ENABLING NEXT GENERATION AGILE, ADAPTIVE AND PROCESS-MANAGED ENTERPRISE

RELEASE NOTES

AgilePoint BPMS Version 5.0

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1. Introduction

These Release Notes cover the major enhancements for AgilePoint BPMS Version 5.0.

1.1 Disclaimer of Warranty

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2. Release Details

Release Date: May 2, 2010

2.1 Overview

This release contains changes and enhancements that affect the following specific products within the AgilePoint BPMS Suite:

- AgilePoint Server
- AgilePoint Enterprise Manager
- AgilePoint Envision
- AgilePoint Developer
- AgilePoint SharePoint Integration
- AgilePoint Office Client Integration

The most significant changes, enhancements, and new functionality include:

- AgilePoint Server as a Windows Service
- AgilePoint Developer Remodel
- AgileExtender Framework

The following **add-on components** are offered in conjunction with this release. These components require additional licenses. Please contact AgilePoint for pricing:

- **AgileReports**
- **SAP Process Integration**

2.2 Installation and Upgrade

For detailed information regarding installing and upgrading the AgilePoint BPMS Suite, see the *Installation Guide*.

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3. Enhancements for the AgilePoint BPMS Suite

3.1 Microsoft 2010 Version Product Support

AgilePoint BPMS v5.0 supports the 2010 versions of the following Microsoft products. For a complete list of supported software, see the *System Requirements Guide*.

- SharePoint
- Word
- Excel
- PowerPoint
- Outlook
- Visio
- Visual Studio

IMPORTANT: Microsoft Visio 2003 is not supported for AgilePoint BPMS v5.0. If you want to continue using Visio 2003, please use AgilePoint v4.7 SP2.

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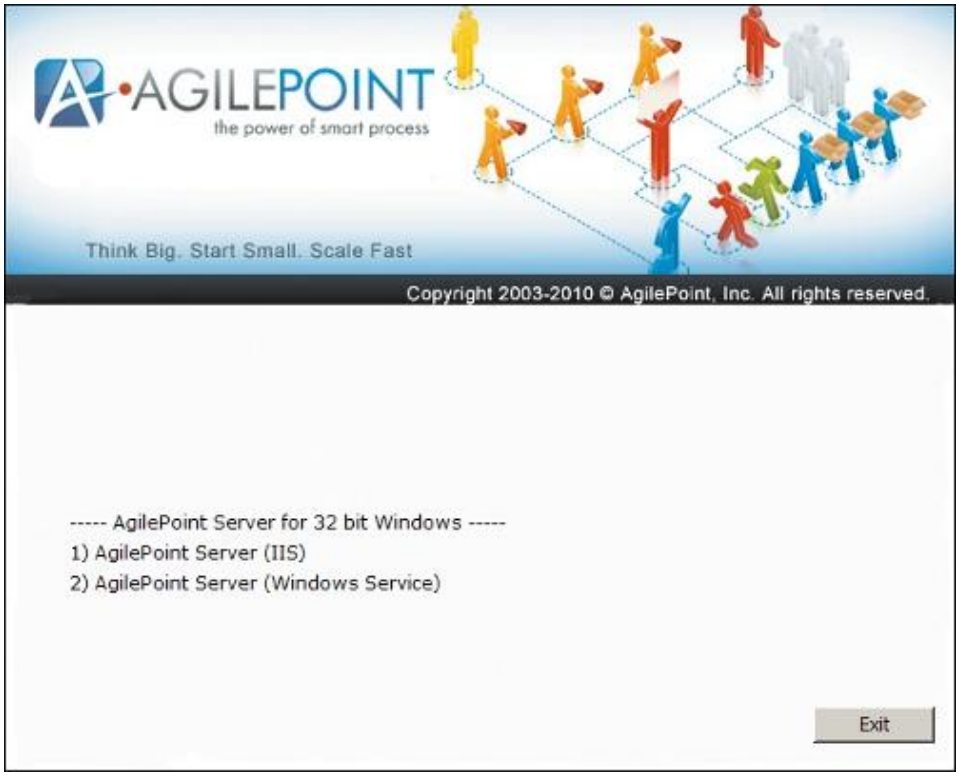
3.2 AgilePoint Server as a Windows Service

Description: AgilePoint Server can now be installed as a Windows Service. The Windows Service version allows for multiple AgilePoint Servers as well as AgilePoint Enterprise Managers to run on a single machine. Since AgilePoint Server is running as a Windows Service and using WCF as the communication mechanism, either HTTP or TCP protocol can be used.

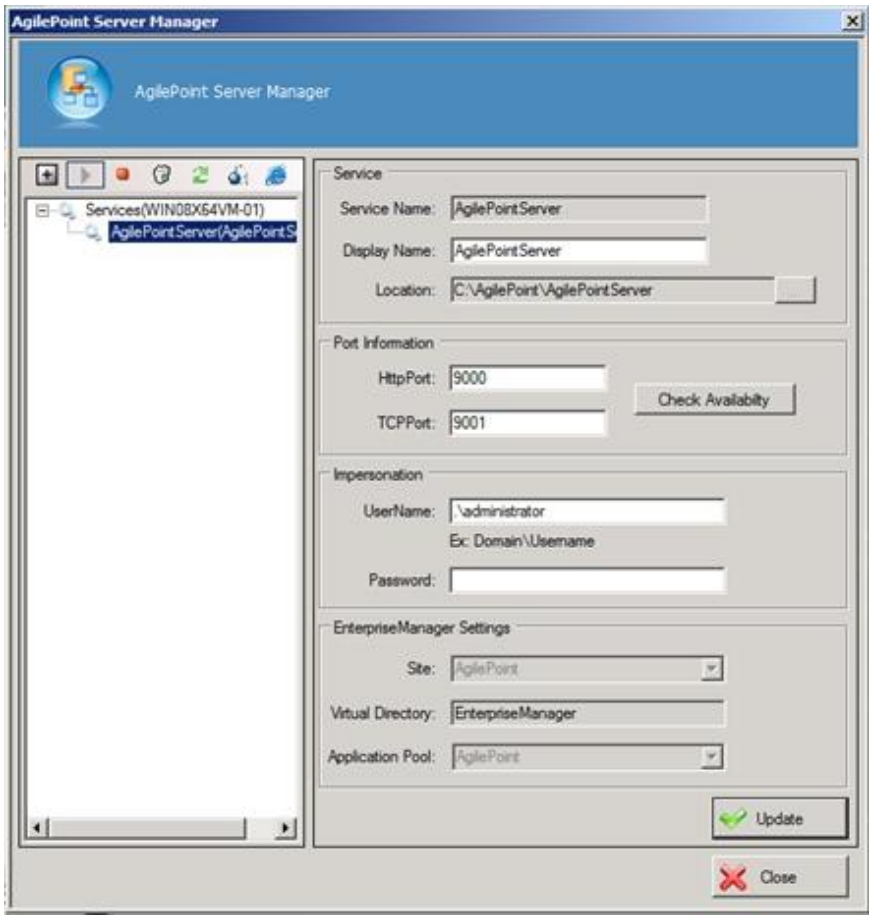
The AgilePoint installer provides the option to install either the AgilePoint Server (IIS) version same as in the past, or AgilePoint Server (Windows Service) version.



The AgilePoint Server (Windows Service) version combines the AgilePoint Server and AgilePoint Enterprise Manager installations into one operation through the AgilePoint Server Manager. You do not need to install Enterprise Manager separately from AgilePoint Server. The AgilePoint Server Manager handles this instead.

Once the AgilePoint Server (Windows Service) is installed the **Start > All Programs > AgilePoint > AgilePoint Server Manager** will provide access to the AgilePoint Server Manager.

The AgilePoint Server Manager will be used to create a new instance of an AgilePoint Server Service.



AgilePoint Server Instances can be controlled via the menu items available above the tree view.

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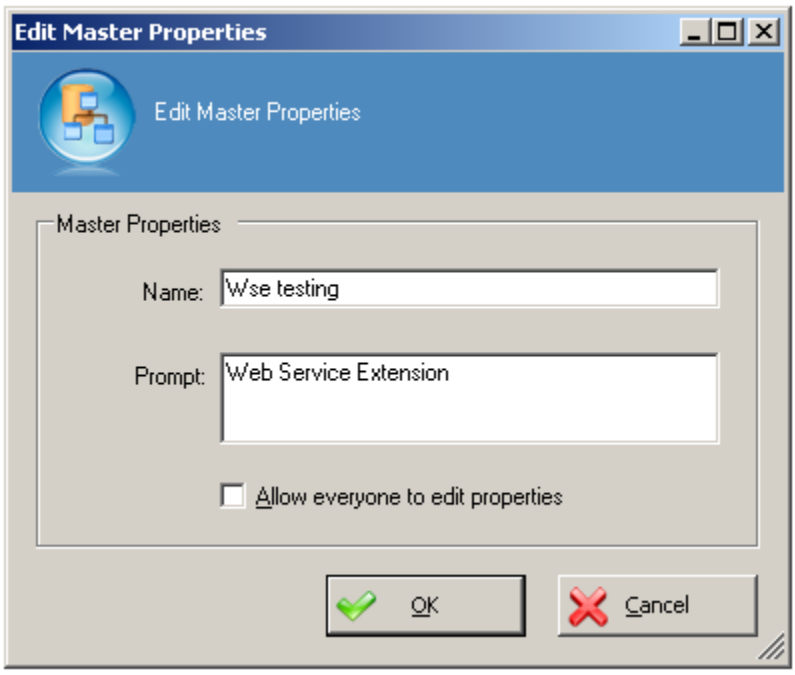
3.3 Dialog Boxes Enhanced with New Graphics and Shortcut Navigation

Description: Dialog boxes throughout the AgilePoint BPMS user interface have been enhanced with the following features, which are intended primarily to improve accessibility:

- Use keyboard shortcuts to navigate, such as **Enter**, **Esc**, and **Alt+<Letter>**.
- Buttons are larger and add icons and color.

The following image provides a simple example.



