Installation Guide: Comprehensive

All Configurations and Environments

AgilePoint BPMS v5.0 SP2

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Preface

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Virus-free software policy

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

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

Document Revision Numbers

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

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

AgilePoint Documentation in PDF and HTML

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

Advantages of HTML Documentation

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

Advantages of PDF Documentation

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

For more information, see Downloading Files and Sharing Links from the Documentation Library on the AgilePoint Support Portal.

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

Installation Guide

This document provides instructions on how to prepare for and perform the software installation of the AgilePoint BPMS Suite.

AgilePoint BPMS Express Edition

AgilePoint Express supports only one installation scenario, which is detailed in the following document:

Installing AgilePoint Express

AgilePoint BPMS Standard or Enterprise Edition

The complete list of AgilePoint BPMS installation instructions for Standard and Enterprise Edition are divided according to the conditions in the following table.

Document Variant	NLB or Single Server?	IIS or Windows Service Mode?	.NET 3.5 or 4.0?
Configuration A	NLB	IIS	3.5
Configuration B	NLB	IIS	4.0
Configuration C	NLB	Windows Service	3.5
Configuration D	NLB	Windows Service	4.0
Configuration E	Single Server	IIS	3.5
Configuration F	Single Server	IIS	4.0
Configuration G	Single Server	Windows Service	3.5
Configuration H	Single Server	Windows Service	4.0

Installing AgilePoint Express

This section provides instructions for installing AgilePoint the components for AgilePoint BPMS **Express Edition**.

Prerequisites

Before installing the AgilePoint system, you must comply with the following prerequisites.

New Installations Only

This section assumes that you are installing each component of the AgilePoint BPMS Suite on a computer that does not have any version of that component already installed. If you do already have any version of a component installed on the target computer, see Upgrade Guide on the AgilePoint Support Portal.

Pre-Installation Complete

Before installing any of the components of the AgilePoint BPMS Suite, please ensure you have read and completed the checklist items in the **AgilePoint Pre-Installation Guide**, this is a requirement and will ensure a successful installation.

For more information, see Pre-Installation Guide on the AgilePoint Support Portal.

Local Installation Files

Make sure that the installation files are located on one of the computer's local drives. If you attempt to run the installation directly from a network, the installation may fail. If you do attempt to install when the installation file(s) are located on a network drive (or some other remote location), the setup application may fail to run with an error message similar to the following: "An exception 'System.Security.Policy.PolicyException' has occurred in Setup. "

Installing AgilePoint Server

Use the procedures in this section to set up an AgilePoint Server machine for your environment. This section provides instructions for installing and configuring all the core components on the AgilePoint Server machine.

Install AgilePoint Server

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system – 32 bit or 64 bit.
4. Click **AgilePoint Server**.

5. Click the installation type you want: **AgilePoint Server (IIS)** or **AgilePoint Server (Windows Service)**.
6. Click **Next** in the AgilePoint Server window.
7. Again, click **Next** in the AgilePoint Server window.
8. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
9. Do one of the following, depending upon whether you are performing an IIS Web Site or as a Windows Service:
   - **IIS:**
     1. Select the AgilePoint Server Web site for which you would like to install AgilePoint Server.
     2. Enter a virtual directory name. The default is **AgilePointServer**.
     3. In the **Application Pool** list, select the application pool you want to use.
     4. Click **Next**.
   - **Windows Service:**
     1. Specify the location for your installation, and click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Configure AgilePoint Server

1. To open the **AgilePoint Server Configuration** utility, do one of the following:
   - If you have just added a new Windows Service instance, this window opens automatically.
   - If you are installing on IIS, click **Start > All Programs > AgilePoint > AgilePoint Server Configuration**.
   - If you are configuring an existing Windows Service installation, click **Start > All Programs > AgilePoint > AgilePoint Server Manager**. In the **AgilePoint Server Manager** window, select the Windows Service instance you want to configure, and click the **Configuration** icon.
2. The **System** tab allows you to configure the AgilePoint System User and default email notification behavior. The System area allows you to specify the identity and authentication information for the AgilePoint system user, and the maximum number of threads that AgilePoint will be able to use at runtime while handling workflow requests. The Notification area allows you to specify the default values for certain email notification settings.
3. Do one of the following:
   - Check the **Active Directory** check box if you are configuring AgilePoint Server on a network controlled by a Windows Server Domain Controller. This will use Active Directory lookup to validate the user in Active Directory.

- Leave the **Active Directory** check box unchecked if you will be using a local machine account for the AgilePoint system user.

4. Enter the AgilePoint **System User** name and **Password**.
   - If you checked the **Active Directory** check box above, enter the domain **User Name** and **Password**.
   - If you did not check the **Active Directory** check box above, this should contain a local machine account **User Name** and **Password** that you would use when logging into Windows.
5. Enter the **Thread Pool Size**. The Thread Pool Size should be set to the number of Concurrent User Licenses purchased for the server or the number of threads that the physical hardware will support. Use the most limiting of the two numbers.

   For more information, see Configuring the AgilePoint Server Thread Pool Size on the AgilePoint Support Portal.
6. Configure the Notification settings as appropriate for your environment.
   - Enter the SMTP Server information obtained during the pre-installation setup.
   - Enter the SMTP email address for the default Email Sender (i.e. the From address on AgilePoint email notifications).
   - Enter the System User Email. This is the email that will be used to send system notifications if the AgilePoint Server is encountering operational errors.
7. Click the **Database** tab and configure the settings as appropriate for your environment.
8. Do one of the following:
   - Check the **Integrated Security** check box to use Windows Authentication and the Application Pool Identity of AgilePoint Server (APServiceAccount) to authenticate to the database.
   - If using SQL Authentication, enter the SQL user account and password.
9. Enter the Database Server and enter the AgilePoint Database Name or click the **Ellipses** button to retrieve the database names and select the AgilePoint Database. The AgilePoint System User is used to connect to the database during configuration. Therefore, the AgilePoint System User must have db_owner privileges on the AgilePoint Database.
10. The Connection Pool Size must be a minimum of 100 and should be at least 2 times the Thread Pool Size configured on the System tab.
11. (Oracle DB Only) If you are employing an Oracle database, open the Oracle Net Configuration Assistant utility, and configure the Oracle Local Service as necessary. If the Local Service Name has changed, you will need to also update the AgilePoint Server Configuration utility Database tab with the new Oracle Local Service Name.
12. (Optional) Click the **Work Calendar** tab, and configure the settings as appropriate for your environment. This configuration is used in processes for duration assignment or due date.
13. Click **OK** to complete the configuration.

Verify the AgilePoint Server Installation

This step is important and determines whether the AgilePoint installation and configuration was successful. This should be done prior to installing AgilePoint Enterprise Manager.

After AgilePoint Server is configured, do the following:

1. Open IIS and view the AgilePointServer Virtual Directory.
2. Browse the file **Test.asmx**.
3. In your web browser on the **Test.asmx** page, click **Hello** to access the Hello World method.
4. On the **Hello World** page, click **Invoke** to invoke the method and ensure that the service is working.

   The run-once installer script will be executed to create the database structures the first time that an AgilePoint Server request is made. As a result, it may take a while for the result to display.

Create the AgilePoint Database Schema

1. Open IIS and view the AgilePointServer Virtual Directory. **Browse** the **Workflow.asmx** file. This creates the AgilePoint Database schema.

Check the AgilePoint Monitor Service

1. Verify the pre-installation steps
2. Click **Start > Run**, and enter **services.msc**.
3. In the **Services** window, ensure the AgilePoint Monitor Service is started.
   - In an IIS environment, the name is **AgilePoint Server Monitor**.
   - In a Windows Service environment, the name is the name of the service you created in AgilePoint Server Manager.
4. If it is not started, right-click on the AgilePoint service name, and click **Start**.

Configure the SMTP Server Account

AgilePoint uses anonymous SMTP by default. The AgilePoint Server **netflow.cfg** file will now need to be edited to provide the user name and password to use with SMTP for user authentication.

1. Open the **netflow.cfg** file in a text editor such as Notepad.
2. Locate the **Notification** section and modify it to look something like this:

```
<notification
mode="true"
format="text"
smtpService="BuiltIn::username@sbcglobal.net,password1"
mailServer="smtp.sbcglobal.yahoo.com"
```

```
sender="NETSVR2@agilepoint.com"
sysadm="adminuser@agilepoint.com">
```

Where username@sbcglobal.net is the user name provided to you by your ISP and password1 is the password provided to you by your ISP.

Install Enterprise Manager

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Enterprise Manager**.
5. Click **Next** in the AgilePoint Enterprise Manager window.
6. Select the site for which you would like to install AgilePoint Enterprise Manager. It is recommended to use the same site where you installed AgilePoint Server.
7. Enter a Virtual Directory name. The default is **EnterpriseManager**.
8. In the **Application Pool** field, select the application pool you want to use.
9. Click **Next**.
10. The installer is now ready to install AgilePoint Enterprise Manager. Click **Next** to install.
11. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
12. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
13. (Note that this step applies only under the specified conditions.) Open the file**[AgilePointWebSiteLocation]\EnterpriseManager\web.config**, modify the value of the **serverUrl** key using the following instructions:
    - **NLB environment** - replace **localhost** with the **virtual IP address** assigned to AgilePoint Server. Use the same port number as AgilePoint Server.
    - **Non-NLB environment** - Only if AgilePoint Server is bound to a specific IP address in IIS (rather than to "All Unassigned"), replace **localhost** with the **physical IP address** assigned to AgilePoint Server.

    Example:

    ```
    <add key="ServerUrl" value="http://1.2.3.4:81/AgilePointServer" />
    ```
14. Make sure the Web Site for which AgilePoint Server/AgilePoint Enterprise Manager is installed is configured to run under the .NET 2.0 Framework:
    a. Open IIS and expand Web Sites, then right-click the Web site that contains the AgilePoint Server virtual directory and click **Properties**.
    b. Click the **ASP.NET** tab.
    c. In the **ASP.NET** field, make sure it is set for 2.0.
    d. Click **OK**.The Login page appears.

15. Log on to AgilePoint Enterprise Manager using the AgilePoint System User account. The AgilePoint System User account is configured in the AgilePoint Server Configuration. This is an important step as this is when the database tables are created in the AgilePoint Workflow Database.

    The AgilePoint Enterprise Manager Main Page appears.

Keep AgilePoint Enterprise Manager open for the next step.

(Optional) Configure SQL Reporting Services

You must provide the correct database privileges for SQL Reporting Services to properly connect and access the AgilePoint database. Follow the steps below to configure the database privileges after installing Enterprise Manager with SQL Server Reporting Services integration.

1. Open **Microsoft SQL Server** > **Reporting Services** > **Report Manager** and click the **AgilePoint** link
2. In the AgilePoint folder, click the **APDS** item to configure the sample reports data source.
3. Make sure the option **Use as Windows Credentials when connecting to the data source** is checked.
4. Click **Apply** to save the changes.

Add User Accounts

You must add the following user accounts to Enterprise Manager.

Add the SharePoint Impersonator User Account to AgilePoint

This is the domain-qualified user account that SharePoint will use to interact with AgilePoint Server at runtime.

This step is required if you are installing the AgilePoint SharePoint Integration, and you are not using the same user account for the AgilePoint System User and the SharePoint Impersonator User. If you are using the same user account for the AgilePoint System User and the SharePoint Impersonator User, you can skip this part.

1. Log on to Enterprise Manager.
2. On the AgilePoint **Enterprise Manager Main Page**, click the **Users** link.
3. Click the **Add** link.
4. Enter the SharePoint Impersonator User Account information and click **OK**.
5. Navigate back to the Main Page, and click the **Roles** link.
6. Click the **Add Role** button.
7. Enter **SharePoint Impersonator** as the Role Name, and give this Role **Initiate a process** and **Cancel a process** rights and click **OK**.
8. Click the **SharePoint Impersonator** Role link.

9. Click the **Add Users(s) as Member** button.
10. Select the **SharePoint Impersonator** User Account and click **OK**.

Add the AgilePoint Server Service User Account to AgilePoint

1. On the AgilePoint Enterprise Manager Main Page, click the **Users** link.
2. Click the **Add** link.
3. Enter the AgilePoint Server Service User Account and click **OK**.
4. Navigate back to the Main Page and click the **Roles** link.
5. Click the **Administrators** link and add the AgilePoint Server Service User Account to the AgilePoint Administrators Role.
6. Close AgilePoint Enterprise Manager.

Install AgilePoint Envision

To install AgilePoint Envision, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Envision**.
5. Click **Next** in the AgilePoint Envision window.
6. Again, click **Next** in the AgilePoint Envision window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.

   Select the type of AgilePoint Server installation you are using (**IIS** or **Windows Service**), and click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Envision\
9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
14. To open AgilePoint Envision click **Start** > **Programs** > **AgilePoint** > **AgilePoint Envision**.

Installing AgilePoint SharePoint Integration

This section provides instructions for installing the AgilePoint SharePoint Integration component of the AgilePoint BPMS Suite.

The AgilePoint SharePoint Integration v2 consists of three features:

- **AgilePoint Configuration List** – Stores the AgilePoint configuration data in a custom list.
- **AgilePoint Process Launcher** – Associates a SharePoint entity with an AgilePoint process.
- **AgilePoint Web Parts** – Includes the three AgilePoint Web Parts (Process Model List, Process Instance List, and Task List).

SharePoint Integration v2 Versus v1

The AgilePoint SharePoint Integration v2 is the version AgilePoint SharePoint Integration available for a fresh installation in AgilePoint BPMS.

For existing AgilePoint customers, it is possible to upgrade AgilePoint SharePoint Integration v1 from AgilePoint v4.x to AgilePoint SharePoint Integration v1 for AgilePoint v5.x. For more information, see Upgrade Guide on the AgilePoint Support Portal.

For information about migrating from SharePoint Integration v1 to v2, contact AgilePoint.

Configure the AgilePoint SharePoint Integration AgileConnector

Prerequisites

- AgilePoint Server is installed.

Navigation

1. Open the **AgilePoint Server Configuration** utility.
2. Click the **Extension** tab.

Instructions

1. On the **Extension** tab, click on **Add**.
2. Browse one of the following locations to open the file **Ascentn.SharePoint.AgileConnector.dll**:
   - For IIS installations, this file is located in the **bin** folder under the AgilePoint Server installation folder.
   - For Windows Service installations, this file is located in the **bin** folder under the path provided in the **Location** field in Windows Server Manager for the Windows Service instance you want to configure.
3. Change the **Name** from **AgileConnector** to **SPSIntegration**.
4. Enter the Impersonator (e.g. Administrator).
5. Click **OK**.

6. Optionally, you can click **Configure** to set the maximum thread for SharePoint access and to set the credential for SharePoint access. By default it will use the AgilePoint System User Account credential.
7. When you have finished the configuration, on the **AgilePoint Configuration** window, click **OK**.

   Accept any informational messages.

   If you are prompted to restart IIS or the AgilePoint Service, click **Yes**.

Install AgilePoint SharePoint Integration

Prerequisites

- Configure the AgilePoint SharePoint Integration AgileConnector
- If you are installing AgilePoint SharePoint Integration in a SharePoint server farm, you must select a SharePoint server you want to designate as the primary AgilePoint integration server. **Document your decision.** You will need to use the same machine for all AgilePoint SharePoint Integration installations and upgrades.
- Log on to the SharePoint machine using a user account that belongs to the local system's Administrators group.

Navigation

1. On the SharePoint machine, double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
2. Click the **Install AgilePoint…** link that is most appropriate for your system.

Instructions

1. Click **AgilePoint SharePoint Integration**.
2. Click **Next** in the AgilePoint SharePoint Integration window.
3. Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Integration for SharePoint\
4. Click **Next**.
5. The installer will deploy the installation files to the installation folder.
6. Once the **Installation Complete** message is displayed, click **Close**.

Add, Deploy, and Activate the SharePoint Solution Files

Prerequisites

- Install AgilePoint SharePoint Integration
- Log on to the SharePoint machine using a user account that belongs to the local system's Administrators group.

Navigation

1. Open the **stsadm** command line tool.

You can find the stsadm.exe at one of the following locations:

- **SharePoint 2007** - C:\Program Files\Common Files\Microsoft Shared\web server extensions \12\BIN
- **SharePoint 2010** - C:\Program Files\Common Files\Microsoft Shared\web server extensions \14\BIN

Instructions

1. In the **stsadm** command line tool, enter the following. This copies the wsp files to the home folder of the installation folder for the stsadm tool. You can specify a different path in the command.

```
stsadm –o addsolution –filename Ascentn.SharePoint.SettingsList.wsp
stsadm –o addsolution –filename Ascentn.SharePoint.WebParts.wsp
stsadm –o addsolution –filename Ascentn.SharePoint.WFIntegration.wsp
stsadm –o addsolution –filename Ascentn.SharePoint.ListForm.wsp
```

2. Deploy the following solutions to your SharePoint web applications:

```
stsadm -o deploysolution -name ascentn.sharepoint.settingslist.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
stsadm -o deploysolution -name Ascentn.SharePoint.ListForm.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
stsadm -o deploysolution -name Ascentn.SharePoint.WebParts.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
stsadm -o deploysolution -name Ascentn.SharePoint.WFIntegration.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
```

3. In the **stsadm** tool, execute the following command:

```
stsadm –o copyappbincontent
```

4. In the **stsadm** tool, activate the AgilePoint features:

```
stsadm -o activatefeature -name Agilepointsettingslistfeature -url
 "[Site Collection URL]" –force
stsadm -o activatefeature -name agilepointlistform -url "[Site
 Collection URL]" -force
stsadm -o activatefeature -name agilepointwebparts -url "[Site
 Collection URL]" -force
stsadm -o activatefeature -name agilepoint agilepointwfintegration -url
 "[Site Collection URL]" -force
```

Clean Up the SharePoint web.config

This step addresses a limitation in Microsoft SharePoint 2010. If you do not complete this step, an error will appear on the pages wfassociation.aspx and processviewer.aspx.

Prerequisites

- SharePoint 2010 installed. (This does not apply to earlier versions of SharePoint.)

Navigation

1. In a text editor, open the **web.config** file for your SharePoint installation.

Instructions

1. In the **web.config** within the **AssemblyBinding** node, paste the following:

```
<dependentAssembly>
   <assemblyIdentity name="Microsoft.SharePoint.ApplicationPages"
      publicKeyToken="71e9bce111e9429c" culture="neutral" />
   <bindingRedirect oldVersion="12.0.0.0" newVersion="14.0.0.0" />
</dependentAssembly>
```

2. Save and close the **web.config**.

Run the Windows Service Client Utility Tool

If you are installing SharePoint Integration in a Windows Service environment, you must run the Windows Service Client Utility Tool to configure the binding with the AgilePoint Server.

Prerequisites

- You are using AgilePoint SharePoint Integration in a Windows Service environment.
- Create a backup copy of the configuration file for the application you are configuring before using this utility.

Navigation

To open the Windows Service Client Utility Tool, do one of the following:

- On the AgilePoint Server machine, navigate to **[AgilePoint Server Installation]\SVCUtilityTool \AgilePointWindowsServiceClientUtilityTool.exe**
- Open the AgilePoint installation **Setup.exe** file, and click **AgilePoint Utilities and Other Support Files > AgilePoint Windows Service Client Utility Tool**.

Instructions

1. In the AgilePoint Windows Service Client Utility Tool dialog box, complete the following fields:
   - **Service Address** – The URI for the Windows Service for which you are creating the binding. The information required to build this URI is provided in the AgilePoint Server Manager window.
   - **HTTP** - http://[APServer Machine Name]: [Http Port]/AgilePointServer

     When you create the bindings for the web application, the settings are automatically configured in the web.config file for both HTTP and TCP protocols. By default, the HTTP bindings are used. However, you can switch to TCP by modifying the following properties in the web.config:
     - Change the following so value="**NetTcpBinding_IWCFWorkflowService**"

```
<add key="WorkFlowBindingUsed"
 value="WSHttpBinding_IWCFWorkflowService" />
```

     - Change the following so value="**NetTcpBinding_IWCFEventServices**"

```
<add key="EventServicesBindingUsed"
 value="WSHttpBinding_IWCFEventServices" />
```

- Change the following so value="**NetTcpBinding_IWCFAdminService**"

```
<add key="AdminBindingUsed"
 value="WSHttpBinding_IWCFAdminService" />
```

- **Target Config** – The file name and location of the configuration file for the application you are configuring.
  - **SharePoint Integration** – The web.config for the SharePoint web application you want to bind.
  - **Data Services** – DataServicesWindowsService.exe.config in the Data Services installation folder. The default location is C:\Program Files\AgilePoint\AgilePoint Data Services\
  - **AgileForms** - The web.config file in the AgileForms installation folder. The default location is C:\Program Files\BWS\AFInt\Webroot\
  - **Deployment Service** - apds.exe.config file in the Deployment Service installation folder. The default location is C:\Program Files\AgilePoint\AgilePoint Deployment Service\

2. Click **Settings** to configure the following fields:
   - **Max Buffer Size**
   - **Max Buffer Pool Size**
   - **Max Received Message Size**
   - **Max String Content Length**
   - **Max Array Length**

   Guidance for modifying these values can be found at the following articles on MSDN:
   - http://msdn.microsoft.com/en-us/library/ms731361(v=VS.100).aspx
   - http://msdn.microsoft.com/en-us/library/ms731325(v=VS.100).aspx

Verify the Installation was Successful

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.

Navigation

1. Navigate to SharePoint Central Administration on your SharePoint site.
2. In SharePoint Central Administration, click **Operations > Solutions Management**

Instructions

1. On the **Solution Management** page, verify that the following AgilePoint solutions are deployed::
   - **ascentn.sharepoint.settingslist.wsp**
   - **ascentn.sharepoint.webparts.wsp**
   - **ascentn.sharepoint.wfintegration.wsp**
   - **ascentn.sharepoint.listform.wsp**

Set the AgilePoint Configuration List

The AgilePoint Configuration List feature creates a new list called AgilePoint Configuration List when the feature is activated. By default, this list is populated with sample data, it is required to modify the items before using the integration.

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.
- The SharePoint Administrator should restrict access to the AgilePoint Configuration List.

Navigation

1. Open an AgilePoint-enabled SharePoint Site Collection.
2. Click **View All Site Content**.
3. Click **AgilePoint Configuration** list under the **Lists** section.

Instructions

Modify the following items in the list as appropriate to your environment.

Application	Title	Value
AgilePoint	ServerUrl	The URL of AgilePoint Server • **HTTP Format -** http:// APServerMachineName:HTTP Port /AgilePointServer • **TCP Format** (Windows Service Only) - net.tcp:// APServerMachineName: TCP Port/AgilePointServer
AgilePoint	ImpersonatorDomain	The Domain Name
AgilePoint	ImpersonatorUser	The User Name
AgilePoint	ImpersonatorPass	The Password (Optionally, you can check the **Encrypted** check box in order to encrypt the value of this setting.)
AgilePoint	Log	Location of the log files (e.g. C:\NewSPLog). You can give the FTP location also (e.g. ftp:// netsvr1/AgilePontSharePoint/ Log). The Impersonator user should have write permission on FTP server.

Application	Title	Value
AgilePoint	LogSwitch	You can provide switches for logging. The following are the available switches. • All • Info • Debug • Error • None You can give multiple switches separating by a comma(,) (e.g. Debug, error, Info). The Default value is: All.
AgilePoint	HostingMechanism	Enter the type of AgilePoint installation you are using: • **IIS** – A standard, web-based installation. • **WCF** – A Windows service installation.
AgilePoint	AdminBindingUsed	Enter the type of binding that is used for Windows Service. This setting applies only if AgilePoint Server is running as a Windows Service. If AgilePoint Server is running in IIS mode, this setting is ignored. • HTTP - **WS HttpBinding_IWCFAdminService** • TCP (Windows Service Only) - **NetTcpBinding_IWCFAdminService**
AgilePoint	WorkflowBindingUsed	Enter the type of binding that is used for Windows Service. This setting applies only if AgilePoint Server is running as a Windows Service. If AgilePoint Server is running in IIS mode, this setting is ignored. • HTTP - **WS HttpBinding_IWCFWorkflowService**

Application	Title	Value
		• TCP (Windows Service Only) - **NetTcpBinding_IWCFWorkflowService**

Set up a Common AgilePoint Configuration List

By default, each SharePoint site collection has its own AgilePoint Configuration List. However, you can define one common AgilePoint Configuration List that can be used across all SharePoint site collections.

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.

Navigation

1. Navigate to SharePoint Central Administration on your SharePoint site.
2. In a text editor, open the SharePoint Web Application **web.config** file.

Instructions

Modify the **web.config** as follows:

```
<appSettings>
    <add key="APSettingsListName" value="AgilePoint Configuration" />
    <add key="APSettingsSiteUrl" value="http://demo3:8081" />
    <add key="APSettingsWebName" value="" />
</appSettings>
```

Where:

- **APSettingsListName** - The name of the AgilePoint Settings List.
- **APSettingsSiteURL** -The SharePoint SiteURL that contains the common AgilePoint Configuration List. The rest of the site collections will refer to this location and list as long as the individual AgilePoint Configuration list (which is auto-created in the site collection when this feature is activated) is deactivated or removed.
- **APSettingsWebName** - If this field is left blank, this means that the AgilePoint Configuration List is located at the top-level site. A value would indicate the Sub site name.

Add the AgilePoint Web Parts to SharePoint

To access the features of the AgilePoint SharePoint Integration, you must add the AgilePoint Web Parts to your SharePoint site. AgilePoint Web Parts are added in the same manner as other SharePoint Web Parts.

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.

Instructions

The following AgilePoint Web Parts can be deployed to your SharePoint site:

- **AgilePoint Process Instance List** – Includes the list of running process instances.
- **AgilePoint Process Model List** – Displays all process models that are deployed to AgilePoint Server.
- **AgilePoint Task List** – Includes the AgilePoint Task List that provides a way for users to manage their tasks.

The exact procedure for adding Web Parts varies, depending upon your version of SharePoint. See your SharePoint documentation for more information.

Installing AgilePoint Data Services

This section provides detailed instructions for installing the AgilePoint Data Services component of the AgilePoint BPMS Suite.

Install AgilePoint Data Services

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link.
4. Click the link for **AgilePoint Data Services** that is most appropriate for your system.
5. Click **Next** in the AgilePoint Data Services Setup window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Data Services\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Setting Up AgilePoint Data Services

After installing the AgilePoint Data Services and prior to using this AgileConnector, do the following to set up AgilePoint Data Services.

Configure Data Service

Before starting the Data Services Windows service, do the following to configure the Data Service:

1. In the installation directory for AgilePoint Data Services (by default, C:\Program Files\AgilePoint \AgilePoint Data Services), run the script **DataServiceConfiguration.exe**.
2. On the **AgilePoint Data Services Configuration** window, complete the following fields:
   - **Database Type** – The type of database you want to use for AgilePoint Data Services. **Microsoft SQL Server** or **Oracle Database**.
   - **Database Authentication** – Indicates the database **User** name, **Password**, and whether **Integrated Security** is used.
   - **Database Location** - The database to which the data will populate. This can be an existing database, the AgilePoint database, or a new database.
   - **Enable Data Population** – If selected, allows application data to be written to the database.
   - **Enable Data Tracking** – If selected, allows changes to application data to be tracked.
   - **Time Interval** - The timer interval used by the Windows Service to check for any new entries in the database. On a production system, this can be set to a high interval like 3600 (i.e. one hour).
   - **Server URL** - The AgilePoint Server URL.
     - **Windows Service** – Open the file **Ascentn.AgilePoint.WCFService.exe.config** in [Windows Service installation location]\bin. You can find the Windows Service installation location in the Server Manager window in the Location field for the service instance.
     - **IIS** – In the IIS Manager, Browse **AgilePoint Server > workflow.asmx**. The URL appears in the Location field in your web browser.
   - **Hosting Mechanism** – IIS or Windows Service, depending on your AgilePoint Server installation type.

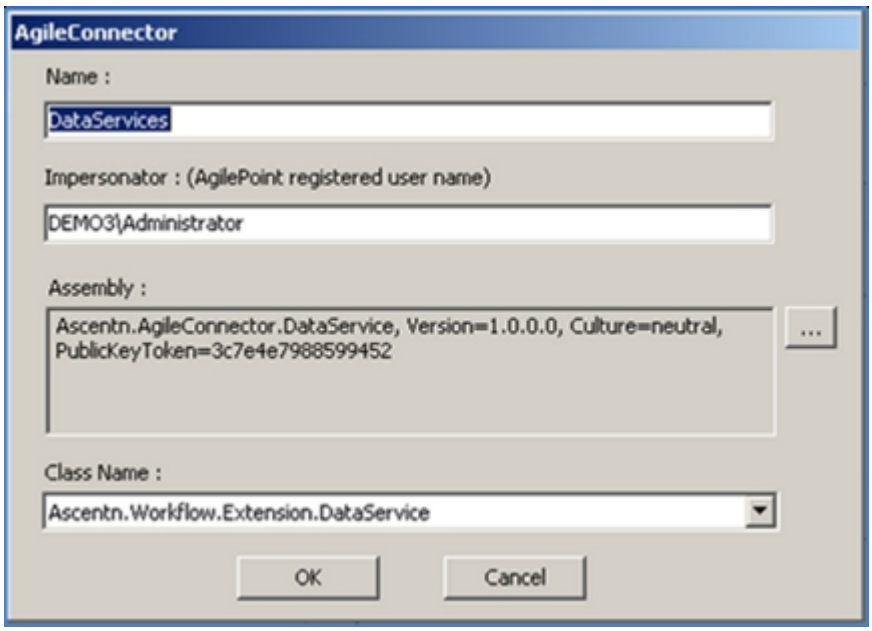
     If you are running AgilePoint Server as a Windows Service, indicating Windows Service creates the binding between the Data Services component and the AgilePoint Server. This setting is required.
3. To create database tables and save the Data Services configuration, click **OK**.

   This creates tables named **WF_DATA_SERVICE_TEMPDB**, **WF_DATA_SERVICE_ERRORDB**, and **WF_DATA_TRACKING** in the specified database.

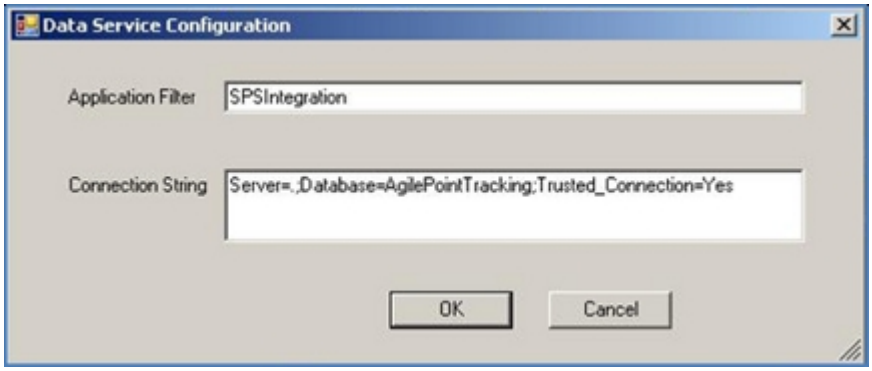
Enable the Data Services Extension

To enable this 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** field should be set to **SPSIntegration** for InfoPath applications, for ASP.NET applications, set the **Application** 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**.

You can configure multiple AgileConnectors to service different applications or use the same one across applications. To use the same AgileConnector, give the names of all the applications separated by a semicolon (;).

Start the Service

To start the service:

1. In Windows, open the **Services** window.
2. In the **Services** window, right-click **AgilePointDataServices**, and click **Properties**.
3. On the **Properties** dialog box, click the **Log On** tab.
4. On the **Log On** tab, select **This account**, and enter the credentials for an account that has database ownership privileges to the database for AgilePoint Data Services.
5. Click the **General** tab.
6. On the **General** tab, click **Start**.
7. Click **OK**.

