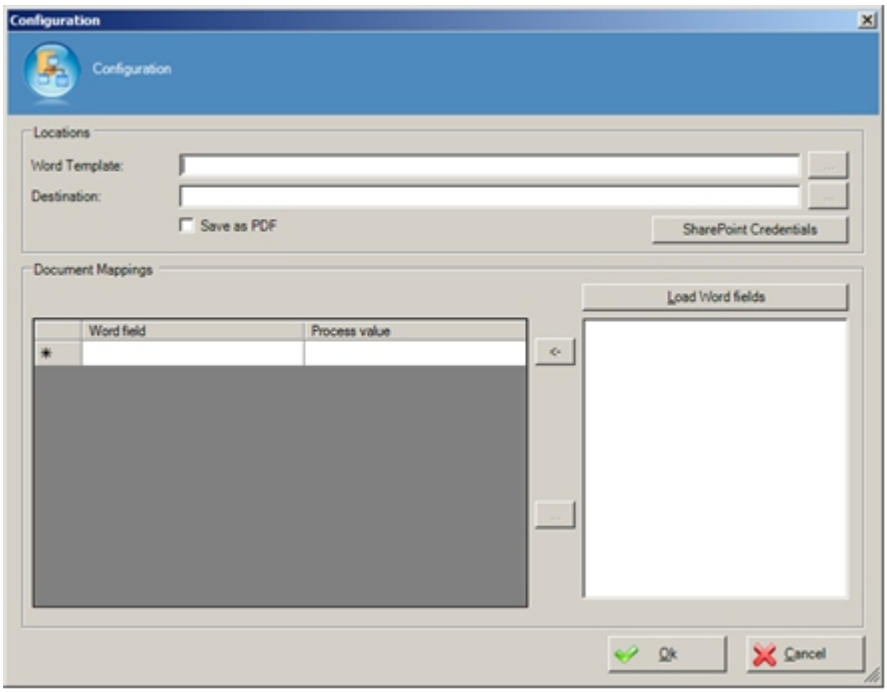


Once the configuration dialog is open, enter the URL of a Web Service and click the **Connect** button. A list of the Web service's available methods will be retrieved. Select the method you want to associate with this AgileShape. To configure the custom process attributes for the parameters and/or return value, simply click on an attribute (e.g. $piID) to highlight it, and then click on it again to modify the value.



Word Configuration Window

This property enables you to configure a Word template conversion. Click the **Ellipses** button to open the Configuration dialog box.



Field Definitions

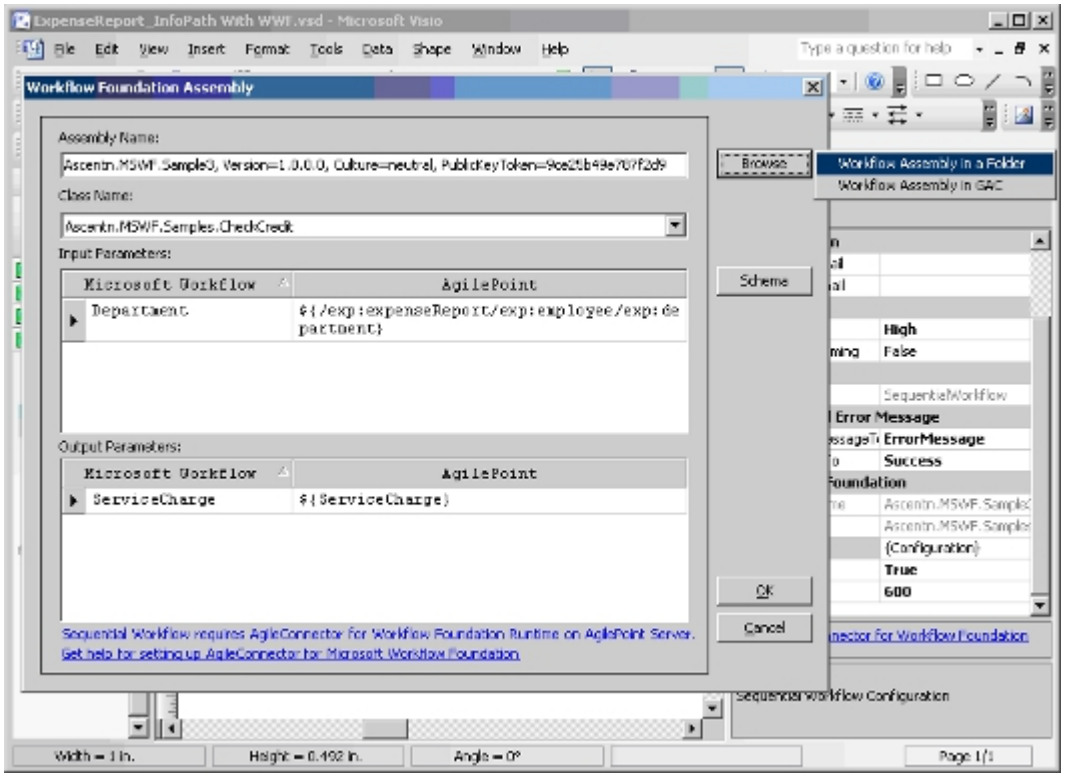
Field Name	Definition
Word Template	Enter the location for a Word template file, or click the **Ellipses** to select a custom attribute.
Destination	The destination (folder and file path) for the file output. Click the **Ellipses** (...) to select a custom attribute.
Save as PDF	Indicates that the generated file will be saved as a PDF file, instead of a Word document.
SharePoint Credentials	Click this button to enter the SharePoint logon credentials required to create the file.

Field Name	Definition
Load Word Fields	Click this button to load the list on the right with the dynamic fields from the Word document. Select the field names in this list, and click the left arrow (**<-**) button to add the fields to the list on the left.
Process value	For each field in the Word template, select this column, and click the **Ellipses** (...) button. In the pop-up, select the value you want for the selected Word field.

Workflow Foundation Assembly Window

This window allows the process modeler to configure the details for invoking Windows Workflow Foundation activities.

1. Click the **Ellipses** button to open the Workflow Foundation Assembly window.



2. Click **Browse**, the following two choices are available:
   - Workflow Assembly in a folder
   - Workflow Assembly in GAC

The Sequential Workflow assembly can be either in the GAC or in a folder. If it is in a folder, it will be added into the GAC automatically when the Sequential Workflow AgilePart is configured.

3. Choose a workflow assembly.
4. Configure the "Input Parameters" and "Output Parameters".
5. Click **OK**.

XML Schema Mappings

This window enables you to map schema nodes from a parent process to a sub-process.

Field Definitions

Field Name	Definition
Child	The mapped XML schema node for a child process.
Parent	The mapped XML schema node for a parent process.
Schema	Opens the schema associated with the selected **Child** or **Parent**.
Add	Creates a new parent/child pair you can map using the schema mapper.
Remove	Removes the selected new parent/child schema node pair.