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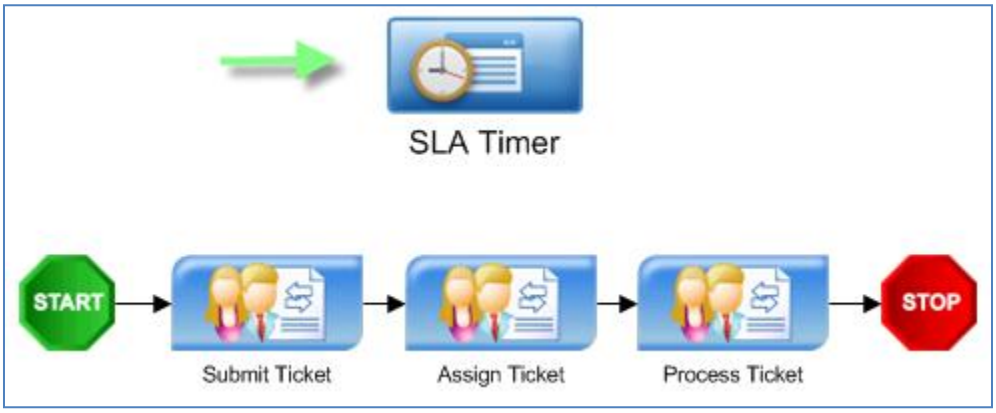
3.4 AgileExtender Framework

Description: The AgileExtender framework allows for elements to be built using AgilePoint Developer that can "overlay" the process in AgilePoint Envision, rather than being inserted in the process flow. These "overlaid" extender elements are associated with a range of in-line process elements. This new feature provides an increased level of extensibility and allows layers of powerful functionality to be added to the process without making the core process model unnecessarily convoluted or complex. The AgileExtender framework presents an event-driven module that captures process level events and activity level events. It is also able to interact with the AgilePoint engine using API.

NOTE: The new SLA AgileExtender is an example of an out-of-the-box AgileExtender provided in AgilePoint Envision.



3.5 Retry Connection on Database Deadlock

Description: If an AgilePoint API call encounters a database deadlock, it will retry the database connection.

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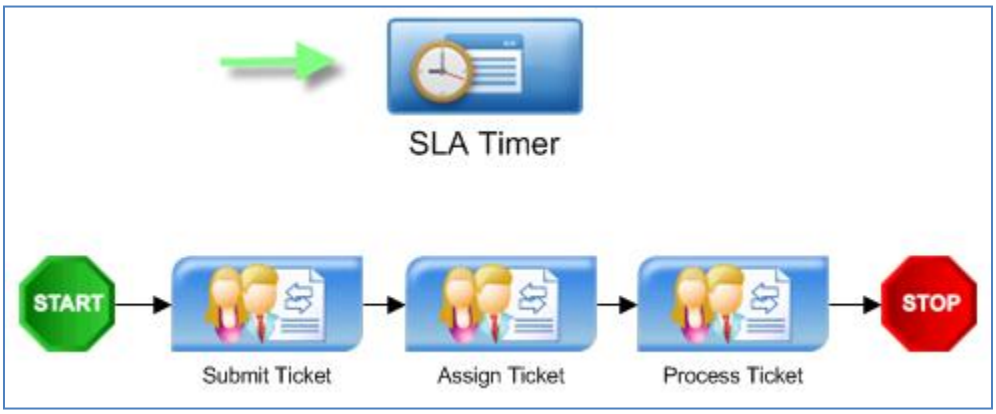
4. Enhancements for AgilePoint Envision

4.1 SLA AgileExtender

Description: Often, Service Level Agreements (SLAs) require your business to perform some action within a given amount of time or by a certain date. The SLA AgileExtender allows you to set a timer to track the time taken to complete a group of activities to ensure that the SLA is not compromised. If the time taken to complete the activities reaches a certain date or time, an email notification can be sent and/or an AgilePoint process can be initiated.

In the following sample process, the SLA timer is set up to monitor the duration from the time a ticket is submitted to the time the ticket is processed. If the time is greater than 24 hours, a support escalation is created.



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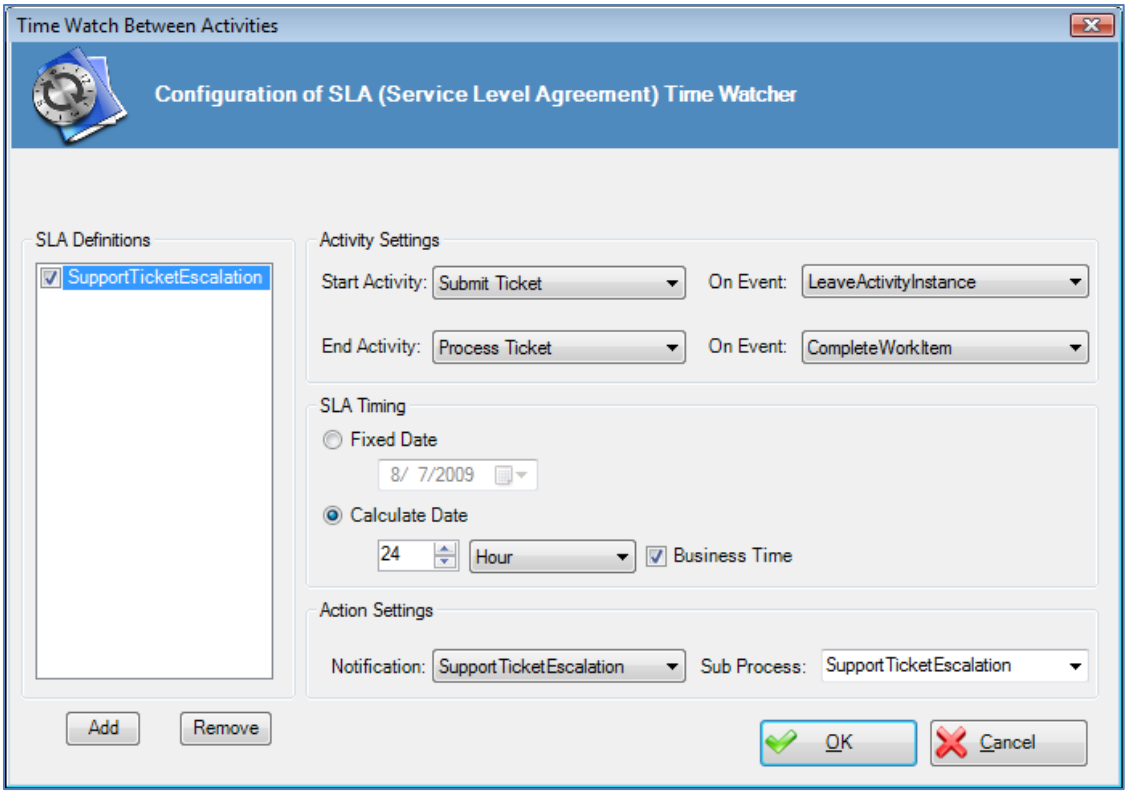
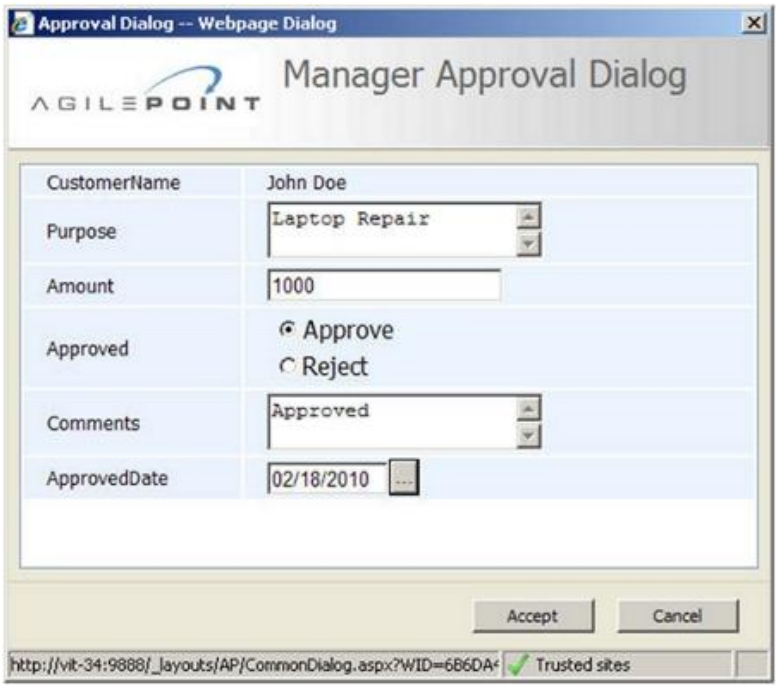
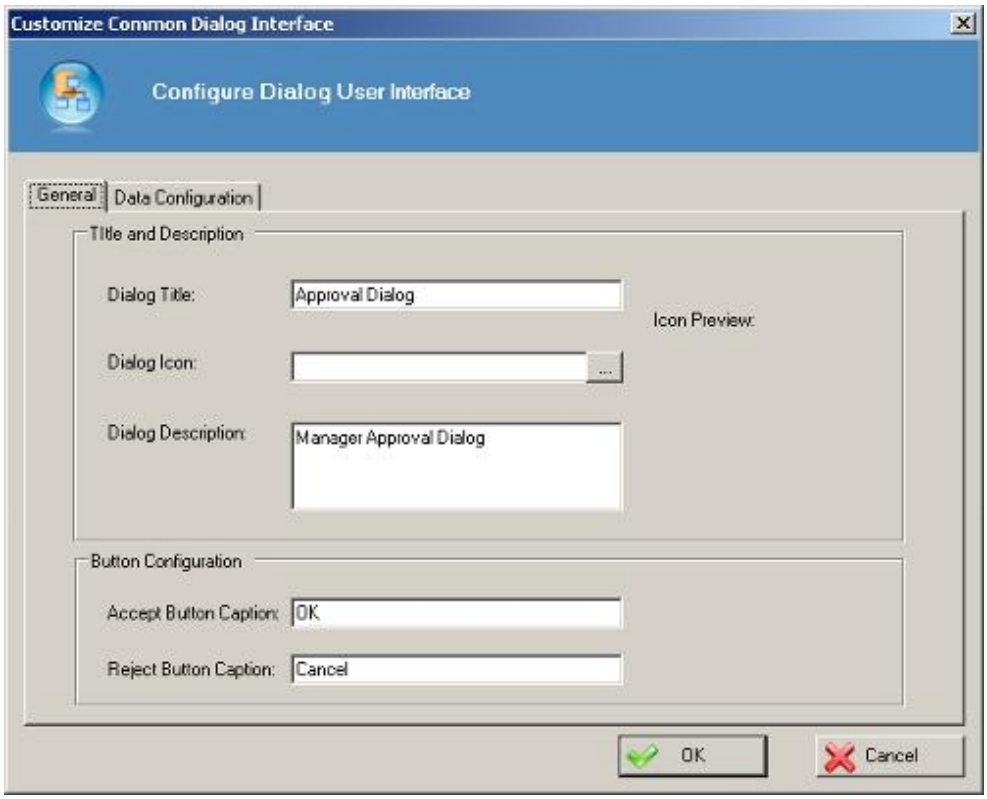

Time Watch Between Activities
Configuration of SLA (Service Level Agreement) Time Watcher
SLA Definitions
SupportTicketEscalation
Activity Settings
Start Activity:
Submit Ticket
On Event:
LeaveActivityInstance
End Activity:
Process Ticket
On Event:
CompleteWorkItem
SLA Timing
Fixed Date
8/ 7/2009
Calculate Date
24
Hour
Business Time
Action Settings
Notification:
SupportTicketEscalation
Sub Process:
SupportTicketEscalation
Add
Remove
OK
Cancel