Modify the Enterprise Manager web.config

To modify the Enterprise Manager web.config

1. Add an element under <AppSettings> in the Enterprise Manager web.config file.

Element to be added :

```
<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

Using Data Population for the First Time

For Data Population, create a table in a database that is specific for the application, and create the table columns based on the fields from the form, the Primary Key should be the Process Instance ID.

The Database connection string and the table information for Data Population are configured in the Process Template in AgilePoint Envision.

Installing AgilePoint Configuration A

This section provides instructions for installing each component of the AgilePoint Suite with the following conditions:

Document Variant	NLB or Single Server?	IIS or Windows Service Mode?	.NET 3.5 or 4.0?
Configuration A	NLB	IIS	3.5

Prerequisites

Before installing the AgilePoint system, you must comply with the following prerequisites.

New Installations Only

This section assumes that you are installing each component of the AgilePoint BPMS Suite on a computer that does not have any version of that component already installed. If you do already have any version of a component installed on the target computer, see Upgrade Guide on the AgilePoint Support Portal.

Pre-Installation Complete

Before installing any of the components of the AgilePoint BPMS Suite, please ensure you have read and completed the checklist items in the **AgilePoint Pre-Installation Guide**, this is a requirement and will ensure a successful installation.

For more information, see Pre-Installation Guide on the AgilePoint Support Portal.

Local Installation Files

Make sure that the installation files are located on one of the computer's local drives. If you attempt to run the installation directly from a network, the installation may fail. If you do attempt to install when the installation file(s) are located on a network drive (or some other remote location), the setup application may fail to run with an error message similar to the following: "An exception 'System.Security.Policy.PolicyException' has occurred in Setup. "

Installing AgilePoint Server

Use the procedures in this section to set up an AgilePoint Server machine for your environment. This section provides instructions for installing and configuring all the core components on the AgilePoint Server machine.

Install Clustering Server Manager

To install AgilePoint Clustering Server Manager:

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Clustering Server Manager**.
5. Click **Next** in the AgilePoint Clustering Server Manager window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Clustering Server Manager\
7. Click **Next**.
8. The installer is now ready to install the **AgilePoint Clustering Server Manager**. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.

Set Up a Private Network

When you install AgilePoint Server in an NLB environment, you must set up a private network for the AgilePoint Server machines.

The machineKey element configuration setting is used to configure ASP.NET sites and applications for use in a NLB environment. When configuring an AgilePoint NLB environment, all machines in the cluster should use the SAME keys for the validationKey and decryptionKey attributes of the machineKey configuration element. The machineKey element can be set in either the machine.config or web.config files.

For example, you might need to change this:

```
<machineKey validationKey="AutoGenerate,IsolateApps"
          decryptionKey="AutoGenerate,IsolateApps" validation="SHA1"
          decryption="Auto" />
```

to something like this (note that the values below are examples, and not meant for actual use):

```
<machineKey validationKey="SOME_VALIDATION_KEY"
          decryptionKey="SOME_ENCRYPTION_KEY" validation="SHA1"
decryption="Auto" />
```

The following Microsoft article provides information about creating keys: http://support.microsoft.com/default.aspx?scid=kb;en-us;Q312906

Suspend the Logical Server Name

When installing AgilePoint Server in an NLB environment, you must temporarily suspend the use of the logical server name.

In IIS, make sure to use the Physical name of the AgilePoint Server machine instead of the Logical (i.e. Virtual IP) name for the install:

- **IP Address** - Make sure the IP address is set to 'All Unassigned' temporarily during the installation.
- **Host Header** - Make sure the Host Header of the Web site is temporarily removed.

See also, Reset the Server to the Logical Name on the AgilePoint Support Portal..

Install AgilePoint Server

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system – 32 bit or 64 bit.
4. Click **AgilePoint Server**.
5. Click the installation type you want: **AgilePoint Server (IIS)** or **AgilePoint Server (Windows Service)**.
6. Click **Next** in the AgilePoint Server window.
7. Again, click **Next** in the AgilePoint Server window.
8. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
9. Do one of the following, depending upon whether you are performing an IIS Web Site or as a Windows Service:
   - **IIS:**
     1. Select the AgilePoint Server Web site for which you would like to install AgilePoint Server.
     2. Enter a virtual directory name. The default is **AgilePointServer**.
     3. In the **Application Pool** list, select the application pool you want to use.
     4. Click **Next**.
   - **Windows Service:**
     1. Specify the location for your installation, and click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Configure AgilePoint Server

1. To open the **AgilePoint Server Configuration** utility, do one of the following:
   - If you have just added a new Windows Service instance, this window opens automatically.

- If you are installing on IIS, click **Start > All Programs > AgilePoint > AgilePoint Server Configuration**.
- If you are configuring an existing Windows Service installation, click **Start > All Programs > AgilePoint > AgilePoint Server Manager**. In the **AgilePoint Server Manager** window, select the Windows Service instance you want to configure, and click the **Configuration** icon.

2. The **System** tab allows you to configure the AgilePoint System User and default email notification behavior. The System area allows you to specify the identity and authentication information for the AgilePoint system user, and the maximum number of threads that AgilePoint will be able to use at runtime while handling workflow requests. The Notification area allows you to specify the default values for certain email notification settings.
3. Do one of the following:
   - Check the **Active Directory** check box if you are configuring AgilePoint Server on a network controlled by a Windows Server Domain Controller. This will use Active Directory lookup to validate the user in Active Directory.
   - Leave the **Active Directory** check box unchecked if you will be using a local machine account for the AgilePoint system user.
4. Enter the AgilePoint **System User** name and **Password**.
   - If you checked the **Active Directory** check box above, enter the domain **User Name** and **Password**.
   - If you did not check the **Active Directory** check box above, this should contain a local machine account **User Name** and **Password** that you would use when logging into Windows.
5. Enter the **Thread Pool Size**. The Thread Pool Size should be set to the number of Concurrent User Licenses purchased for the server or the number of threads that the physical hardware will support. Use the most limiting of the two numbers.

   For more information, see Configuring the AgilePoint Server Thread Pool Size on the AgilePoint Support Portal.
6. Configure the Notification settings as appropriate for your environment.
   - Enter the SMTP Server information obtained during the pre-installation setup.
   - Enter the SMTP email address for the default Email Sender (i.e. the From address on AgilePoint email notifications).
   - Enter the System User Email. This is the email that will be used to send system notifications if the AgilePoint Server is encountering operational errors.
7. Click the **Database** tab and configure the settings as appropriate for your environment.
8. Do one of the following:
   - Check the **Integrated Security** check box to use Windows Authentication and the Application Pool Identity of AgilePoint Server (APServiceAccount) to authenticate to the database.
   - If using SQL Authentication, enter the SQL user account and password.
9. Enter the Database Server and enter the AgilePoint Database Name or click the **Ellipses** button to retrieve the database names and select the AgilePoint Database. The AgilePoint System User

is used to connect to the database during configuration. Therefore, the AgilePoint System User must have db_owner privileges on the AgilePoint Database.

10. The Connection Pool Size must be a minimum of 100 and should be at least 2 times the Thread Pool Size configured on the System tab.
11. (Oracle DB Only) If you are employing an Oracle database, open the Oracle Net Configuration Assistant utility, and configure the Oracle Local Service as necessary. If the Local Service Name has changed, you will need to also update the AgilePoint Server Configuration utility Database tab with the new Oracle Local Service Name.
12. (Optional) Click the **Work Calendar** tab, and configure the settings as appropriate for your environment. This configuration is used in processes for duration assignment or due date.
13. Click **OK** to complete the configuration.

Create the AgilePoint Database Schema

1. Open IIS and view the AgilePointServer Virtual Directory. **Browse** the **Workflow.asmx** file. This creates the AgilePoint Database schema.

Check the AgilePoint Monitor Service

1. Verify the pre-installation steps
2. Click **Start > Run**, and enter **services.msc**.
3. In the **Services** window, ensure the AgilePoint Monitor Service is started.
   - In an IIS environment, the name is **AgilePoint Server Monitor**.
   - In a Windows Service environment, the name is the name of the service you created in AgilePoint Server Manager.
4. If it is not started, right-click on the AgilePoint service name, and click **Start**.

Reset the Server to the Logical Name

Reset the AgilePoint Server and Enterprise Manager Web site to use the Virtual IP.

1. Once both AgilePoint Server and AgilePoint Enterprise Manager are installed on a server machine, change the IIS setting for your AgilePoint Server/Enterprise Manager Web site back to use the Virtual IP address.
2. On the **Add/Edit Web Site Identification** window, do the following:
   - Change the IP address from 'All Unassigned' to the Virtual IP address set up for the NLB environment.
   - Add a Host Header value for the NLB to use the AgilePointLogicalName.
3. Reset IIS.

Configure the SMTP Server Account

AgilePoint uses anonymous SMTP by default. The AgilePoint Server **netflow.cfg** file will now need to be edited to provide the user name and password to use with SMTP for user authentication.

1. Open the **netflow.cfg** file in a text editor such as Notepad.
2. Locate the **Notification** section and modify it to look something like this:

```
<notification
mode="true"
format="text"
smtpService="BuiltIn::username@sbcglobal.net,password1"
mailServer="smtp.sbcglobal.yahoo.com"
sender="NETSVR2@agilepoint.com"
sysadm="adminuser@agilepoint.com">
```

   Where username@sbcglobal.net is the user name provided to you by your ISP and password1 is the password provided to you by your ISP.

Install Enterprise Manager

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Enterprise Manager**.
5. Click **Next** in the AgilePoint Enterprise Manager window.
6. Select the site for which you would like to install AgilePoint Enterprise Manager. It is recommended to use the same site where you installed AgilePoint Server.
7. Enter a Virtual Directory name. The default is **EnterpriseManager**.
8. In the **Application Pool** field, select the application pool you want to use.
9. Click **Next**.
10. The installer is now ready to install AgilePoint Enterprise Manager. Click **Next** to install.
11. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
12. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
13. (Note that this step applies only under the specified conditions.) Open the file**[AgilePointWebSiteLocation]\EnterpriseManager\web.config**, modify the value of the **serverUrl** key using the following instructions:
    - **NLB environment** - replace **localhost** with the **virtual IP address** assigned to AgilePoint Server. Use the same port number as AgilePoint Server.

- **Non-NLB environment** - Only if AgilePoint Server is bound to a specific IP address in IIS (rather than to "All Unassigned"), replace **localhost** with the **physical IP address** assigned to AgilePoint Server.

Example:

```
<add key="ServerUrl" value="http://1.2.3.4:81/AgilePointServer" />
```

14. Make sure the Web Site for which AgilePoint Server/AgilePoint Enterprise Manager is installed is configured to run under the .NET 2.0 Framework:
    a. Open IIS and expand Web Sites, then right-click the Web site that contains the AgilePoint Server virtual directory and click **Properties**.
    b. Click the **ASP.NET** tab.
    c. In the **ASP.NET** field, make sure it is set for 2.0.
    d. Click **OK**.The Login page appears.
15. Log on to AgilePoint Enterprise Manager using the AgilePoint System User account. The AgilePoint System User account is configured in the AgilePoint Server Configuration. This is an important step as this is when the database tables are created in the AgilePoint Workflow Database.

    The AgilePoint Enterprise Manager Main Page appears.

Keep AgilePoint Enterprise Manager open for the next step.

(Optional) Configure SQL Reporting Services

You must provide the correct database privileges for SQL Reporting Services to properly connect and access the AgilePoint database. Follow the steps below to configure the database privileges after installing Enterprise Manager with SQL Server Reporting Services integration.

1. Open **Microsoft SQL Server** > **Reporting Services** > **Report Manager** and click the **AgilePoint** link
2. In the AgilePoint folder, click the **APDS** item to configure the sample reports data source.
3. Make sure the option **Use as Windows Credentials when connecting to the data source** is checked.
4. Click **Apply** to save the changes.

Configure Session State Handling

After installing AgilePoint Server and Enterprise Manager, you must configure session state handling. There may be several valid options, depending upon your environment and your organization's requirements.

Value	Description
InProc	This is the default value for ASP.NET. This value is suitable for single-machine AgilePoint Server

Value	Description
	environments; you cannot use this setting for NLB.
StateServer	This setting can be used in a single-machine or NLB environment to manage the session state using the ASP.NET State Service Windows Service. To use the StateServer setting, the ASP.NET State Service must be running on a separate machine from AgilePoint Server.
SQLServer	In NLB environments, this setting allows the AgilePoint Servers to store their session data on a separate machine in a SQL Server database. If an AgilePoint Server fails, another server in the cluster can take over and serve requests without session data loss.
Off	This setting enables you to turn off the session state for AgilePoint Server. This setting can help to improve performance of AgilePoint Server in NLB environments. You cannot use this session for Enterprise Manager.
Custom	This setting requires custom coding. For more information, contact AgilePoint Support.

If you use Session State handling in an NLB environment, note the following:

- The session must be persisted outside of the current server.
- This session persistence is managed by the .NET Framework, not by AgilePoint. The framework uses the connection string declared in the web.config for AgilePoint Server and AgilePoint Enterprise Manager. See http://msdn2.microsoft.com/en-us/library/87069683(vs.71).aspx to communicate to the database where the session is persisted.

To set up session state handling:

1. Run **InstallSqlState.sql** (installed by default in [system root]\Microsoft.NET\Framework\version) on the computer running SQL Server that will store the session state (i.e. the db server). This creates a database called ASPState with new stored procedures and ASPStateTempApplications and ASPStateTempSessions tables in the TempDB database.
2. Open the **AgilePoint Server** and **AgilePoint Enterprise Manager web.config** files. In the <sessionState> node, set the values as required for your environment.

   For example, if you are using the **SQLServer** setting, the SQL connection string must point to the session state SQL Server database on the DB server machine that stores the session data:

```
<sessionState mode="SQLServer"
sqlConnectionString="[your sessionState database connection string]"
cookieless="false"
timeout="20000"
/>
```

If you are using the **Off** setting, no further information is required:

```
<sessionState mode="Off" />
```

Verify the AgilePoint Server Installation

This step is important and determines whether the AgilePoint installation and configuration was successful. This should be done prior to installing AgilePoint Enterprise Manager.

After AgilePoint Server is configured, do the following:

1. Open IIS and view the AgilePointServer Virtual Directory.
2. Browse the file **Test.asmx**.
3. In your web browser on the **Test.asmx** page, click **Hello** to access the Hello World method.
4. On the **Hello World** page, click **Invoke** to invoke the method and ensure that the service is working.

   The run-once installer script will be executed to create the database structures the first time that an AgilePoint Server request is made. As a result, it may take a while for the result to display.

Add User Accounts

You must add the following user accounts to Enterprise Manager.

Add the SharePoint Impersonator User Account to AgilePoint

This is the domain-qualified user account that SharePoint will use to interact with AgilePoint Server at runtime.

This step is required if you are installing the AgilePoint SharePoint Integration, and you are not using the same user account for the AgilePoint System User and the SharePoint Impersonator User. If you are using the same user account for the AgilePoint System User and the SharePoint Impersonator User, you can skip this part.

1. Log on to Enterprise Manager.
2. On the AgilePoint **Enterprise Manager Main Page**, click the **Users** link.
3. Click the **Add** link.
4. Enter the SharePoint Impersonator User Account information and click **OK**.
5. Navigate back to the Main Page, and click the **Roles** link.
6. Click the **Add Role** button.
7. Enter **SharePoint Impersonator** as the Role Name, and give this Role **Initiate a process** and **Cancel a process** rights and click **OK**.
8. Click the **SharePoint Impersonator** Role link.
9. Click the **Add Users(s) as Member** button.

10. Select the **SharePoint Impersonator** User Account and click **OK**.

Add the AgilePoint Server Service User Account to AgilePoint

1. On the AgilePoint Enterprise Manager Main Page, click the **Users** link.
2. Click the **Add** link.
3. Enter the AgilePoint Server Service User Account and click **OK**.
4. Navigate back to the Main Page and click the **Roles** link.
5. Click the **Administrators** link and add the AgilePoint Server Service User Account to the AgilePoint Administrators Role.
6. Close AgilePoint Enterprise Manager.

Install AgilePoint Envision

To install AgilePoint Envision, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Envision**.
5. Click **Next** in the AgilePoint Envision window.
6. Again, click **Next** in the AgilePoint Envision window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.

   Select the type of AgilePoint Server installation you are using (**IIS** or **Windows Service**), and click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Envision\
9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
14. To open AgilePoint Envision click **Start** > **Programs** > **AgilePoint** > **AgilePoint Envision**.

Install AgilePoint Developer

To install AgilePoint Developer, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Developer**.
5. Click **Next** in the AgilePoint Developer window.
6. Again, click **Next** in the AgilePoint Developer window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Developer
9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
14. To start AgilePoint Developer, open the Microsoft Visual Studio.NET application as you would normally.

Installing AgilePoint SharePoint Integration

This section provides instructions for installing the AgilePoint SharePoint Integration component of the AgilePoint BPMS Suite.

The AgilePoint SharePoint Integration v2 consists of three features:

- **AgilePoint Configuration List** – Stores the AgilePoint configuration data in a custom list.
- **AgilePoint Process Launcher** – Associates a SharePoint entity with an AgilePoint process.
- **AgilePoint Web Parts** – Includes the three AgilePoint Web Parts (Process Model List, Process Instance List, and Task List).

SharePoint Integration v2 Versus v1

The AgilePoint SharePoint Integration v2 is the version AgilePoint SharePoint Integration available for a fresh installation in AgilePoint BPMS.

For existing AgilePoint customers, it is possible to upgrade AgilePoint SharePoint Integration v1 from AgilePoint v4.x to AgilePoint SharePoint Integration v1 for AgilePoint v5.x. For more information, see Upgrade Guide on the AgilePoint Support Portal.

For information about migrating from SharePoint Integration v1 to v2, contact AgilePoint.

Configure the AgilePoint SharePoint Integration AgileConnector

Prerequisites

- AgilePoint Server is installed.

Navigation

1. Open the **AgilePoint Server Configuration** utility.
2. Click the **Extension** tab.

Instructions

1. On the **Extension** tab, click on **Add**.
2. Browse one of the following locations to open the file **Ascentn.SharePoint.AgileConnector.dll**:
   - For IIS installations, this file is located in the **bin** folder under the AgilePoint Server installation folder.
   - For Windows Service installations, this file is located in the **bin** folder under the path provided in the **Location** field in Windows Server Manager for the Windows Service instance you want to configure.
3. Change the **Name** from **AgileConnector** to **SPSIntegration**.
4. Enter the Impersonator (e.g. Administrator).
5. Click **OK**.
6. Optionally, you can click **Configure** to set the maximum thread for SharePoint access and to set the credential for SharePoint access. By default it will use the AgilePoint System User Account credential.
7. When you have finished the configuration, on the **AgilePoint Configuration** window, click **OK**.

   Accept any informational messages.

   If you are prompted to restart IIS or the AgilePoint Service, click **Yes**.

Install AgilePoint SharePoint Integration

Prerequisites

- Configure the AgilePoint SharePoint Integration AgileConnector
- If you are installing AgilePoint SharePoint Integration in a SharePoint server farm, you must select a SharePoint server you want to designate as the primary AgilePoint integration server. **Document your decision.** You will need to use the same machine for all AgilePoint SharePoint Integration installations and upgrades.
- Log on to the SharePoint machine using a user account that belongs to the local system's Administrators group.

Navigation

1. On the SharePoint machine, double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
2. Click the **Install AgilePoint…** link that is most appropriate for your system.

Instructions

1. Click **AgilePoint SharePoint Integration**.
2. Click **Next** in the AgilePoint SharePoint Integration window.
3. Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Integration for SharePoint\
4. Click **Next**.
5. The installer will deploy the installation files to the installation folder.
6. Once the **Installation Complete** message is displayed, click **Close**.

Add, Deploy, and Activate the SharePoint Solution Files

Prerequisites

- Install AgilePoint SharePoint Integration
- Log on to the SharePoint machine using a user account that belongs to the local system's Administrators group.

Navigation

1. Open the **stsadm** command line tool.

   You can find the stsadm.exe at one of the following locations:
   - **SharePoint 2007** - C:\Program Files\Common Files\Microsoft Shared\web server extensions \12\BIN
   - **SharePoint 2010** - C:\Program Files\Common Files\Microsoft Shared\web server extensions \14\BIN

Instructions

1. In the **stsadm** command line tool, enter the following. This copies the wsp files to the home folder of the installation folder for the stsadm tool. You can specify a different path in the command.

```
stsadm –o addsolution –filename Ascentn.SharePoint.SettingsList.wsp
stsadm –o addsolution –filename Ascentn.SharePoint.WebParts.wsp
stsadm –o addsolution –filename Ascentn.SharePoint.WFIntegration.wsp
stsadm –o addsolution –filename Ascentn.SharePoint.ListForm.wsp
```

2. Deploy the following solutions to your SharePoint web applications:

```
stsadm -o deploysolution -name ascentn.sharepoint.settingslist.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
stsadm -o deploysolution -name Ascentn.SharePoint.ListForm.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
stsadm -o deploysolution -name Ascentn.SharePoint.WebParts.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
```

```
stsadm -o deploysolution -name Ascentn.SharePoint.WFIntegration.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
```

3. In the **stsadm** tool, execute the following command:

```
stsadm –o copyappbincontent
```

4. In the **stsadm** tool, activate the AgilePoint features:

```
stsadm -o activatefeature -name Agilepointsettingslistfeature -url
 "[Site Collection URL]" –force
stsadm -o activatefeature -name agilepointlistform -url "[Site
 Collection URL]" -force
stsadm -o activatefeature -name agilepointwebparts -url "[Site
 Collection URL]" -force
stsadm -o activatefeature -name agilepoint agilepointwfintegration -url
 "[Site Collection URL]" -force
```

Clean Up the SharePoint web.config

This step addresses a limitation in Microsoft SharePoint 2010. If you do not complete this step, an error will appear on the pages wfassociation.aspx and processviewer.aspx.

Prerequisites

- SharePoint 2010 installed. (This does not apply to earlier versions of SharePoint.)

Navigation

1. In a text editor, open the **web.config** file for your SharePoint installation.

Instructions

1. In the **web.config** within the **AssemblyBinding** node, paste the following:

```
<dependentAssembly>
   <assemblyIdentity name="Microsoft.SharePoint.ApplicationPages"
      publicKeyToken="71e9bce111e9429c" culture="neutral" />
   <bindingRedirect oldVersion="12.0.0.0" newVersion="14.0.0.0" />
</dependentAssembly>
```

2. Save and close the **web.config**.

Run the Windows Service Client Utility Tool

If you are installing SharePoint Integration in a Windows Service environment, you must run the Windows Service Client Utility Tool to configure the binding with the AgilePoint Server.

Prerequisites

- You are using AgilePoint SharePoint Integration in a Windows Service environment.
- Create a backup copy of the configuration file for the application you are configuring before using this utility.

Navigation

To open the Windows Service Client Utility Tool, do one of the following:

- On the AgilePoint Server machine, navigate to **[AgilePoint Server Installation]\SVCUtilityTool \AgilePointWindowsServiceClientUtilityTool.exe**
- Open the AgilePoint installation **Setup.exe** file, and click **AgilePoint Utilities and Other Support Files > AgilePoint Windows Service Client Utility Tool**.

Instructions

1. In the AgilePoint Windows Service Client Utility Tool dialog box, complete the following fields:
   - **Service Address** – The URI for the Windows Service for which you are creating the binding. The information required to build this URI is provided in the AgilePoint Server Manager window.
   - **HTTP** - http://[APServer Machine Name]: [Http Port]/AgilePointServer

     When you create the bindings for the web application, the settings are automatically configured in the web.config file for both HTTP and TCP protocols. By default, the HTTP bindings are used. However, you can switch to TCP by modifying the following properties in the web.config:
     - Change the following so value="**NetTcpBinding_IWCFWorkflowService**"

       ```
       <add key="WorkFlowBindingUsed"
        value="WSHttpBinding_IWCFWorkflowService" />
       ```
     - Change the following so value="**NetTcpBinding_IWCFEventServices**"

       ```
       <add key="EventServicesBindingUsed"
        value="WSHttpBinding_IWCFEventServices" />
       ```
     - Change the following so value="**NetTcpBinding_IWCFAdminService**"

       ```
       <add key="AdminBindingUsed"
        value="WSHttpBinding_IWCFAdminService" />
       ```
   - **Target Config** – The file name and location of the configuration file for the application you are configuring.
     - **SharePoint Integration** – The web.config for the SharePoint web application you want to bind.
     - **Data Services** – DataServicesWindowsService.exe.config in the Data Services installation folder. The default location is C:\Program Files\AgilePoint\AgilePoint Data Services\
     - **AgileForms** - The web.config file in the AgileForms installation folder. The default location is C:\Program Files\BWS\AFInt\Webroot\
     - **Deployment Service** - apds.exe.config file in the Deployment Service installation folder. The default location is C:\Program Files\AgilePoint\AgilePoint Deployment Service\
2. Click **Settings** to configure the following fields:
   - **Max Buffer Size**
   - **Max Buffer Pool Size**
   - **Max Received Message Size**
   - **Max String Content Length**
   - **Max Array Length**

   Guidance for modifying these values can be found at the following articles on MSDN:

- http://msdn.microsoft.com/en-us/library/ms731361(v=VS.100).aspx
- http://msdn.microsoft.com/en-us/library/ms731325(v=VS.100).aspx

Verify the Installation was Successful

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.

Navigation

1. Navigate to SharePoint Central Administration on your SharePoint site.
2. In SharePoint Central Administration, click **Operations > Solutions Management**

Instructions

1. On the **Solution Management** page, verify that the following AgilePoint solutions are deployed::
   - **ascentn.sharepoint.settingslist.wsp**
   - **ascentn.sharepoint.webparts.wsp**
   - **ascentn.sharepoint.wfintegration.wsp**
   - **ascentn.sharepoint.listform.wsp**

Set the AgilePoint Configuration List

The AgilePoint Configuration List feature creates a new list called AgilePoint Configuration List when the feature is activated. By default, this list is populated with sample data, it is required to modify the items before using the integration.

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.
- The SharePoint Administrator should restrict access to the AgilePoint Configuration List.

Navigation

1. Open an AgilePoint-enabled SharePoint Site Collection.
2. Click **View All Site Content**.
3. Click **AgilePoint Configuration** list under the **Lists** section.

Instructions

Modify the following items in the list as appropriate to your environment.

Application	Title	Value
AgilePoint	ServerUrl	The URL of AgilePoint Server

Application	Title	Value
		• **HTTP Format -** http://APServerMachineName:HTTP Port /AgilePointServer • **TCP Format** (Windows Service Only) - net.tcp://APServerMachineName: TCP Port/AgilePointServer
AgilePoint	ImpersonatorDomain	The Domain Name
AgilePoint	ImpersonatorUser	The User Name
AgilePoint	ImpersonatorPass	The Password (Optionally, you can check the **Encrypted** check box in order to encrypt the value of this setting.)
AgilePoint	Log	Location of the log files (e.g. C:\NewSPLog). You can give the FTP location also (e.g. ftp://netsvr1/AgilePontSharePoint/Log). The Impersonator user should have write permission on FTP server.
AgilePoint	LogSwitch	You can provide switches for logging. The following are the available switches. • All • Info • Debug • Error • None You can give multiple switches separating by a comma(,) (e.g. Debug, error, Info). The Default value is: All.
AgilePoint	HostingMechanism	Enter the type of AgilePoint installation you are using: • **IIS** – A standard, web-based installation. • **WCF** – A Windows service installation.
AgilePoint	AdminBindingUsed	Enter the type of binding that is used for Windows Service.

Application	Title	Value
		This setting applies only if AgilePoint Server is running as a Windows Service. If AgilePoint Server is running in IIS mode, this setting is ignored. • HTTP - **WS HttpBinding_IWCFAdminService** • TCP (Windows Service Only) - **NetTcpBinding_IWCFAdminService**
AgilePoint	WorkflowBindingUsed	Enter the type of binding that is used for Windows Service. This setting applies only if AgilePoint Server is running as a Windows Service. If AgilePoint Server is running in IIS mode, this setting is ignored. • HTTP - **WS HttpBinding_IWCFWorkflowService** • TCP (Windows Service Only) - **NetTcpBinding_IWCFWorkflowService**

Set up a Common AgilePoint Configuration List

By default, each SharePoint site collection has its own AgilePoint Configuration List. However, you can define one common AgilePoint Configuration List that can be used across all SharePoint site collections.

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.

Navigation

1. Navigate to SharePoint Central Administration on your SharePoint site.
2. In a text editor, open the SharePoint Web Application **web.config** file.

Instructions

Modify the **web.config** as follows:

```
<appSettings>
    <add key="APSettingsListName" value="AgilePoint Configuration" />
    <add key="APSettingsSiteUrl" value="http://demo3:8081" />
    <add key="APSettingsWebName" value="" />
</appSettings>
```

Where:

- **APSettingsListName** - The name of the AgilePoint Settings List.
- **APSettingsSiteURL** -The SharePoint SiteURL that contains the common AgilePoint Configuration List. The rest of the site collections will refer to this location and list as long as the individual AgilePoint Configuration list (which is auto-created in the site collection when this feature is activated) is deactivated or removed.
- **APSettingsWebName** - If this field is left blank, this means that the AgilePoint Configuration List is located at the top-level site. A value would indicate the Sub site name.

Add the AgilePoint Web Parts to SharePoint

To access the features of the AgilePoint SharePoint Integration, you must add the AgilePoint Web Parts to your SharePoint site. AgilePoint Web Parts are added in the same manner as other SharePoint Web Parts.

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.

Instructions

The following AgilePoint Web Parts can be deployed to your SharePoint site:

- **AgilePoint Process Instance List** – Includes the list of running process instances.
- **AgilePoint Process Model List** – Displays all process models that are deployed to AgilePoint Server.
- **AgilePoint Task List** – Includes the AgilePoint Task List that provides a way for users to manage their tasks.

The exact procedure for adding Web Parts varies, depending upon your version of SharePoint. See your SharePoint documentation for more information.

Installing AgileReports

This section provides instructions for installing the AgileReports component of the AgilePoint BPMS Suite.

Install AgileReports

To install AgileReports:

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgileReports**.
5. On the **AgileReports** dialog box, click **Next**.
6. Click **Next**.

7. Review the **License Agreement**, select **I Agree**, and click **Next**.
8. On the **Select Installation Address** dialog box, complete the following fields:
   - **Site** – The IIS site you want to use for AgileReports.
   - **Virtual directory** – The IIS virtual directory you want to use for AgileReports.
   - **Application Pool** – The IIS application pool you want to use for AgileReports.
9. On the **Database Server Details** dialog box, complete the following fields.
   - **Server Name** – The name of the AgilePoint database server machine.
   - **AgilePoint Database Name** – The name of the AgilePoint database.
   - **AgileReports Database Name** – The name of the database AgileReports will use. The default is **AgileReportsMetaDB**.
10. On the **Customer Information** window, enter your **Name**, **Organization**, and **Serial number**, and click **Next**.
11. On the **Activation Wizard** window, follow the onscreen instructions to activate AgileReports.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Configure AgileReports

1. On the Active Directory to which AgilePoint Server is connected, create a Windows group named **adHocAdmin**.
2. Add the **Administrator** user to the **adHocAdmin** group.
3. Log off of AgilePoint Server, and log on again.
4. In your database application (SQL Server or Oracle), create a new database. The database name should match the database **AgileReports Database Name** you entered during installation. The default is **AgileReportsMetaDB**.
5. (Oracle only) If you are using Oracle, download the file AgileReports_Oracle.zip. Then unzip the file to the hard drive on the machine where AgileReports is installed.
6. In your **AgileReports database**, execute one of the following scripts:
   - SQL Server - **[AgileReports Virtual Directory]\Database\MetaDataDB Script.sql**
   - Oracle - **[AgileReports _Oracle unzip folder]\ Oracle Script.sql**
7. (SQL Server only) In your **AgilePoint database**, execute the SQL script **[AgileReports Virtual Directory]\Database\AgilePointDB Script.sql**
8. In an XML editor, open the file **[AgileReports Virtual Directory]_Definitions\Settings.lgx**.
9. In **Settings.lgx**, modify the **<Security>** node with the following changes:
   - **LogonPage** - The AgilePoint Enterprise Manager main logon page. To find this location, open the Enterprise Manager web client, and copy the URL up to the end of the file name,

LogonForm.aspx . The default value is **http://[hostname]/EnterpriseManager/Common/LogonForm.aspx.** However, this value may not be correct. You may need to modify the host, port number, or other elements within the URL.

- **LogonFailPage** - The AgilePoint Enterprise Manager main logon page. See the instructions for **LogonPage**.
- **NTAuthenticationDomain** – Verify the domain name is correct.

10. (Oracle only) If you are using Oracle, in **Settings.lgx**, replace the following **<Connection>** node with the node below:

- Old node:

```
<Connection Type="Application" ID="ahMetadata"
ConnectionString="Provider=SQLOLEDB.1;Integrated
Security=SSPI;Persist Security Info=False;Initial
Catalog=AgileReportsMetaDB;Data Source=." Label=""
ahDBType="SQLSERVER" />
```

- New node representing the connection for the AgileReports metadata database:

```
<Connection Type="Oracle" ID="ahMetadata"
ahDBType="ORACLE" Label="" ahUseANSI="False"
OracleUser="AgileReports" OraclePassword="pass"
OracleServer="[hostname]" OracleDatabase="AgileReportsMetaDB"
OracleProtocol="TCP" OraclePort="1521" />
```

  - OracleUser="**AgileReports**" – The user ID for your AgileReports metadata database.
  - OraclePassword="**pass** " – The password for your AgileReports metadata database.
  - OracleDatabase="**AgileReportsMetaDB**" – The service name or ID for your AgileReports metadata database.
  - OraclePort ="**1521**" – The port number for your AgileReports metadata database.

```
<Connection ID="1" CommandTimeOut="90"
Label="AgilePoint40"
 ConnectionString="Provider=SQLOLEDB.1;Integrated
Security=SSPI;Persist Security Info=False;Initial
Catalog=AgilePoint40;Data Source=." Type="Application"
ahDBType="SQLSERVER" />
```

- New node representing the database you want your reports to analyze. You can have multiple copies of this connection string, each with its own database information. The example below assumes the default connection to the AgilePoint database.

```
<Connection ID="1" CommandTimeOut="90"
Label="AgilePoint" Type="Oracle" ahDBType="ORACLE"
ahUseANSI="False" OracleUser="AgilePoint"
OraclePassword="pass" OracleServer="[hostname]"
OracleDatabase="AgilePoint" OracleProtocol="TCP"
OraclePort="1521"/>
```

  - OracleUser="**AgilePoint**"– The user ID for your database.
  - OraclePassword="**pass**" – The password for your database.
  - OracleDatabase="**AgilePoint**" – The service name or ID for your database.

- OraclePort="**1521**" – The port number for your database.

11. Restrict the access for the users for the databases from which you collect data (not the users to **connect** and **resource**.
12. In the **web.config** file in the virtual folder for the Enterprise Manager web application, add the following element as a child of **<appSettings>** with the correct AgileReports URL:

```
<add key="AgileReportUrl"
value="http://[AgileReports domain name and port number]/AgileReports/
Default.aspx"/>
```

13. (Oracle only) If you are using Oracle, copy the report files (files with the file nameahReport*.lgx) that are provided in **AgileReports_Oracle.zip**, and paste them in the folder **[AgileReports Virtual Directory]_Definitions_Reports**

Using AgileReports for the First Time

Once you have completed this procedure, you can open AgileReports from the Enterprise Manager home page.

When you open AgileReports for the first time, your reports are available under the **All Personal Reports** section. From there, you can move them to My Personal Reports or Shared Reports. See the AgileReports online help for more information.

Install AgilePoint InfoPath Integration

To install AgilePoint InfoPath Integration, do the following.

1. Log on to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint InfoPath Integration**.
5. Click **Next** in the AgilePoint InfoPath Integration window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint InfoPath Integration\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Install AgilePoint Office Client Integration

To install AgilePoint Office Client Integration, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Office Client Integration**.
5. Click **Next** in the AgilePoint Office 12 Client Setup window.
6. Select the type of AgilePoint Server installation you are using (**IIS** or **Windows Service**), and click **Next**.
7. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Office12 Client\
8. Click **Next**.
9. The installer is now ready to install the application. Click **Next** to install.
10. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
11. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Install AgilePoint Outlook Integration

To install AgilePoint Outlook Integration, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link that is most appropriate for your system.
4. Click the link for the **AgilePoint Outlook Integration** type that is most appropriate for your system.
5. Click **Next** in the AgilePoint Office 12 Client Setup window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Outlook Integration\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Installing AgilePoint Data Services

This section provides detailed instructions for installing the AgilePoint Data Services component of the AgilePoint BPMS Suite.

Install AgilePoint Data Services

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link.
4. Click the link for **AgilePoint Data Services** that is most appropriate for your system.
5. Click **Next** in the AgilePoint Data Services Setup window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Data Services\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Setting Up AgilePoint Data Services

After installing the AgilePoint Data Services and prior to using this AgileConnector, do the following to set up AgilePoint Data Services.

Configure Data Service

Before starting the Data Services Windows service, do the following to configure the Data Service:

1. In the installation directory for AgilePoint Data Services (by default, C:\Program Files\AgilePoint \AgilePoint Data Services), run the script **DataServiceConfiguration.exe**.
2. On the **AgilePoint Data Services Configuration** window, complete the following fields:
   - **Database Type** – The type of database you want to use for AgilePoint Data Services. **Microsoft SQL Server** or **Oracle Database**.
   - **Database Authentication** – Indicates the database **User** name, **Password**, and whether **Integrated Security** is used.
   - **Database Location** - The database to which the data will populate. This can be an existing database, the AgilePoint database, or a new database.
   - **Enable Data Population** – If selected, allows application data to be written to the database.

- **Enable Data Tracking** – If selected, allows changes to application data to be tracked.
- **Time Interval** - The timer interval used by the Windows Service to check for any new entries in the database. On a production system, this can be set to a high interval like 3600 (i.e. one hour).
- **Server URL** - The AgilePoint Server URL.
  - **Windows Service** – Open the file **Ascentn.AgilePoint.WCFService.exe.config** in [Windows Service installation location]\bin. You can find the Windows Service installation location in the Server Manager window in the Location field for the service instance.
  - **IIS** – In the IIS Manager, Browse **AgilePoint Server > workflow.asmx**. The URL appears in the Location field in your web browser.
- **Hosting Mechanism** – IIS or Windows Service, depending on your AgilePoint Server installation type.

  If you are running AgilePoint Server as a Windows Service, indicating Windows Service creates the binding between the Data Services component and the AgilePoint Server. This setting is required.

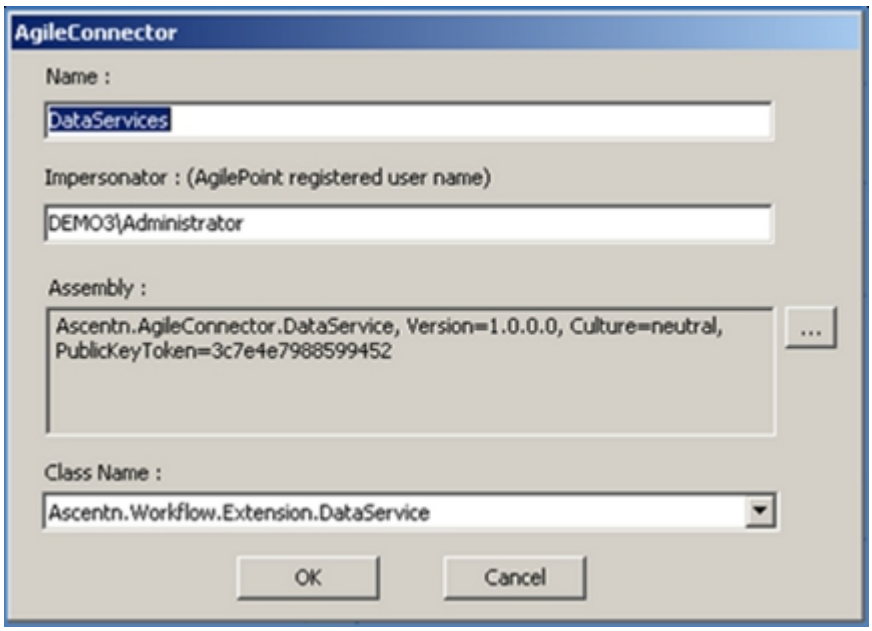
3. To create database tables and save the Data Services configuration, click **OK**.

   This creates tables named **WF_DATA_SERVICE_TEMPDB**, **WF_DATA_SERVICE_ERRORDB**, and **WF_DATA_TRACKING** in the specified database.

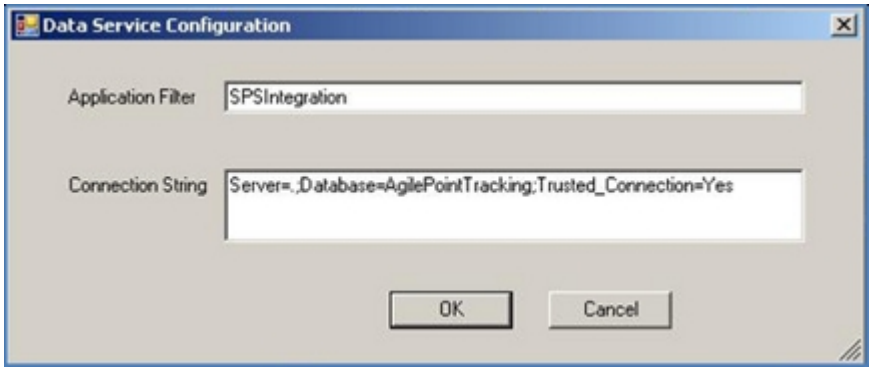
Enable the Data Services Extension

To enable this 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** field should be set to **SPSIntegration** for InfoPath applications, for ASP.NET applications, set the **Application** 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**.

You can configure multiple AgileConnectors to service different applications or use the same one across applications. To use the same AgileConnector, give the names of all the applications separated by a semicolon (;).

Start the Service

To start the service:

1. In Windows, open the **Services** window.
2. In the **Services** window, right-click **AgilePointDataServices**, and click **Properties**.
3. On the **Properties** dialog box, click the **Log On** tab.
4. On the **Log On** tab, select **This account**, and enter the credentials for an account that has database ownership privileges to the database for AgilePoint Data Services.
5. Click the **General** tab.
6. On the **General** tab, click **Start**.
7. Click **OK**.

Modify the Enterprise Manager web.config

To modify the Enterprise Manager web.config

1. Add an element under <AppSettings> in the Enterprise Manager web.config file.

Element to be added :

```
<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

Using Data Population for the First Time

For Data Population, create a table in a database that is specific for the application, and create the table columns based on the fields from the form, the Primary Key should be the Process Instance ID.