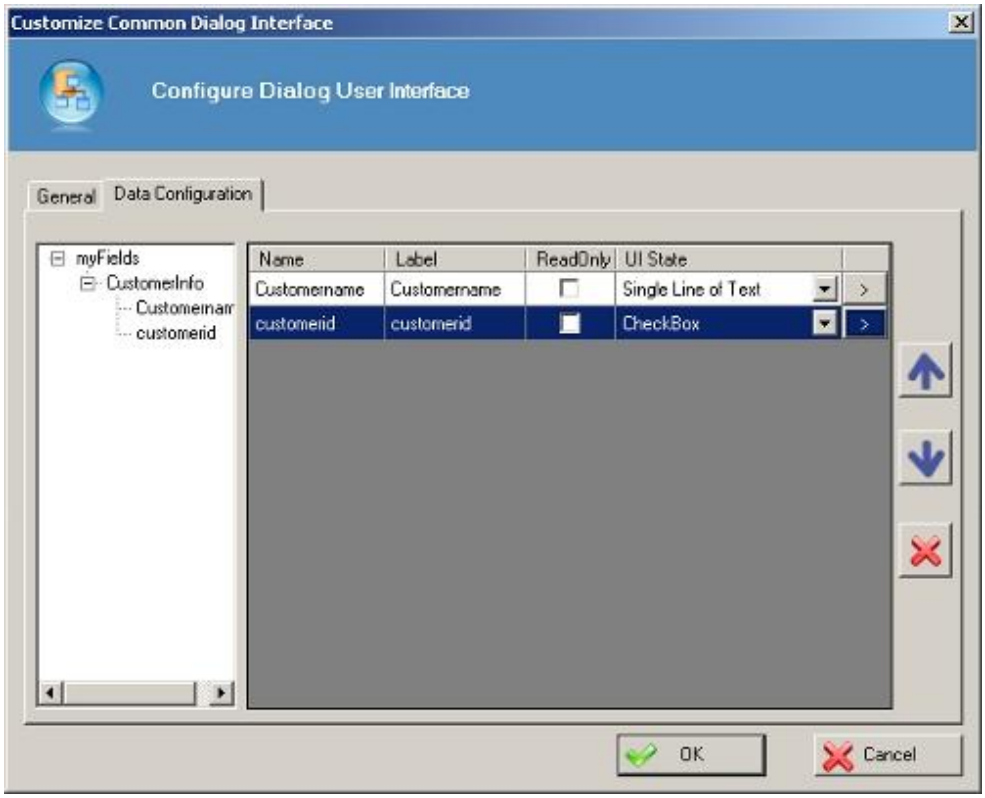
4.2 Common Dialog AgileWork

Description: The **Common Dialog** AgileWork enables Envision users to create a dialog box form in SharePoint. The most common use for this AgileShape is creating simple input or approval forms. Once you have created a Common Dialog and deployed your process, the dialog displays to a user when he or she clicks a task in SharePoint. The following image shows an approval form using a Common Dialog accessed from the SharePoint Task List.



The following image shows the configuration screens for the Common dialog AgileWork.





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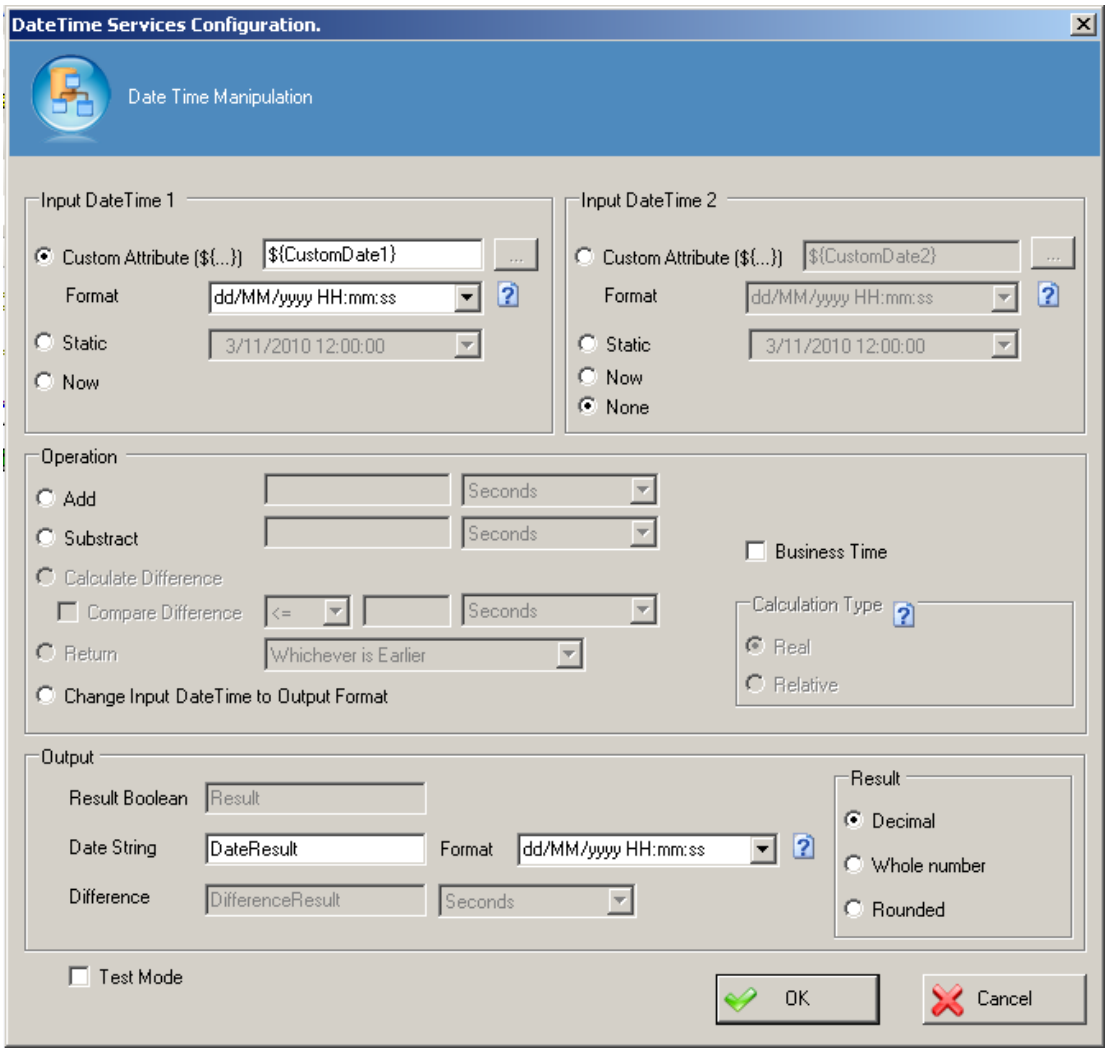
4.3 DateTime Operation AgilePart

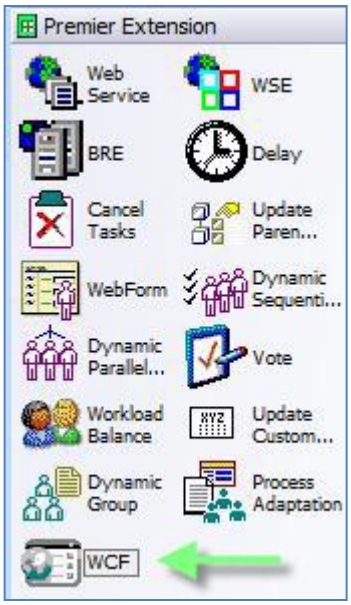
Description: The **DateTime Operation** AgilePart enables Envision users to perform complex date calculations within a process model using a simple graphical user interface. The DateTime Operation AgilePart is available from the **Miscellaneous** stencil in AgilePoint Envision.

The DateTime Services AgilePart can manipulate the operations between two DateTime input values or add extra values (second/minute/hour/days etc) to one DateTime value.

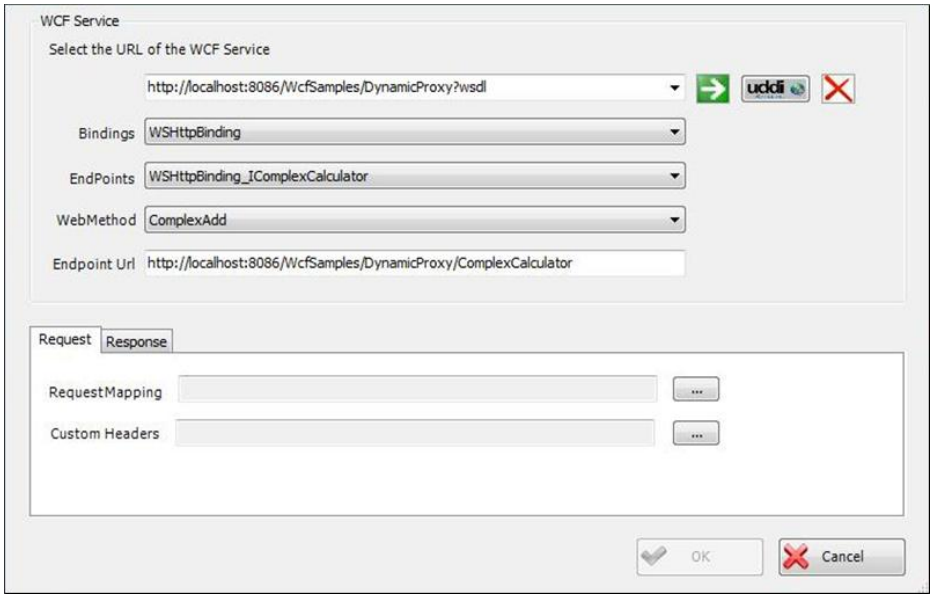


4.4 WCF AgilePart

Description: A new WCF AgilePart has been added to the Premier Stencil that enables you to call WCF enabled services.



The Configuration window allows you to connect to the WCF Service and configure the input (request) and output (response) parameters. Type the URL of the WCF Service and then click the green arrow to connect to it. Next, choose the Bindings, Endpoints, Web Method, and Endpoint URL.



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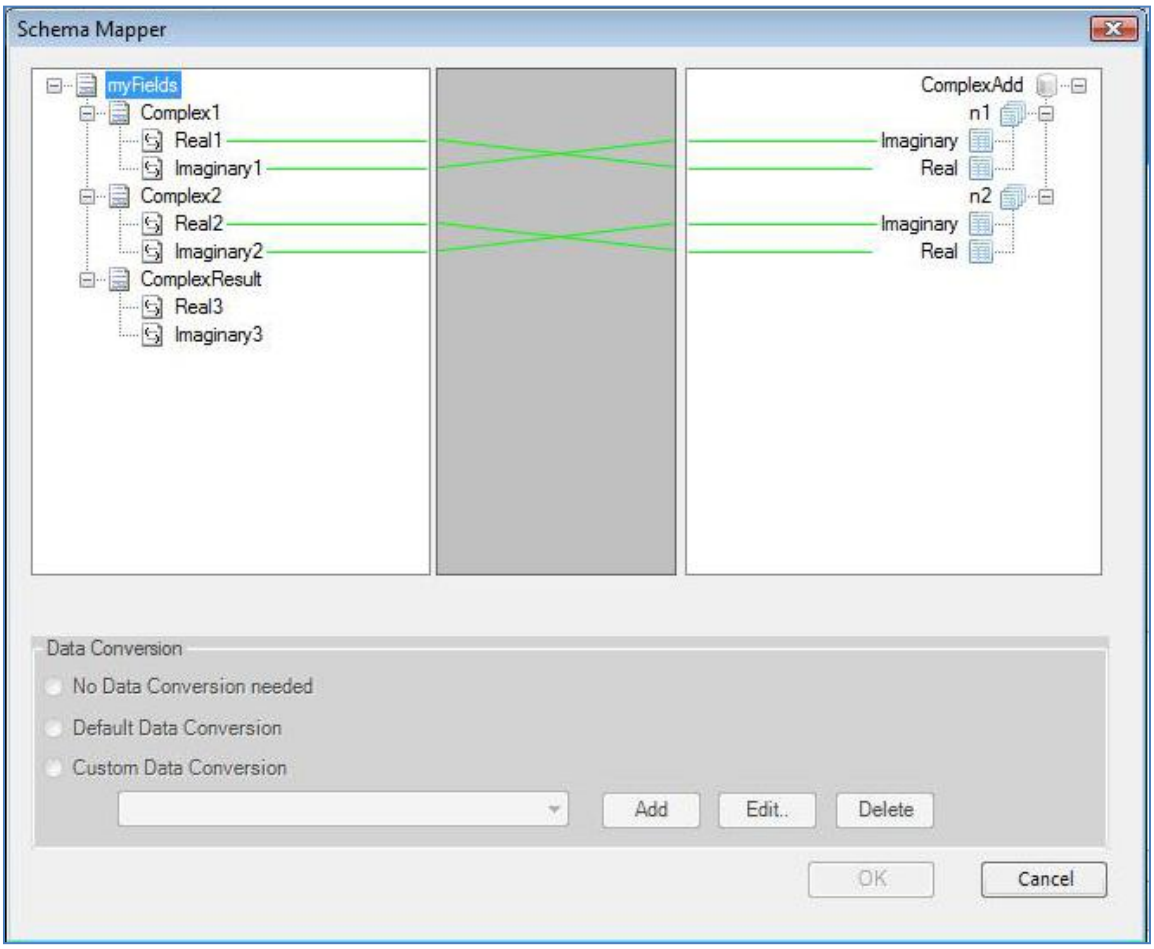
Configure the Request Mapping by mapping the application schema nodes to the WCF Service definition input parameters.



Configure the Response Mapping by mapping the output parameters from the WCF Service to the application schema.

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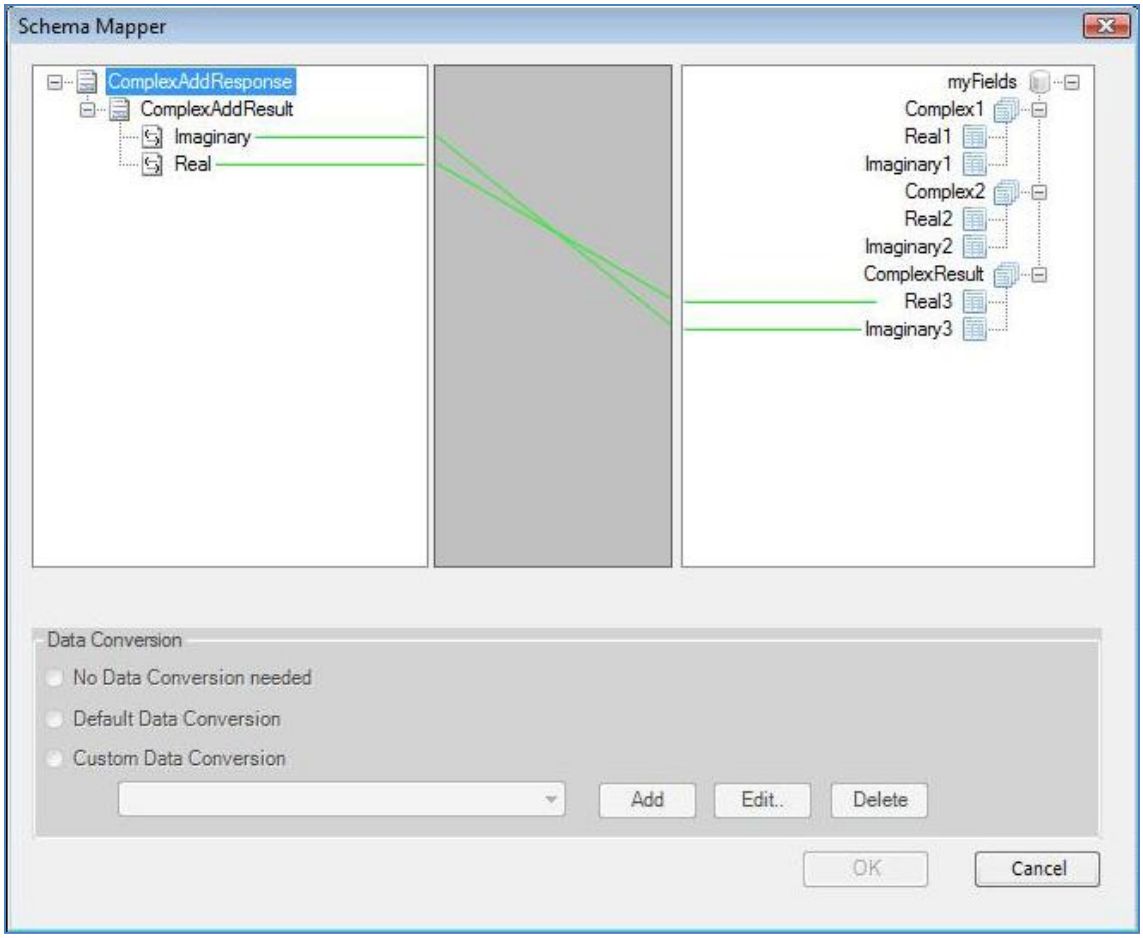

If the output type is an InfoPath form, the results from the operations performed by the WCF AgilePart are automatically updated in the InfoPath form.

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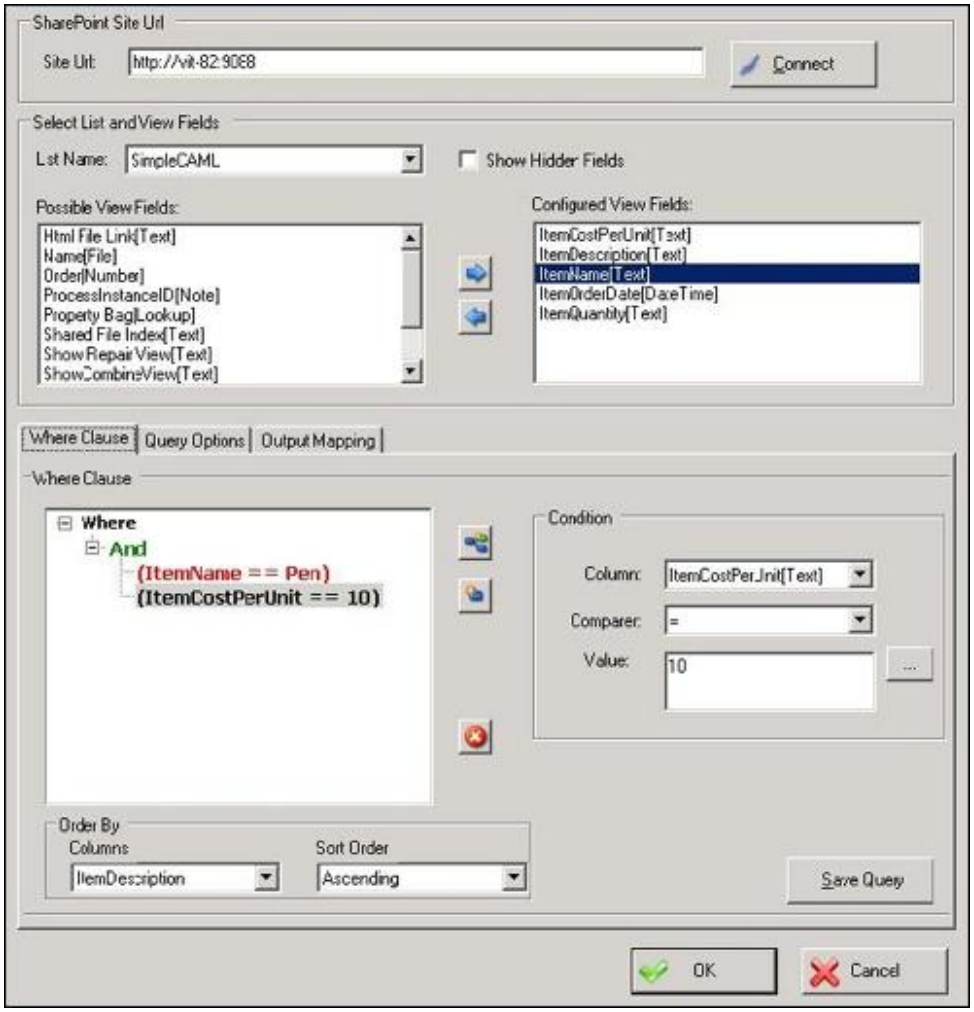
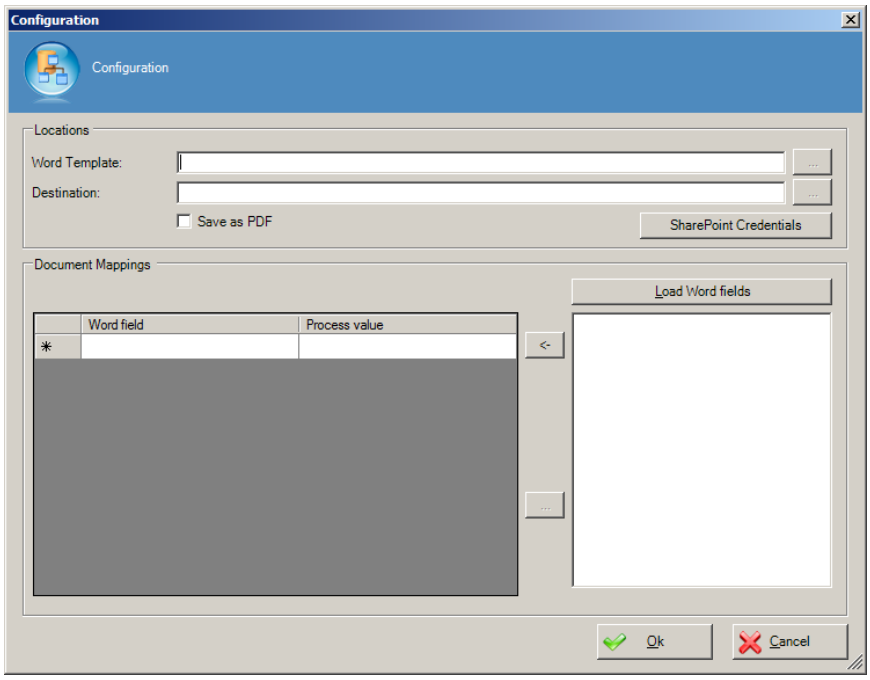
4.5 CAML Query Builder AgilePart

Description: AgilePoint Envision includes a new AgilePart that enables you to create a SharePoint view based on available fields using a CAML query. You can use the CAML Query Builder AgilePart to create your CAML query, and your view.