The Database connection string and the table information for Data Population are configured in the Process Template in AgilePoint Envision.

Install AgilePoint Deployment Services

You must install two components of the AgilePoint Deployment Services module (i.e. Install the Service module on the AgilePoint Server machine(s), and the Client module on any Client machines that will use this functionality). To install AgilePoint Deployment Services, do the following:

1. Login to Windows using a user login that belongs to the local system's Administrators group.

2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link.
4. Click the link for **AgilePoint Deployment Service** to install AgilePoint Deployment Services component on the Server machine(s).
5. Click **Next** in the AgilePoint Deployment Service window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Deployment Service\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
11. Start the Service on each Server.
12. Return to the installer window and click the **AgilePoint Utilities and Other Support Files** link.
13. Click the link for **AgilePoint Deployment Utility** to install AgilePoint Deployment Services Utility on the Client machines.
14. Click **Next** in the AgilePoint Deployment Utility window.
15. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Deployment Utility\
16. Click **Next**.
17. The installer is now ready to install the application. Click **Next** to install.
18. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
19. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Installing iNet BPS for SAP Integration

iNet BPS is a third-party software product used to enable SAP Integration with AgilePoint BPMS. If you have purchased SAP Integration (an add-on component that requires an additional license), AgilePoint will provide an email with license keys and download instructions.

To ensure a successful installation and integration experience, AgilePoint's development partner ERP-Link (http://erp-link.com) requests to provide support directly to you during your installation.

Once you have completed the iNet BPS installation, you must set up the AgileConnector and configure the SAP integration. For more information, see SAP Integration on the AgilePoint Support Portal.

Installing AgilePoint Configuration B

This section provides instructions for installing each component of the AgilePoint Suite with the following conditions:

Document Variant	NLB or Single Server?	IIS or Windows Service Mode?	.NET 3.5 or 4.0?
Configuration B	NLB	IIS	4.0

Prerequisites

Before installing the AgilePoint system, you must comply with the following prerequisites.

New Installations Only

This section assumes that you are installing each component of the AgilePoint BPMS Suite on a computer that does not have any version of that component already installed. If you do already have any version of a component installed on the target computer, see Upgrade Guide on the AgilePoint Support Portal.

Pre-Installation Complete

Before installing any of the components of the AgilePoint BPMS Suite, please ensure you have read and completed the checklist items in the **AgilePoint Pre-Installation Guide**, this is a requirement and will ensure a successful installation.

For more information, see Pre-Installation Guide on the AgilePoint Support Portal.

Local Installation Files

Make sure that the installation files are located on one of the computer's local drives. If you attempt to run the installation directly from a network, the installation may fail. If you do attempt to install when the installation file(s) are located on a network drive (or some other remote location), the setup application may fail to run with an error message similar to the following: "An exception 'System.Security.Policy.PolicyException' has occurred in Setup. "

Installing AgilePoint Server

Use the procedures in this section to set up an AgilePoint Server machine for your environment. This section provides instructions for installing and configuring all the core components on the AgilePoint Server machine.

Install Clustering Server Manager

To install AgilePoint Clustering Server Manager:

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Clustering Server Manager**.
5. Click **Next** in the AgilePoint Clustering Server Manager window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Clustering Server Manager\
7. Click **Next**.
8. The installer is now ready to install the **AgilePoint Clustering Server Manager**. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.

Set Up a Private Network

When you install AgilePoint Server in an NLB environment, you must set up a private network for the AgilePoint Server machines.

The machineKey element configuration setting is used to configure ASP.NET sites and applications for use in a NLB environment. When configuring an AgilePoint NLB environment, all machines in the cluster should use the SAME keys for the validationKey and decryptionKey attributes of the machineKey configuration element. The machineKey element can be set in either the machine.config or web.config files.

For example, you might need to change this:

```
<machineKey validationKey="AutoGenerate,IsolateApps"
          decryptionKey="AutoGenerate,IsolateApps" validation="SHA1"
          decryption="Auto" />
```

to something like this (note that the values below are examples, and not meant for actual use):

```
<machineKey validationKey="SOME_VALIDATION_KEY"
          decryptionKey="SOME_ENCRYPTION_KEY" validation="SHA1"
decryption="Auto" />
```

The following Microsoft article provides information about creating keys: http://support.microsoft.com/default.aspx?scid=kb;en-us;Q312906

Suspend the Logical Server Name

When installing AgilePoint Server in an NLB environment, you must temporarily suspend the use of the logical server name.

In IIS, make sure to use the Physical name of the AgilePoint Server machine instead of the Logical (i.e. Virtual IP) name for the install:

- **IP Address** - Make sure the IP address is set to 'All Unassigned' temporarily during the installation.
- **Host Header** - Make sure the Host Header of the Web site is temporarily removed.

See also, Reset the Server to the Logical Name on the AgilePoint Support Portal..

Install AgilePoint Server

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system – 32 bit or 64 bit.
4. Click **AgilePoint Server**.
5. Click the installation type you want: **AgilePoint Server (IIS)** or **AgilePoint Server (Windows Service)**.
6. Click **Next** in the AgilePoint Server window.
7. Again, click **Next** in the AgilePoint Server window.
8. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
9. Do one of the following, depending upon whether you are performing an IIS Web Site or as a Windows Service:
   - **IIS:**
     1. Select the AgilePoint Server Web site for which you would like to install AgilePoint Server.
     2. Enter a virtual directory name. The default is **AgilePointServer**.
     3. In the **Application Pool** list, select the application pool you want to use.
     4. Click **Next**.
   - **Windows Service:**
     1. Specify the location for your installation, and click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Configure AgilePoint Server

1. To open the **AgilePoint Server Configuration** utility, do one of the following:
   - If you have just added a new Windows Service instance, this window opens automatically.

- If you are installing on IIS, click **Start > All Programs > AgilePoint > AgilePoint Server Configuration**.
- If you are configuring an existing Windows Service installation, click **Start > All Programs > AgilePoint > AgilePoint Server Manager**. In the **AgilePoint Server Manager** window, select the Windows Service instance you want to configure, and click the **Configuration** icon.

2. The **System** tab allows you to configure the AgilePoint System User and default email notification behavior. The System area allows you to specify the identity and authentication information for the AgilePoint system user, and the maximum number of threads that AgilePoint will be able to use at runtime while handling workflow requests. The Notification area allows you to specify the default values for certain email notification settings.
3. Do one of the following:
   - Check the **Active Directory** check box if you are configuring AgilePoint Server on a network controlled by a Windows Server Domain Controller. This will use Active Directory lookup to validate the user in Active Directory.
   - Leave the **Active Directory** check box unchecked if you will be using a local machine account for the AgilePoint system user.
4. Enter the AgilePoint **System User** name and **Password**.
   - If you checked the **Active Directory** check box above, enter the domain **User Name** and **Password**.
   - If you did not check the **Active Directory** check box above, this should contain a local machine account **User Name** and **Password** that you would use when logging into Windows.
5. Enter the **Thread Pool Size**. The Thread Pool Size should be set to the number of Concurrent User Licenses purchased for the server or the number of threads that the physical hardware will support. Use the most limiting of the two numbers.

   For more information, see Configuring the AgilePoint Server Thread Pool Size on the AgilePoint Support Portal.
6. Configure the Notification settings as appropriate for your environment.
   - Enter the SMTP Server information obtained during the pre-installation setup.
   - Enter the SMTP email address for the default Email Sender (i.e. the From address on AgilePoint email notifications).
   - Enter the System User Email. This is the email that will be used to send system notifications if the AgilePoint Server is encountering operational errors.
7. Click the **Database** tab and configure the settings as appropriate for your environment.
8. Do one of the following:
   - Check the **Integrated Security** check box to use Windows Authentication and the Application Pool Identity of AgilePoint Server (APServiceAccount) to authenticate to the database.
   - If using SQL Authentication, enter the SQL user account and password.
9. Enter the Database Server and enter the AgilePoint Database Name or click the **Ellipses** button to retrieve the database names and select the AgilePoint Database. The AgilePoint System User

is used to connect to the database during configuration. Therefore, the AgilePoint System User must have db_owner privileges on the AgilePoint Database.

10. The Connection Pool Size must be a minimum of 100 and should be at least 2 times the Thread Pool Size configured on the System tab.
11. (Oracle DB Only) If you are employing an Oracle database, open the Oracle Net Configuration Assistant utility, and configure the Oracle Local Service as necessary. If the Local Service Name has changed, you will need to also update the AgilePoint Server Configuration utility Database tab with the new Oracle Local Service Name.
12. (Optional) Click the **Work Calendar** tab, and configure the settings as appropriate for your environment. This configuration is used in processes for duration assignment or due date.
13. Click **OK** to complete the configuration.

Create the AgilePoint Database Schema

1. Open IIS and view the AgilePointServer Virtual Directory. **Browse** the **Workflow.asmx** file. This creates the AgilePoint Database schema.

Check the AgilePoint Monitor Service

1. Verify the pre-installation steps
2. Click **Start > Run**, and enter **services.msc**.
3. In the **Services** window, ensure the AgilePoint Monitor Service is started.
   - In an IIS environment, the name is **AgilePoint Server Monitor**.
   - In a Windows Service environment, the name is the name of the service you created in AgilePoint Server Manager.
4. If it is not started, right-click on the AgilePoint service name, and click **Start**.

Reset the Server to the Logical Name

Reset the AgilePoint Server and Enterprise Manager Web site to use the Virtual IP.

1. Once both AgilePoint Server and AgilePoint Enterprise Manager are installed on a server machine, change the IIS setting for your AgilePoint Server/Enterprise Manager Web site back to use the Virtual IP address.
2. On the **Add/Edit Web Site Identification** window, do the following:
   - Change the IP address from 'All Unassigned' to the Virtual IP address set up for the NLB environment.
   - Add a Host Header value for the NLB to use the AgilePointLogicalName.
3. Reset IIS.

Configure the SMTP Server Account

AgilePoint uses anonymous SMTP by default. The AgilePoint Server **netflow.cfg** file will now need to be edited to provide the user name and password to use with SMTP for user authentication.

1. Open the **netflow.cfg** file in a text editor such as Notepad.
2. Locate the **Notification** section and modify it to look something like this:

```
<notification
mode="true"
format="text"
smtpService="BuiltIn::username@sbcglobal.net,password1"
mailServer="smtp.sbcglobal.yahoo.com"
sender="NETSVR2@agilepoint.com"
sysadm="adminuser@agilepoint.com">
```

   Where username@sbcglobal.net is the user name provided to you by your ISP and password1 is the password provided to you by your ISP.

Install Enterprise Manager

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Enterprise Manager**.
5. Click **Next** in the AgilePoint Enterprise Manager window.
6. Select the site for which you would like to install AgilePoint Enterprise Manager. It is recommended to use the same site where you installed AgilePoint Server.
7. Enter a Virtual Directory name. The default is **EnterpriseManager**.
8. In the **Application Pool** field, select the application pool you want to use.
9. Click **Next**.
10. The installer is now ready to install AgilePoint Enterprise Manager. Click **Next** to install.
11. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
12. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
13. (Note that this step applies only under the specified conditions.) Open the file**[AgilePointWebSiteLocation]\EnterpriseManager\web.config**, modify the value of the **serverUrl** key using the following instructions:
    - **NLB environment** - replace **localhost** with the **virtual IP address** assigned to AgilePoint Server. Use the same port number as AgilePoint Server.

- **Non-NLB environment** - Only if AgilePoint Server is bound to a specific IP address in IIS (rather than to "All Unassigned"), replace **localhost** with the **physical IP address** assigned to AgilePoint Server.

Example:

```
<add key="ServerUrl" value="http://1.2.3.4:81/AgilePointServer" />
```

14. Make sure the Web Site for which AgilePoint Server/AgilePoint Enterprise Manager is installed is configured to run under the .NET 2.0 Framework:
    a. Open IIS and expand Web Sites, then right-click the Web site that contains the AgilePoint Server virtual directory and click **Properties**.
    b. Click the **ASP.NET** tab.
    c. In the **ASP.NET** field, make sure it is set for 2.0.
    d. Click **OK**.The Login page appears.
15. Log on to AgilePoint Enterprise Manager using the AgilePoint System User account. The AgilePoint System User account is configured in the AgilePoint Server Configuration. This is an important step as this is when the database tables are created in the AgilePoint Workflow Database.

    The AgilePoint Enterprise Manager Main Page appears.

Keep AgilePoint Enterprise Manager open for the next step.

(Optional) Configure SQL Reporting Services

You must provide the correct database privileges for SQL Reporting Services to properly connect and access the AgilePoint database. Follow the steps below to configure the database privileges after installing Enterprise Manager with SQL Server Reporting Services integration.

1. Open **Microsoft SQL Server** > **Reporting Services** > **Report Manager** and click the **AgilePoint** link
2. In the AgilePoint folder, click the **APDS** item to configure the sample reports data source.
3. Make sure the option **Use as Windows Credentials when connecting to the data source** is checked.
4. Click **Apply** to save the changes.

Configure Session State Handling

After installing AgilePoint Server and Enterprise Manager, you must configure session state handling. There may be several valid options, depending upon your environment and your organization's requirements.

Value	Description
InProc	This is the default value for ASP.NET. This value is suitable for single-machine AgilePoint Server

Value	Description
	environments; you cannot use this setting for NLB.
StateServer	This setting can be used in a single-machine or NLB environment to manage the session state using the ASP.NET State Service Windows Service. To use the StateServer setting, the ASP.NET State Service must be running on a separate machine from AgilePoint Server.
SQLServer	In NLB environments, this setting allows the AgilePoint Servers to store their session data on a separate machine in a SQL Server database. If an AgilePoint Server fails, another server in the cluster can take over and serve requests without session data loss.
Off	This setting enables you to turn off the session state for AgilePoint Server. This setting can help to improve performance of AgilePoint Server in NLB environments. You cannot use this session for Enterprise Manager.
Custom	This setting requires custom coding. For more information, contact AgilePoint Support.

If you use Session State handling in an NLB environment, note the following:

- The session must be persisted outside of the current server.
- This session persistence is managed by the .NET Framework, not by AgilePoint. The framework uses the connection string declared in the web.config for AgilePoint Server and AgilePoint Enterprise Manager. See http://msdn2.microsoft.com/en-us/library/87069683(vs.71).aspx to communicate to the database where the session is persisted.

To set up session state handling:

1. Run **InstallSqlState.sql** (installed by default in [system root]\Microsoft.NET\Framework\version) on the computer running SQL Server that will store the session state (i.e. the db server). This creates a database called ASPState with new stored procedures and ASPStateTempApplications and ASPStateTempSessions tables in the TempDB database.
2. Open the **AgilePoint Server** and **AgilePoint Enterprise Manager web.config** files. In the <sessionState> node, set the values as required for your environment.

   For example, if you are using the **SQLServer** setting, the SQL connection string must point to the session state SQL Server database on the DB server machine that stores the session data:

```
<sessionState mode="SQLServer"
sqlConnectionString="[your sessionState database connection string]"
cookieless="false"
timeout="20000"
/>
```

If you are using the **Off** setting, no further information is required:

```
<sessionState mode="Off" />
```

Verify the AgilePoint Server Installation

This step is important and determines whether the AgilePoint installation and configuration was successful. This should be done prior to installing AgilePoint Enterprise Manager.

After AgilePoint Server is configured, do the following:

1. Open IIS and view the AgilePointServer Virtual Directory.
2. Browse the file **Test.asmx**.
3. In your web browser on the **Test.asmx** page, click **Hello** to access the Hello World method.
4. On the **Hello World** page, click **Invoke** to invoke the method and ensure that the service is working.

   The run-once installer script will be executed to create the database structures the first time that an AgilePoint Server request is made. As a result, it may take a while for the result to display.

Add User Accounts

You must add the following user accounts to Enterprise Manager.

Add the SharePoint Impersonator User Account to AgilePoint

This is the domain-qualified user account that SharePoint will use to interact with AgilePoint Server at runtime.

This step is required if you are installing the AgilePoint SharePoint Integration, and you are not using the same user account for the AgilePoint System User and the SharePoint Impersonator User. If you are using the same user account for the AgilePoint System User and the SharePoint Impersonator User, you can skip this part.

1. Log on to Enterprise Manager.
2. On the AgilePoint **Enterprise Manager Main Page**, click the **Users** link.
3. Click the **Add** link.
4. Enter the SharePoint Impersonator User Account information and click **OK**.
5. Navigate back to the Main Page, and click the **Roles** link.
6. Click the **Add Role** button.
7. Enter **SharePoint Impersonator** as the Role Name, and give this Role **Initiate a process** and **Cancel a process** rights and click **OK**.
8. Click the **SharePoint Impersonator** Role link.
9. Click the **Add Users(s) as Member** button.

10. Select the **SharePoint Impersonator** User Account and click **OK**.

Add the AgilePoint Server Service User Account to AgilePoint

1. On the AgilePoint Enterprise Manager Main Page, click the **Users** link.
2. Click the **Add** link.
3. Enter the AgilePoint Server Service User Account and click **OK**.
4. Navigate back to the Main Page and click the **Roles** link.
5. Click the **Administrators** link and add the AgilePoint Server Service User Account to the AgilePoint Administrators Role.
6. Close AgilePoint Enterprise Manager.

Install AgilePoint Envision

To install AgilePoint Envision, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Envision**.
5. Click **Next** in the AgilePoint Envision window.
6. Again, click **Next** in the AgilePoint Envision window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.

   Select the type of AgilePoint Server installation you are using (**IIS** or **Windows Service**), and click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Envision\
9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
14. To open AgilePoint Envision click **Start** > **Programs** > **AgilePoint** > **AgilePoint Envision**.

Install AgilePoint Developer

To install AgilePoint Developer, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Developer**.
5. Click **Next** in the AgilePoint Developer window.
6. Again, click **Next** in the AgilePoint Developer window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Developer
9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
14. To start AgilePoint Developer, open the Microsoft Visual Studio.NET application as you would normally.

Installing AgilePoint Data Services

This section provides detailed instructions for installing the AgilePoint Data Services component of the AgilePoint BPMS Suite.

Install AgilePoint Data Services

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link.
4. Click the link for **AgilePoint Data Services** that is most appropriate for your system.
5. Click **Next** in the AgilePoint Data Services Setup window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Data Services\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.

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

Setting Up AgilePoint Data Services

After installing the AgilePoint Data Services and prior to using this AgileConnector, do the following to set up AgilePoint Data Services.

Configure Data Service

Before starting the Data Services Windows service, do the following to configure the Data Service:

1. In the installation directory for AgilePoint Data Services (by default, C:\Program Files\AgilePoint \AgilePoint Data Services), run the script **DataServiceConfiguration.exe**.
2. On the **AgilePoint Data Services Configuration** window, complete the following fields:
   - **Database Type** – The type of database you want to use for AgilePoint Data Services. **Microsoft SQL Server** or **Oracle Database**.
   - **Database Authentication** – Indicates the database **User** name, **Password**, and whether **Integrated Security** is used.
   - **Database Location** - The database to which the data will populate. This can be an existing database, the AgilePoint database, or a new database.
   - **Enable Data Population** – If selected, allows application data to be written to the database.
   - **Enable Data Tracking** – If selected, allows changes to application data to be tracked.
   - **Time Interval** - The timer interval used by the Windows Service to check for any new entries in the database. On a production system, this can be set to a high interval like 3600 (i.e. one hour).
   - **Server URL** - The AgilePoint Server URL.
     - **Windows Service** – Open the file **Ascentn.AgilePoint.WCFService.exe.config** in [Windows Service installation location]\bin. You can find the Windows Service installation location in the Server Manager window in the Location field for the service instance.
     - **IIS** – In the IIS Manager, Browse **AgilePoint Server > workflow.asmx**. The URL appears in the Location field in your web browser.
   - **Hosting Mechanism** – IIS or Windows Service, depending on your AgilePoint Server installation type.

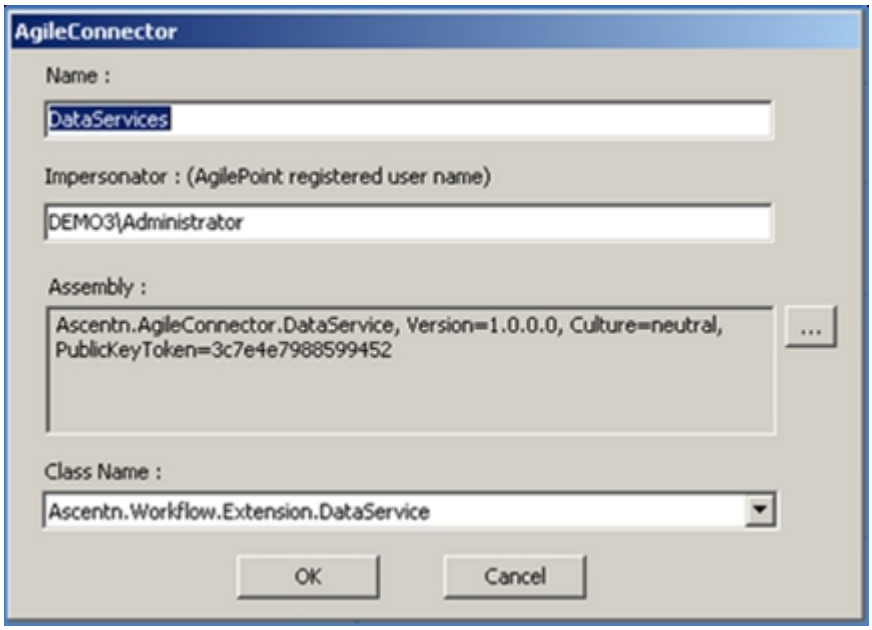
     If you are running AgilePoint Server as a Windows Service, indicating Windows Service creates the binding between the Data Services component and the AgilePoint Server. This setting is required.
3. To create database tables and save the Data Services configuration, click **OK**.

   This creates tables named **WF_DATA_SERVICE_TEMPDB**, **WF_DATA_SERVICE_ERRORDB**, and **WF_DATA_TRACKING** in the specified database.

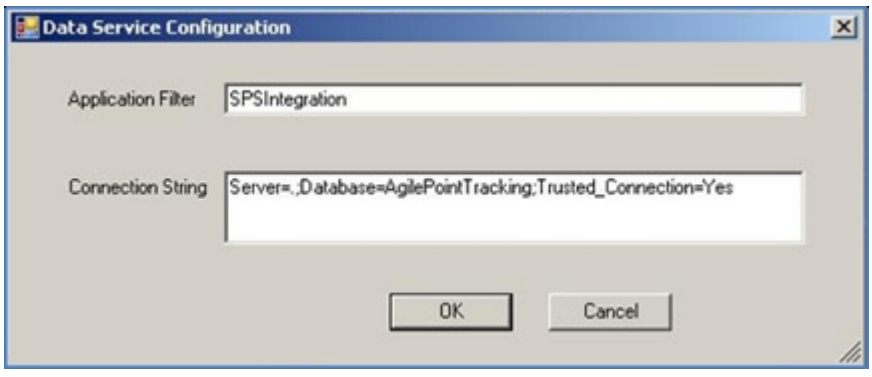
Enable the Data Services Extension

To enable this 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** field should be set to **SPSIntegration** for InfoPath applications, for ASP.NET applications, set the **Application** 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**.

You can configure multiple AgileConnectors to service different applications or use the same one across applications. To use the same AgileConnector, give the names of all the applications separated by a semicolon (;).

Start the Service

To start the service:

1. In Windows, open the **Services** window.
2. In the **Services** window, right-click **AgilePointDataServices**, and click **Properties**.
3. On the **Properties** dialog box, click the **Log On** tab.
4. On the **Log On** tab, select **This account**, and enter the credentials for an account that has database ownership privileges to the database for AgilePoint Data Services.
5. Click the **General** tab.
6. On the **General** tab, click **Start**.
7. Click **OK**.

Modify the Enterprise Manager web.config

To modify the Enterprise Manager web.config

1. Add an element under <AppSettings> in the Enterprise Manager web.config file.

Element to be added :

```
<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

Using Data Population for the First Time

For Data Population, create a table in a database that is specific for the application, and create the table columns based on the fields from the form, the Primary Key should be the Process Instance ID.

The Database connection string and the table information for Data Population are configured in the Process Template in AgilePoint Envision.

Installing AgilePoint Configuration C

This section provides instructions for installing each component of the AgilePoint Suite with the following conditions:

Document Variant	NLB or Single Server?	IIS or Windows Service Mode?	.NET 3.5 or 4.0?
Configuration C	NLB	Windows Service	3.5

Prerequisites

Before installing the AgilePoint system, you must comply with the following prerequisites.

New Installations Only

This section assumes that you are installing each component of the AgilePoint BPMS Suite on a computer that does not have any version of that component already installed. If you do already have any version of a component installed on the target computer, see Upgrade Guide on the AgilePoint Support Portal.

Pre-Installation Complete

Before installing any of the components of the AgilePoint BPMS Suite, please ensure you have read and completed the checklist items in the **AgilePoint Pre-Installation Guide**, this is a requirement and will ensure a successful installation.

For more information, see Pre-Installation Guide on the AgilePoint Support Portal.

Local Installation Files

Make sure that the installation files are located on one of the computer's local drives. If you attempt to run the installation directly from a network, the installation may fail. If you do attempt to install when the installation file(s) are located on a network drive (or some other remote location), the setup application may fail to run with an error message similar to the following: "An exception 'System.Security.Policy.PolicyException' has occurred in Setup. "

Installing AgilePoint Server

Use the procedures in this section to set up an AgilePoint Server machine for your environment. This section provides instructions for installing and configuring all the core components on the AgilePoint Server machine.

Install Clustering Server Manager

To install AgilePoint Clustering Server Manager:

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Clustering Server Manager**.
5. Click **Next** in the AgilePoint Clustering Server Manager window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Clustering Server Manager\
7. Click **Next**.
8. The installer is now ready to install the **AgilePoint Clustering Server Manager**. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.

Set Up a Private Network

When you install AgilePoint Server in an NLB environment, you must set up a private network for the AgilePoint Server machines.

The machineKey element configuration setting is used to configure ASP.NET sites and applications for use in a NLB environment. When configuring an AgilePoint NLB environment, all machines in the cluster should use the SAME keys for the validationKey and decryptionKey attributes of the machineKey configuration element. The machineKey element can be set in either the machine.config or web.config files.

For example, you might need to change this:

```
<machineKey validationKey="AutoGenerate,IsolateApps"
          decryptionKey="AutoGenerate,IsolateApps" validation="SHA1"
          decryption="Auto" />
```

to something like this (note that the values below are examples, and not meant for actual use):

```
<machineKey validationKey="SOME_VALIDATION_KEY"
          decryptionKey="SOME_ENCRYPTION_KEY" validation="SHA1"
decryption="Auto" />
```

The following Microsoft article provides information about creating keys: http://support.microsoft.com/default.aspx?scid=kb;en-us;Q312906

Suspend the Logical Server Name

When installing AgilePoint Server in an NLB environment, you must temporarily suspend the use of the logical server name.

In IIS, make sure to use the Physical name of the AgilePoint Server machine instead of the Logical (i.e. Virtual IP) name for the install:

- **IP Address** - Make sure the IP address is set to 'All Unassigned' temporarily during the installation.
- **Host Header** - Make sure the Host Header of the Web site is temporarily removed.

See also, Reset the Server to the Logical Name on the AgilePoint Support Portal..

Install AgilePoint Server

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system – 32 bit or 64 bit.
4. Click **AgilePoint Server**.
5. Click the installation type you want: **AgilePoint Server (IIS)** or **AgilePoint Server (Windows Service)**.
6. Click **Next** in the AgilePoint Server window.
7. Again, click **Next** in the AgilePoint Server window.
8. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
9. Do one of the following, depending upon whether you are performing an IIS Web Site or as a Windows Service:
   - **IIS:**
     1. Select the AgilePoint Server Web site for which you would like to install AgilePoint Server.
     2. Enter a virtual directory name. The default is **AgilePointServer**.
     3. In the **Application Pool** list, select the application pool you want to use.
     4. Click **Next**.
   - **Windows Service:**
     1. Specify the location for your installation, and click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Setting up AgilePoint Server to Run as a Windows Service

1. To open the **AgilePoint Server Manager**, click **Start > All Programs > AgilePoint > AgilePoint Server Manager**.

2. On the **AgilePoint Server Manager** window, click the **Add** (+) button to create an instance of the AgilePoint Server service.
3. In the right pane, complete the fields as required.
   - **Service Name** – The name you want to use to identify the Windows service associated with the AgilePoint Server instance.
   - **Display Name** – The name you want to display to users to identify the AgilePoint Server instance.
   - **Location** - The path to which you want to create the AgilePoint Windows Service instance.
   - **Ports** – Any two free, unique ports. When running as a Windows service, AgilePoint Server can bind with other applications using either HTTP or TCP. Provide a port number for each type of connection. Do not use the port for your AgilePoint web application. Click **Check Availability** to determine if the ports you entered are free.
   - **User Name** and **Password** - Enter the credentials for the authenticated AgilePoint Server user.
   - **Site** - The web site you created for AgilePoint during pre-installation.
   - **Virtual Directory** - The name you want to use for the virtual directory that contains the files for the Enterprise Manager web application.
   - **Application Pool** - The application pool for the Enterprise Manager web application you want to run.
4. When you have finished, click **Update**.
5. If you are prompted to activate the AgilePoint Server, follow the prompts to activate your AgilePoint Server software.
6. The **AgilePoint Configuration** window opens. Follow the procedure to **Configure AgilePoint Server**.

Configure AgilePoint Server

1. To open the **AgilePoint Server Configuration** utility, do one of the following:
   - If you have just added a new Windows Service instance, this window opens automatically.
   - If you are installing on IIS, click **Start > All Programs > AgilePoint > AgilePoint Server Configuration**.
   - If you are configuring an existing Windows Service installation, click **Start > All Programs > AgilePoint > AgilePoint Server Manager**. In the **AgilePoint Server Manager** window, select the Windows Service instance you want to configure, and click the **Configuration** icon.
2. The **System** tab allows you to configure the AgilePoint System User and default email notification behavior. The System area allows you to specify the identity and authentication information for the AgilePoint system user, and the maximum number of threads that AgilePoint will be able to use at runtime while handling workflow requests. The Notification area allows you to specify the default values for certain email notification settings.
3. Do one of the following:

- Check the **Active Directory** check box if you are configuring AgilePoint Server on a network controlled by a Windows Server Domain Controller. This will use Active Directory lookup to validate the user in Active Directory.
- Leave the **Active Directory** check box unchecked if you will be using a local machine account for the AgilePoint system user.

4. Enter the AgilePoint **System User** name and **Password**.
   - If you checked the **Active Directory** check box above, enter the domain **User Name** and **Password**.
   - If you did not check the **Active Directory** check box above, this should contain a local machine account **User Name** and **Password** that you would use when logging into Windows.
5. Enter the **Thread Pool Size**. The Thread Pool Size should be set to the number of Concurrent User Licenses purchased for the server or the number of threads that the physical hardware will support. Use the most limiting of the two numbers.

   For more information, see Configuring the AgilePoint Server Thread Pool Size on the AgilePoint Support Portal.
6. Configure the Notification settings as appropriate for your environment.
   - Enter the SMTP Server information obtained during the pre-installation setup.
   - Enter the SMTP email address for the default Email Sender (i.e. the From address on AgilePoint email notifications).
   - Enter the System User Email. This is the email that will be used to send system notifications if the AgilePoint Server is encountering operational errors.
7. Click the **Database** tab and configure the settings as appropriate for your environment.
8. Do one of the following:
   - Check the **Integrated Security** check box to use Windows Authentication and the Application Pool Identity of AgilePoint Server (APServiceAccount) to authenticate to the database.
   - If using SQL Authentication, enter the SQL user account and password.
9. Enter the Database Server and enter the AgilePoint Database Name or click the **Ellipses** button to retrieve the database names and select the AgilePoint Database. The AgilePoint System User is used to connect to the database during configuration. Therefore, the AgilePoint System User must have db_owner privileges on the AgilePoint Database.
10. The Connection Pool Size must be a minimum of 100 and should be at least 2 times the Thread Pool Size configured on the System tab.
11. (Oracle DB Only) If you are employing an Oracle database, open the Oracle Net Configuration Assistant utility, and configure the Oracle Local Service as necessary. If the Local Service Name has changed, you will need to also update the AgilePoint Server Configuration utility Database tab with the new Oracle Local Service Name.
12. (Optional) Click the **Work Calendar** tab, and configure the settings as appropriate for your environment. This configuration is used in processes for duration assignment or due date.
13. Click **OK** to complete the configuration.

Create the AgilePoint Database Schema

1. Open IIS and view the AgilePointServer Virtual Directory. **Browse** the **Workflow.asmx** file. This creates the AgilePoint Database schema.

Check the AgilePoint Monitor Service

1. Verify the pre-installation steps
2. Click **Start > Run**, and enter **services.msc**.
3. In the **Services** window, ensure the AgilePoint Monitor Service is started.
   - In an IIS environment, the name is **AgilePoint Server Monitor**.
   - In a Windows Service environment, the name is the name of the service you created in AgilePoint Server Manager.
4. If it is not started, right-click on the AgilePoint service name, and click **Start**.

Reset the Server to the Logical Name

Reset the AgilePoint Server and Enterprise Manager Web site to use the Virtual IP.

1. Once both AgilePoint Server and AgilePoint Enterprise Manager are installed on a server machine, change the IIS setting for your AgilePoint Server/Enterprise Manager Web site back to use the Virtual IP address.
2. On the **Add/Edit Web Site Identification** window, do the following:
   - Change the IP address from 'All Unassigned' to the Virtual IP address set up for the NLB environment.
   - Add a Host Header value for the NLB to use the AgilePointLogicalName.
3. Reset IIS.

Configure the SMTP Server Account

AgilePoint uses anonymous SMTP by default. The AgilePoint Server **netflow.cfg** file will now need to be edited to provide the user name and password to use with SMTP for user authentication.

1. Open the **netflow.cfg** file in a text editor such as Notepad.
2. Locate the **Notification** section and modify it to look something like this:

```
<notification
mode="true"
format="text"
smtpService="BuiltIn::username@sbcglobal.net,password1"
mailServer="smtp.sbcglobal.yahoo.com"
sender="NETSVR2@agilepoint.com"
sysadm="adminuser@agilepoint.com">
```

Where username@sbcglobal.net is the user name provided to you by your ISP and password1 is the password provided to you by your ISP.

Configure Session State Handling

After installing AgilePoint Server and Enterprise Manager, you must configure session state handling. There may be several valid options, depending upon your environment and your organization's requirements.

Value	Description
InProc	This is the default value for ASP.NET. This value is suitable for single-machine AgilePoint Server environments; you cannot use this setting for NLB.
StateServer	This setting can be used in a single-machine or NLB environment to manage the session state using the ASP.NET State Service Windows Service. To use the StateServer setting, the ASP.NET State Service must be running on a separate machine from AgilePoint Server.
SQLServer	In NLB environments, this setting allows the AgilePoint Servers to store their session data on a separate machine in a SQL Server database. If an AgilePoint Server fails, another server in the cluster can take over and serve requests without session data loss.
Off	This setting enables you to turn off the session state for AgilePoint Server. This setting can help to improve performance of AgilePoint Server in NLB environments. You cannot use this session for Enterprise Manager.
Custom	This setting requires custom coding. For more information, contact AgilePoint Support.

If you use Session State handling in an NLB environment, note the following:

- The session must be persisted outside of the current server.
- This session persistence is managed by the .NET Framework, not by AgilePoint. The framework uses the connection string declared in the web.config for AgilePoint Server and AgilePoint Enterprise Manager. See http://msdn2.microsoft.com/en-us/library/87069683(vs.71).aspx to communicate to the database where the session is persisted.

To set up session state handling:

1. Run **InstallSqlState.sql** (installed by default in [system root]\Microsoft.NET\Framework\version) on the computer running SQL Server that will store the session state (i.e. the db server). This

creates a database called ASPState with new stored procedures and ASPStateTempApplications and ASPStateTempSessions tables in the TempDB database.

2. Open the **AgilePoint Server** and **AgilePoint Enterprise Manager web.config** files. In the <sessionState> node, set the values as required for your environment.

   For example, if you are using the **SQLServer** setting, the SQL connection string must point to the session state SQL Server database on the DB server machine that stores the session data:

```
<sessionState mode="SQLServer"
sqlConnectionString="[your sessionState database connection string]"
cookieless="false"
timeout="20000"
/>
```

   If you are using the **Off** setting, no further information is required:

```
<sessionState mode="Off" />
```

Verify the AgilePoint Server Installation

Windows Service installation is verified by opening Enterprise Manager. In a Windows Service installation, Enterprise Manager is installed in the background along with AgilePoint Server.

To verify a Windows Service AgilePoint Service installation, open Enterprise Manager from the AgilePoint Server Manager for the AgilePoint Server instance you want to test. Ensure you can **log on** to Enterprise Manager successfully without errors.

If Enterprise Manager does not open properly, or you cannot log in, please verify the installation steps.

Add User Accounts

You must add the following user accounts to Enterprise Manager.

Add the SharePoint Impersonator User Account to AgilePoint

This is the domain-qualified user account that SharePoint will use to interact with AgilePoint Server at runtime.

This step is required if you are installing the AgilePoint SharePoint Integration, and you are not using the same user account for the AgilePoint System User and the SharePoint Impersonator User. If you are using the same user account for the AgilePoint System User and the SharePoint Impersonator User, you can skip this part.

1. Log on to Enterprise Manager.
2. On the AgilePoint **Enterprise Manager Main Page**, click the **Users** link.
3. Click the **Add** link.
4. Enter the SharePoint Impersonator User Account information and click **OK**.
5. Navigate back to the Main Page, and click the **Roles** link.
6. Click the **Add Role** button.

7. Enter **SharePoint Impersonator** as the Role Name, and give this Role **Initiate a process** and **Cancel a process** rights and click **OK**.
8. Click the **SharePoint Impersonator** Role link.
9. Click the **Add Users(s) as Member** button.
10. Select the **SharePoint Impersonator** User Account and click **OK**.

Add the AgilePoint Server Service User Account to AgilePoint

1. On the AgilePoint Enterprise Manager Main Page, click the **Users** link.
2. Click the **Add** link.
3. Enter the AgilePoint Server Service User Account and click **OK**.
4. Navigate back to the Main Page and click the **Roles** link.
5. Click the **Administrators** link and add the AgilePoint Server Service User Account to the AgilePoint Administrators Role.
6. Close AgilePoint Enterprise Manager.

Install AgilePoint Envision

To install AgilePoint Envision, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Envision**.
5. Click **Next** in the AgilePoint Envision window.
6. Again, click **Next** in the AgilePoint Envision window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.

   Select the type of AgilePoint Server installation you are using (**IIS** or **Windows Service**), and click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Envision\
9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

14. To open AgilePoint Envision click **Start** > **Programs** > **AgilePoint** > **AgilePoint Envision**.

Install AgilePoint Developer

To install AgilePoint Developer, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Developer**.
5. Click **Next** in the AgilePoint Developer window.
6. Again, click **Next** in the AgilePoint Developer window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Developer
9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
14. To start AgilePoint Developer, open the Microsoft Visual Studio.NET application as you would normally.

Installing AgilePoint SharePoint Integration

This section provides instructions for installing the AgilePoint SharePoint Integration component of the AgilePoint BPMS Suite.

The AgilePoint SharePoint Integration v2 consists of three features:

- **AgilePoint Configuration List** – Stores the AgilePoint configuration data in a custom list.
- **AgilePoint Process Launcher** – Associates a SharePoint entity with an AgilePoint process.
- **AgilePoint Web Parts** – Includes the three AgilePoint Web Parts (Process Model List, Process Instance List, and Task List).

SharePoint Integration v2 Versus v1

The AgilePoint SharePoint Integration v2 is the version AgilePoint SharePoint Integration available for a fresh installation in AgilePoint BPMS.

For existing AgilePoint customers, it is possible to upgrade AgilePoint SharePoint Integration v1 from AgilePoint v4.x to AgilePoint SharePoint Integration v1 for AgilePoint v5.x. For more information, see Upgrade Guide on the AgilePoint Support Portal.

For information about migrating from SharePoint Integration v1 to v2, contact AgilePoint.

Configure the AgilePoint SharePoint Integration AgileConnector

Prerequisites

- AgilePoint Server is installed.

Navigation

1. Open the **AgilePoint Server Configuration** utility.
2. Click the **Extension** tab.

Instructions

1. On the **Extension** tab, click on **Add**.
2. Browse one of the following locations to open the file **Ascentn.SharePoint.AgileConnector.dll**:
   - For IIS installations, this file is located in the **bin** folder under the AgilePoint Server installation folder.
   - For Windows Service installations, this file is located in the **bin** folder under the path provided in the **Location** field in Windows Server Manager for the Windows Service instance you want to configure.
3. Change the **Name** from **AgileConnector** to **SPSIntegration**.
4. Enter the Impersonator (e.g. Administrator).
5. Click **OK**.
6. Optionally, you can click **Configure** to set the maximum thread for SharePoint access and to set the credential for SharePoint access. By default it will use the AgilePoint System User Account credential.
7. When you have finished the configuration, on the **AgilePoint Configuration** window, click **OK**.

   Accept any informational messages.

   If you are prompted to restart IIS or the AgilePoint Service, click **Yes**.

Install AgilePoint SharePoint Integration

Prerequisites

- Configure the AgilePoint SharePoint Integration AgileConnector
- If you are installing AgilePoint SharePoint Integration in a SharePoint server farm, you must select a SharePoint server you want to designate as the primary AgilePoint integration server. **Document your decision.** You will need to use the same machine for all AgilePoint SharePoint Integration installations and upgrades.

- Log on to the SharePoint machine using a user account that belongs to the local system's Administrators group.

Navigation

1. On the SharePoint machine, double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
2. Click the **Install AgilePoint…** link that is most appropriate for your system.

Instructions

1. Click **AgilePoint SharePoint Integration**.
2. Click **Next** in the AgilePoint SharePoint Integration window.
3. Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Integration for SharePoint\
4. Click **Next**.
5. The installer will deploy the installation files to the installation folder.
6. Once the **Installation Complete** message is displayed, click **Close**.

Add, Deploy, and Activate the SharePoint Solution Files

Prerequisites

- Install AgilePoint SharePoint Integration
- Log on to the SharePoint machine using a user account that belongs to the local system's Administrators group.

Navigation

1. Open the **stsadm** command line tool.

   You can find the stsadm.exe at one of the following locations:

   - **SharePoint 2007** - C:\Program Files\Common Files\Microsoft Shared\web server extensions \12\BIN
   - **SharePoint 2010** - C:\Program Files\Common Files\Microsoft Shared\web server extensions \14\BIN

Instructions

1. In the **stsadm** command line tool, enter the following. This copies the wsp files to the home folder of the installation folder for the stsadm tool. You can specify a different path in the command.

```
stsadm –o addsolution –filename Ascentn.SharePoint.SettingsList.wsp
stsadm –o addsolution –filename Ascentn.SharePoint.WebParts.wsp
stsadm –o addsolution –filename Ascentn.SharePoint.WFIntegration.wsp
stsadm –o addsolution –filename Ascentn.SharePoint.ListForm.wsp
```

2. Deploy the following solutions to your SharePoint web applications:

```
stsadm -o deploysolution -name ascentn.sharepoint.settingslist.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
```

```
stsadm -o deploysolution -name Ascentn.SharePoint.ListForm.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
stsadm -o deploysolution -name Ascentn.SharePoint.WebParts.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
stsadm -o deploysolution -name Ascentn.SharePoint.WFIntegration.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
```

3. In the **stsadm** tool, execute the following command:

```
stsadm –o copyappbincontent
```

4. In the **stsadm** tool, activate the AgilePoint features:

```
stsadm -o activatefeature -name Agilepointsettingslistfeature -url
 "[Site Collection URL]" –force
stsadm -o activatefeature -name agilepointlistform -url "[Site
 Collection URL]" -force
stsadm -o activatefeature -name agilepointwebparts -url "[Site
 Collection URL]" -force
stsadm -o activatefeature -name agilepoint agilepointwfintegration -url
 "[Site Collection URL]" -force
```

Clean Up the SharePoint web.config

This step addresses a limitation in Microsoft SharePoint 2010. If you do not complete this step, an error will appear on the pages wfassociation.aspx and processviewer.aspx.

Prerequisites

- SharePoint 2010 installed. (This does not apply to earlier versions of SharePoint.)

Navigation

1. In a text editor, open the **web.config** file for your SharePoint installation.

Instructions

1. In the **web.config** within the **AssemblyBinding** node, paste the following:

```
<dependentAssembly>
   <assemblyIdentity name="Microsoft.SharePoint.ApplicationPages"
      publicKeyToken="71e9bce111e9429c" culture="neutral" />
   <bindingRedirect oldVersion="12.0.0.0" newVersion="14.0.0.0" />
</dependentAssembly>
```

2. Save and close the **web.config**.

Run the Windows Service Client Utility Tool

If you are installing SharePoint Integration in a Windows Service environment, you must run the Windows Service Client Utility Tool to configure the binding with the AgilePoint Server.

Prerequisites

- You are using AgilePoint SharePoint Integration in a Windows Service environment.
- Create a backup copy of the configuration file for the application you are configuring before using this utility.

Navigation

To open the Windows Service Client Utility Tool, do one of the following:

- On the AgilePoint Server machine, navigate to **[AgilePoint Server Installation]\SVCUtilityTool \AgilePointWindowsServiceClientUtilityTool.exe**
- Open the AgilePoint installation **Setup.exe** file, and click **AgilePoint Utilities and Other Support Files > AgilePoint Windows Service Client Utility Tool**.

Instructions

1. In the AgilePoint Windows Service Client Utility Tool dialog box, complete the following fields:
   - **Service Address** – The URI for the Windows Service for which you are creating the binding. The information required to build this URI is provided in the AgilePoint Server Manager window.
   - **HTTP** - http://[APServer Machine Name]: [Http Port]/AgilePointServer

     When you create the bindings for the web application, the settings are automatically configured in the web.config file for both HTTP and TCP protocols. By default, the HTTP bindings are used. However, you can switch to TCP by modifying the following properties in the web.config:
     - Change the following so value="**NetTcpBinding_IWCFWorkflowService**"

       ```
       <add key="WorkFlowBindingUsed"
        value="WSHttpBinding_IWCFWorkflowService" />
       ```
     - Change the following so value="**NetTcpBinding_IWCFEventServices**"

       ```
       <add key="EventServicesBindingUsed"
        value="WSHttpBinding_IWCFEventServices" />
       ```
     - Change the following so value="**NetTcpBinding_IWCFAdminService**"

       ```
       <add key="AdminBindingUsed"
        value="WSHttpBinding_IWCFAdminService" />
       ```
   - **Target Config** – The file name and location of the configuration file for the application you are configuring.
     - **SharePoint Integration** – The web.config for the SharePoint web application you want to bind.
     - **Data Services** – DataServicesWindowsService.exe.config in the Data Services installation folder. The default location is C:\Program Files\AgilePoint\AgilePoint Data Services\
     - **AgileForms** - The web.config file in the AgileForms installation folder. The default location is C:\Program Files\BWS\AFInt\Webroot\
     - **Deployment Service** - apds.exe.config file in the Deployment Service installation folder. The default location is C:\Program Files\AgilePoint\AgilePoint Deployment Service\
2. Click **Settings** to configure the following fields:
   - **Max Buffer Size**
   - **Max Buffer Pool Size**
   - **Max Received Message Size**

- **Max String Content Length**
- **Max Array Length**

Guidance for modifying these values can be found at the following articles on MSDN:

- http://msdn.microsoft.com/en-us/library/ms731361(v=VS.100).aspx
- http://msdn.microsoft.com/en-us/library/ms731325(v=VS.100).aspx

Verify the Installation was Successful

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.

Navigation

1. Navigate to SharePoint Central Administration on your SharePoint site.
2. In SharePoint Central Administration, click **Operations > Solutions Management**

Instructions

1. On the **Solution Management** page, verify that the following AgilePoint solutions are deployed::
   - **ascentn.sharepoint.settingslist.wsp**
   - **ascentn.sharepoint.webparts.wsp**
   - **ascentn.sharepoint.wfintegration.wsp**
   - **ascentn.sharepoint.listform.wsp**

Set the AgilePoint Configuration List

The AgilePoint Configuration List feature creates a new list called AgilePoint Configuration List when the feature is activated. By default, this list is populated with sample data, it is required to modify the items before using the integration.

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.
- The SharePoint Administrator should restrict access to the AgilePoint Configuration List.

Navigation

1. Open an AgilePoint-enabled SharePoint Site Collection.
2. Click **View All Site Content**.
3. Click **AgilePoint Configuration** list under the **Lists** section.

Instructions

Modify the following items in the list as appropriate to your environment.

Application	Title	Value
AgilePoint	ServerUrl	The URL of AgilePoint Server • **HTTP Format -** http:// APServerMachineName:HTTP Port /AgilePointServer • **TCP Format** (Windows Service Only) - net.tcp:// APServerMachineName: TCP Port/AgilePointServer
AgilePoint	ImpersonatorDomain	The Domain Name
AgilePoint	ImpersonatorUser	The User Name
AgilePoint	ImpersonatorPass	The Password (Optionally, you can check the **Encrypted** check box in order to encrypt the value of this setting.)
AgilePoint	Log	Location of the log files (e.g. C:\NewSPLog). You can give the FTP location also (e.g. ftp://netsvr1/AgilePontSharePoint/Log). The Impersonator user should have write permission on FTP server.
AgilePoint	LogSwitch	You can provide switches for logging. The following are the available switches. • All • Info • Debug • Error • None You can give multiple switches separating by a comma(,) (e.g. Debug, error, Info). The Default value is: All.
AgilePoint	HostingMechanism	Enter the type of AgilePoint installation you are using: • **IIS** – A standard, web-based installation. • **WCF** – A Windows service installation.

Application	Title	Value
AgilePoint	AdminBindingUsed	Enter the type of binding that is used for Windows Service. This setting applies only if AgilePoint Server is running as a Windows Service. If AgilePoint Server is running in IIS mode, this setting is ignored. • HTTP - **WS HttpBinding_IWCFAdminService** • TCP (Windows Service Only) - **NetTcpBinding_IWCFAdminService**
AgilePoint	WorkflowBindingUsed	Enter the type of binding that is used for Windows Service. This setting applies only if AgilePoint Server is running as a Windows Service. If AgilePoint Server is running in IIS mode, this setting is ignored. • HTTP - **WS HttpBinding_IWCFWorkflowService** • TCP (Windows Service Only) - **NetTcpBinding_IWCFWorkflowService**

Set up a Common AgilePoint Configuration List

By default, each SharePoint site collection has its own AgilePoint Configuration List. However, you can define one common AgilePoint Configuration List that can be used across all SharePoint site collections.

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.

Navigation

1. Navigate to SharePoint Central Administration on your SharePoint site.
2. In a text editor, open the SharePoint Web Application **web.config** file.

Instructions

Modify the **web.config** as follows:

```
<appSettings>
```

```
    <add key="APSettingsListName" value="AgilePoint Configuration" />
    <add key="APSettingsSiteUrl" value="http://demo3:8081" />
    <add key="APSettingsWebName" value="" />
</appSettings>
```

Where:

- **APSettingsListName** - The name of the AgilePoint Settings List.
- **APSettingsSiteURL** -The SharePoint SiteURL that contains the common AgilePoint Configuration List. The rest of the site collections will refer to this location and list as long as the individual AgilePoint Configuration list (which is auto-created in the site collection when this feature is activated) is deactivated or removed.
- **APSettingsWebName** - If this field is left blank, this means that the AgilePoint Configuration List is located at the top-level site. A value would indicate the Sub site name.

Add the AgilePoint Web Parts to SharePoint

To access the features of the AgilePoint SharePoint Integration, you must add the AgilePoint Web Parts to your SharePoint site. AgilePoint Web Parts are added in the same manner as other SharePoint Web Parts.

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.

Instructions

The following AgilePoint Web Parts can be deployed to your SharePoint site:

- **AgilePoint Process Instance List** – Includes the list of running process instances.
- **AgilePoint Process Model List** – Displays all process models that are deployed to AgilePoint Server.
- **AgilePoint Task List** – Includes the AgilePoint Task List that provides a way for users to manage their tasks.

The exact procedure for adding Web Parts varies, depending upon your version of SharePoint. See your SharePoint documentation for more information.

Installing AgileReports

This section provides instructions for installing the AgileReports component of the AgilePoint BPMS Suite.

Install AgileReports

To install AgileReports:

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.

4. Click the link for **AgileReports**.
5. On the **AgileReports** dialog box, click **Next**.
6. Click **Next**.
7. Review the **License Agreement**, select **I Agree**, and click **Next**.
8. On the **Select Installation Address** dialog box, complete the following fields:
   - **Site** – The IIS site you want to use for AgileReports.
   - **Virtual directory** – The IIS virtual directory you want to use for AgileReports.
   - **Application Pool** – The IIS application pool you want to use for AgileReports.
9. On the **Database Server Details** dialog box, complete the following fields.
   - **Server Name** – The name of the AgilePoint database server machine.
   - **AgilePoint Database Name** – The name of the AgilePoint database.
   - **AgileReports Database Name** – The name of the database AgileReports will use. The default is **AgileReportsMetaDB**.
10. On the **Customer Information** window, enter your **Name**, **Organization**, and **Serial number**, and click **Next**.
11. On the **Activation Wizard** window, follow the onscreen instructions to activate AgileReports.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Configure AgileReports

1. On the Active Directory to which AgilePoint Server is connected, create a Windows group named **adHocAdmin**.
2. Add the **Administrator** user to the **adHocAdmin** group.
3. Log off of AgilePoint Server, and log on again.
4. In your database application (SQL Server or Oracle), create a new database. The database name should match the database **AgileReports Database Name** you entered during installation. The default is **AgileReportsMetaDB**.
5. (Oracle only) If you are using Oracle, download the file AgileReports_Oracle.zip. Then unzip the file to the hard drive on the machine where AgileReports is installed.
6. In your **AgileReports database**, execute one of the following scripts:
   - SQL Server - **[AgileReports Virtual Directory]\Database\MetaDataDB Script.sql**
   - Oracle - **[AgileReports _Oracle unzip folder]\ Oracle Script.sql**
7. (SQL Server only) In your **AgilePoint database**, execute the SQL script **[AgileReports Virtual Directory]\Database\AgilePointDB Script.sql**

8. In an XML editor, open the file **[AgileReports Virtual Directory]_Definitions\Settings.lgx**.
9. In **Settings.lgx**, modify the **<Security>** node with the following changes:
   - **LogonPage** - The AgilePoint Enterprise Manager main logon page. To find this location, open the Enterprise Manager web client, and copy the URL up to the end of the file name, **LogonForm.aspx** . The default value is **http://[hostname]/EnterpriseManager/Common/ LogonForm.aspx.** However, this value may not be correct. You may need to modify the host, port number, or other elements within the URL.
   - **LogonFailPage** - The AgilePoint Enterprise Manager main logon page. See the instructions for **LogonPage**.
   - **NTAuthenticationDomain** – Verify the domain name is correct.
10. (Oracle only) If you are using Oracle, in **Settings.lgx**, replace the following **<Connection>** node with the node below:
    - Old node:

```
<Connection Type="Application" ID="ahMetadata"
ConnectionString="Provider=SQLOLEDB.1;Integrated
Security=SSPI;Persist Security Info=False;Initial
Catalog=AgileReportsMetaDB;Data Source=." Label=""
ahDBType="SQLSERVER" />
```

    - New node representing the connection for the AgileReports metadata database:

```
<Connection Type="Oracle" ID="ahMetadata"
ahDBType="ORACLE" Label="" ahUseANSI="False"
OracleUser="AgileReports" OraclePassword="pass"
OracleServer="[hostname]" OracleDatabase="AgileReportsMetaDB"
OracleProtocol="TCP" OraclePort="1521" />
```

      - OracleUser="**AgileReports**" – The user ID for your AgileReports metadata database.
      - OraclePassword="**pass** " – The password for your AgileReports metadata database.
      - OracleDatabase="**AgileReportsMetaDB**" – The service name or ID for your AgileReports metadata database.
      - OraclePort ="**1521**" – The port number for your AgileReports metadata database.

```
<Connection ID="1" CommandTimeOut="90"
Label="AgilePoint40"
 ConnectionString="Provider=SQLOLEDB.1;Integrated
Security=SSPI;Persist Security Info=False;Initial
Catalog=AgilePoint40;Data Source=." Type="Application"
ahDBType="SQLSERVER" />
```

    - New node representing the database you want your reports to analyze. You can have multiple copies of this connection string, each with its own database information. The example below assumes the default connection to the AgilePoint database.

```
<Connection ID="1" CommandTimeOut="90"
Label="AgilePoint" Type="Oracle" ahDBType="ORACLE"
ahUseANSI="False" OracleUser="AgilePoint"
OraclePassword="pass" OracleServer="[hostname]"
OracleDatabase="AgilePoint" OracleProtocol="TCP"
OraclePort="1521"/>
```

- OracleUser="**AgilePoint**"– The user ID for your database.
- OraclePassword="**pass**" – The password for your database.
- OracleDatabase="**AgilePoint**" – The service name or ID for your database.
- OraclePort="**1521**" – The port number for your database.

11. Restrict the access for the users for the databases from which you collect data (not the users to **connect** and **resource**.
12. In the **web.config** file in the virtual folder for the Enterprise Manager web application, add the following element as a child of **<appSettings>** with the correct AgileReports URL:

```
<add key="AgileReportUrl"
value="http://[AgileReports domain name and port number]/AgileReports/
Default.aspx"/>
```

13. (Oracle only) If you are using Oracle, copy the report files (files with the file nameahReport*.lgx) that are provided in **AgileReports_Oracle.zip**, and paste them in the folder **[AgileReports Virtual Directory]_Definitions_Reports**

Using AgileReports for the First Time

Once you have completed this procedure, you can open AgileReports from the Enterprise Manager home page.

When you open AgileReports for the first time, your reports are available under the **All Personal Reports** section. From there, you can move them to My Personal Reports or Shared Reports. See the AgileReports online help for more information.

Install AgilePoint InfoPath Integration

To install AgilePoint InfoPath Integration, do the following.

1. Log on to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint InfoPath Integration**.
5. Click **Next** in the AgilePoint InfoPath Integration window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint InfoPath Integration\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Install AgilePoint Office Client Integration

To install AgilePoint Office Client Integration, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Office Client Integration**.
5. Click **Next** in the AgilePoint Office 12 Client Setup window.
6. Select the type of AgilePoint Server installation you are using (**IIS** or **Windows Service**), and click **Next**.
7. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Office12 Client\
8. Click **Next**.
9. The installer is now ready to install the application. Click **Next** to install.
10. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
11. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Install AgilePoint Outlook Integration

To install AgilePoint Outlook Integration, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link that is most appropriate for your system.
4. Click the link for the **AgilePoint Outlook Integration** type that is most appropriate for your system.
5. Click **Next** in the AgilePoint Office 12 Client Setup window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Outlook Integration\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Installing AgilePoint Data Services

This section provides detailed instructions for installing the AgilePoint Data Services component of the AgilePoint BPMS Suite.

Install AgilePoint Data Services

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link.
4. Click the link for **AgilePoint Data Services** that is most appropriate for your system.
5. Click **Next** in the AgilePoint Data Services Setup window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Data Services\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Setting Up AgilePoint Data Services

After installing the AgilePoint Data Services and prior to using this AgileConnector, do the following to set up AgilePoint Data Services.

Configure Data Service

Before starting the Data Services Windows service, do the following to configure the Data Service:

1. In the installation directory for AgilePoint Data Services (by default, C:\Program Files\AgilePoint \AgilePoint Data Services), run the script **DataServiceConfiguration.exe**.
2. On the **AgilePoint Data Services Configuration** window, complete the following fields:
   - **Database Type** – The type of database you want to use for AgilePoint Data Services. **Microsoft SQL Server** or **Oracle Database**.
   - **Database Authentication** – Indicates the database **User** name, **Password**, and whether **Integrated Security** is used.
   - **Database Location** - The database to which the data will populate. This can be an existing database, the AgilePoint database, or a new database.
   - **Enable Data Population** – If selected, allows application data to be written to the database.

- **Enable Data Tracking** – If selected, allows changes to application data to be tracked.
- **Time Interval** - The timer interval used by the Windows Service to check for any new entries in the database. On a production system, this can be set to a high interval like 3600 (i.e. one hour).
- **Server URL** - The AgilePoint Server URL.
  - **Windows Service** – Open the file **Ascentn.AgilePoint.WCFService.exe.config** in [Windows Service installation location]\bin. You can find the Windows Service installation location in the Server Manager window in the Location field for the service instance.
  - **IIS** – In the IIS Manager, Browse **AgilePoint Server > workflow.asmx**. The URL appears in the Location field in your web browser.
- **Hosting Mechanism** – IIS or Windows Service, depending on your AgilePoint Server installation type.

  If you are running AgilePoint Server as a Windows Service, indicating Windows Service creates the binding between the Data Services component and the AgilePoint Server. This setting is required.

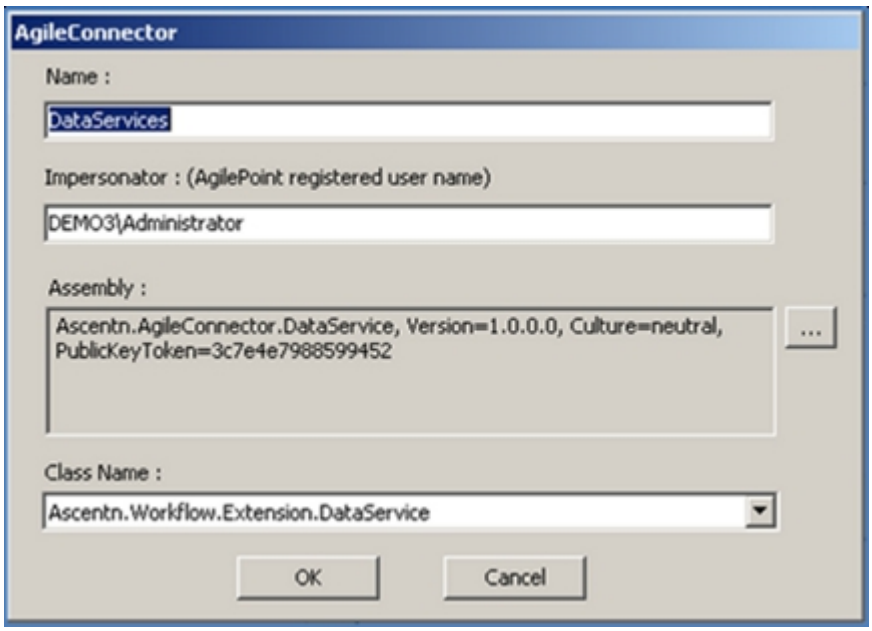
3. To create database tables and save the Data Services configuration, click **OK**.

   This creates tables named **WF_DATA_SERVICE_TEMPDB**, **WF_DATA_SERVICE_ERRORDB**, and **WF_DATA_TRACKING** in the specified database.

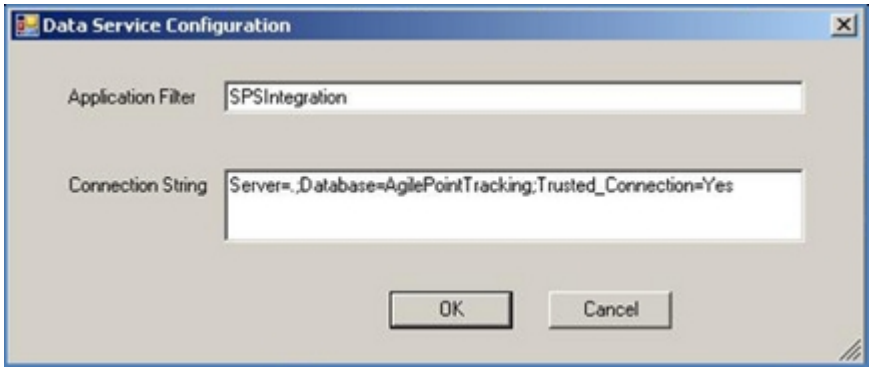
Enable the Data Services Extension

To enable this 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** field should be set to **SPSIntegration** for InfoPath applications, for ASP.NET applications, set the **Application** 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**.

You can configure multiple AgileConnectors to service different applications or use the same one across applications. To use the same AgileConnector, give the names of all the applications separated by a semicolon (;).

Start the Service

To start the service:

1. In Windows, open the **Services** window.
2. In the **Services** window, right-click **AgilePointDataServices**, and click **Properties**.
3. On the **Properties** dialog box, click the **Log On** tab.
4. On the **Log On** tab, select **This account**, and enter the credentials for an account that has database ownership privileges to the database for AgilePoint Data Services.
5. Click the **General** tab.
6. On the **General** tab, click **Start**.
7. Click **OK**.

Modify the Enterprise Manager web.config

To modify the Enterprise Manager web.config

1. Add an element under <AppSettings> in the Enterprise Manager web.config file.

Element to be added :

```
<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

Using Data Population for the First Time

For Data Population, create a table in a database that is specific for the application, and create the table columns based on the fields from the form, the Primary Key should be the Process Instance ID.

The Database connection string and the table information for Data Population are configured in the Process Template in AgilePoint Envision.

Install AgilePoint Deployment Services

You must install two components of the AgilePoint Deployment Services module (i.e. Install the Service module on the AgilePoint Server machine(s), and the Client module on any Client machines that will use this functionality). To install AgilePoint Deployment Services, do the following:

1. Login to Windows using a user login that belongs to the local system's Administrators group.

2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link.
4. Click the link for **AgilePoint Deployment Service** to install AgilePoint Deployment Services component on the Server machine(s).
5. Click **Next** in the AgilePoint Deployment Service window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Deployment Service\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
11. Start the Service on each Server.
12. Return to the installer window and click the **AgilePoint Utilities and Other Support Files** link.
13. Click the link for **AgilePoint Deployment Utility** to install AgilePoint Deployment Services Utility on the Client machines.
14. Click **Next** in the AgilePoint Deployment Utility window.
15. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Deployment Utility\
16. Click **Next**.
17. The installer is now ready to install the application. Click **Next** to install.
18. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
19. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Installing iNet BPS for SAP Integration

iNet BPS is a third-party software product used to enable SAP Integration with AgilePoint BPMS. If you have purchased SAP Integration (an add-on component that requires an additional license), AgilePoint will provide an email with license keys and download instructions.