4.6 Word AgilePart

Description: The Word AgilePart enables Envision users to create Word documents (.doc or .docx files) or PDF files from Word templates (.dot or .dotx files), filling from the template in fields with values you specify in the generated document.



NOTE: In pre-release versions of the Word AgilePart, as well as the PDF AgilePart, customers were required to purchase a separate license from Aspose. These additional licenses are no longer required for Envision v5.0 and higher.

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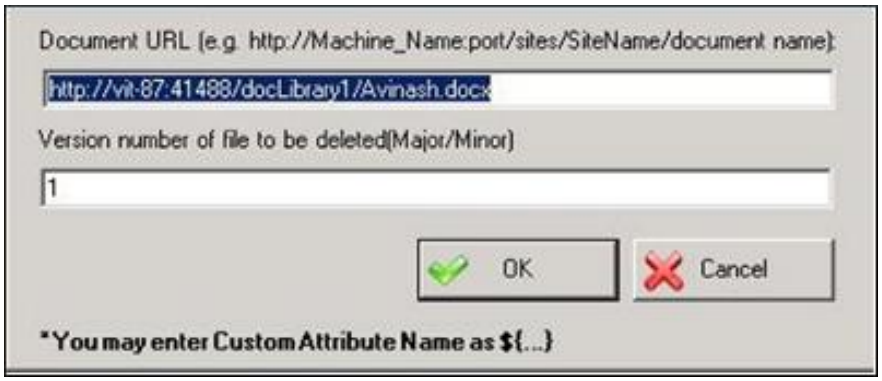
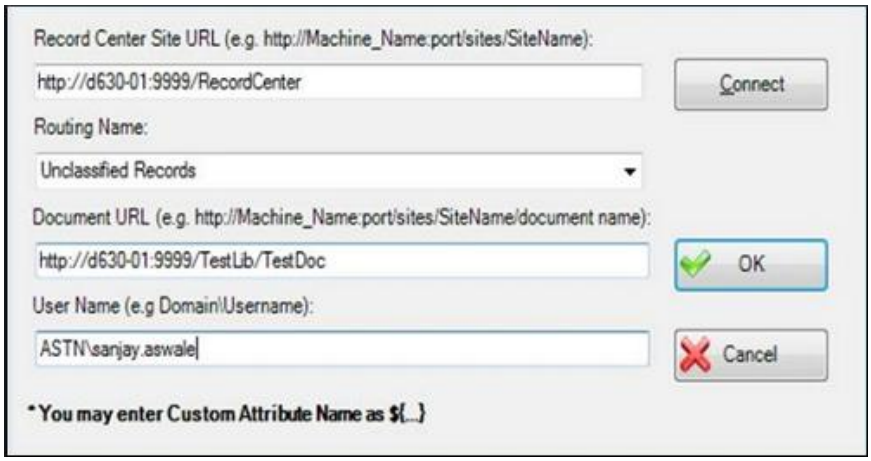
4.7 Delete Particular File Version AgilePart

Description: AgilePoint Envision includes a new AgilePart that enables you to delete a major or minor file version from a SharePoint Library.



4.8 Submit File to Record Center AgilePart

Description: AgilePoint Envision includes an AgilePart called **Submit File to Record Center**. This AgilePart stores a specified file in a SharePoint Record Center.



4.9 Pass Milestone and Wait for Milestone AgileParts

Description: Two new AgileParts work together to enable processes to wait for an event that is not within the direct process flow, and then continue once the event is complete. For example, if an activity cannot start within a process until an approval occurs in a subprocess, there is now a way to regulate the process flow based on that event. The Pass Milestone and Wait for Milestone AgileParts work together in a caller/listener model to support this functionality.

Example

Activity E in a sub process must wait for wait for a manager approval activity in its parent process before proceeding. A Wait for Milestone shape is placed before Activity E in the sub process, and a Pass Milestone shape is added to the parent process after the ManagerApproval activity. By assigning the same Name value (ManagerApproval) to the Pass Milestone and Wait for Milestone shapes, the two are established in a caller/listener relationship.

Parent Process

Sub Process

4.10 C# and VB shapes support custom assemblies

Description: The Managed Code C# and Managed Code VB AgileParts now allow developers to add custom classes to their code snippets.

Setup is required. See the Envision Online help for details.

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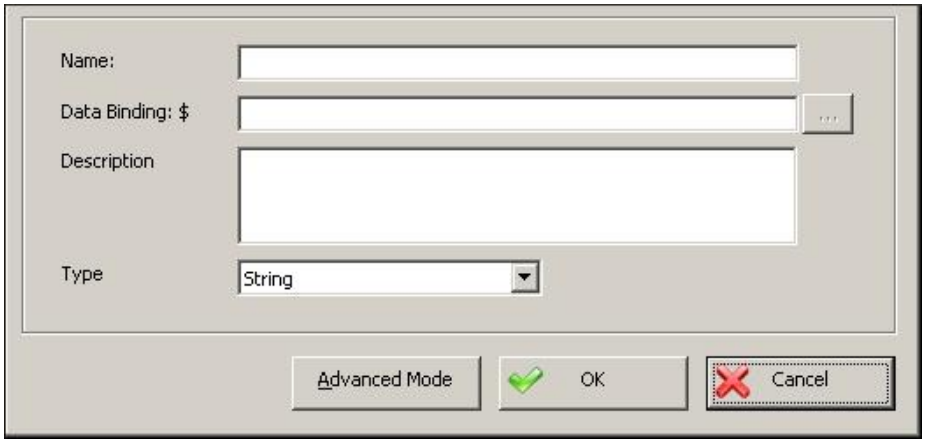
4.11 Complex Multiple Condition AgilePart

Description: The Multiple Condition activity has been enhanced to include an advanced configuration mode where you can now implement more advanced type of logic and build more complex expressions.



Clicking on the **Advanced Mode** button will open the Define Conditions window as shown below:

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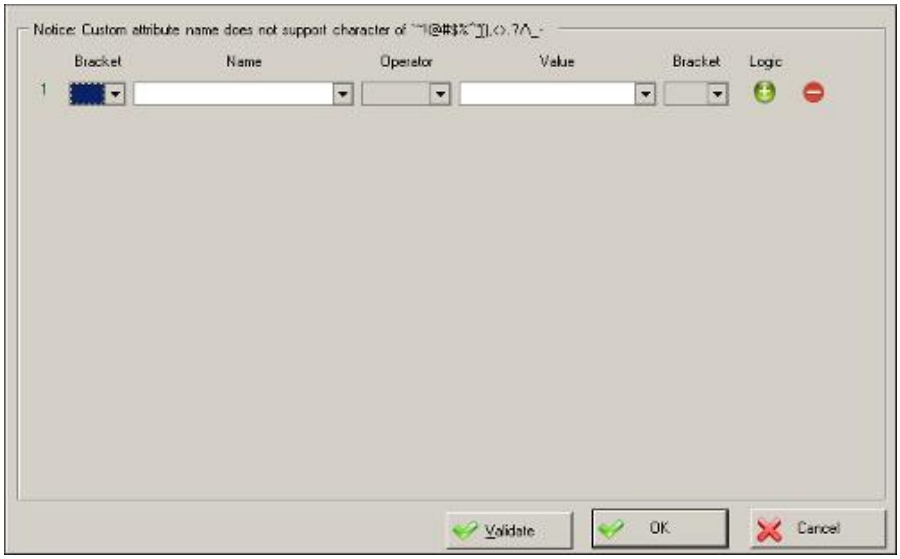
Click New to define a new expression, or click **Advanced** to build an expression manually.



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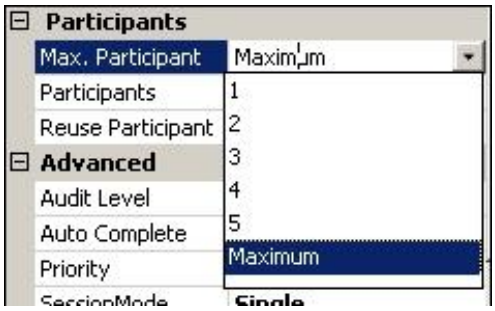
4.12 Support All Participants in the Max Participant Field

Description: For all AgileShapes that include the **Max. Participant** property, an option is now included called **Maximum**. This option indicates that all members of a group must complete the task.



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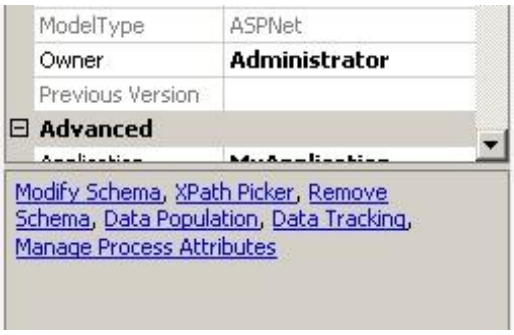
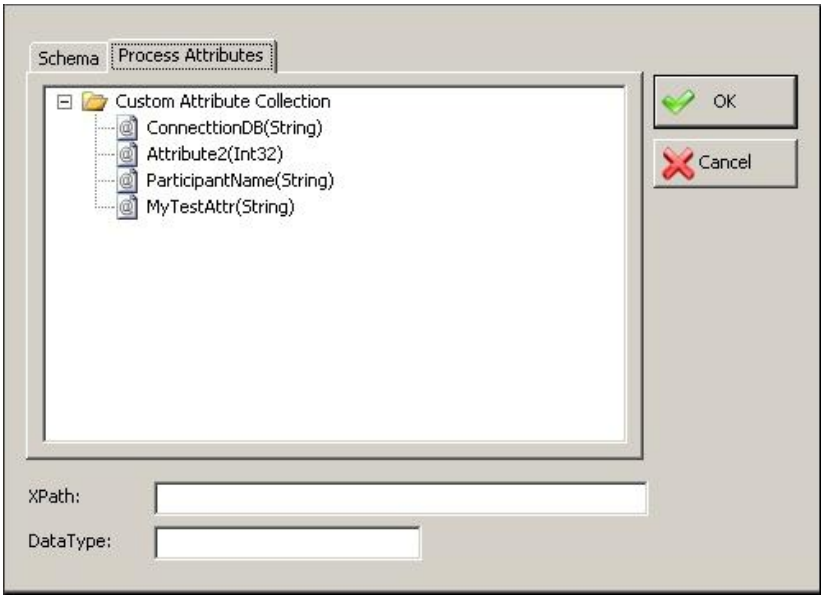
4.13 Manage Process Level Attributes

Description: AgilePoint Envision v5.0 enables you to define custom attributes at a process level. This additional setup step eliminates the need to type the name of a custom attribute in the data binding properties for an AgileShape because the names are available in the schema dialog box.