To ensure a successful installation and integration experience, AgilePoint's development partner ERP-Link (http://erp-link.com) requests to provide support directly to you during your installation.

Once you have completed the iNet BPS installation, you must set up the AgileConnector and configure the SAP integration. For more information, see SAP Integration on the AgilePoint Support Portal.

Installing AgilePoint Configuration D

This section provides instructions for installing each component of the AgilePoint Suite with the following conditions:

Document Variant	NLB or Single Server?	IIS or Windows Service Mode?	.NET 3.5 or 4.0?
Configuration D	NLB	Windows Service	4.0

Prerequisites

Before installing the AgilePoint system, you must comply with the following prerequisites.

New Installations Only

This section assumes that you are installing each component of the AgilePoint BPMS Suite on a computer that does not have any version of that component already installed. If you do already have any version of a component installed on the target computer, see Upgrade Guide on the AgilePoint Support Portal.

Pre-Installation Complete

Before installing any of the components of the AgilePoint BPMS Suite, please ensure you have read and completed the checklist items in the **AgilePoint Pre-Installation Guide**, this is a requirement and will ensure a successful installation.

For more information, see Pre-Installation Guide on the AgilePoint Support Portal.

Local Installation Files

Make sure that the installation files are located on one of the computer's local drives. If you attempt to run the installation directly from a network, the installation may fail. If you do attempt to install when the installation file(s) are located on a network drive (or some other remote location), the setup application may fail to run with an error message similar to the following: "An exception 'System.Security.Policy.PolicyException' has occurred in Setup. "

Installing AgilePoint Server

Use the procedures in this section to set up an AgilePoint Server machine for your environment. This section provides instructions for installing and configuring all the core components on the AgilePoint Server machine.

Install Clustering Server Manager

To install AgilePoint Clustering Server Manager:

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Clustering Server Manager**.
5. Click **Next** in the AgilePoint Clustering Server Manager window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Clustering Server Manager\
7. Click **Next**.
8. The installer is now ready to install the **AgilePoint Clustering Server Manager**. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.

Set Up a Private Network

When you install AgilePoint Server in an NLB environment, you must set up a private network for the AgilePoint Server machines.

The machineKey element configuration setting is used to configure ASP.NET sites and applications for use in a NLB environment. When configuring an AgilePoint NLB environment, all machines in the cluster should use the SAME keys for the validationKey and decryptionKey attributes of the machineKey configuration element. The machineKey element can be set in either the machine.config or web.config files.

For example, you might need to change this:

```
<machineKey validationKey="AutoGenerate,IsolateApps"
          decryptionKey="AutoGenerate,IsolateApps" validation="SHA1"
          decryption="Auto" />
```

to something like this (note that the values below are examples, and not meant for actual use):

```
<machineKey validationKey="SOME_VALIDATION_KEY"
          decryptionKey="SOME_ENCRYPTION_KEY" validation="SHA1"
decryption="Auto" />
```

The following Microsoft article provides information about creating keys: http://support.microsoft.com/default.aspx?scid=kb;en-us;Q312906

Suspend the Logical Server Name

When installing AgilePoint Server in an NLB environment, you must temporarily suspend the use of the logical server name.

In IIS, make sure to use the Physical name of the AgilePoint Server machine instead of the Logical (i.e. Virtual IP) name for the install:

- **IP Address** - Make sure the IP address is set to 'All Unassigned' temporarily during the installation.
- **Host Header** - Make sure the Host Header of the Web site is temporarily removed.

See also, Reset the Server to the Logical Name on the AgilePoint Support Portal..

Install AgilePoint Server

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system – 32 bit or 64 bit.
4. Click **AgilePoint Server**.
5. Click the installation type you want: **AgilePoint Server (IIS)** or **AgilePoint Server (Windows Service)**.
6. Click **Next** in the AgilePoint Server window.
7. Again, click **Next** in the AgilePoint Server window.
8. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
9. Do one of the following, depending upon whether you are performing an IIS Web Site or as a Windows Service:
   - **IIS:**
     1. Select the AgilePoint Server Web site for which you would like to install AgilePoint Server.
     2. Enter a virtual directory name. The default is **AgilePointServer**.
     3. In the **Application Pool** list, select the application pool you want to use.
     4. Click **Next**.
   - **Windows Service:**
     1. Specify the location for your installation, and click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Setting up AgilePoint Server to Run as a Windows Service

1. To open the **AgilePoint Server Manager**, click **Start > All Programs > AgilePoint > AgilePoint Server Manager**.

2. On the **AgilePoint Server Manager** window, click the **Add** (+) button to create an instance of the AgilePoint Server service.
3. In the right pane, complete the fields as required.
   - **Service Name** – The name you want to use to identify the Windows service associated with the AgilePoint Server instance.
   - **Display Name** – The name you want to display to users to identify the AgilePoint Server instance.
   - **Location** - The path to which you want to create the AgilePoint Windows Service instance.
   - **Ports** – Any two free, unique ports. When running as a Windows service, AgilePoint Server can bind with other applications using either HTTP or TCP. Provide a port number for each type of connection. Do not use the port for your AgilePoint web application. Click **Check Availability** to determine if the ports you entered are free.
   - **User Name** and **Password** - Enter the credentials for the authenticated AgilePoint Server user.
   - **Site** - The web site you created for AgilePoint during pre-installation.
   - **Virtual Directory** - The name you want to use for the virtual directory that contains the files for the Enterprise Manager web application.
   - **Application Pool** - The application pool for the Enterprise Manager web application you want to run.
4. When you have finished, click **Update**.
5. If you are prompted to activate the AgilePoint Server, follow the prompts to activate your AgilePoint Server software.
6. The **AgilePoint Configuration** window opens. Follow the procedure to **Configure AgilePoint Server**.

Configure AgilePoint Server

1. To open the **AgilePoint Server Configuration** utility, do one of the following:
   - If you have just added a new Windows Service instance, this window opens automatically.
   - If you are installing on IIS, click **Start > All Programs > AgilePoint > AgilePoint Server Configuration**.
   - If you are configuring an existing Windows Service installation, click **Start > All Programs > AgilePoint > AgilePoint Server Manager**. In the **AgilePoint Server Manager** window, select the Windows Service instance you want to configure, and click the **Configuration** icon.
2. The **System** tab allows you to configure the AgilePoint System User and default email notification behavior. The System area allows you to specify the identity and authentication information for the AgilePoint system user, and the maximum number of threads that AgilePoint will be able to use at runtime while handling workflow requests. The Notification area allows you to specify the default values for certain email notification settings.
3. Do one of the following:

- Check the **Active Directory** check box if you are configuring AgilePoint Server on a network controlled by a Windows Server Domain Controller. This will use Active Directory lookup to validate the user in Active Directory.
- Leave the **Active Directory** check box unchecked if you will be using a local machine account for the AgilePoint system user.

4. Enter the AgilePoint **System User** name and **Password**.
   - If you checked the **Active Directory** check box above, enter the domain **User Name** and **Password**.
   - If you did not check the **Active Directory** check box above, this should contain a local machine account **User Name** and **Password** that you would use when logging into Windows.
5. Enter the **Thread Pool Size**. The Thread Pool Size should be set to the number of Concurrent User Licenses purchased for the server or the number of threads that the physical hardware will support. Use the most limiting of the two numbers.

   For more information, see Configuring the AgilePoint Server Thread Pool Size on the AgilePoint Support Portal.
6. Configure the Notification settings as appropriate for your environment.
   - Enter the SMTP Server information obtained during the pre-installation setup.
   - Enter the SMTP email address for the default Email Sender (i.e. the From address on AgilePoint email notifications).
   - Enter the System User Email. This is the email that will be used to send system notifications if the AgilePoint Server is encountering operational errors.
7. Click the **Database** tab and configure the settings as appropriate for your environment.
8. Do one of the following:
   - Check the **Integrated Security** check box to use Windows Authentication and the Application Pool Identity of AgilePoint Server (APServiceAccount) to authenticate to the database.
   - If using SQL Authentication, enter the SQL user account and password.
9. Enter the Database Server and enter the AgilePoint Database Name or click the **Ellipses** button to retrieve the database names and select the AgilePoint Database. The AgilePoint System User is used to connect to the database during configuration. Therefore, the AgilePoint System User must have db_owner privileges on the AgilePoint Database.
10. The Connection Pool Size must be a minimum of 100 and should be at least 2 times the Thread Pool Size configured on the System tab.
11. (Oracle DB Only) If you are employing an Oracle database, open the Oracle Net Configuration Assistant utility, and configure the Oracle Local Service as necessary. If the Local Service Name has changed, you will need to also update the AgilePoint Server Configuration utility Database tab with the new Oracle Local Service Name.
12. (Optional) Click the **Work Calendar** tab, and configure the settings as appropriate for your environment. This configuration is used in processes for duration assignment or due date.
13. Click **OK** to complete the configuration.

Create the AgilePoint Database Schema

1. Open IIS and view the AgilePointServer Virtual Directory. **Browse** the **Workflow.asmx** file. This creates the AgilePoint Database schema.

Check the AgilePoint Monitor Service

1. Verify the pre-installation steps
2. Click **Start > Run**, and enter **services.msc**.
3. In the **Services** window, ensure the AgilePoint Monitor Service is started.
   - In an IIS environment, the name is **AgilePoint Server Monitor**.
   - In a Windows Service environment, the name is the name of the service you created in AgilePoint Server Manager.
4. If it is not started, right-click on the AgilePoint service name, and click **Start**.

Reset the Server to the Logical Name

Reset the AgilePoint Server and Enterprise Manager Web site to use the Virtual IP.

1. Once both AgilePoint Server and AgilePoint Enterprise Manager are installed on a server machine, change the IIS setting for your AgilePoint Server/Enterprise Manager Web site back to use the Virtual IP address.
2. On the **Add/Edit Web Site Identification** window, do the following:
   - Change the IP address from 'All Unassigned' to the Virtual IP address set up for the NLB environment.
   - Add a Host Header value for the NLB to use the AgilePointLogicalName.
3. Reset IIS.

Configure the SMTP Server Account

AgilePoint uses anonymous SMTP by default. The AgilePoint Server **netflow.cfg** file will now need to be edited to provide the user name and password to use with SMTP for user authentication.

1. Open the **netflow.cfg** file in a text editor such as Notepad.
2. Locate the **Notification** section and modify it to look something like this:

```
<notification
mode="true"
format="text"
smtpService="BuiltIn::username@sbcglobal.net,password1"
mailServer="smtp.sbcglobal.yahoo.com"
sender="NETSVR2@agilepoint.com"
sysadm="adminuser@agilepoint.com">
```

Where username@sbcglobal.net is the user name provided to you by your ISP and password1 is the password provided to you by your ISP.

Configure Session State Handling

After installing AgilePoint Server and Enterprise Manager, you must configure session state handling. There may be several valid options, depending upon your environment and your organization's requirements.

Value	Description
InProc	This is the default value for ASP.NET. This value is suitable for single-machine AgilePoint Server environments; you cannot use this setting for NLB.
StateServer	This setting can be used in a single-machine or NLB environment to manage the session state using the ASP.NET State Service Windows Service. To use the StateServer setting, the ASP.NET State Service must be running on a separate machine from AgilePoint Server.
SQLServer	In NLB environments, this setting allows the AgilePoint Servers to store their session data on a separate machine in a SQL Server database. If an AgilePoint Server fails, another server in the cluster can take over and serve requests without session data loss.
Off	This setting enables you to turn off the session state for AgilePoint Server. This setting can help to improve performance of AgilePoint Server in NLB environments. You cannot use this session for Enterprise Manager.
Custom	This setting requires custom coding. For more information, contact AgilePoint Support.

If you use Session State handling in an NLB environment, note the following:

- The session must be persisted outside of the current server.
- This session persistence is managed by the .NET Framework, not by AgilePoint. The framework uses the connection string declared in the web.config for AgilePoint Server and AgilePoint Enterprise Manager. See http://msdn2.microsoft.com/en-us/library/87069683(vs.71).aspx to communicate to the database where the session is persisted.

To set up session state handling:

1. Run **InstallSqlState.sql** (installed by default in [system root]\Microsoft.NET\Framework\version) on the computer running SQL Server that will store the session state (i.e. the db server). This

creates a database called ASPState with new stored procedures and ASPStateTempApplications and ASPStateTempSessions tables in the TempDB database.

2. Open the **AgilePoint Server** and **AgilePoint Enterprise Manager web.config** files. In the <sessionState> node, set the values as required for your environment.

   For example, if you are using the **SQLServer** setting, the SQL connection string must point to the session state SQL Server database on the DB server machine that stores the session data:

```
<sessionState mode="SQLServer"
sqlConnectionString="[your sessionState database connection string]"
cookieless="false"
timeout="20000"
/>
```

   If you are using the **Off** setting, no further information is required:

```
<sessionState mode="Off" />
```

Verify the AgilePoint Server Installation

Windows Service installation is verified by opening Enterprise Manager. In a Windows Service installation, Enterprise Manager is installed in the background along with AgilePoint Server.

To verify a Windows Service AgilePoint Service installation, open Enterprise Manager from the AgilePoint Server Manager for the AgilePoint Server instance you want to test. Ensure you can **log on** to Enterprise Manager successfully without errors.

If Enterprise Manager does not open properly, or you cannot log in, please verify the installation steps.

Add User Accounts

You must add the following user accounts to Enterprise Manager.

Add the SharePoint Impersonator User Account to AgilePoint

This is the domain-qualified user account that SharePoint will use to interact with AgilePoint Server at runtime.

This step is required if you are installing the AgilePoint SharePoint Integration, and you are not using the same user account for the AgilePoint System User and the SharePoint Impersonator User. If you are using the same user account for the AgilePoint System User and the SharePoint Impersonator User, you can skip this part.

1. Log on to Enterprise Manager.
2. On the AgilePoint **Enterprise Manager Main Page**, click the **Users** link.
3. Click the **Add** link.
4. Enter the SharePoint Impersonator User Account information and click **OK**.
5. Navigate back to the Main Page, and click the **Roles** link.
6. Click the **Add Role** button.

7. Enter **SharePoint Impersonator** as the Role Name, and give this Role **Initiate a process** and **Cancel a process** rights and click **OK**.
8. Click the **SharePoint Impersonator** Role link.
9. Click the **Add Users(s) as Member** button.
10. Select the **SharePoint Impersonator** User Account and click **OK**.

Add the AgilePoint Server Service User Account to AgilePoint

1. On the AgilePoint Enterprise Manager Main Page, click the **Users** link.
2. Click the **Add** link.
3. Enter the AgilePoint Server Service User Account and click **OK**.
4. Navigate back to the Main Page and click the **Roles** link.
5. Click the **Administrators** link and add the AgilePoint Server Service User Account to the AgilePoint Administrators Role.
6. Close AgilePoint Enterprise Manager.

Install AgilePoint Envision

To install AgilePoint Envision, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Envision**.
5. Click **Next** in the AgilePoint Envision window.
6. Again, click **Next** in the AgilePoint Envision window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.

   Select the type of AgilePoint Server installation you are using (**IIS** or **Windows Service**), and click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Envision\
9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

14. To open AgilePoint Envision click **Start** > **Programs** > **AgilePoint** > **AgilePoint Envision**.

Install AgilePoint Developer

To install AgilePoint Developer, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Developer**.
5. Click **Next** in the AgilePoint Developer window.
6. Again, click **Next** in the AgilePoint Developer window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Developer
9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
14. To start AgilePoint Developer, open the Microsoft Visual Studio.NET application as you would normally.

Installing AgilePoint Data Services

This section provides detailed instructions for installing the AgilePoint Data Services component of the AgilePoint BPMS Suite.

Install AgilePoint Data Services

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link.
4. Click the link for **AgilePoint Data Services** that is most appropriate for your system.
5. Click **Next** in the AgilePoint Data Services Setup window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Data Services\

7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Setting Up AgilePoint Data Services

After installing the AgilePoint Data Services and prior to using this AgileConnector, do the following to set up AgilePoint Data Services.

Configure Data Service

Before starting the Data Services Windows service, do the following to configure the Data Service:

1. In the installation directory for AgilePoint Data Services (by default, C:\Program Files\AgilePoint \AgilePoint Data Services), run the script **DataServiceConfiguration.exe**.
2. On the **AgilePoint Data Services Configuration** window, complete the following fields:
   - **Database Type** – The type of database you want to use for AgilePoint Data Services. **Microsoft SQL Server** or **Oracle Database**.
   - **Database Authentication** – Indicates the database **User** name, **Password**, and whether **Integrated Security** is used.
   - **Database Location** - The database to which the data will populate. This can be an existing database, the AgilePoint database, or a new database.
   - **Enable Data Population** – If selected, allows application data to be written to the database.
   - **Enable Data Tracking** – If selected, allows changes to application data to be tracked.
   - **Time Interval** - The timer interval used by the Windows Service to check for any new entries in the database. On a production system, this can be set to a high interval like 3600 (i.e. one hour).
   - **Server URL** - The AgilePoint Server URL.
     - **Windows Service** – Open the file **Ascentn.AgilePoint.WCFService.exe.config** in [Windows Service installation location]\bin. You can find the Windows Service installation location in the Server Manager window in the Location field for the service instance.
     - **IIS** – In the IIS Manager, Browse **AgilePoint Server > workflow.asmx**. The URL appears in the Location field in your web browser.
   - **Hosting Mechanism** – IIS or Windows Service, depending on your AgilePoint Server installation type.

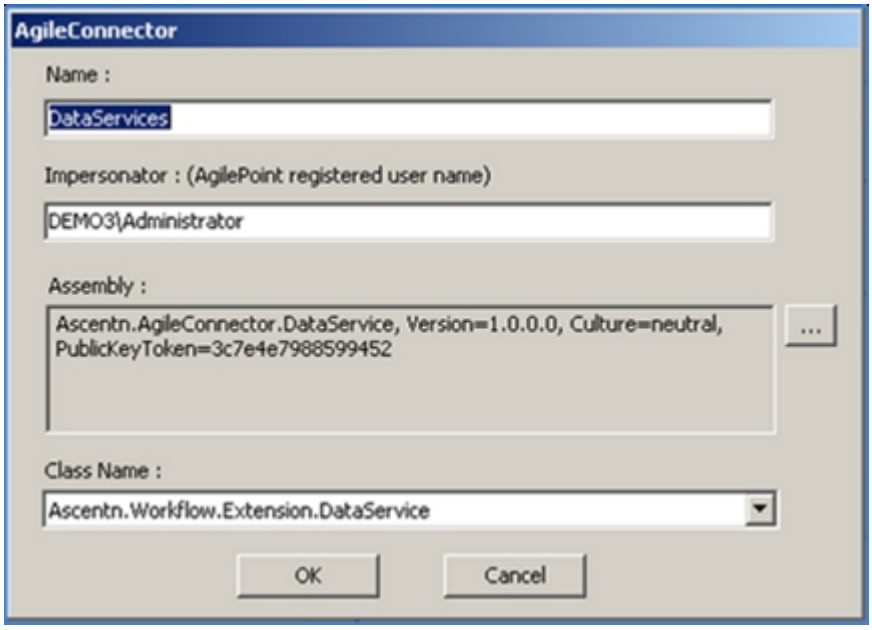
     If you are running AgilePoint Server as a Windows Service, indicating Windows Service creates the binding between the Data Services component and the AgilePoint Server. This setting is required.
3. To create database tables and save the Data Services configuration, click **OK**.

This creates tables named **WF_DATA_SERVICE_TEMPDB**, **WF_DATA_SERVICE_ERRORDB**, and **WF_DATA_TRACKING** in the specified database.

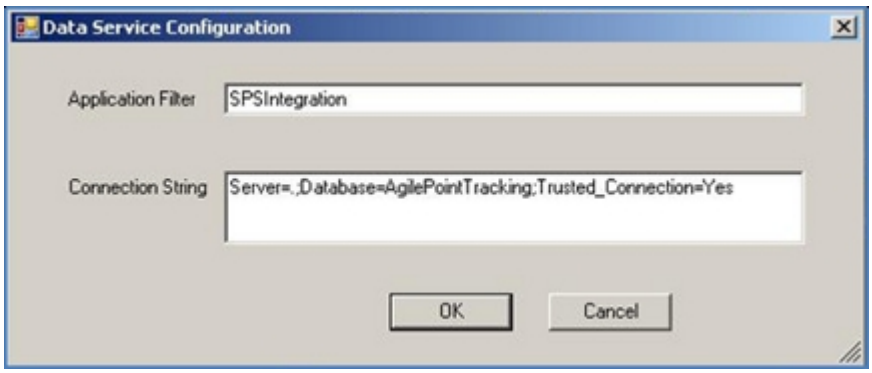
Enable the Data Services Extension

To enable this 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** field should be set to **SPSIntegration** for InfoPath applications, for ASP.NET applications, set the **Application** 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**.

You can configure multiple AgileConnectors to service different applications or use the same one across applications. To use the same AgileConnector, give the names of all the applications separated by a semicolon (;).

Start the Service

To start the service:

1. In Windows, open the **Services** window.
2. In the **Services** window, right-click **AgilePointDataServices**, and click **Properties**.
3. On the **Properties** dialog box, click the **Log On** tab.
4. On the **Log On** tab, select **This account**, and enter the credentials for an account that has database ownership privileges to the database for AgilePoint Data Services.
5. Click the **General** tab.
6. On the **General** tab, click **Start**.
7. Click **OK**.

Modify the Enterprise Manager web.config

To modify the Enterprise Manager web.config

1. Add an element under <AppSettings> in the Enterprise Manager web.config file.

Element to be added :

```
<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

Using Data Population for the First Time

For Data Population, create a table in a database that is specific for the application, and create the table columns based on the fields from the form, the Primary Key should be the Process Instance ID.

The Database connection string and the table information for Data Population are configured in the Process Template in AgilePoint Envision.

Installing AgilePoint Configuration E

This section provides instructions for installing each component of the AgilePoint Suite with the following conditions:

Document Variant	NLB or Single Server?	IIS or Windows Service Mode?	.NET 3.5 or 4.0?
Configuration E	Single Server	IIS	3.5

Prerequisites

Before installing the AgilePoint system, you must comply with the following prerequisites.

New Installations Only

This section assumes that you are installing each component of the AgilePoint BPMS Suite on a computer that does not have any version of that component already installed. If you do already have any version of a component installed on the target computer, see Upgrade Guide on the AgilePoint Support Portal.

Pre-Installation Complete

Before installing any of the components of the AgilePoint BPMS Suite, please ensure you have read and completed the checklist items in the **AgilePoint Pre-Installation Guide**, this is a requirement and will ensure a successful installation.

For more information, see Pre-Installation Guide on the AgilePoint Support Portal.

Local Installation Files

Make sure that the installation files are located on one of the computer's local drives. If you attempt to run the installation directly from a network, the installation may fail. If you do attempt to install when the installation file(s) are located on a network drive (or some other remote location), the setup application may fail to run with an error message similar to the following: "An exception 'System.Security.Policy.PolicyException' has occurred in Setup. "

Installing AgilePoint Server

Use the procedures in this section to set up an AgilePoint Server machine for your environment. This section provides instructions for installing and configuring all the core components on the AgilePoint Server machine.

Install AgilePoint Server

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system – 32 bit or 64 bit.
4. Click **AgilePoint Server**.
5. Click the installation type you want: **AgilePoint Server (IIS)** or **AgilePoint Server (Windows Service)**.
6. Click **Next** in the AgilePoint Server window.
7. Again, click **Next** in the AgilePoint Server window.
8. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
9. Do one of the following, depending upon whether you are performing an IIS Web Site or as a Windows Service:
   - **IIS:**
     1. Select the AgilePoint Server Web site for which you would like to install AgilePoint Server.
     2. Enter a virtual directory name. The default is **AgilePointServer**.
     3. In the **Application Pool** list, select the application pool you want to use.
     4. Click **Next**.
   - **Windows Service:**
     1. Specify the location for your installation, and click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Configure AgilePoint Server

1. To open the **AgilePoint Server Configuration** utility, do one of the following:
   - If you have just added a new Windows Service instance, this window opens automatically.
   - If you are installing on IIS, click **Start > All Programs > AgilePoint > AgilePoint Server Configuration**.
   - If you are configuring an existing Windows Service installation, click **Start > All Programs > AgilePoint > AgilePoint Server Manager**. In the **AgilePoint Server Manager** window, select the Windows Service instance you want to configure, and click the **Configuration** icon.

2. The **System** tab allows you to configure the AgilePoint System User and default email notification behavior. The System area allows you to specify the identity and authentication information for the AgilePoint system user, and the maximum number of threads that AgilePoint will be able to use at runtime while handling workflow requests. The Notification area allows you to specify the default values for certain email notification settings.
3. Do one of the following:
   - Check the **Active Directory** check box if you are configuring AgilePoint Server on a network controlled by a Windows Server Domain Controller. This will use Active Directory lookup to validate the user in Active Directory.
   - Leave the **Active Directory** check box unchecked if you will be using a local machine account for the AgilePoint system user.
4. Enter the AgilePoint **System User** name and **Password**.
   - If you checked the **Active Directory** check box above, enter the domain **User Name** and **Password**.
   - If you did not check the **Active Directory** check box above, this should contain a local machine account **User Name** and **Password** that you would use when logging into Windows.
5. Enter the **Thread Pool Size**. The Thread Pool Size should be set to the number of Concurrent User Licenses purchased for the server or the number of threads that the physical hardware will support. Use the most limiting of the two numbers.

   For more information, see Configuring the AgilePoint Server Thread Pool Size on the AgilePoint Support Portal.
6. Configure the Notification settings as appropriate for your environment.
   - Enter the SMTP Server information obtained during the pre-installation setup.
   - Enter the SMTP email address for the default Email Sender (i.e. the From address on AgilePoint email notifications).
   - Enter the System User Email. This is the email that will be used to send system notifications if the AgilePoint Server is encountering operational errors.
7. Click the **Database** tab and configure the settings as appropriate for your environment.
8. Do one of the following:
   - Check the **Integrated Security** check box to use Windows Authentication and the Application Pool Identity of AgilePoint Server (APServiceAccount) to authenticate to the database.
   - If using SQL Authentication, enter the SQL user account and password.
9. Enter the Database Server and enter the AgilePoint Database Name or click the **Ellipses** button to retrieve the database names and select the AgilePoint Database. The AgilePoint System User is used to connect to the database during configuration. Therefore, the AgilePoint System User must have db_owner privileges on the AgilePoint Database.
10. The Connection Pool Size must be a minimum of 100 and should be at least 2 times the Thread Pool Size configured on the System tab.

11. (Oracle DB Only) If you are employing an Oracle database, open the Oracle Net Configuration Assistant utility, and configure the Oracle Local Service as necessary. If the Local Service Name has changed, you will need to also update the AgilePoint Server Configuration utility Database tab with the new Oracle Local Service Name.
12. (Optional) Click the **Work Calendar** tab, and configure the settings as appropriate for your environment. This configuration is used in processes for duration assignment or due date.
13. Click **OK** to complete the configuration.

Verify the AgilePoint Server Installation

This step is important and determines whether the AgilePoint installation and configuration was successful. This should be done prior to installing AgilePoint Enterprise Manager.

After AgilePoint Server is configured, do the following:

1. Open IIS and view the AgilePointServer Virtual Directory.
2. Browse the file **Test.asmx**.
3. In your web browser on the **Test.asmx** page, click **Hello** to access the Hello World method.
4. On the **Hello World** page, click **Invoke** to invoke the method and ensure that the service is working.

   The run-once installer script will be executed to create the database structures the first time that an AgilePoint Server request is made. As a result, it may take a while for the result to display.

Create the AgilePoint Database Schema

1. Open IIS and view the AgilePointServer Virtual Directory. **Browse** the **Workflow.asmx** file. This creates the AgilePoint Database schema.

Check the AgilePoint Monitor Service

1. Verify the pre-installation steps
2. Click **Start > Run**, and enter **services.msc**.
3. In the **Services** window, ensure the AgilePoint Monitor Service is started.
   - In an IIS environment, the name is **AgilePoint Server Monitor**.
   - In a Windows Service environment, the name is the name of the service you created in AgilePoint Server Manager.
4. If it is not started, right-click on the AgilePoint service name, and click **Start**.

Configure the SMTP Server Account

AgilePoint uses anonymous SMTP by default. The AgilePoint Server **netflow.cfg** file will now need to be edited to provide the user name and password to use with SMTP for user authentication.

1. Open the **netflow.cfg** file in a text editor such as Notepad.

2. Locate the **Notification** section and modify it to look something like this:

```
<notification
mode="true"
format="text"
smtpService="BuiltIn::username@sbcglobal.net,password1"
mailServer="smtp.sbcglobal.yahoo.com"
sender="NETSVR2@agilepoint.com"
sysadm="adminuser@agilepoint.com">
```

   Where username@sbcglobal.net is the user name provided to you by your ISP and password1 is the password provided to you by your ISP.

Install Enterprise Manager

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Enterprise Manager**.
5. Click **Next** in the AgilePoint Enterprise Manager window.
6. Select the site for which you would like to install AgilePoint Enterprise Manager. It is recommended to use the same site where you installed AgilePoint Server.
7. Enter a Virtual Directory name. The default is **EnterpriseManager**.
8. In the **Application Pool** field, select the application pool you want to use.
9. Click **Next**.
10. The installer is now ready to install AgilePoint Enterprise Manager. Click **Next** to install.
11. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
12. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
13. (Note that this step applies only under the specified conditions.) Open the file**[AgilePointWebSiteLocation]\EnterpriseManager\web.config**, modify the value of the **serverUrl** key using the following instructions:
    - **NLB environment** - replace **localhost** with the **virtual IP address** assigned to AgilePoint Server. Use the same port number as AgilePoint Server.
    - **Non-NLB environment** - Only if AgilePoint Server is bound to a specific IP address in IIS (rather than to "All Unassigned"), replace **localhost** with the **physical IP address** assigned to AgilePoint Server.

    Example:

```
<add key="ServerUrl" value="http://1.2.3.4:81/AgilePointServer" />
```

14. Make sure the Web Site for which AgilePoint Server/AgilePoint Enterprise Manager is installed is configured to run under the .NET 2.0 Framework:

a. Open IIS and expand Web Sites, then right-click the Web site that contains the AgilePoint Server virtual directory and click **Properties**.

b. Click the **ASP.NET** tab.

c. In the **ASP.NET** field, make sure it is set for 2.0.

d. Click **OK**.The Login page appears.

15. Log on to AgilePoint Enterprise Manager using the AgilePoint System User account. The AgilePoint System User account is configured in the AgilePoint Server Configuration. This is an important step as this is when the database tables are created in the AgilePoint Workflow Database.

    The AgilePoint Enterprise Manager Main Page appears.

Keep AgilePoint Enterprise Manager open for the next step.

(Optional) Configure SQL Reporting Services

You must provide the correct database privileges for SQL Reporting Services to properly connect and access the AgilePoint database. Follow the steps below to configure the database privileges after installing Enterprise Manager with SQL Server Reporting Services integration.

1. Open **Microsoft SQL Server** > **Reporting Services** > **Report Manager** and click the **AgilePoint** link
2. In the AgilePoint folder, click the **APDS** item to configure the sample reports data source.
3. Make sure the option **Use as Windows Credentials when connecting to the data source** is checked.
4. Click **Apply** to save the changes.

Add User Accounts

You must add the following user accounts to Enterprise Manager.

Add the SharePoint Impersonator User Account to AgilePoint

This is the domain-qualified user account that SharePoint will use to interact with AgilePoint Server at runtime.

This step is required if you are installing the AgilePoint SharePoint Integration, and you are not using the same user account for the AgilePoint System User and the SharePoint Impersonator User. If you are using the same user account for the AgilePoint System User and the SharePoint Impersonator User, you can skip this part.

1. Log on to Enterprise Manager.
2. On the AgilePoint **Enterprise Manager Main Page**, click the **Users** link.
3. Click the **Add** link.
4. Enter the SharePoint Impersonator User Account information and click **OK**.

5. Navigate back to the Main Page, and click the **Roles** link.
6. Click the **Add Role** button.
7. Enter **SharePoint Impersonator** as the Role Name, and give this Role **Initiate a process** and **Cancel a process** rights and click **OK**.
8. Click the **SharePoint Impersonator** Role link.
9. Click the **Add Users(s) as Member** button.
10. Select the **SharePoint Impersonator** User Account and click **OK**.

Add the AgilePoint Server Service User Account to AgilePoint

1. On the AgilePoint Enterprise Manager Main Page, click the **Users** link.
2. Click the **Add** link.
3. Enter the AgilePoint Server Service User Account and click **OK**.
4. Navigate back to the Main Page and click the **Roles** link.
5. Click the **Administrators** link and add the AgilePoint Server Service User Account to the AgilePoint Administrators Role.
6. Close AgilePoint Enterprise Manager.

Install AgilePoint Envision

To install AgilePoint Envision, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Envision**.
5. Click **Next** in the AgilePoint Envision window.
6. Again, click **Next** in the AgilePoint Envision window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.

   Select the type of AgilePoint Server installation you are using (**IIS** or **Windows Service**), and click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Envision\
9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.

13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
14. To open AgilePoint Envision click **Start** > **Programs** > **AgilePoint** > **AgilePoint Envision**.

Install AgilePoint Developer

To install AgilePoint Developer, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Developer**.
5. Click **Next** in the AgilePoint Developer window.
6. Again, click **Next** in the AgilePoint Developer window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Developer
9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
14. To start AgilePoint Developer, open the Microsoft Visual Studio.NET application as you would normally.

Installing AgilePoint SharePoint Integration

This section provides instructions for installing the AgilePoint SharePoint Integration component of the AgilePoint BPMS Suite.

The AgilePoint SharePoint Integration v2 consists of three features:

- **AgilePoint Configuration List** – Stores the AgilePoint configuration data in a custom list.
- **AgilePoint Process Launcher** – Associates a SharePoint entity with an AgilePoint process.
- **AgilePoint Web Parts** – Includes the three AgilePoint Web Parts (Process Model List, Process Instance List, and Task List).

SharePoint Integration v2 Versus v1

The AgilePoint SharePoint Integration v2 is the version AgilePoint SharePoint Integration available for a fresh installation in AgilePoint BPMS.

For existing AgilePoint customers, it is possible to upgrade AgilePoint SharePoint Integration v1 from AgilePoint v4.x to AgilePoint SharePoint Integration v1 for AgilePoint v5.x. For more information, see Upgrade Guide on the AgilePoint Support Portal.

For information about migrating from SharePoint Integration v1 to v2, contact AgilePoint.

Configure the AgilePoint SharePoint Integration AgileConnector

Prerequisites

- AgilePoint Server is installed.

Navigation

1. Open the **AgilePoint Server Configuration** utility.
2. Click the **Extension** tab.

Instructions

1. On the **Extension** tab, click on **Add**.
2. Browse one of the following locations to open the file **Ascentn.SharePoint.AgileConnector.dll**:
   - For IIS installations, this file is located in the **bin** folder under the AgilePoint Server installation folder.
   - For Windows Service installations, this file is located in the **bin** folder under the path provided in the **Location** field in Windows Server Manager for the Windows Service instance you want to configure.
3. Change the **Name** from **AgileConnector** to **SPSIntegration**.
4. Enter the Impersonator (e.g. Administrator).
5. Click **OK**.
6. Optionally, you can click **Configure** to set the maximum thread for SharePoint access and to set the credential for SharePoint access. By default it will use the AgilePoint System User Account credential.
7. When you have finished the configuration, on the **AgilePoint Configuration** window, click **OK**.

   Accept any informational messages.

   If you are prompted to restart IIS or the AgilePoint Service, click **Yes**.

Install AgilePoint SharePoint Integration

Prerequisites

- Configure the AgilePoint SharePoint Integration AgileConnector
- If you are installing AgilePoint SharePoint Integration in a SharePoint server farm, you must select a SharePoint server you want to designate as the primary AgilePoint integration server. **Document your decision.** You will need to use the same machine for all AgilePoint SharePoint Integration installations and upgrades.
- Log on to the SharePoint machine using a user account that belongs to the local system's Administrators group.

Navigation

1. On the SharePoint machine, double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
2. Click the **Install AgilePoint…** link that is most appropriate for your system.

Instructions

1. Click **AgilePoint SharePoint Integration**.
2. Click **Next** in the AgilePoint SharePoint Integration window.
3. Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Integration for SharePoint\
4. Click **Next**.
5. The installer will deploy the installation files to the installation folder.
6. Once the **Installation Complete** message is displayed, click **Close**.

Add, Deploy, and Activate the SharePoint Solution Files

Prerequisites

- Install AgilePoint SharePoint Integration
- Log on to the SharePoint machine using a user account that belongs to the local system's Administrators group.

Navigation

1. Open the **stsadm** command line tool.

   You can find the stsadm.exe at one of the following locations:

   - **SharePoint 2007** - C:\Program Files\Common Files\Microsoft Shared\web server extensions \12\BIN
   - **SharePoint 2010** - C:\Program Files\Common Files\Microsoft Shared\web server extensions \14\BIN

Instructions

1. In the **stsadm** command line tool, enter the following. This copies the wsp files to the home folder of the installation folder for the stsadm tool. You can specify a different path in the command.

```
stsadm –o addsolution –filename Ascentn.SharePoint.SettingsList.wsp
stsadm –o addsolution –filename Ascentn.SharePoint.WebParts.wsp
stsadm –o addsolution –filename Ascentn.SharePoint.WFIntegration.wsp
stsadm –o addsolution –filename Ascentn.SharePoint.ListForm.wsp
```

2. Deploy the following solutions to your SharePoint web applications:

```
stsadm -o deploysolution -name ascentn.sharepoint.settingslist.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
stsadm -o deploysolution -name Ascentn.SharePoint.ListForm.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
stsadm -o deploysolution -name Ascentn.SharePoint.WebParts.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
stsadm -o deploysolution -name Ascentn.SharePoint.WFIntegration.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
```

3. In the **stsadm** tool, execute the following command:

```
stsadm –o copyappbincontent
```

4. In the **stsadm** tool, activate the AgilePoint features:

```
stsadm -o activatefeature -name Agilepointsettingslistfeature -url
 "[Site Collection URL]" –force
stsadm -o activatefeature -name agilepointlistform -url "[Site
 Collection URL]" -force
stsadm -o activatefeature -name agilepointwebparts -url "[Site
 Collection URL]" -force
stsadm -o activatefeature -name agilepoint agilepointwfintegration -url
 "[Site Collection URL]" -force
```

Clean Up the SharePoint web.config

This step addresses a limitation in Microsoft SharePoint 2010. If you do not complete this step, an error will appear on the pages wfassociation.aspx and processviewer.aspx.

Prerequisites

- SharePoint 2010 installed. (This does not apply to earlier versions of SharePoint.)

Navigation

1. In a text editor, open the **web.config** file for your SharePoint installation.

Instructions

1. In the **web.config** within the **AssemblyBinding** node, paste the following:

```
<dependentAssembly>
   <assemblyIdentity name="Microsoft.SharePoint.ApplicationPages"
      publicKeyToken="71e9bce111e9429c" culture="neutral" />
   <bindingRedirect oldVersion="12.0.0.0" newVersion="14.0.0.0" />
</dependentAssembly>
```

2. Save and close the **web.config**.

Run the Windows Service Client Utility Tool

If you are installing SharePoint Integration in a Windows Service environment, you must run the Windows Service Client Utility Tool to configure the binding with the AgilePoint Server.

Prerequisites

- You are using AgilePoint SharePoint Integration in a Windows Service environment.
- Create a backup copy of the configuration file for the application you are configuring before using this utility.

Navigation

To open the Windows Service Client Utility Tool, do one of the following:

- On the AgilePoint Server machine, navigate to **[AgilePoint Server Installation]\SVCUtilityTool \AgilePointWindowsServiceClientUtilityTool.exe**
- Open the AgilePoint installation **Setup.exe** file, and click **AgilePoint Utilities and Other Support Files > AgilePoint Windows Service Client Utility Tool**.

Instructions

1. In the AgilePoint Windows Service Client Utility Tool dialog box, complete the following fields:
   - **Service Address** – The URI for the Windows Service for which you are creating the binding. The information required to build this URI is provided in the AgilePoint Server Manager window.
   - **HTTP** - http://[APServer Machine Name]: [Http Port]/AgilePointServer

     When you create the bindings for the web application, the settings are automatically configured in the web.config file for both HTTP and TCP protocols. By default, the HTTP bindings are used. However, you can switch to TCP by modifying the following properties in the web.config:
     - Change the following so value="**NetTcpBinding_IWCFWorkflowService**"

       ```
       <add key="WorkFlowBindingUsed"
        value="WSHttpBinding_IWCFWorkflowService" />
       ```
     - Change the following so value="**NetTcpBinding_IWCFEventServices**"

       ```
       <add key="EventServicesBindingUsed"
        value="WSHttpBinding_IWCFEventServices" />
       ```
     - Change the following so value="**NetTcpBinding_IWCFAdminService**"

       ```
       <add key="AdminBindingUsed"
        value="WSHttpBinding_IWCFAdminService" />
       ```
   - **Target Config** – The file name and location of the configuration file for the application you are configuring.
     - **SharePoint Integration** – The web.config for the SharePoint web application you want to bind.

- **Data Services** – DataServicesWindowsService.exe.config in the Data Services installation folder. The default location is C:\Program Files\AgilePoint\AgilePoint Data Services\
- **AgileForms** - The web.config file in the AgileForms installation folder. The default location is C:\Program Files\BWS\AFInt\Webroot\
- **Deployment Service** - apds.exe.config file in the Deployment Service installation folder. The default location is C:\Program Files\AgilePoint\AgilePoint Deployment Service\

2. Click **Settings** to configure the following fields:
   - **Max Buffer Size**
   - **Max Buffer Pool Size**
   - **Max Received Message Size**
   - **Max String Content Length**
   - **Max Array Length**

   Guidance for modifying these values can be found at the following articles on MSDN:
   - http://msdn.microsoft.com/en-us/library/ms731361(v=VS.100).aspx
   - http://msdn.microsoft.com/en-us/library/ms731325(v=VS.100).aspx

Verify the Installation was Successful

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.

Navigation

1. Navigate to SharePoint Central Administration on your SharePoint site.
2. In SharePoint Central Administration, click **Operations > Solutions Management**

Instructions

1. On the **Solution Management** page, verify that the following AgilePoint solutions are deployed::
   - **ascentn.sharepoint.settingslist.wsp**
   - **ascentn.sharepoint.webparts.wsp**
   - **ascentn.sharepoint.wfintegration.wsp**
   - **ascentn.sharepoint.listform.wsp**

Set the AgilePoint Configuration List

The AgilePoint Configuration List feature creates a new list called AgilePoint Configuration List when the feature is activated. By default, this list is populated with sample data, it is required to modify the items before using the integration.

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.
- The SharePoint Administrator should restrict access to the AgilePoint Configuration List.

Navigation

1. Open an AgilePoint-enabled SharePoint Site Collection.
2. Click **View All Site Content**.
3. Click **AgilePoint Configuration** list under the **Lists** section.

Instructions

Modify the following items in the list as appropriate to your environment.

Application	Title	Value
AgilePoint	ServerUrl	The URL of AgilePoint Server • **HTTP Format -** http://APServerMachineName:HTTP Port /AgilePointServer • **TCP Format** (Windows Service Only) - net.tcp://APServerMachineName:TCP Port/AgilePointServer
AgilePoint	ImpersonatorDomain	The Domain Name
AgilePoint	ImpersonatorUser	The User Name
AgilePoint	ImpersonatorPass	The Password (Optionally, you can check the **Encrypted** check box in order to encrypt the value of this setting.)
AgilePoint	Log	Location of the log files (e.g. C:\NewSPLog). You can give the FTP location also (e.g. ftp://netsvr1/AgilePontSharePoint/Log). The Impersonator user should have write permission on FTP server.
AgilePoint	LogSwitch	You can provide switches for logging. The following are the available switches. • All • Info • Debug • Error

Application	Title	Value
		• None You can give multiple switches separating by a comma(,) (e.g. Debug, error, Info). The Default value is: All.
AgilePoint	HostingMechanism	Enter the type of AgilePoint installation you are using: • **IIS** – A standard, web-based installation. • **WCF** – A Windows service installation.
AgilePoint	AdminBindingUsed	Enter the type of binding that is used for Windows Service. This setting applies only if AgilePoint Server is running as a Windows Service. If AgilePoint Server is running in IIS mode, this setting is ignored. • HTTP - **WS HttpBinding_IWCFAdminService** • TCP (Windows Service Only) - **NetTcpBinding_IWCFAdminService**
AgilePoint	WorkflowBindingUsed	Enter the type of binding that is used for Windows Service. This setting applies only if AgilePoint Server is running as a Windows Service. If AgilePoint Server is running in IIS mode, this setting is ignored. • HTTP - **WS HttpBinding_IWCFWorkflowService** • TCP (Windows Service Only) - **NetTcpBinding_IWCFWorkflowService**

Set up a Common AgilePoint Configuration List

By default, each SharePoint site collection has its own AgilePoint Configuration List. However, you can define one common AgilePoint Configuration List that can be used across all SharePoint site collections.

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.

Navigation

1. Navigate to SharePoint Central Administration on your SharePoint site.
2. In a text editor, open the SharePoint Web Application **web.config** file.

Instructions

Modify the **web.config** as follows:

```
<appSettings>
    <add key="APSettingsListName" value="AgilePoint Configuration" />
    <add key="APSettingsSiteUrl" value="http://demo3:8081" />
    <add key="APSettingsWebName" value="" />
</appSettings>
```

Where:

- **APSettingsListName** - The name of the AgilePoint Settings List.
- **APSettingsSiteURL** -The SharePoint SiteURL that contains the common AgilePoint Configuration List. The rest of the site collections will refer to this location and list as long as the individual AgilePoint Configuration list (which is auto-created in the site collection when this feature is activated) is deactivated or removed.
- **APSettingsWebName** - If this field is left blank, this means that the AgilePoint Configuration List is located at the top-level site. A value would indicate the Sub site name.

Add the AgilePoint Web Parts to SharePoint

To access the features of the AgilePoint SharePoint Integration, you must add the AgilePoint Web Parts to your SharePoint site. AgilePoint Web Parts are added in the same manner as other SharePoint Web Parts.

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.

Instructions

The following AgilePoint Web Parts can be deployed to your SharePoint site:

- **AgilePoint Process Instance List** – Includes the list of running process instances.
- **AgilePoint Process Model List** – Displays all process models that are deployed to AgilePoint Server.

- **AgilePoint Task List** – Includes the AgilePoint Task List that provides a way for users to manage their tasks.

The exact procedure for adding Web Parts varies, depending upon your version of SharePoint. See your SharePoint documentation for more information.

Installing AgileReports

This section provides instructions for installing the AgileReports component of the AgilePoint BPMS Suite.

Install AgileReports

To install AgileReports:

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgileReports**.
5. On the **AgileReports** dialog box, click **Next**.
6. Click **Next**.
7. Review the **License Agreement**, select **I Agree**, and click **Next**.
8. On the **Select Installation Address** dialog box, complete the following fields:
   - **Site** – The IIS site you want to use for AgileReports.
   - **Virtual directory** – The IIS virtual directory you want to use for AgileReports.
   - **Application Pool** – The IIS application pool you want to use for AgileReports.
9. On the **Database Server Details** dialog box, complete the following fields.
   - **Server Name** – The name of the AgilePoint database server machine.
   - **AgilePoint Database Name** – The name of the AgilePoint database.
   - **AgileReports Database Name** – The name of the database AgileReports will use. The default is **AgileReportsMetaDB**.
10. On the **Customer Information** window, enter your **Name**, **Organization**, and **Serial number**, and click **Next**.
11. On the **Activation Wizard** window, follow the onscreen instructions to activate AgileReports.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Configure AgileReports

1. On the Active Directory to which AgilePoint Server is connected, create a Windows group named **adHocAdmin**.
2. Add the **Administrator** user to the **adHocAdmin** group.
3. Log off of AgilePoint Server, and log on again.
4. In your database application (SQL Server or Oracle), create a new database. The database name should match the database **AgileReports Database Name** you entered during installation. The default is **AgileReportsMetaDB**.
5. (Oracle only) If you are using Oracle, download the file AgileReports_Oracle.zip. Then unzip the file to the hard drive on the machine where AgileReports is installed.
6. In your **AgileReports database**, execute one of the following scripts:
   - SQL Server - **[AgileReports Virtual Directory]\Database\MetaDataDB Script.sql**
   - Oracle - **[AgileReports _Oracle unzip folder]\ Oracle Script.sql**
7. (SQL Server only) In your **AgilePoint database**, execute the SQL script **[AgileReports Virtual Directory]\Database\AgilePointDB Script.sql**
8. In an XML editor, open the file **[AgileReports Virtual Directory]_Definitions\Settings.lgx**.
9. In **Settings.lgx**, modify the **<Security>** node with the following changes:
   - **LogonPage** - The AgilePoint Enterprise Manager main logon page. To find this location, open the Enterprise Manager web client, and copy the URL up to the end of the file name, **LogonForm.aspx** . The default value is **http://[hostname]/EnterpriseManager/Common/LogonForm.aspx.** However, this value may not be correct. You may need to modify the host, port number, or other elements within the URL.
   - **LogonFailPage** - The AgilePoint Enterprise Manager main logon page. See the instructions for **LogonPage**.
   - **NTAuthenticationDomain** – Verify the domain name is correct.
10. (Oracle only) If you are using Oracle, in **Settings.lgx**, replace the following **<Connection>** node with the node below:
    - Old node:

```
<Connection Type="Application" ID="ahMetadata"
ConnectionString="Provider=SQLOLEDB.1;Integrated
Security=SSPI;Persist Security Info=False;Initial
Catalog=AgileReportsMetaDB;Data Source=." Label=""
ahDBType="SQLSERVER" />
```

    - New node representing the connection for the AgileReports metadata database:

```
<Connection Type="Oracle" ID="ahMetadata"
ahDBType="ORACLE" Label="" ahUseANSI="False"
OracleUser="AgileReports" OraclePassword="pass"
OracleServer="[hostname]" OracleDatabase="AgileReportsMetaDB"
OracleProtocol="TCP" OraclePort="1521" />
```

- OracleUser="**AgileReports**" – The user ID for your AgileReports metadata database.
- OraclePassword="**pass** " – The password for your AgileReports metadata database.
- OracleDatabase="**AgileReportsMetaDB**" – The service name or ID for your AgileReports metadata database.
- OraclePort ="**1521**" – The port number for your AgileReports metadata database.

```
<Connection ID="1" CommandTimeOut="90"
Label="AgilePoint40"
 ConnectionString="Provider=SQLOLEDB.1;Integrated
Security=SSPI;Persist Security Info=False;Initial
Catalog=AgilePoint40;Data Source=." Type="Application"
ahDBType="SQLSERVER" />
```

- New node representing the database you want your reports to analyze. You can have multiple copies of this connection string, each with its own database information. The example below assumes the default connection to the AgilePoint database.

```
<Connection ID="1" CommandTimeOut="90"
Label="AgilePoint" Type="Oracle" ahDBType="ORACLE"
ahUseANSI="False" OracleUser="AgilePoint"
OraclePassword="pass" OracleServer="[hostname]"
OracleDatabase="AgilePoint" OracleProtocol="TCP"
OraclePort="1521"/>
```

- OracleUser="**AgilePoint**"– The user ID for your database.
- OraclePassword="**pass**" – The password for your database.
- OracleDatabase="**AgilePoint**" – The service name or ID for your database.
- OraclePort="**1521**" – The port number for your database.

11. Restrict the access for the users for the databases from which you collect data (not the users to **connect** and **resource**.
12. In the **web.config** file in the virtual folder for the Enterprise Manager web application, add the following element as a child of **<appSettings>** with the correct AgileReports URL:

```
<add key="AgileReportUrl"
value="http://[AgileReports domain name and port number]/AgileReports/
Default.aspx"/>
```

13. (Oracle only) If you are using Oracle, copy the report files (files with the file nameahReport*.lgx) that are provided in **AgileReports_Oracle.zip**, and paste them in the folder **[AgileReports Virtual Directory]_Definitions_Reports**

Using AgileReports for the First Time

Once you have completed this procedure, you can open AgileReports from the Enterprise Manager home page.

When you open AgileReports for the first time, your reports are available under the **All Personal Reports** section. From there, you can move them to My Personal Reports or Shared Reports. See the AgileReports online help for more information.

Install AgilePoint InfoPath Integration

To install AgilePoint InfoPath Integration, do the following.

1. Log on to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint InfoPath Integration**.
5. Click **Next** in the AgilePoint InfoPath Integration window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint InfoPath Integration\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Install AgilePoint Office Client Integration

To install AgilePoint Office Client Integration, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Office Client Integration**.
5. Click **Next** in the AgilePoint Office 12 Client Setup window.
6. Select the type of AgilePoint Server installation you are using (**IIS** or **Windows Service**), and click **Next**.
7. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Office12 Client\
8. Click **Next**.
9. The installer is now ready to install the application. Click **Next** to install.
10. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
11. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Install AgilePoint Outlook Integration

To install AgilePoint Outlook Integration, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link that is most appropriate for your system.
4. Click the link for the **AgilePoint Outlook Integration** type that is most appropriate for your system.
5. Click **Next** in the AgilePoint Office 12 Client Setup window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Outlook Integration\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Installing AgilePoint Data Services

This section provides detailed instructions for installing the AgilePoint Data Services component of the AgilePoint BPMS Suite.

Install AgilePoint Data Services

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link.
4. Click the link for **AgilePoint Data Services** that is most appropriate for your system.
5. Click **Next** in the AgilePoint Data Services Setup window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Data Services\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.

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

Setting Up AgilePoint Data Services

After installing the AgilePoint Data Services and prior to using this AgileConnector, do the following to set up AgilePoint Data Services.

Configure Data Service

Before starting the Data Services Windows service, do the following to configure the Data Service:

1. In the installation directory for AgilePoint Data Services (by default, C:\Program Files\AgilePoint \AgilePoint Data Services), run the script **DataServiceConfiguration.exe**.
2. On the **AgilePoint Data Services Configuration** window, complete the following fields:
   - **Database Type** – The type of database you want to use for AgilePoint Data Services. **Microsoft SQL Server** or **Oracle Database**.
   - **Database Authentication** – Indicates the database **User** name, **Password**, and whether **Integrated Security** is used.
   - **Database Location** - The database to which the data will populate. This can be an existing database, the AgilePoint database, or a new database.
   - **Enable Data Population** – If selected, allows application data to be written to the database.
   - **Enable Data Tracking** – If selected, allows changes to application data to be tracked.
   - **Time Interval** - The timer interval used by the Windows Service to check for any new entries in the database. On a production system, this can be set to a high interval like 3600 (i.e. one hour).
   - **Server URL** - The AgilePoint Server URL.
     - **Windows Service** – Open the file **Ascentn.AgilePoint.WCFService.exe.config** in [Windows Service installation location]\bin. You can find the Windows Service installation location in the Server Manager window in the Location field for the service instance.
     - **IIS** – In the IIS Manager, Browse **AgilePoint Server > workflow.asmx**. The URL appears in the Location field in your web browser.
   - **Hosting Mechanism** – IIS or Windows Service, depending on your AgilePoint Server installation type.

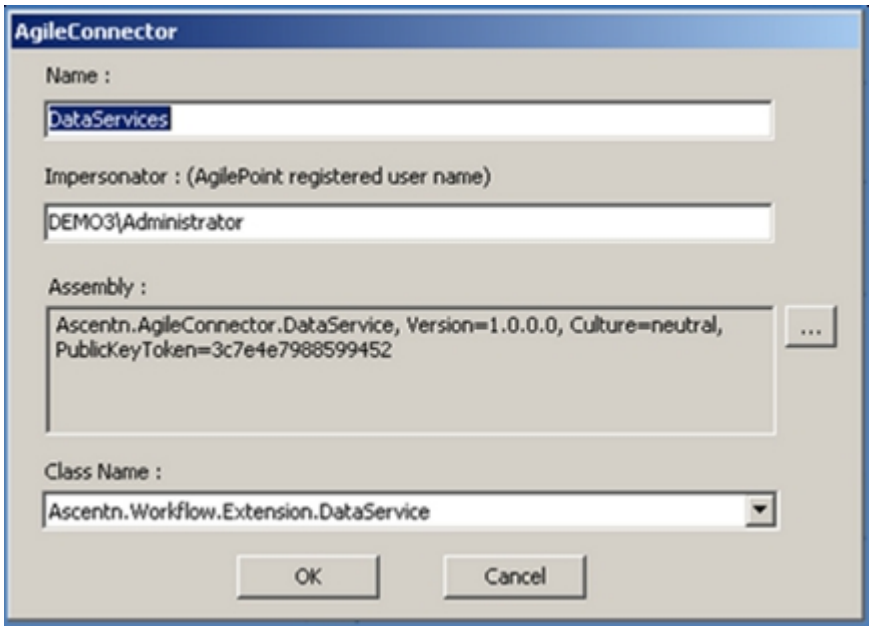
     If you are running AgilePoint Server as a Windows Service, indicating Windows Service creates the binding between the Data Services component and the AgilePoint Server. This setting is required.
3. To create database tables and save the Data Services configuration, click **OK**.

   This creates tables named **WF_DATA_SERVICE_TEMPDB**, **WF_DATA_SERVICE_ERRORDB**, and **WF_DATA_TRACKING** in the specified database.

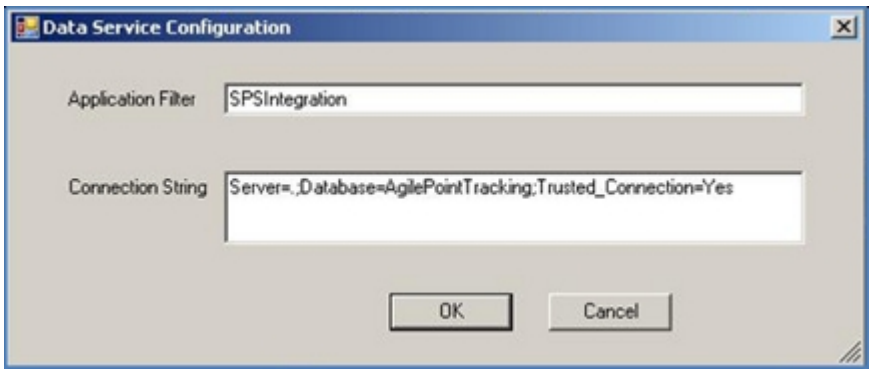
Enable the Data Services Extension

To enable this 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** field should be set to **SPSIntegration** for InfoPath applications, for ASP.NET applications, set the **Application** 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**.

You can configure multiple AgileConnectors to service different applications or use the same one across applications. To use the same AgileConnector, give the names of all the applications separated by a semicolon (;).

Start the Service

To start the service:

1. In Windows, open the **Services** window.
2. In the **Services** window, right-click **AgilePointDataServices**, and click **Properties**.
3. On the **Properties** dialog box, click the **Log On** tab.
4. On the **Log On** tab, select **This account**, and enter the credentials for an account that has database ownership privileges to the database for AgilePoint Data Services.
5. Click the **General** tab.
6. On the **General** tab, click **Start**.
7. Click **OK**.

Modify the Enterprise Manager web.config

To modify the Enterprise Manager web.config

1. Add an element under <AppSettings> in the Enterprise Manager web.config file.

Element to be added :

```
<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

Using Data Population for the First Time

For Data Population, create a table in a database that is specific for the application, and create the table columns based on the fields from the form, the Primary Key should be the Process Instance ID.

The Database connection string and the table information for Data Population are configured in the Process Template in AgilePoint Envision.

Install AgilePoint Deployment Services

You must install two components of the AgilePoint Deployment Services module (i.e. Install the Service module on the AgilePoint Server machine(s), and the Client module on any Client machines that will use this functionality). To install AgilePoint Deployment Services, do the following:

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link.
4. Click the link for **AgilePoint Deployment Service** to install AgilePoint Deployment Services component on the Server machine(s).
5. Click **Next** in the AgilePoint Deployment Service window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Deployment Service\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
11. Start the Service on each Server.
12. Return to the installer window and click the **AgilePoint Utilities and Other Support Files** link.
13. Click the link for **AgilePoint Deployment Utility** to install AgilePoint Deployment Services Utility on the Client machines.
14. Click **Next** in the AgilePoint Deployment Utility window.
15. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Deployment Utility\
16. Click **Next**.
17. The installer is now ready to install the application. Click **Next** to install.
18. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
19. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Installing iNet BPS for SAP Integration

iNet BPS is a third-party software product used to enable SAP Integration with AgilePoint BPMS. If you have purchased SAP Integration (an add-on component that requires an additional license), AgilePoint will provide an email with license keys and download instructions.

To ensure a successful installation and integration experience, AgilePoint's development partner ERP-Link (http://erp-link.com) requests to provide support directly to you during your installation.

Once you have completed the iNet BPS installation, you must set up the AgileConnector and configure the SAP integration. For more information, see SAP Integration on the AgilePoint Support Portal.

Installing AgilePoint Configuration F

This section provides instructions for installing each component of the AgilePoint Suite with the following conditions:

Document Variant	NLB or Single Server?	IIS or Windows Service Mode?	.NET 3.5 or 4.0?
Configuration F	Single Server	IIS	4.0

Prerequisites

Before installing the AgilePoint system, you must comply with the following prerequisites.

New Installations Only

This section assumes that you are installing each component of the AgilePoint BPMS Suite on a computer that does not have any version of that component already installed. If you do already have any version of a component installed on the target computer, see Upgrade Guide on the AgilePoint Support Portal.

Pre-Installation Complete

Before installing any of the components of the AgilePoint BPMS Suite, please ensure you have read and completed the checklist items in the **AgilePoint Pre-Installation Guide**, this is a requirement and will ensure a successful installation.

For more information, see Pre-Installation Guide on the AgilePoint Support Portal.

Local Installation Files

Make sure that the installation files are located on one of the computer's local drives. If you attempt to run the installation directly from a network, the installation may fail. If you do attempt to install when the installation file(s) are located on a network drive (or some other remote location), the setup application may fail to run with an error message similar to the following: "An exception 'System.Security.Policy.PolicyException' has occurred in Setup. "

Installing AgilePoint Server

Use the procedures in this section to set up an AgilePoint Server machine for your environment. This section provides instructions for installing and configuring all the core components on the AgilePoint Server machine.

Install AgilePoint Server

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system – 32 bit or 64 bit.
4. Click **AgilePoint Server**.
5. Click the installation type you want: **AgilePoint Server (IIS)** or **AgilePoint Server (Windows Service)**.
6. Click **Next** in the AgilePoint Server window.
7. Again, click **Next** in the AgilePoint Server window.
8. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
9. Do one of the following, depending upon whether you are performing an IIS Web Site or as a Windows Service:
   - **IIS:**
     1. Select the AgilePoint Server Web site for which you would like to install AgilePoint Server.
     2. Enter a virtual directory name. The default is **AgilePointServer**.
     3. In the **Application Pool** list, select the application pool you want to use.
     4. Click **Next**.
   - **Windows Service:**
     1. Specify the location for your installation, and click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Configure AgilePoint Server

1. To open the **AgilePoint Server Configuration** utility, do one of the following:
   - If you have just added a new Windows Service instance, this window opens automatically.
   - If you are installing on IIS, click **Start > All Programs > AgilePoint > AgilePoint Server Configuration**.
   - If you are configuring an existing Windows Service installation, click **Start > All Programs > AgilePoint > AgilePoint Server Manager**. In the **AgilePoint Server Manager** window, select the Windows Service instance you want to configure, and click the **Configuration** icon.

2. The **System** tab allows you to configure the AgilePoint System User and default email notification behavior. The System area allows you to specify the identity and authentication information for the AgilePoint system user, and the maximum number of threads that AgilePoint will be able to use at runtime while handling workflow requests. The Notification area allows you to specify the default values for certain email notification settings.
3. Do one of the following:
   - Check the **Active Directory** check box if you are configuring AgilePoint Server on a network controlled by a Windows Server Domain Controller. This will use Active Directory lookup to validate the user in Active Directory.
   - Leave the **Active Directory** check box unchecked if you will be using a local machine account for the AgilePoint system user.
4. Enter the AgilePoint **System User** name and **Password**.
   - If you checked the **Active Directory** check box above, enter the domain **User Name** and **Password**.
   - If you did not check the **Active Directory** check box above, this should contain a local machine account **User Name** and **Password** that you would use when logging into Windows.
5. Enter the **Thread Pool Size**. The Thread Pool Size should be set to the number of Concurrent User Licenses purchased for the server or the number of threads that the physical hardware will support. Use the most limiting of the two numbers.

   For more information, see Configuring the AgilePoint Server Thread Pool Size on the AgilePoint Support Portal.
6. Configure the Notification settings as appropriate for your environment.
   - Enter the SMTP Server information obtained during the pre-installation setup.
   - Enter the SMTP email address for the default Email Sender (i.e. the From address on AgilePoint email notifications).
   - Enter the System User Email. This is the email that will be used to send system notifications if the AgilePoint Server is encountering operational errors.
7. Click the **Database** tab and configure the settings as appropriate for your environment.
8. Do one of the following:
   - Check the **Integrated Security** check box to use Windows Authentication and the Application Pool Identity of AgilePoint Server (APServiceAccount) to authenticate to the database.
   - If using SQL Authentication, enter the SQL user account and password.
9. Enter the Database Server and enter the AgilePoint Database Name or click the **Ellipses** button to retrieve the database names and select the AgilePoint Database. The AgilePoint System User is used to connect to the database during configuration. Therefore, the AgilePoint System User must have db_owner privileges on the AgilePoint Database.
10. The Connection Pool Size must be a minimum of 100 and should be at least 2 times the Thread Pool Size configured on the System tab.

11. (Oracle DB Only) If you are employing an Oracle database, open the Oracle Net Configuration Assistant utility, and configure the Oracle Local Service as necessary. If the Local Service Name has changed, you will need to also update the AgilePoint Server Configuration utility Database tab with the new Oracle Local Service Name.
12. (Optional) Click the **Work Calendar** tab, and configure the settings as appropriate for your environment. This configuration is used in processes for duration assignment or due date.
13. Click **OK** to complete the configuration.

Verify the AgilePoint Server Installation

This step is important and determines whether the AgilePoint installation and configuration was successful. This should be done prior to installing AgilePoint Enterprise Manager.

After AgilePoint Server is configured, do the following:

1. Open IIS and view the AgilePointServer Virtual Directory.
2. Browse the file **Test.asmx**.
3. In your web browser on the **Test.asmx** page, click **Hello** to access the Hello World method.
4. On the **Hello World** page, click **Invoke** to invoke the method and ensure that the service is working.

   The run-once installer script will be executed to create the database structures the first time that an AgilePoint Server request is made. As a result, it may take a while for the result to display.

Create the AgilePoint Database Schema

1. Open IIS and view the AgilePointServer Virtual Directory. **Browse** the **Workflow.asmx** file. This creates the AgilePoint Database schema.

Check the AgilePoint Monitor Service

1. Verify the pre-installation steps
2. Click **Start > Run**, and enter **services.msc**.
3. In the **Services** window, ensure the AgilePoint Monitor Service is started.
   - In an IIS environment, the name is **AgilePoint Server Monitor**.
   - In a Windows Service environment, the name is the name of the service you created in AgilePoint Server Manager.
4. If it is not started, right-click on the AgilePoint service name, and click **Start**.

Configure the SMTP Server Account

AgilePoint uses anonymous SMTP by default. The AgilePoint Server **netflow.cfg** file will now need to be edited to provide the user name and password to use with SMTP for user authentication.

1. Open the **netflow.cfg** file in a text editor such as Notepad.

2. Locate the **Notification** section and modify it to look something like this:

```
<notification
mode="true"
format="text"
smtpService="BuiltIn::username@sbcglobal.net,password1"
mailServer="smtp.sbcglobal.yahoo.com"
sender="NETSVR2@agilepoint.com"
sysadm="adminuser@agilepoint.com">
```

   Where username@sbcglobal.net is the user name provided to you by your ISP and password1 is the password provided to you by your ISP.

Install Enterprise Manager

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Enterprise Manager**.
5. Click **Next** in the AgilePoint Enterprise Manager window.
6. Select the site for which you would like to install AgilePoint Enterprise Manager. It is recommended to use the same site where you installed AgilePoint Server.
7. Enter a Virtual Directory name. The default is **EnterpriseManager**.
8. In the **Application Pool** field, select the application pool you want to use.
9. Click **Next**.
10. The installer is now ready to install AgilePoint Enterprise Manager. Click **Next** to install.
11. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
12. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
13. (Note that this step applies only under the specified conditions.) Open the file**[AgilePointWebSiteLocation]\EnterpriseManager\web.config**, modify the value of the **serverUrl** key using the following instructions:
    - **NLB environment** - replace **localhost** with the **virtual IP address** assigned to AgilePoint Server. Use the same port number as AgilePoint Server.
    - **Non-NLB environment** - Only if AgilePoint Server is bound to a specific IP address in IIS (rather than to "All Unassigned"), replace **localhost** with the **physical IP address** assigned to AgilePoint Server.

    Example:

```
<add key="ServerUrl" value="http://1.2.3.4:81/AgilePointServer" />
```

14. Make sure the Web Site for which AgilePoint Server/AgilePoint Enterprise Manager is installed is configured to run under the .NET 2.0 Framework:

a. Open IIS and expand Web Sites, then right-click the Web site that contains the AgilePoint Server virtual directory and click **Properties**.

b. Click the **ASP.NET** tab.

c. In the **ASP.NET** field, make sure it is set for 2.0.

d. Click **OK**.The Login page appears.

15. Log on to AgilePoint Enterprise Manager using the AgilePoint System User account. The AgilePoint System User account is configured in the AgilePoint Server Configuration. This is an important step as this is when the database tables are created in the AgilePoint Workflow Database.

    The AgilePoint Enterprise Manager Main Page appears.

Keep AgilePoint Enterprise Manager open for the next step.

(Optional) Configure SQL Reporting Services

You must provide the correct database privileges for SQL Reporting Services to properly connect and access the AgilePoint database. Follow the steps below to configure the database privileges after installing Enterprise Manager with SQL Server Reporting Services integration.