For more information, see the Envision Online Help.



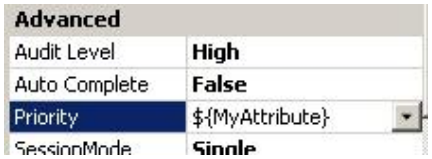


4.14 Debug Property for AgileShapes

Description: All AgileShapes include a new property called **Debug**. Setting this property to **True** adds information to the AgilePoint Server log regarding this shape – for example, data being passed to or from the shape, or database connection information. You can use this data to debug issues for a particular AgileShape.

4.15 The Priority Setting in AgileParts Supports Custom Attributes

Description: For all AgileShapes that use the **Priority** property, you can now replace the value in the drop-down with a custom attribute.



4.16 Envision Templates and Stencils Reorganized

Description: AgilePoint stencils have been reorganized in several respects in AgilePoint Envision:

- AgilePoint stencils have been grouped in the File menu in AgilePoint Envision. AgilePoint stencils are now grouped in the menu **File > Shapes > AgilePoint**.
- The location of the templates and stencils for AgilePoint Envision stencils has changed. The old location was **C:\Program Files\Microsoft Office\Office12\1033\Solutions\Ascentn BPM**. The new location is **C:\Program Files\Microsoft Office\Office12\1033\Solutions\AgilePoint**.
- The name of the **MOSS** stencil has changed to **SharePoint**.

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4.17 Select Database Connection Strings for Database AgileParts

Description: In AgilePoint Envision, for all database-oriented AgileParts (for example, Query Database or Delete Records), the user can select a database connection string from the list of shared custom attributes. (Shared custom attributes are still defined in Enterprise Manager.)

For details see the Envision Online Help.

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4.18 Email Approval

Description: Using email approval, process participants can approve documents or requests through email, without accessing their task lists. The MailApproval AgileConnector supports the following functionality:

- Approve or reject tasks using a simple email reply
- Multiple AgileConnector configurations
- Network load balancing

4.18.1 Requirements

One of the following:

- A POP3 mailbox configured with a valid account in the AgilePoint Server Configuration
- An IMAP4 mailbox configured with a valid account in the AgilePoint Server Configuration
- An Exchange Server mailbox with a valid account

4.18.2 Creating an Email Template to Support Approvals

Create an email template for the Activity Entry Email that participants will use to approve a request. In the email body, include the following information. Note that the terms used in the email can follow the format approved/rejected, or yes/no.

{Approved [] = {*Xpath-Node*}=*Value*} **- OR -** {Yes [] = {*Xpath-Node*}=*Value*}

{Rejected [] = {*Xpath-Node*}=*Value*} **- OR -** {No[] = {*Xpath-Node*}=*Value*}

{Remarks[] = {*Xpath-Node*}}

- ***Xpath-Node*** represents a valid Xpath node -- for example, {/pd:MyFields/pd:Approval}
- ***Value*** represents the value you want to pass when the user selects this option. A common usage is True or False. The action that is selected with the X will be processed along with any information in the remarks section.

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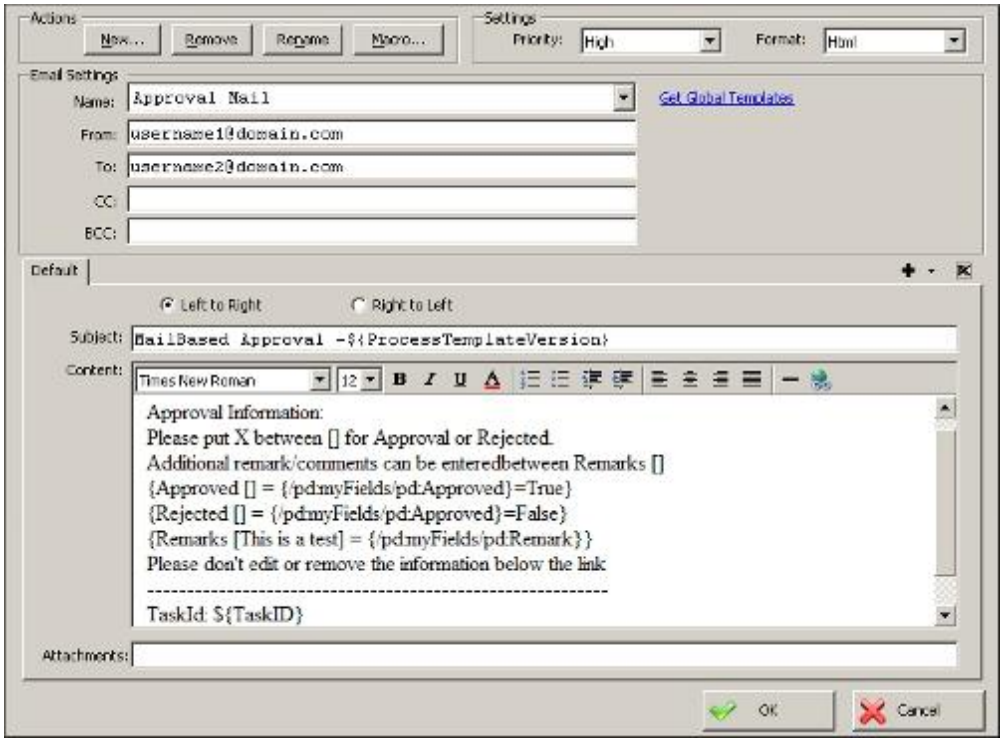

4.18.3 POP3 Limitations

The following limitations apply when using email approval on a POP3 server:

- There is no response while testing a connection if you deselect **SSL-Connect** when the POP3 Server requires SSL.
- The incorrect emails will not be deleted from the mailbox even if the option **Delete incorrect approval emails** is selected.

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4.19 Naming Convention for Email Notifications Changed for Clarity

Description: To improve usability, the following nomenclature changes have been applied to email notifications in AgilePoint BPMS Version 5.0:

Old Name	New Name
Notification	Email Notification
Incoming Email	Activity Entry Email
Outgoing Email	Activity Exit Email
Reassigning Email	Task Reassigned Email
Reminding Email	Reminder Email
Timeout Email	Activity Timeout Email

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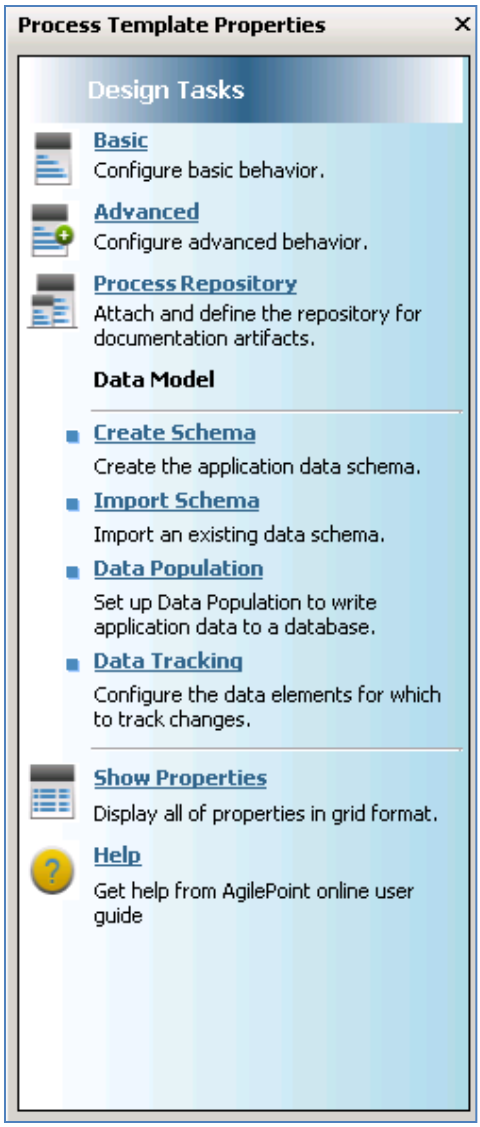
4.20 User Friendly AgilePoint Envision Property Panel

Description: The AgilePoint Envision Activity Properties panel has been redesigned to provide a more business user friendly configuration UI. The **Show Properties** link allows you to switch between the old and the new.



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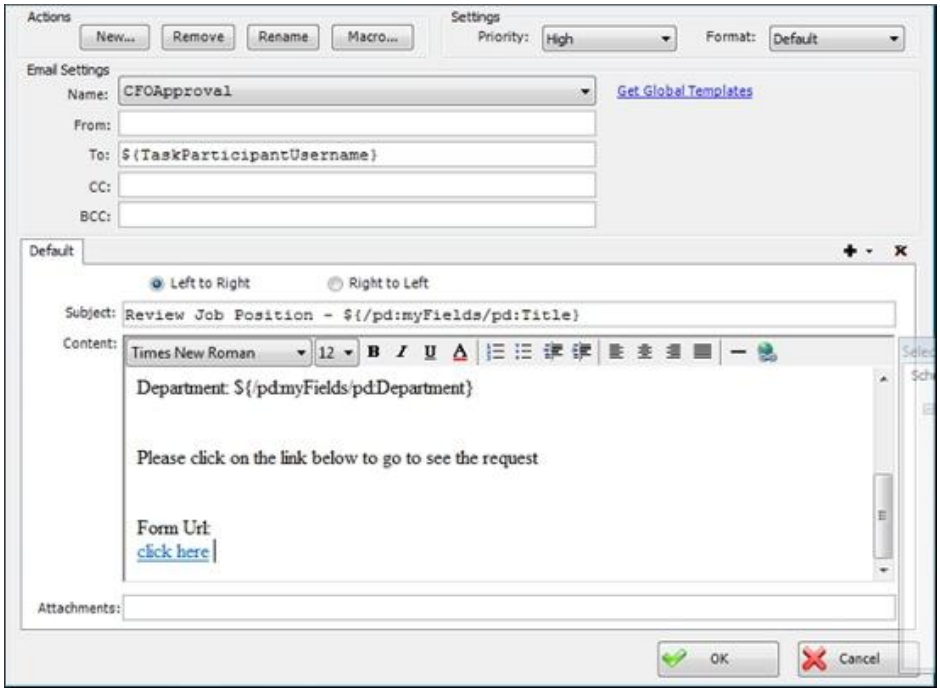
4.21 HTML Editor for Email in Envision