1. Open **Microsoft SQL Server** > **Reporting Services** > **Report Manager** and click the **AgilePoint** link
2. In the AgilePoint folder, click the **APDS** item to configure the sample reports data source.
3. Make sure the option **Use as Windows Credentials when connecting to the data source** is checked.
4. Click **Apply** to save the changes.

Add User Accounts

You must add the following user accounts to Enterprise Manager.

Add the SharePoint Impersonator User Account to AgilePoint

This is the domain-qualified user account that SharePoint will use to interact with AgilePoint Server at runtime.

This step is required if you are installing the AgilePoint SharePoint Integration, and you are not using the same user account for the AgilePoint System User and the SharePoint Impersonator User. If you are using the same user account for the AgilePoint System User and the SharePoint Impersonator User, you can skip this part.

1. Log on to Enterprise Manager.
2. On the AgilePoint **Enterprise Manager Main Page**, click the **Users** link.
3. Click the **Add** link.
4. Enter the SharePoint Impersonator User Account information and click **OK**.

5. Navigate back to the Main Page, and click the **Roles** link.
6. Click the **Add Role** button.
7. Enter **SharePoint Impersonator** as the Role Name, and give this Role **Initiate a process** and **Cancel a process** rights and click **OK**.
8. Click the **SharePoint Impersonator** Role link.
9. Click the **Add Users(s) as Member** button.
10. Select the **SharePoint Impersonator** User Account and click **OK**.

Add the AgilePoint Server Service User Account to AgilePoint

1. On the AgilePoint Enterprise Manager Main Page, click the **Users** link.
2. Click the **Add** link.
3. Enter the AgilePoint Server Service User Account and click **OK**.
4. Navigate back to the Main Page and click the **Roles** link.
5. Click the **Administrators** link and add the AgilePoint Server Service User Account to the AgilePoint Administrators Role.
6. Close AgilePoint Enterprise Manager.

Install AgilePoint Envision

To install AgilePoint Envision, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Envision**.
5. Click **Next** in the AgilePoint Envision window.
6. Again, click **Next** in the AgilePoint Envision window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.

   Select the type of AgilePoint Server installation you are using (**IIS** or **Windows Service**), and click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Envision\
9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.

13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
14. To open AgilePoint Envision click **Start** > **Programs** > **AgilePoint** > **AgilePoint Envision**.

Install AgilePoint Developer

To install AgilePoint Developer, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Developer**.
5. Click **Next** in the AgilePoint Developer window.
6. Again, click **Next** in the AgilePoint Developer window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Developer
9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
14. To start AgilePoint Developer, open the Microsoft Visual Studio.NET application as you would normally.

Installing AgilePoint Data Services

This section provides detailed instructions for installing the AgilePoint Data Services component of the AgilePoint BPMS Suite.

Install AgilePoint Data Services

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link.
4. Click the link for **AgilePoint Data Services** that is most appropriate for your system.
5. Click **Next** in the AgilePoint Data Services Setup window.

6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Data Services\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Setting Up AgilePoint Data Services

After installing the AgilePoint Data Services and prior to using this AgileConnector, do the following to set up AgilePoint Data Services.

Configure Data Service

Before starting the Data Services Windows service, do the following to configure the Data Service:

1. In the installation directory for AgilePoint Data Services (by default, C:\Program Files\AgilePoint \AgilePoint Data Services), run the script **DataServiceConfiguration.exe**.
2. On the **AgilePoint Data Services Configuration** window, complete the following fields:
   - **Database Type** – The type of database you want to use for AgilePoint Data Services. **Microsoft SQL Server** or **Oracle Database**.
   - **Database Authentication** – Indicates the database **User** name, **Password**, and whether **Integrated Security** is used.
   - **Database Location** - The database to which the data will populate. This can be an existing database, the AgilePoint database, or a new database.
   - **Enable Data Population** – If selected, allows application data to be written to the database.
   - **Enable Data Tracking** – If selected, allows changes to application data to be tracked.
   - **Time Interval** - The timer interval used by the Windows Service to check for any new entries in the database. On a production system, this can be set to a high interval like 3600 (i.e. one hour).
   - **Server URL** - The AgilePoint Server URL.
     - **Windows Service** – Open the file **Ascentn.AgilePoint.WCFService.exe.config** in [Windows Service installation location]\bin. You can find the Windows Service installation location in the Server Manager window in the Location field for the service instance.
     - **IIS** – In the IIS Manager, Browse **AgilePoint Server > workflow.asmx**. The URL appears in the Location field in your web browser.
   - **Hosting Mechanism** – IIS or Windows Service, depending on your AgilePoint Server installation type.

If you are running AgilePoint Server as a Windows Service, indicating Windows Service creates the binding between the Data Services component and the AgilePoint Server. This setting is required.

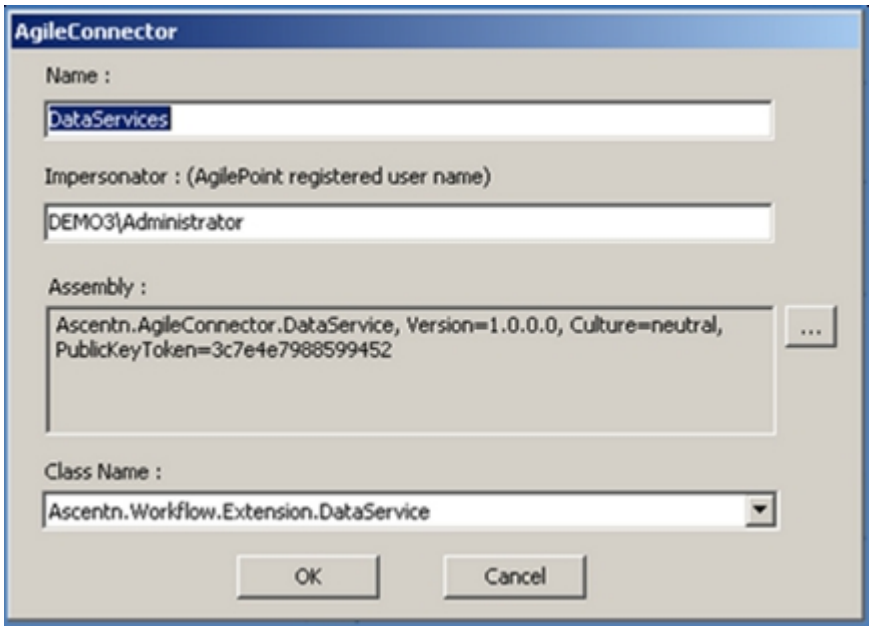
3. To create database tables and save the Data Services configuration, click **OK**.

   This creates tables named **WF_DATA_SERVICE_TEMPDB**, **WF_DATA_SERVICE_ERRORDB**, and **WF_DATA_TRACKING** in the specified database.

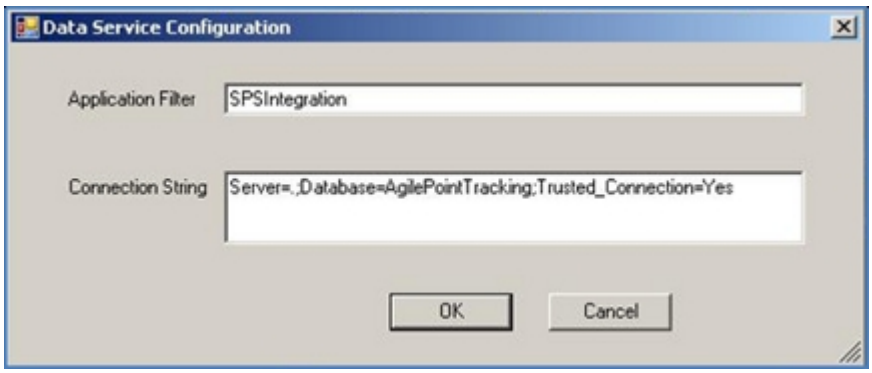
Enable the Data Services Extension

To enable this 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** field should be set to **SPSIntegration** for InfoPath applications, for ASP.NET applications, set the **Application** 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**.

You can configure multiple AgileConnectors to service different applications or use the same one across applications. To use the same AgileConnector, give the names of all the applications separated by a semicolon (;).

Start the Service

To start the service:

1. In Windows, open the **Services** window.
2. In the **Services** window, right-click **AgilePointDataServices**, and click **Properties**.
3. On the **Properties** dialog box, click the **Log On** tab.
4. On the **Log On** tab, select **This account**, and enter the credentials for an account that has database ownership privileges to the database for AgilePoint Data Services.
5. Click the **General** tab.
6. On the **General** tab, click **Start**.
7. Click **OK**.

Modify the Enterprise Manager web.config

To modify the Enterprise Manager web.config

1. Add an element under <AppSettings> in the Enterprise Manager web.config file.

Element to be added :

```
<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

Using Data Population for the First Time

For Data Population, create a table in a database that is specific for the application, and create the table columns based on the fields from the form, the Primary Key should be the Process Instance ID.

The Database connection string and the table information for Data Population are configured in the Process Template in AgilePoint Envision.

Installing AgilePoint Configuration G

This section provides instructions for installing each component of the AgilePoint Suite with the following conditions:

Document Variant	NLB or Single Server?	IIS or Windows Service Mode?	.NET 3.5 or 4.0?
Configuration G	Single Server	Windows Service	3.5

Prerequisites

Before installing the AgilePoint system, you must comply with the following prerequisites.

New Installations Only

This section assumes that you are installing each component of the AgilePoint BPMS Suite on a computer that does not have any version of that component already installed. If you do already have any version of a component installed on the target computer, see Upgrade Guide on the AgilePoint Support Portal.

Pre-Installation Complete

Before installing any of the components of the AgilePoint BPMS Suite, please ensure you have read and completed the checklist items in the **AgilePoint Pre-Installation Guide**, this is a requirement and will ensure a successful installation.

For more information, see Pre-Installation Guide on the AgilePoint Support Portal.

Local Installation Files

Make sure that the installation files are located on one of the computer's local drives. If you attempt to run the installation directly from a network, the installation may fail. If you do attempt to install when the installation file(s) are located on a network drive (or some other remote location), the setup application may fail to run with an error message similar to the following: "An exception 'System.Security.Policy.PolicyException' has occurred in Setup. "

Installing AgilePoint Server

Use the procedures in this section to set up an AgilePoint Server machine for your environment. This section provides instructions for installing and configuring all the core components on the AgilePoint Server machine.

Install AgilePoint Server

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system – 32 bit or 64 bit.
4. Click **AgilePoint Server**.
5. Click the installation type you want: **AgilePoint Server (IIS)** or **AgilePoint Server (Windows Service)**.
6. Click **Next** in the AgilePoint Server window.
7. Again, click **Next** in the AgilePoint Server window.
8. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
9. Do one of the following, depending upon whether you are performing an IIS Web Site or as a Windows Service:
   - **IIS:**
     1. Select the AgilePoint Server Web site for which you would like to install AgilePoint Server.
     2. Enter a virtual directory name. The default is **AgilePointServer**.
     3. In the **Application Pool** list, select the application pool you want to use.
     4. Click **Next**.
   - **Windows Service:**
     1. Specify the location for your installation, and click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Setting up AgilePoint Server to Run as a Windows Service

1. To open the **AgilePoint Server Manager**, click **Start > All Programs > AgilePoint > AgilePoint Server Manager**.
2. On the **AgilePoint Server Manager** window, click the **Add** (+) button to create an instance of the AgilePoint Server service.
3. In the right pane, complete the fields as required.
   - **Service Name** – The name you want to use to identify the Windows service associated with the AgilePoint Server instance.

- **Display Name** – The name you want to display to users to identify the AgilePoint Server instance.
- **Location** - The path to which you want to create the AgilePoint Windows Service instance.
- **Ports** – Any two free, unique ports. When running as a Windows service, AgilePoint Server can bind with other applications using either HTTP or TCP. Provide a port number for each type of connection. Do not use the port for your AgilePoint web application. Click **Check Availability** to determine if the ports you entered are free.
- **User Name** and **Password** - Enter the credentials for the authenticated AgilePoint Server user.
- **Site** - The web site you created for AgilePoint during pre-installation.
- **Virtual Directory** - The name you want to use for the virtual directory that contains the files for the Enterprise Manager web application.
- **Application Pool** - The application pool for the Enterprise Manager web application you want to run.

4. When you have finished, click **Update**.
5. If you are prompted to activate the AgilePoint Server, follow the prompts to activate your AgilePoint Server software.
6. The **AgilePoint Configuration** window opens. Follow the procedure to **Configure AgilePoint Server**.

Configure AgilePoint Server

1. To open the **AgilePoint Server Configuration** utility, do one of the following:
   - If you have just added a new Windows Service instance, this window opens automatically.
   - If you are installing on IIS, click **Start > All Programs > AgilePoint > AgilePoint Server Configuration**.
   - If you are configuring an existing Windows Service installation, click **Start > All Programs > AgilePoint > AgilePoint Server Manager**. In the **AgilePoint Server Manager** window, select the Windows Service instance you want to configure, and click the **Configuration** icon.
2. The **System** tab allows you to configure the AgilePoint System User and default email notification behavior. The System area allows you to specify the identity and authentication information for the AgilePoint system user, and the maximum number of threads that AgilePoint will be able to use at runtime while handling workflow requests. The Notification area allows you to specify the default values for certain email notification settings.
3. Do one of the following:
   - Check the **Active Directory** check box if you are configuring AgilePoint Server on a network controlled by a Windows Server Domain Controller. This will use Active Directory lookup to validate the user in Active Directory.
   - Leave the **Active Directory** check box unchecked if you will be using a local machine account for the AgilePoint system user.

4. Enter the AgilePoint **System User** name and **Password**.
   - If you checked the **Active Directory** check box above, enter the domain **User Name** and **Password**.
   - If you did not check the **Active Directory** check box above, this should contain a local machine account **User Name** and **Password** that you would use when logging into Windows.
5. Enter the **Thread Pool Size**. The Thread Pool Size should be set to the number of Concurrent User Licenses purchased for the server or the number of threads that the physical hardware will support. Use the most limiting of the two numbers.

   For more information, see Configuring the AgilePoint Server Thread Pool Size on the AgilePoint Support Portal.
6. Configure the Notification settings as appropriate for your environment.
   - Enter the SMTP Server information obtained during the pre-installation setup.
   - Enter the SMTP email address for the default Email Sender (i.e. the From address on AgilePoint email notifications).
   - Enter the System User Email. This is the email that will be used to send system notifications if the AgilePoint Server is encountering operational errors.
7. Click the **Database** tab and configure the settings as appropriate for your environment.
8. Do one of the following:
   - Check the **Integrated Security** check box to use Windows Authentication and the Application Pool Identity of AgilePoint Server (APServiceAccount) to authenticate to the database.
   - If using SQL Authentication, enter the SQL user account and password.
9. Enter the Database Server and enter the AgilePoint Database Name or click the **Ellipses** button to retrieve the database names and select the AgilePoint Database. The AgilePoint System User is used to connect to the database during configuration. Therefore, the AgilePoint System User must have db_owner privileges on the AgilePoint Database.
10. The Connection Pool Size must be a minimum of 100 and should be at least 2 times the Thread Pool Size configured on the System tab.
11. (Oracle DB Only) If you are employing an Oracle database, open the Oracle Net Configuration Assistant utility, and configure the Oracle Local Service as necessary. If the Local Service Name has changed, you will need to also update the AgilePoint Server Configuration utility Database tab with the new Oracle Local Service Name.
12. (Optional) Click the **Work Calendar** tab, and configure the settings as appropriate for your environment. This configuration is used in processes for duration assignment or due date.
13. Click **OK** to complete the configuration.

Check the AgilePoint Monitor Service

1. Verify the pre-installation steps
2. Click **Start > Run**, and enter **services.msc**.

3. In the **Services** window, ensure the AgilePoint Monitor Service is started.
   - In an IIS environment, the name is **AgilePoint Server Monitor**.
   - In a Windows Service environment, the name is the name of the service you created in AgilePoint Server Manager.
4. If it is not started, right-click on the AgilePoint service name, and click **Start**.

Configure the SMTP Server Account

AgilePoint uses anonymous SMTP by default. The AgilePoint Server **netflow.cfg** file will now need to be edited to provide the user name and password to use with SMTP for user authentication.

1. Open the **netflow.cfg** file in a text editor such as Notepad.
2. Locate the **Notification** section and modify it to look something like this:

```
<notification
mode="true"
format="text"
smtpService="BuiltIn::username@sbcglobal.net,password1"
mailServer="smtp.sbcglobal.yahoo.com"
sender="NETSVR2@agilepoint.com"
sysadm="adminuser@agilepoint.com">
```

   Where username@sbcglobal.net is the user name provided to you by your ISP and password1 is the password provided to you by your ISP.

Verify the AgilePoint Server Installation

Windows Service installation is verified by opening Enterprise Manager. In a Windows Service installation, Enterprise Manager is installed in the background along with AgilePoint Server.

To verify a Windows Service AgilePoint Service installation, open Enterprise Manager from the AgilePoint Server Manager for the AgilePoint Server instance you want to test. Ensure you can **log on** to Enterprise Manager successfully without errors.

If Enterprise Manager does not open properly, or you cannot log in, please verify the installation steps.

Add User Accounts

You must add the following user accounts to Enterprise Manager.

Add the SharePoint Impersonator User Account to AgilePoint

This is the domain-qualified user account that SharePoint will use to interact with AgilePoint Server at runtime.

This step is required if you are installing the AgilePoint SharePoint Integration, and you are not using the same user account for the AgilePoint System User and the SharePoint Impersonator User. If you are using the same user account for the AgilePoint System User and the SharePoint Impersonator User, you can skip this part.

1. Log on to Enterprise Manager.
2. On the AgilePoint **Enterprise Manager Main Page**, click the **Users** link.
3. Click the **Add** link.
4. Enter the SharePoint Impersonator User Account information and click **OK**.
5. Navigate back to the Main Page, and click the **Roles** link.
6. Click the **Add Role** button.
7. Enter **SharePoint Impersonator** as the Role Name, and give this Role **Initiate a process** and **Cancel a process** rights and click **OK**.
8. Click the **SharePoint Impersonator** Role link.
9. Click the **Add Users(s) as Member** button.
10. Select the **SharePoint Impersonator** User Account and click **OK**.

Add the AgilePoint Server Service User Account to AgilePoint

1. On the AgilePoint Enterprise Manager Main Page, click the **Users** link.
2. Click the **Add** link.
3. Enter the AgilePoint Server Service User Account and click **OK**.
4. Navigate back to the Main Page and click the **Roles** link.
5. Click the **Administrators** link and add the AgilePoint Server Service User Account to the AgilePoint Administrators Role.
6. Close AgilePoint Enterprise Manager.

Install AgilePoint Envision

To install AgilePoint Envision, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Envision**.
5. Click **Next** in the AgilePoint Envision window.
6. Again, click **Next** in the AgilePoint Envision window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.

   Select the type of AgilePoint Server installation you are using (**IIS** or **Windows Service**), and click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Envision\

9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
14. To open AgilePoint Envision click **Start** > **Programs** > **AgilePoint** > **AgilePoint Envision**.

Install AgilePoint Developer

To install AgilePoint Developer, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Developer**.
5. Click **Next** in the AgilePoint Developer window.
6. Again, click **Next** in the AgilePoint Developer window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Developer
9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
14. To start AgilePoint Developer, open the Microsoft Visual Studio.NET application as you would normally.

Installing AgilePoint SharePoint Integration

This section provides instructions for installing the AgilePoint SharePoint Integration component of the AgilePoint BPMS Suite.

The AgilePoint SharePoint Integration v2 consists of three features:

- **AgilePoint Configuration List** – Stores the AgilePoint configuration data in a custom list.
- **AgilePoint Process Launcher** – Associates a SharePoint entity with an AgilePoint process.

- **AgilePoint Web Parts** – Includes the three AgilePoint Web Parts (Process Model List, Process Instance List, and Task List).

SharePoint Integration v2 Versus v1

The AgilePoint SharePoint Integration v2 is the version AgilePoint SharePoint Integration available for a fresh installation in AgilePoint BPMS.

For existing AgilePoint customers, it is possible to upgrade AgilePoint SharePoint Integration v1 from AgilePoint v4.x to AgilePoint SharePoint Integration v1 for AgilePoint v5.x. For more information, see Upgrade Guide on the AgilePoint Support Portal.

For information about migrating from SharePoint Integration v1 to v2, contact AgilePoint.

Configure the AgilePoint SharePoint Integration AgileConnector

Prerequisites

- AgilePoint Server is installed.

Navigation

1. Open the **AgilePoint Server Configuration** utility.
2. Click the **Extension** tab.

Instructions

1. On the **Extension** tab, click on **Add**.
2. Browse one of the following locations to open the file **Ascentn.SharePoint.AgileConnector.dll**:
   - For IIS installations, this file is located in the **bin** folder under the AgilePoint Server installation folder.
   - For Windows Service installations, this file is located in the **bin** folder under the path provided in the **Location** field in Windows Server Manager for the Windows Service instance you want to configure.
3. Change the **Name** from **AgileConnector** to **SPSIntegration**.
4. Enter the Impersonator (e.g. Administrator).
5. Click **OK**.
6. Optionally, you can click **Configure** to set the maximum thread for SharePoint access and to set the credential for SharePoint access. By default it will use the AgilePoint System User Account credential.
7. When you have finished the configuration, on the **AgilePoint Configuration** window, click **OK**.

   Accept any informational messages.

   If you are prompted to restart IIS or the AgilePoint Service, click **Yes**.

Install AgilePoint SharePoint Integration

Prerequisites

- Configure the AgilePoint SharePoint Integration AgileConnector
- If you are installing AgilePoint SharePoint Integration in a SharePoint server farm, you must select a SharePoint server you want to designate as the primary AgilePoint integration server. **Document your decision.** You will need to use the same machine for all AgilePoint SharePoint Integration installations and upgrades.
- Log on to the SharePoint machine using a user account that belongs to the local system's Administrators group.

Navigation

1. On the SharePoint machine, double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
2. Click the **Install AgilePoint…** link that is most appropriate for your system.

Instructions

1. Click **AgilePoint SharePoint Integration**.
2. Click **Next** in the AgilePoint SharePoint Integration window.
3. Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Integration for SharePoint\
4. Click **Next**.
5. The installer will deploy the installation files to the installation folder.
6. Once the **Installation Complete** message is displayed, click **Close**.

Add, Deploy, and Activate the SharePoint Solution Files

Prerequisites

- Install AgilePoint SharePoint Integration
- Log on to the SharePoint machine using a user account that belongs to the local system's Administrators group.

Navigation

1. Open the **stsadm** command line tool.

   You can find the stsadm.exe at one of the following locations:

   - **SharePoint 2007** - C:\Program Files\Common Files\Microsoft Shared\web server extensions \12\BIN
   - **SharePoint 2010** - C:\Program Files\Common Files\Microsoft Shared\web server extensions \14\BIN

Instructions

1. In the **stsadm** command line tool, enter the following. This copies the wsp files to the home folder of the installation folder for the stsadm tool. You can specify a different path in the command.

```
stsadm –o addsolution –filename Ascentn.SharePoint.SettingsList.wsp
stsadm –o addsolution –filename Ascentn.SharePoint.WebParts.wsp
stsadm –o addsolution –filename Ascentn.SharePoint.WFIntegration.wsp
stsadm –o addsolution –filename Ascentn.SharePoint.ListForm.wsp
```

2. Deploy the following solutions to your SharePoint web applications:

```
stsadm -o deploysolution -name ascentn.sharepoint.settingslist.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
stsadm -o deploysolution -name Ascentn.SharePoint.ListForm.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
stsadm -o deploysolution -name Ascentn.SharePoint.WebParts.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
stsadm -o deploysolution -name Ascentn.SharePoint.WFIntegration.wsp -
immediate -allowgacdeployment -url "[Site Collection URL]"
```

3. In the **stsadm** tool, execute the following command:

```
stsadm –o copyappbincontent
```

4. In the **stsadm** tool, activate the AgilePoint features:

```
stsadm -o activatefeature -name Agilepointsettingslistfeature -url
 "[Site Collection URL]" –force
stsadm -o activatefeature -name agilepointlistform -url "[Site
 Collection URL]" -force
stsadm -o activatefeature -name agilepointwebparts -url "[Site
 Collection URL]" -force
stsadm -o activatefeature -name agilepoint agilepointwfintegration -url
 "[Site Collection URL]" -force
```

Clean Up the SharePoint web.config

This step addresses a limitation in Microsoft SharePoint 2010. If you do not complete this step, an error will appear on the pages wfassociation.aspx and processviewer.aspx.

Prerequisites

- SharePoint 2010 installed. (This does not apply to earlier versions of SharePoint.)

Navigation

1. In a text editor, open the **web.config** file for your SharePoint installation.

Instructions

1. In the **web.config** within the **AssemblyBinding** node, paste the following:

```
<dependentAssembly>
   <assemblyIdentity name="Microsoft.SharePoint.ApplicationPages"
      publicKeyToken="71e9bce111e9429c" culture="neutral" />
   <bindingRedirect oldVersion="12.0.0.0" newVersion="14.0.0.0" />
</dependentAssembly>
```

2. Save and close the **web.config**.

Run the Windows Service Client Utility Tool

If you are installing SharePoint Integration in a Windows Service environment, you must run the Windows Service Client Utility Tool to configure the binding with the AgilePoint Server.

Prerequisites

- You are using AgilePoint SharePoint Integration in a Windows Service environment.
- Create a backup copy of the configuration file for the application you are configuring before using this utility.

Navigation

To open the Windows Service Client Utility Tool, do one of the following:

- On the AgilePoint Server machine, navigate to **[AgilePoint Server Installation]\SVCUtilityTool \AgilePointWindowsServiceClientUtilityTool.exe**
- Open the AgilePoint installation **Setup.exe** file, and click **AgilePoint Utilities and Other Support Files > AgilePoint Windows Service Client Utility Tool**.

Instructions

1. In the AgilePoint Windows Service Client Utility Tool dialog box, complete the following fields:
   - **Service Address** – The URI for the Windows Service for which you are creating the binding. The information required to build this URI is provided in the AgilePoint Server Manager window.
   - **HTTP** - http://[APServer Machine Name]: [Http Port]/AgilePointServer

     When you create the bindings for the web application, the settings are automatically configured in the web.config file for both HTTP and TCP protocols. By default, the HTTP bindings are used. However, you can switch to TCP by modifying the following properties in the web.config:
     - Change the following so value="**NetTcpBinding_IWCFWorkflowService**"

       ```
       <add key="WorkFlowBindingUsed"
        value="WSHttpBinding_IWCFWorkflowService" />
       ```
     - Change the following so value="**NetTcpBinding_IWCFEventServices**"

       ```
       <add key="EventServicesBindingUsed"
        value="WSHttpBinding_IWCFEventServices" />
       ```
     - Change the following so value="**NetTcpBinding_IWCFAdminService**"

       ```
       <add key="AdminBindingUsed"
        value="WSHttpBinding_IWCFAdminService" />
       ```
   - **Target Config** – The file name and location of the configuration file for the application you are configuring.
     - **SharePoint Integration** – The web.config for the SharePoint web application you want to bind.

- **Data Services** – DataServicesWindowsService.exe.config in the Data Services installation folder. The default location is C:\Program Files\AgilePoint\AgilePoint Data Services\
- **AgileForms** - The web.config file in the AgileForms installation folder. The default location is C:\Program Files\BWS\AFInt\Webroot\
- **Deployment Service** - apds.exe.config file in the Deployment Service installation folder. The default location is C:\Program Files\AgilePoint\AgilePoint Deployment Service\

2. Click **Settings** to configure the following fields:
   - **Max Buffer Size**
   - **Max Buffer Pool Size**
   - **Max Received Message Size**
   - **Max String Content Length**
   - **Max Array Length**

   Guidance for modifying these values can be found at the following articles on MSDN:
   - http://msdn.microsoft.com/en-us/library/ms731361(v=VS.100).aspx
   - http://msdn.microsoft.com/en-us/library/ms731325(v=VS.100).aspx

Verify the Installation was Successful

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.

Navigation

1. Navigate to SharePoint Central Administration on your SharePoint site.
2. In SharePoint Central Administration, click **Operations > Solutions Management**

Instructions

1. On the **Solution Management** page, verify that the following AgilePoint solutions are deployed::
   - **ascentn.sharepoint.settingslist.wsp**
   - **ascentn.sharepoint.webparts.wsp**
   - **ascentn.sharepoint.wfintegration.wsp**
   - **ascentn.sharepoint.listform.wsp**

Set the AgilePoint Configuration List

The AgilePoint Configuration List feature creates a new list called AgilePoint Configuration List when the feature is activated. By default, this list is populated with sample data, it is required to modify the items before using the integration.

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.
- The SharePoint Administrator should restrict access to the AgilePoint Configuration List.

Navigation

1. Open an AgilePoint-enabled SharePoint Site Collection.
2. Click **View All Site Content**.
3. Click **AgilePoint Configuration** list under the **Lists** section.

Instructions

Modify the following items in the list as appropriate to your environment.

Application	Title	Value
AgilePoint	ServerUrl	The URL of AgilePoint Server • **HTTP Format -** http://APServerMachineName:HTTP Port /AgilePointServer • **TCP Format** (Windows Service Only) - net.tcp://APServerMachineName:TCP Port/AgilePointServer
AgilePoint	ImpersonatorDomain	The Domain Name
AgilePoint	ImpersonatorUser	The User Name
AgilePoint	ImpersonatorPass	The Password (Optionally, you can check the **Encrypted** check box in order to encrypt the value of this setting.)
AgilePoint	Log	Location of the log files (e.g. C:\NewSPLog). You can give the FTP location also (e.g. ftp://netsvr1/AgilePontSharePoint/Log). The Impersonator user should have write permission on FTP server.
AgilePoint	LogSwitch	You can provide switches for logging. The following are the available switches. • All • Info • Debug • Error

Application	Title	Value
		• None You can give multiple switches separating by a comma(,) (e.g. Debug, error, Info). The Default value is: All.
AgilePoint	HostingMechanism	Enter the type of AgilePoint installation you are using: • **IIS** – A standard, web-based installation. • **WCF** – A Windows service installation.
AgilePoint	AdminBindingUsed	Enter the type of binding that is used for Windows Service. This setting applies only if AgilePoint Server is running as a Windows Service. If AgilePoint Server is running in IIS mode, this setting is ignored. • HTTP - **WS HttpBinding_IWCFAdminService** • TCP (Windows Service Only) - **NetTcpBinding_IWCFAdminService**
AgilePoint	WorkflowBindingUsed	Enter the type of binding that is used for Windows Service. This setting applies only if AgilePoint Server is running as a Windows Service. If AgilePoint Server is running in IIS mode, this setting is ignored. • HTTP - **WS HttpBinding_IWCFWorkflowService** • TCP (Windows Service Only) - **NetTcpBinding_IWCFWorkflowService**

Set up a Common AgilePoint Configuration List

By default, each SharePoint site collection has its own AgilePoint Configuration List. However, you can define one common AgilePoint Configuration List that can be used across all SharePoint site collections.

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.

Navigation

1. Navigate to SharePoint Central Administration on your SharePoint site.
2. In a text editor, open the SharePoint Web Application **web.config** file.

Instructions

Modify the **web.config** as follows:

```
<appSettings>
    <add key="APSettingsListName" value="AgilePoint Configuration" />
    <add key="APSettingsSiteUrl" value="http://demo3:8081" />
    <add key="APSettingsWebName" value="" />
</appSettings>
```

Where:

- **APSettingsListName** - The name of the AgilePoint Settings List.
- **APSettingsSiteURL** -The SharePoint SiteURL that contains the common AgilePoint Configuration List. The rest of the site collections will refer to this location and list as long as the individual AgilePoint Configuration list (which is auto-created in the site collection when this feature is activated) is deactivated or removed.
- **APSettingsWebName** - If this field is left blank, this means that the AgilePoint Configuration List is located at the top-level site. A value would indicate the Sub site name.

Add the AgilePoint Web Parts to SharePoint

To access the features of the AgilePoint SharePoint Integration, you must add the AgilePoint Web Parts to your SharePoint site. AgilePoint Web Parts are added in the same manner as other SharePoint Web Parts.

Prerequisites

- AgilePoint Integration for SharePoint is fully installed.

Instructions

The following AgilePoint Web Parts can be deployed to your SharePoint site:

- **AgilePoint Process Instance List** – Includes the list of running process instances.
- **AgilePoint Process Model List** – Displays all process models that are deployed to AgilePoint Server.

- **AgilePoint Task List** – Includes the AgilePoint Task List that provides a way for users to manage their tasks.

The exact procedure for adding Web Parts varies, depending upon your version of SharePoint. See your SharePoint documentation for more information.

Installing AgileReports

This section provides instructions for installing the AgileReports component of the AgilePoint BPMS Suite.

Install AgileReports

To install AgileReports:

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgileReports**.
5. On the **AgileReports** dialog box, click **Next**.
6. Click **Next**.
7. Review the **License Agreement**, select **I Agree**, and click **Next**.
8. On the **Select Installation Address** dialog box, complete the following fields:
   - **Site** – The IIS site you want to use for AgileReports.
   - **Virtual directory** – The IIS virtual directory you want to use for AgileReports.
   - **Application Pool** – The IIS application pool you want to use for AgileReports.
9. On the **Database Server Details** dialog box, complete the following fields.
   - **Server Name** – The name of the AgilePoint database server machine.
   - **AgilePoint Database Name** – The name of the AgilePoint database.
   - **AgileReports Database Name** – The name of the database AgileReports will use. The default is **AgileReportsMetaDB**.
10. On the **Customer Information** window, enter your **Name**, **Organization**, and **Serial number**, and click **Next**.
11. On the **Activation Wizard** window, follow the onscreen instructions to activate AgileReports.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Configure AgileReports

1. On the Active Directory to which AgilePoint Server is connected, create a Windows group named **adHocAdmin**.
2. Add the **Administrator** user to the **adHocAdmin** group.
3. Log off of AgilePoint Server, and log on again.
4. In your database application (SQL Server or Oracle), create a new database. The database name should match the database **AgileReports Database Name** you entered during installation. The default is **AgileReportsMetaDB**.
5. (Oracle only) If you are using Oracle, download the file AgileReports_Oracle.zip. Then unzip the file to the hard drive on the machine where AgileReports is installed.
6. In your **AgileReports database**, execute one of the following scripts:
   - SQL Server - **[AgileReports Virtual Directory]\Database\MetaDataDB Script.sql**
   - Oracle - **[AgileReports _Oracle unzip folder]\ Oracle Script.sql**
7. (SQL Server only) In your **AgilePoint database**, execute the SQL script **[AgileReports Virtual Directory]\Database\AgilePointDB Script.sql**
8. In an XML editor, open the file **[AgileReports Virtual Directory]_Definitions\Settings.lgx**.
9. In **Settings.lgx**, modify the **<Security>** node with the following changes:
   - **LogonPage** - The AgilePoint Enterprise Manager main logon page. To find this location, open the Enterprise Manager web client, and copy the URL up to the end of the file name, **LogonForm.aspx** . The default value is **http://[hostname]/EnterpriseManager/Common/LogonForm.aspx.** However, this value may not be correct. You may need to modify the host, port number, or other elements within the URL.
   - **LogonFailPage** - The AgilePoint Enterprise Manager main logon page. See the instructions for **LogonPage**.
   - **NTAuthenticationDomain** – Verify the domain name is correct.
10. (Oracle only) If you are using Oracle, in **Settings.lgx**, replace the following **<Connection>** node with the node below:
    - Old node:

```
<Connection Type="Application" ID="ahMetadata"
ConnectionString="Provider=SQLOLEDB.1;Integrated
Security=SSPI;Persist Security Info=False;Initial
Catalog=AgileReportsMetaDB;Data Source=." Label=""
ahDBType="SQLSERVER" />
```

    - New node representing the connection for the AgileReports metadata database:

```
<Connection Type="Oracle" ID="ahMetadata"
ahDBType="ORACLE" Label="" ahUseANSI="False"
OracleUser="AgileReports" OraclePassword="pass"
OracleServer="[hostname]" OracleDatabase="AgileReportsMetaDB"
OracleProtocol="TCP" OraclePort="1521" />
```

- OracleUser="**AgileReports**" – The user ID for your AgileReports metadata database.
- OraclePassword="**pass** " – The password for your AgileReports metadata database.
- OracleDatabase="**AgileReportsMetaDB**" – The service name or ID for your AgileReports metadata database.
- OraclePort ="**1521**" – The port number for your AgileReports metadata database.