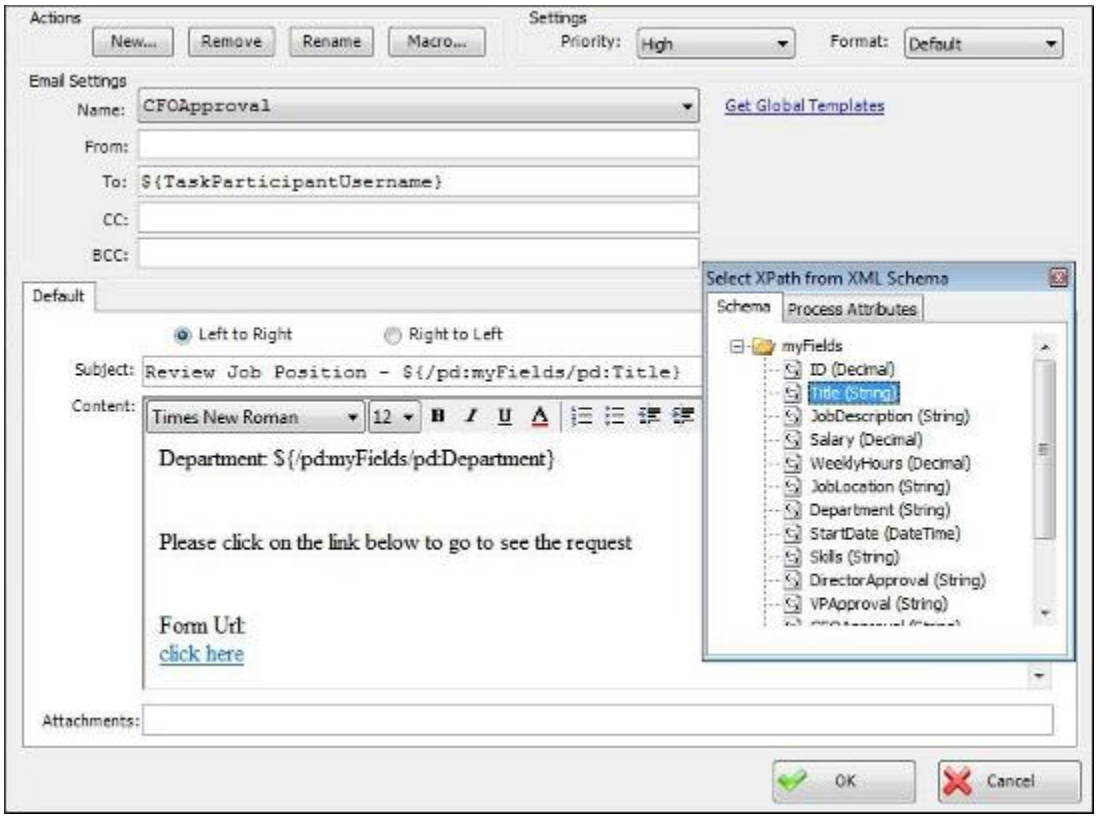
Description: AgilePoint Envision includes a rich text HTML email editor. Envision users can create HTML emails and email templates without writing HTML code.



4.22 Drag and Drop Schema in Email Editors

Description: Email editors in AgilePoint Envision now enables users to drag and drop attributes from the schemas to any field that supports custom attributes (To, From, CC, Subject, Content, and so on).

When you are entering information in a field that supports custom attributes, the schema pop-up appears. Drag the item you want from the schema to the field.



4.23 Support for SPDoc and SPList in Data Services

Description: AgilePoint Data Services can now be used for SPDoc and SPList based process models.

4.24 WSE shape Enhanced to Automatically Update InfoPath Content

When using a WSE shape with mapping specified between an InfoPath schema and a web service output schema, the InfoPath form will be automatically updated with the return value without having to use an Update InfoPath shape separately.

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5. Enhancements for AgilePoint Developer

5.1 64 Bit Support

Description: AgilePoint Developer v5.0 supports installation on a 64 bit operating system.

5.2 Project Templates Upgraded

Description: The AgilePoint Project Templates have been enhanced to be compatible with Visual Studio 2005, 2008, and 2010.

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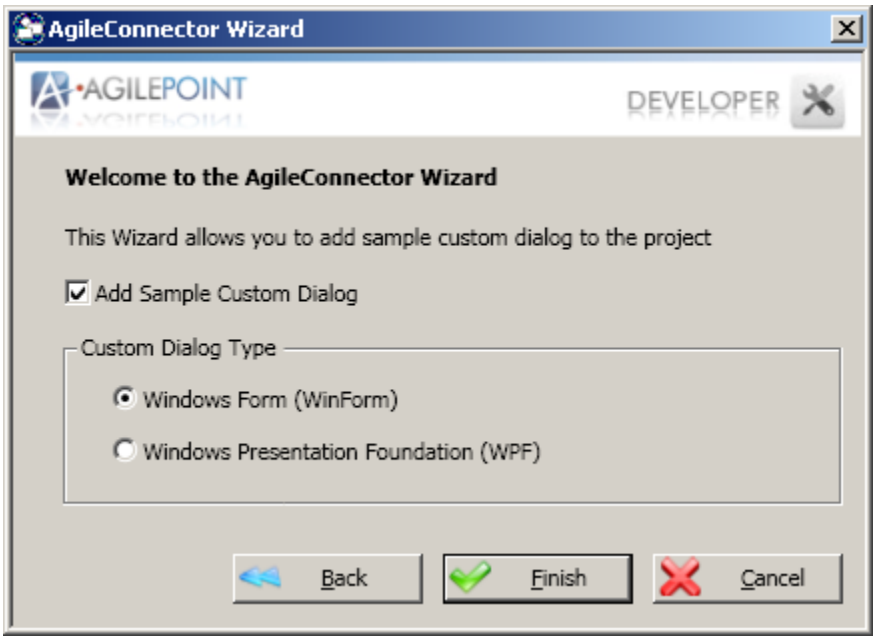
5.3 AgileConnector Project Template

Description: AgilePoint Developer provides a new project template for AgileConnectors. AgileConnectors enable you to create custom connections from AgilePoint to other systems.



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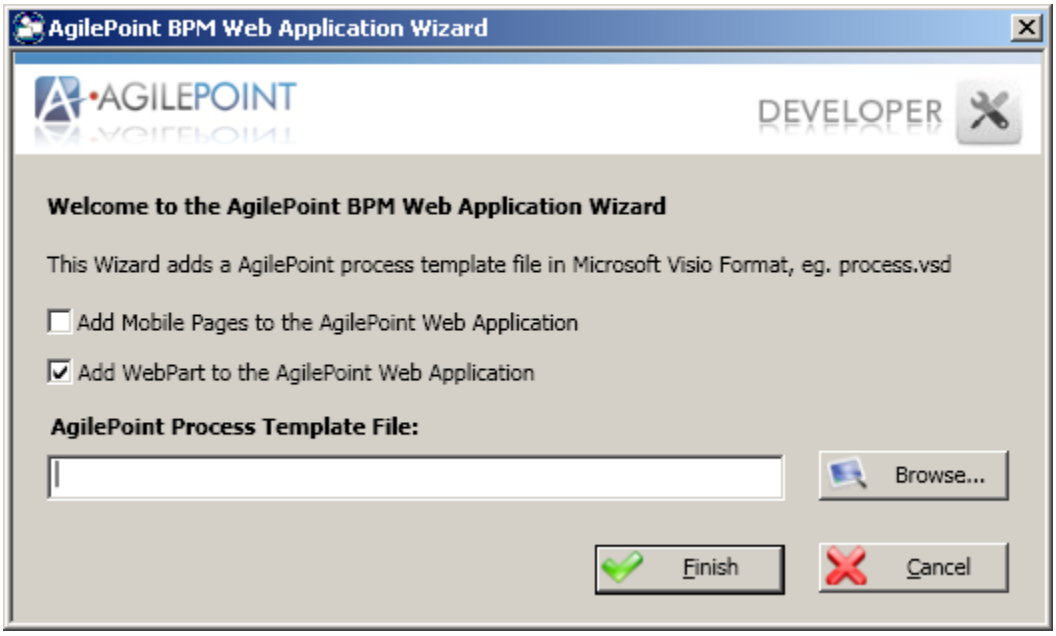
5.4 Web Application Wizard Redesigned

Description: The create AgilePoint Web Application wizard has been redesigned for usability.



5.5 Support for Mobile Devices in Web Applications

Description: The AgilePoint Web Application wizard provides the option to add mobile UI pages to the application. If the user checks this option, the wizard will add some default mobile pages (like Mobile_LognonForm, Mobile_Default, Mobile_TasksPage, etc.) to the application. Also when adding mobile pages to an application, AgilePoint will add a mobile page for the “Work To Perform” property of each activity that has the “EnableMobile” property set to True.

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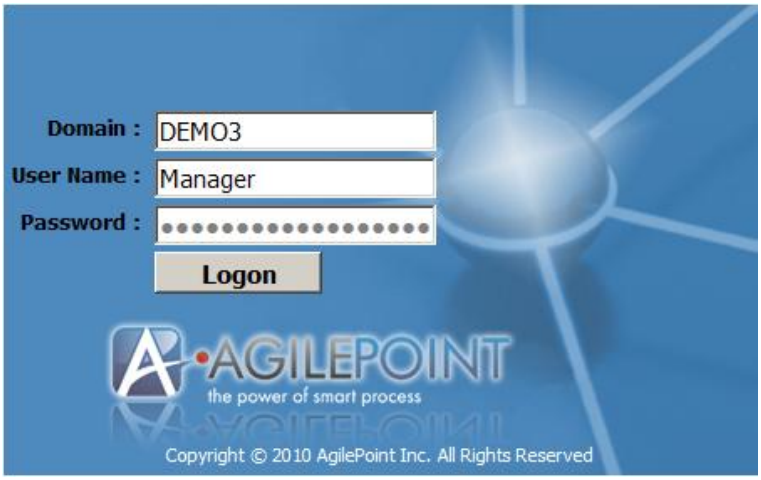
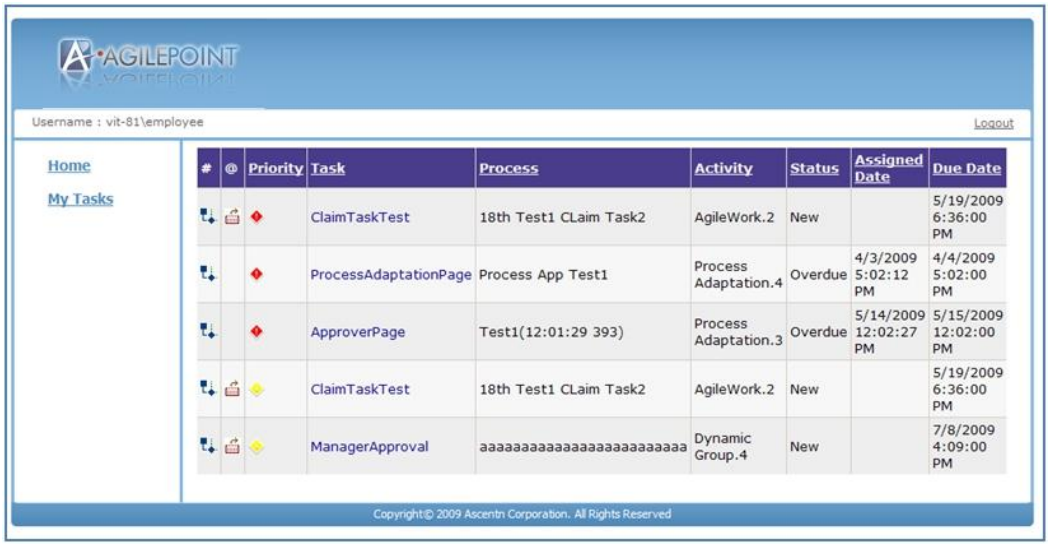
5.6 New Web Application Navigation

Description: The AgilePoint Web Application now uses AJAX controls. Instead of the Default.aspx page, it now uses a Master page including a navigation panel that shows a link to the AgilePoint Task List. The enhanced AgilePoint Web Application template will also have new images and CSS file.