```
<Connection ID="1" CommandTimeOut="90"
Label="AgilePoint40"
 ConnectionString="Provider=SQLOLEDB.1;Integrated
Security=SSPI;Persist Security Info=False;Initial
Catalog=AgilePoint40;Data Source=." Type="Application"
ahDBType="SQLSERVER" />
```

- New node representing the database you want your reports to analyze. You can have multiple copies of this connection string, each with its own database information. The example below assumes the default connection to the AgilePoint database.

```
<Connection ID="1" CommandTimeOut="90"
Label="AgilePoint" Type="Oracle" ahDBType="ORACLE"
ahUseANSI="False" OracleUser="AgilePoint"
OraclePassword="pass" OracleServer="[hostname]"
OracleDatabase="AgilePoint" OracleProtocol="TCP"
OraclePort="1521"/>
```

- OracleUser="**AgilePoint**"– The user ID for your database.
- OraclePassword="**pass**" – The password for your database.
- OracleDatabase="**AgilePoint**" – The service name or ID for your database.
- OraclePort="**1521**" – The port number for your database.

11. Restrict the access for the users for the databases from which you collect data (not the users to **connect** and **resource**.
12. In the **web.config** file in the virtual folder for the Enterprise Manager web application, add the following element as a child of **<appSettings>** with the correct AgileReports URL:

```
<add key="AgileReportUrl"
value="http://[AgileReports domain name and port number]/AgileReports/
Default.aspx"/>
```

13. (Oracle only) If you are using Oracle, copy the report files (files with the file nameahReport*.lgx) that are provided in **AgileReports_Oracle.zip**, and paste them in the folder **[AgileReports Virtual Directory]_Definitions_Reports**

Using AgileReports for the First Time

Once you have completed this procedure, you can open AgileReports from the Enterprise Manager home page.

When you open AgileReports for the first time, your reports are available under the **All Personal Reports** section. From there, you can move them to My Personal Reports or Shared Reports. See the AgileReports online help for more information.

Install AgilePoint InfoPath Integration

To install AgilePoint InfoPath Integration, do the following.

1. Log on to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint InfoPath Integration**.
5. Click **Next** in the AgilePoint InfoPath Integration window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint InfoPath Integration\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Install AgilePoint Office Client Integration

To install AgilePoint Office Client Integration, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Office Client Integration**.
5. Click **Next** in the AgilePoint Office 12 Client Setup window.
6. Select the type of AgilePoint Server installation you are using (**IIS** or **Windows Service**), and click **Next**.
7. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Office12 Client\
8. Click **Next**.
9. The installer is now ready to install the application. Click **Next** to install.
10. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
11. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Install AgilePoint Outlook Integration

To install AgilePoint Outlook Integration, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link that is most appropriate for your system.
4. Click the link for the **AgilePoint Outlook Integration** type that is most appropriate for your system.
5. Click **Next** in the AgilePoint Office 12 Client Setup window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Outlook Integration\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Installing AgilePoint Data Services

This section provides detailed instructions for installing the AgilePoint Data Services component of the AgilePoint BPMS Suite.

Install AgilePoint Data Services

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link.
4. Click the link for **AgilePoint Data Services** that is most appropriate for your system.
5. Click **Next** in the AgilePoint Data Services Setup window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Data Services\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.

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

Setting Up AgilePoint Data Services

After installing the AgilePoint Data Services and prior to using this AgileConnector, do the following to set up AgilePoint Data Services.

Configure Data Service

Before starting the Data Services Windows service, do the following to configure the Data Service:

1. In the installation directory for AgilePoint Data Services (by default, C:\Program Files\AgilePoint \AgilePoint Data Services), run the script **DataServiceConfiguration.exe**.
2. On the **AgilePoint Data Services Configuration** window, complete the following fields:
   - **Database Type** – The type of database you want to use for AgilePoint Data Services. **Microsoft SQL Server** or **Oracle Database**.
   - **Database Authentication** – Indicates the database **User** name, **Password**, and whether **Integrated Security** is used.
   - **Database Location** - The database to which the data will populate. This can be an existing database, the AgilePoint database, or a new database.
   - **Enable Data Population** – If selected, allows application data to be written to the database.
   - **Enable Data Tracking** – If selected, allows changes to application data to be tracked.
   - **Time Interval** - The timer interval used by the Windows Service to check for any new entries in the database. On a production system, this can be set to a high interval like 3600 (i.e. one hour).
   - **Server URL** - The AgilePoint Server URL.
     - **Windows Service** – Open the file **Ascentn.AgilePoint.WCFService.exe.config** in [Windows Service installation location]\bin. You can find the Windows Service installation location in the Server Manager window in the Location field for the service instance.
     - **IIS** – In the IIS Manager, Browse **AgilePoint Server > workflow.asmx**. The URL appears in the Location field in your web browser.
   - **Hosting Mechanism** – IIS or Windows Service, depending on your AgilePoint Server installation type.

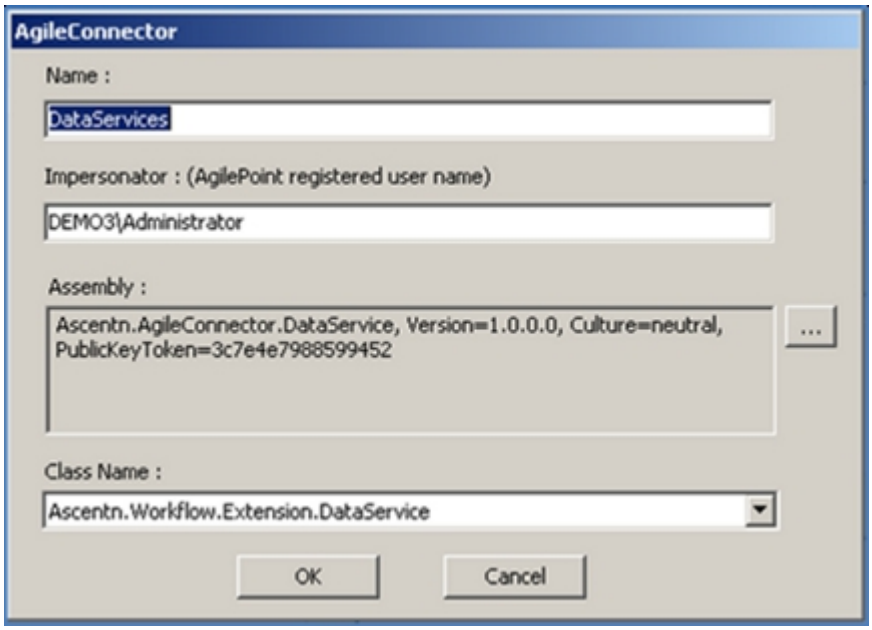
     If you are running AgilePoint Server as a Windows Service, indicating Windows Service creates the binding between the Data Services component and the AgilePoint Server. This setting is required.
3. To create database tables and save the Data Services configuration, click **OK**.

   This creates tables named **WF_DATA_SERVICE_TEMPDB**, **WF_DATA_SERVICE_ERRORDB**, and **WF_DATA_TRACKING** in the specified database.

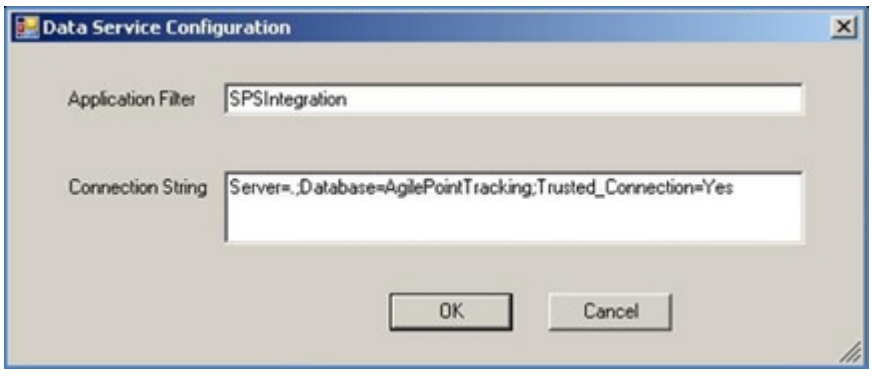
Enable the Data Services Extension

To enable this 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** field should be set to **SPSIntegration** for InfoPath applications, for ASP.NET applications, set the **Application** 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**.

You can configure multiple AgileConnectors to service different applications or use the same one across applications. To use the same AgileConnector, give the names of all the applications separated by a semicolon (;).

Start the Service

To start the service:

1. In Windows, open the **Services** window.
2. In the **Services** window, right-click **AgilePointDataServices**, and click **Properties**.
3. On the **Properties** dialog box, click the **Log On** tab.
4. On the **Log On** tab, select **This account**, and enter the credentials for an account that has database ownership privileges to the database for AgilePoint Data Services.
5. Click the **General** tab.
6. On the **General** tab, click **Start**.
7. Click **OK**.

Modify the Enterprise Manager web.config

To modify the Enterprise Manager web.config

1. Add an element under <AppSettings> in the Enterprise Manager web.config file.

Element to be added :

```
<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

Using Data Population for the First Time

For Data Population, create a table in a database that is specific for the application, and create the table columns based on the fields from the form, the Primary Key should be the Process Instance ID.

The Database connection string and the table information for Data Population are configured in the Process Template in AgilePoint Envision.

Install AgilePoint Deployment Services

You must install two components of the AgilePoint Deployment Services module (i.e. Install the Service module on the AgilePoint Server machine(s), and the Client module on any Client machines that will use this functionality). To install AgilePoint Deployment Services, do the following:

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link.
4. Click the link for **AgilePoint Deployment Service** to install AgilePoint Deployment Services component on the Server machine(s).
5. Click **Next** in the AgilePoint Deployment Service window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Deployment Service\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
11. Start the Service on each Server.
12. Return to the installer window and click the **AgilePoint Utilities and Other Support Files** link.
13. Click the link for **AgilePoint Deployment Utility** to install AgilePoint Deployment Services Utility on the Client machines.
14. Click **Next** in the AgilePoint Deployment Utility window.
15. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Deployment Utility\
16. Click **Next**.
17. The installer is now ready to install the application. Click **Next** to install.
18. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
19. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Installing iNet BPS for SAP Integration

iNet BPS is a third-party software product used to enable SAP Integration with AgilePoint BPMS. If you have purchased SAP Integration (an add-on component that requires an additional license), AgilePoint will provide an email with license keys and download instructions.

To ensure a successful installation and integration experience, AgilePoint's development partner ERP-Link (http://erp-link.com) requests to provide support directly to you during your installation.

Once you have completed the iNet BPS installation, you must set up the AgileConnector and configure the SAP integration. For more information, see SAP Integration on the AgilePoint Support Portal.

Installing AgilePoint Configuration H

This section provides instructions for installing each component of the AgilePoint Suite with the following conditions:

Document Variant	NLB or Single Server?	IIS or Windows Service Mode?	.NET 3.5 or 4.0?
Configuration H	Single Server	Windows Service	4.0

Prerequisites

Before installing the AgilePoint system, you must comply with the following prerequisites.

New Installations Only

This section assumes that you are installing each component of the AgilePoint BPMS Suite on a computer that does not have any version of that component already installed. If you do already have any version of a component installed on the target computer, see Upgrade Guide on the AgilePoint Support Portal.

Pre-Installation Complete

Before installing any of the components of the AgilePoint BPMS Suite, please ensure you have read and completed the checklist items in the **AgilePoint Pre-Installation Guide**, this is a requirement and will ensure a successful installation.

For more information, see Pre-Installation Guide on the AgilePoint Support Portal.

Local Installation Files

Make sure that the installation files are located on one of the computer's local drives. If you attempt to run the installation directly from a network, the installation may fail. If you do attempt to install when the installation file(s) are located on a network drive (or some other remote location), the setup application may fail to run with an error message similar to the following: "An exception 'System.Security.Policy.PolicyException' has occurred in Setup. "

Installing AgilePoint Server

Use the procedures in this section to set up an AgilePoint Server machine for your environment. This section provides instructions for installing and configuring all the core components on the AgilePoint Server machine.

Install AgilePoint Server

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system – 32 bit or 64 bit.
4. Click **AgilePoint Server**.
5. Click the installation type you want: **AgilePoint Server (IIS)** or **AgilePoint Server (Windows Service)**.
6. Click **Next** in the AgilePoint Server window.
7. Again, click **Next** in the AgilePoint Server window.
8. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
9. Do one of the following, depending upon whether you are performing an IIS Web Site or as a Windows Service:
   - **IIS:**
     1. Select the AgilePoint Server Web site for which you would like to install AgilePoint Server.
     2. Enter a virtual directory name. The default is **AgilePointServer**.
     3. In the **Application Pool** list, select the application pool you want to use.
     4. Click **Next**.
   - **Windows Service:**
     1. Specify the location for your installation, and click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Setting up AgilePoint Server to Run as a Windows Service

1. To open the **AgilePoint Server Manager**, click **Start > All Programs > AgilePoint > AgilePoint Server Manager**.
2. On the **AgilePoint Server Manager** window, click the **Add** (+) button to create an instance of the AgilePoint Server service.
3. In the right pane, complete the fields as required.
   - **Service Name** – The name you want to use to identify the Windows service associated with the AgilePoint Server instance.

- **Display Name** – The name you want to display to users to identify the AgilePoint Server instance.
- **Location** - The path to which you want to create the AgilePoint Windows Service instance.
- **Ports** – Any two free, unique ports. When running as a Windows service, AgilePoint Server can bind with other applications using either HTTP or TCP. Provide a port number for each type of connection. Do not use the port for your AgilePoint web application. Click **Check Availability** to determine if the ports you entered are free.
- **User Name** and **Password** - Enter the credentials for the authenticated AgilePoint Server user.
- **Site** - The web site you created for AgilePoint during pre-installation.
- **Virtual Directory** - The name you want to use for the virtual directory that contains the files for the Enterprise Manager web application.
- **Application Pool** - The application pool for the Enterprise Manager web application you want to run.

4. When you have finished, click **Update**.
5. If you are prompted to activate the AgilePoint Server, follow the prompts to activate your AgilePoint Server software.
6. The **AgilePoint Configuration** window opens. Follow the procedure to **Configure AgilePoint Server**.

Configure AgilePoint Server

1. To open the **AgilePoint Server Configuration** utility, do one of the following:
   - If you have just added a new Windows Service instance, this window opens automatically.
   - If you are installing on IIS, click **Start > All Programs > AgilePoint > AgilePoint Server Configuration**.
   - If you are configuring an existing Windows Service installation, click **Start > All Programs > AgilePoint > AgilePoint Server Manager**. In the **AgilePoint Server Manager** window, select the Windows Service instance you want to configure, and click the **Configuration** icon.
2. The **System** tab allows you to configure the AgilePoint System User and default email notification behavior. The System area allows you to specify the identity and authentication information for the AgilePoint system user, and the maximum number of threads that AgilePoint will be able to use at runtime while handling workflow requests. The Notification area allows you to specify the default values for certain email notification settings.
3. Do one of the following:
   - Check the **Active Directory** check box if you are configuring AgilePoint Server on a network controlled by a Windows Server Domain Controller. This will use Active Directory lookup to validate the user in Active Directory.
   - Leave the **Active Directory** check box unchecked if you will be using a local machine account for the AgilePoint system user.

4. Enter the AgilePoint **System User** name and **Password**.
   - If you checked the **Active Directory** check box above, enter the domain **User Name** and **Password**.
   - If you did not check the **Active Directory** check box above, this should contain a local machine account **User Name** and **Password** that you would use when logging into Windows.
5. Enter the **Thread Pool Size**. The Thread Pool Size should be set to the number of Concurrent User Licenses purchased for the server or the number of threads that the physical hardware will support. Use the most limiting of the two numbers.

   For more information, see Configuring the AgilePoint Server Thread Pool Size on the AgilePoint Support Portal.
6. Configure the Notification settings as appropriate for your environment.
   - Enter the SMTP Server information obtained during the pre-installation setup.
   - Enter the SMTP email address for the default Email Sender (i.e. the From address on AgilePoint email notifications).
   - Enter the System User Email. This is the email that will be used to send system notifications if the AgilePoint Server is encountering operational errors.
7. Click the **Database** tab and configure the settings as appropriate for your environment.
8. Do one of the following:
   - Check the **Integrated Security** check box to use Windows Authentication and the Application Pool Identity of AgilePoint Server (APServiceAccount) to authenticate to the database.
   - If using SQL Authentication, enter the SQL user account and password.
9. Enter the Database Server and enter the AgilePoint Database Name or click the **Ellipses** button to retrieve the database names and select the AgilePoint Database. The AgilePoint System User is used to connect to the database during configuration. Therefore, the AgilePoint System User must have db_owner privileges on the AgilePoint Database.
10. The Connection Pool Size must be a minimum of 100 and should be at least 2 times the Thread Pool Size configured on the System tab.
11. (Oracle DB Only) If you are employing an Oracle database, open the Oracle Net Configuration Assistant utility, and configure the Oracle Local Service as necessary. If the Local Service Name has changed, you will need to also update the AgilePoint Server Configuration utility Database tab with the new Oracle Local Service Name.
12. (Optional) Click the **Work Calendar** tab, and configure the settings as appropriate for your environment. This configuration is used in processes for duration assignment or due date.
13. Click **OK** to complete the configuration.

Check the AgilePoint Monitor Service

1. Verify the pre-installation steps
2. Click **Start > Run**, and enter **services.msc**.

3. In the **Services** window, ensure the AgilePoint Monitor Service is started.
   - In an IIS environment, the name is **AgilePoint Server Monitor**.
   - In a Windows Service environment, the name is the name of the service you created in AgilePoint Server Manager.
4. If it is not started, right-click on the AgilePoint service name, and click **Start**.

Configure the SMTP Server Account

AgilePoint uses anonymous SMTP by default. The AgilePoint Server **netflow.cfg** file will now need to be edited to provide the user name and password to use with SMTP for user authentication.

1. Open the **netflow.cfg** file in a text editor such as Notepad.
2. Locate the **Notification** section and modify it to look something like this:

```
<notification
mode="true"
format="text"
smtpService="BuiltIn::username@sbcglobal.net,password1"
mailServer="smtp.sbcglobal.yahoo.com"
sender="NETSVR2@agilepoint.com"
sysadm="adminuser@agilepoint.com">
```

   Where username@sbcglobal.net is the user name provided to you by your ISP and password1 is the password provided to you by your ISP.

Verify the AgilePoint Server Installation

Windows Service installation is verified by opening Enterprise Manager. In a Windows Service installation, Enterprise Manager is installed in the background along with AgilePoint Server.

To verify a Windows Service AgilePoint Service installation, open Enterprise Manager from the AgilePoint Server Manager for the AgilePoint Server instance you want to test. Ensure you can **log on** to Enterprise Manager successfully without errors.

If Enterprise Manager does not open properly, or you cannot log in, please verify the installation steps.

Add User Accounts

You must add the following user accounts to Enterprise Manager.

Add the SharePoint Impersonator User Account to AgilePoint

This is the domain-qualified user account that SharePoint will use to interact with AgilePoint Server at runtime.

This step is required if you are installing the AgilePoint SharePoint Integration, and you are not using the same user account for the AgilePoint System User and the SharePoint Impersonator User. If you are using the same user account for the AgilePoint System User and the SharePoint Impersonator User, you can skip this part.

1. Log on to Enterprise Manager.
2. On the AgilePoint **Enterprise Manager Main Page**, click the **Users** link.
3. Click the **Add** link.
4. Enter the SharePoint Impersonator User Account information and click **OK**.
5. Navigate back to the Main Page, and click the **Roles** link.
6. Click the **Add Role** button.
7. Enter **SharePoint Impersonator** as the Role Name, and give this Role **Initiate a process** and **Cancel a process** rights and click **OK**.
8. Click the **SharePoint Impersonator** Role link.
9. Click the **Add Users(s) as Member** button.
10. Select the **SharePoint Impersonator** User Account and click **OK**.

Add the AgilePoint Server Service User Account to AgilePoint

1. On the AgilePoint Enterprise Manager Main Page, click the **Users** link.
2. Click the **Add** link.
3. Enter the AgilePoint Server Service User Account and click **OK**.
4. Navigate back to the Main Page and click the **Roles** link.
5. Click the **Administrators** link and add the AgilePoint Server Service User Account to the AgilePoint Administrators Role.
6. Close AgilePoint Enterprise Manager.

Install AgilePoint Envision

To install AgilePoint Envision, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Envision**.
5. Click **Next** in the AgilePoint Envision window.
6. Again, click **Next** in the AgilePoint Envision window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.

   Select the type of AgilePoint Server installation you are using (**IIS** or **Windows Service**), and click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Envision\

9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
14. To open AgilePoint Envision click **Start** > **Programs** > **AgilePoint** > **AgilePoint Envision**.

Install AgilePoint Developer

To install AgilePoint Developer, do the following.

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgilePoint…** link that is most appropriate for your system.
4. Click the link for **AgilePoint Developer**.
5. Click **Next** in the AgilePoint Developer window.
6. Again, click **Next** in the AgilePoint Developer window.
7. Click the **I Agree** radio button after reading the license agreement. Then click **Next**.
8. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Developer
9. Click **Next**.
10. Enter your customer information and License Key. Then click **Next**.
11. The installer is now ready to install the application. Click **Next** to install.
12. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
13. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
14. To start AgilePoint Developer, open the Microsoft Visual Studio.NET application as you would normally.

Installing AgilePoint Data Services

This section provides detailed instructions for installing the AgilePoint Data Services component of the AgilePoint BPMS Suite.

Install AgilePoint Data Services

1. Login to Windows using a user login that belongs to the local system's Administrators group.

2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **AgilePoint Utilities and Other Support Files** link.
4. Click the link for **AgilePoint Data Services** that is most appropriate for your system.
5. Click **Next** in the AgilePoint Data Services Setup window.
6. (Optional) Enter an installation folder name. The default is: C:\Program Files\AgilePoint\AgilePoint Data Services\
7. Click **Next**.
8. The installer is now ready to install the application. Click **Next** to install.
9. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
10. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Setting Up AgilePoint Data Services

After installing the AgilePoint Data Services and prior to using this AgileConnector, do the following to set up AgilePoint Data Services.

Configure Data Service

Before starting the Data Services Windows service, do the following to configure the Data Service:

1. In the installation directory for AgilePoint Data Services (by default, C:\Program Files\AgilePoint \AgilePoint Data Services), run the script **DataServiceConfiguration.exe**.
2. On the **AgilePoint Data Services Configuration** window, complete the following fields:
    - **Database Type** – The type of database you want to use for AgilePoint Data Services. **Microsoft SQL Server** or **Oracle Database**.
    - **Database Authentication** – Indicates the database **User** name, **Password**, and whether **Integrated Security** is used.
    - **Database Location** - The database to which the data will populate. This can be an existing database, the AgilePoint database, or a new database.
    - **Enable Data Population** – If selected, allows application data to be written to the database.
    - **Enable Data Tracking** – If selected, allows changes to application data to be tracked.
    - **Time Interval** - The timer interval used by the Windows Service to check for any new entries in the database. On a production system, this can be set to a high interval like 3600 (i.e. one hour).
    - **Server URL** - The AgilePoint Server URL.
        - **Windows Service** – Open the file **Ascentn.AgilePoint.WCFService.exe.config** in [Windows Service installation location]\bin. You can find the Windows Service installation location in the Server Manager window in the Location field for the service instance.

- **IIS** – In the IIS Manager, Browse **AgilePoint Server > workflow.asmx**. The URL appears in the Location field in your web browser.

- **Hosting Mechanism** – IIS or Windows Service, depending on your AgilePoint Server installation type.

  If you are running AgilePoint Server as a Windows Service, indicating Windows Service creates the binding between the Data Services component and the AgilePoint Server. This setting is required.

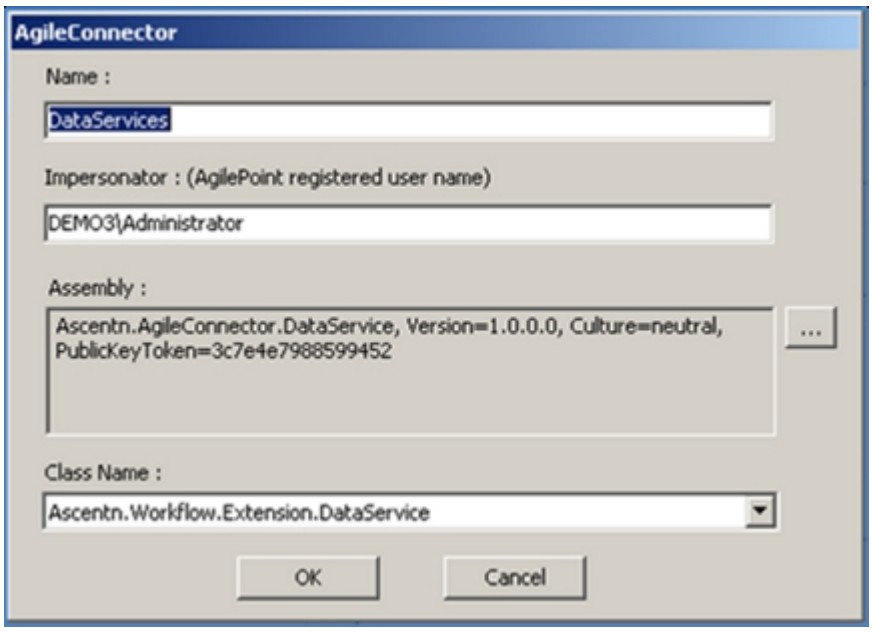
3. To create database tables and save the Data Services configuration, click **OK**.

   This creates tables named **WF_DATA_SERVICE_TEMPDB**, **WF_DATA_SERVICE_ERRORDB**, and **WF_DATA_TRACKING** in the specified database.

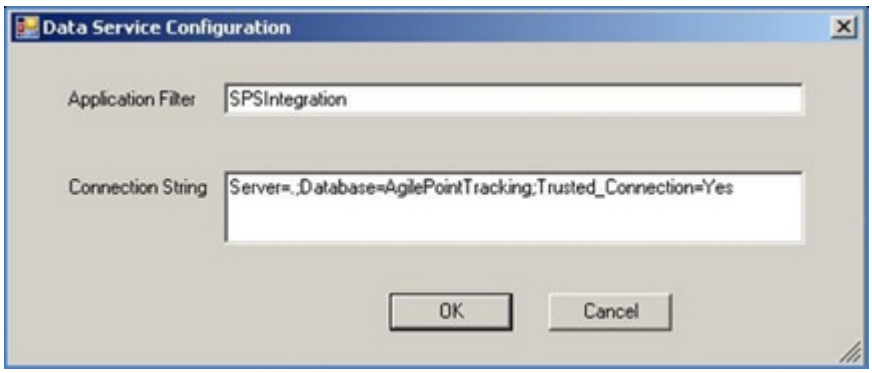
Enable the Data Services Extension

To enable this 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** field should be set to **SPSIntegration** for InfoPath applications, for ASP.NET applications, set the **Application** 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**.

You can configure multiple AgileConnectors to service different applications or use the same one across applications. To use the same AgileConnector, give the names of all the applications separated by a semicolon (;).

Start the Service

To start the service:

1. In Windows, open the **Services** window.
2. In the **Services** window, right-click **AgilePointDataServices**, and click **Properties**.
3. On the **Properties** dialog box, click the **Log On** tab.
4. On the **Log On** tab, select **This account**, and enter the credentials for an account that has database ownership privileges to the database for AgilePoint Data Services.
5. Click the **General** tab.
6. On the **General** tab, click **Start**.
7. Click **OK**.

Modify the Enterprise Manager web.config

To modify the Enterprise Manager web.config

1. Add an element under <AppSettings> in the Enterprise Manager web.config file.

Element to be added :

```
<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

Using Data Population for the First Time

For Data Population, create a table in a database that is specific for the application, and create the table columns based on the fields from the form, the Primary Key should be the Process Instance ID.

The Database connection string and the table information for Data Population are configured in the Process Template in AgilePoint Envision.

Activating AgilePoint Licenses

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

- AgilePoint Envision
- AgilePoint Developer
- AgilePoint Server

Activating Over the Internet

Internet activation is recommended for all machines with Internet connections.

Prerequisites

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

Navigation

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

Instructions

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

Your product should be activated automatically within a few seconds.

Activating Manually

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

Prerequisites

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

Navigation

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

Instructions

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

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

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

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

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

Uninstalling AgilePoint BPMS

This section provides instructions for uninstalling each component of the AgilePoint BPMS Suite.

Uninstall AgilePoint Server

Uninstalling the AgilePoint Server component will not remove or affect the workflow database. If you wish to remove the workflow database, you must do so manually. For example, you can remove the database using SQL Server Enterprise Manager.

Prerequisites

1. If you are uninstalling an AgilePoint Server instance in a Windows Service environment, delete all AgilePoint Server service instances from the AgilePoint Server Manager. These services will not be removed automatically.
2. Manually back up the **netflow.cfg** file in your AgilePoint Server installation directory.
3. Clear the cache in your web browser on any machine where you access Enterprise Manager.
4. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
    a. Microsoft Internet Explorer
    b. Microsoft IIS

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint Server**

Uninstall Clustering Server Manager

Prerequisites

1. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
    a. Microsoft Internet Explorer

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint Clustering Server Manager**

Uninstall AgilePoint Enterprise Manager

Prerequisites

1. Clear the cache in your web browser on any machine where you access Enterprise Manager.
2. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
   a. Microsoft Internet Explorer
   b. Microsoft IIS

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint Enterprise Manager**

Uninstall AgilePoint Envision

Prerequisites

1. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
   a. Microsoft Internet Explorer
   b. Microsoft InfoPath (If it is installed)
   c. Microsoft Visio
   d. AgilePoint Envision

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint Envision**

Uninstall AgilePoint Developer

Prerequisites

1. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
   a. Microsoft Internet Explorer
   b. Microsoft Visual Studio.NET

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint Developer**

Uninstall AgilePoint InfoPath Integration

Prerequisites

1. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
   a. Microsoft Internet Explorer
   b. Microsoft InfoPath (If it is installed)

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint InfoPath Integration**

Uninstall AgilePoint Microsoft Office Client Integration

Prerequisites

1. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
   a. Microsoft Internet Explorer
   b. Microsoft Word
   c. Microsoft Excel
   d. Microsoft PowerPoint

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint Microsoft Office Integration**

Uninstall AgilePoint Outlook Integration

Prerequisites

1. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.

a. Microsoft Internet Explorer

b. Microsoft Outlook

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint Outlook Integration**

Uninstall AgilePoint SharePoint Integration v1

Prerequisites

1. Log on to the SharePoint machine as a user with sufficient privileges to access the SharePoint configuration database.
2. Manually back up the **web.config** file of your SharePoint site. The web.config for SharePoint is located under the Virtual Directory of your SharePoint Web site (C:\inetpub\wwwroot when it is installed in the default Web site).
3. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
   a. Microsoft Internet Explorer
   b. Any web pages that include the SharePoint Web Parts.
   c. Microsoft IIS
   d. Microsoft InfoPath (If it is installed)

Instructions

1. In Windows, use **Add or Remove Programs** to remove the following program:
   - **AgilePoint SharePoint Integration**
2. Open the SharePoint site that contains the AgilePoint Integration in Microsoft Office SharePoint Designer.
3. In the **_catalogs** folder, click on **wp** (Web Part Gallery).
4. Select the Web Parts and delete them.
5. Run the following command prompt to delete the AgilePoint Web Part Package.

```
stsadm –o
     deletewppack –name apwpcab.cab –url http://...
```

6. Run the following command to uninstall the AgilePoint Web Parts from the SharePoint Farm.

```
stsadm –o uninstallfeature -id
   134872ac-c2bf-4afc-b1e3-4d809934c51f –force
```

7. (Optional) The uninstallation may not remove some of the AgilePoint SharePoint Integration configuration settings from your SharePoint site's web.config file. The web.config for SharePoint can be found under the Virtual Directory of your SharePoint Web site (e.g. C:\inetpub\wwwroot when it is installed in the default web site).

If you want to remove those settings, you can manually remove the following items from your SharePoint web.config:

AgilePoint Server References:

```
<appSettings>
   <add key="AgilePointUrl" value="http://[machineName]:[portNum]/
      AgilePointServer" />
   <add key="AgilePointDomain" value="[domainname]"/>
   <add key="AgilePointUsername" value="[username]"/>
   <add key="AgilePointPassword" value="[encrypted password]"
</appSettings>
```

AgilePoint Web Part References:

```
<SafeControl Assembly="APWP, Version=2.0.2.0,
   Culture=neutral, PublicKeyToken=2f06ef94bac0a0f" Namespace="APWP"
   TypeName="*" Safe="True" />
</SafeControl>
```

8. Remove the **AP** folder at C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\TEMPLATE\LAYOUTS
9. Remove the **Ascentn.SharePoint.Common** Assembly Reference from the SharePoint web.config.
10. It is recommended to restart your system after uninstalling the AgilePoint SharePoint Integration component.

Uninstall AgilePoint SharePoint Integration v2

Prerequisites

1. Log on to the SharePoint machine as a user with sufficient privileges to access the SharePoint configuration database.
2. Manually back up the **web.config** file of your SharePoint site. The web.config for SharePoint is located under the Virtual Directory of your SharePoint Web site (C:\inetpub\wwwroot when it is installed in the default Web site).
3. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
   a. Microsoft Internet Explorer
   b. Any web pages that include the SharePoint Web Parts.
   c. Microsoft IIS
   d. Microsoft InfoPath (If it is installed)

Instructions

1. Navigate to the following directory: C:\Program Files\AgilePoint\AgilePoint Integration for SharePoint\
2. Run the **UninstallSharePointV2Integration.bat** file.

Please contact AgilePoint Support if you cannot locate this file.

3. In Windows, use **Add or Remove Programs** to remove the following program:
   - **AgilePoint SharePoint Integration**
4. Remove the **AP** folder at C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\TEMPLATE\LAYOUTS
5. It is recommended to restart your system after uninstalling the AgilePoint SharePoint Integration component.

Uninstall AgilePoint Data Services

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint Data Services**

Uninstall AgileReports

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgileReports**

Uninstall AgilePoint One Click Deployment

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint One Click Deployment**