AGILEPOINT
Username : vit-81\employee
Logout
Home
My Tasks
@ Priority Task Process Activity Status Assigned Date Due Date
ClaimTaskTest 18th Test1 CLaim Task2 AgileWork.2 New 5/19/2009 6:36:00 PM
ProcessAdaptationPage Process App Test1 Process Adaptation.4 Overdue 4/3/2009 5:02:12 PM 4/4/2009 5:02:00 PM
ApproverPage Test1(12:01:29 393) Process Adaptation.3 Overdue 5/14/2009 12:02:27 PM 5/15/2009 12:02:00 PM
ClaimTaskTest 18th Test1 CLaim Task2 AgileWork.2 New 5/19/2009 6:36:00 PM
ManagerApproval aaaaaaaaaaaaaaaaaaaaaaa Dynamic Group.4 New 7/8/2009 4:09:00 PM
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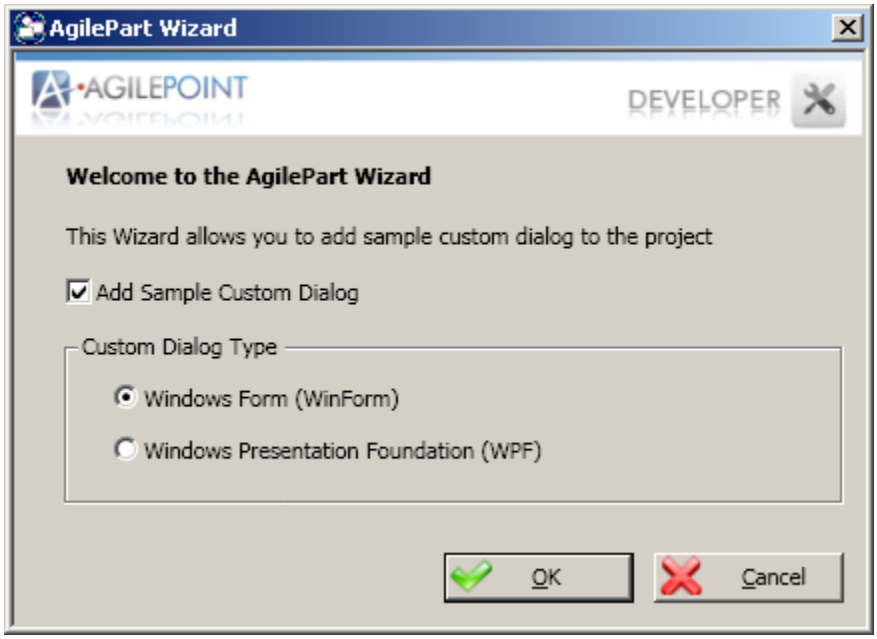
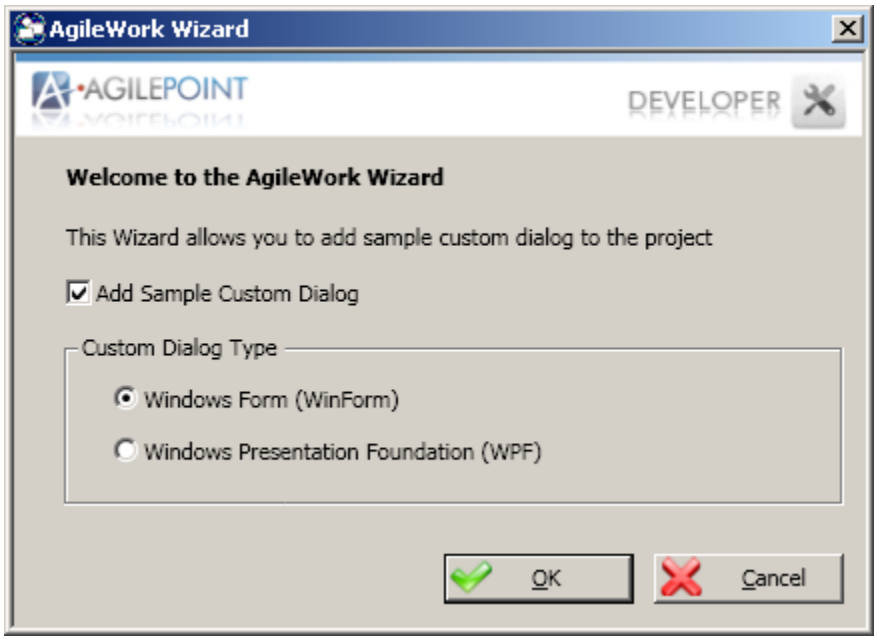
5.7 Add Sample Custom Dialog

Description: The AgilePart and AgileWork templates include a custom configuration screen that allows the user to select whether to “Add Sample Custom Dialog” to the project. This custom screen has the option to either generate a WinForm dialog or WPF dialog. Sample properties of type String, Int, Bool, List, CheckList, and Config Form will be included if the user selects to add sample custom dialog to the project. All project files will be properly categorized under the folders “DesignTime”, "RunTime” and “Resources” if the project has some resource or image files.





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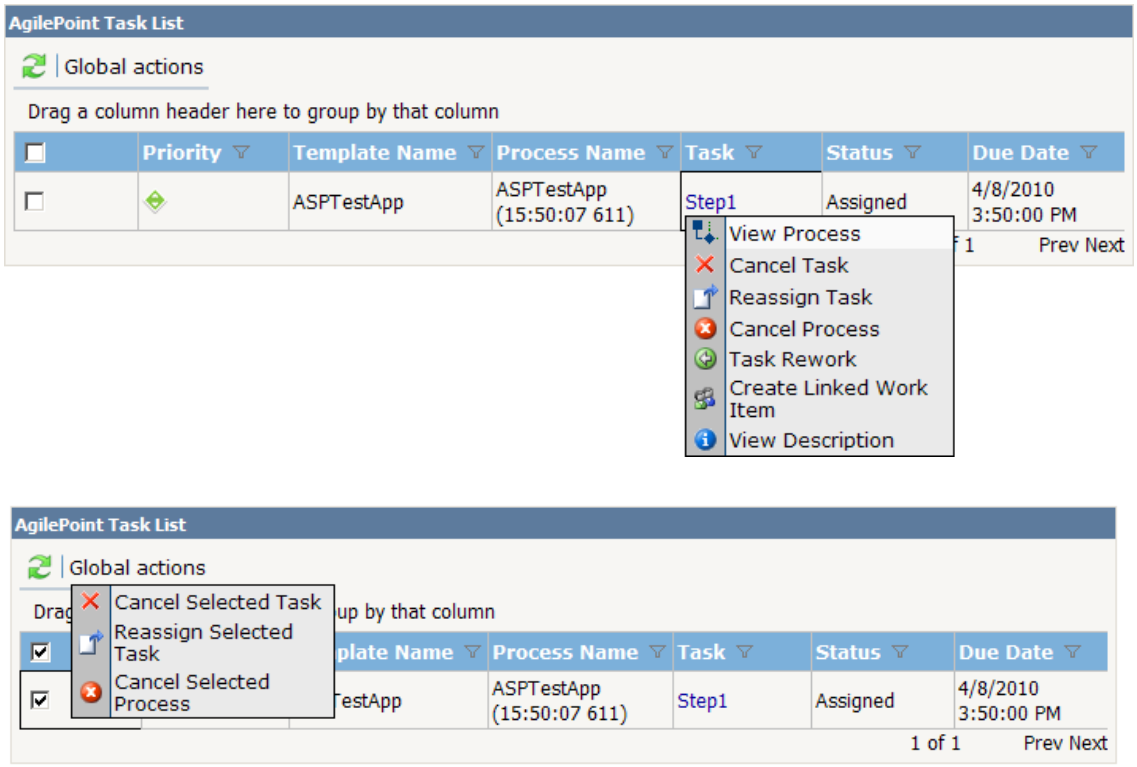
5.8 Task List Web Part for AgilePoint .NET Web Applications

Description: AgilePoint includes a new Web Part to display the Task List in ASP.NET web applications. This Web Part displays the list of tasks assigned to the authenticated user, and allows the user to take actions related to the tasks. This Web Part functions like the SharePoint Task List Web Part. For more information, see the *AgilePoint BPMS Version 5.0 User's Guide*.



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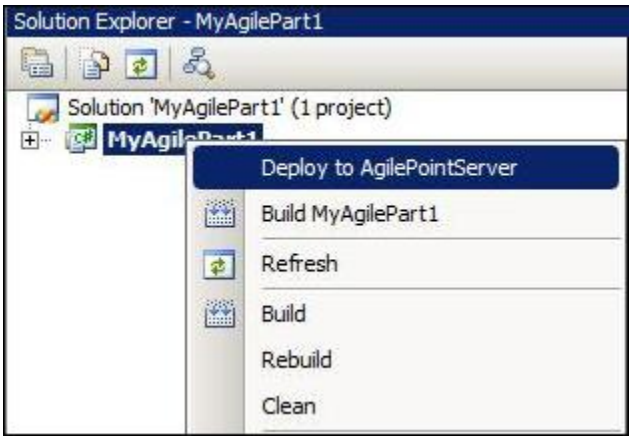
5.9 Deploy an AgileShape directly from Visual Studio

Description: AgilePoint Developer users can now deploy AgileShapes directly from Visual Studio to the AgilePoint Server GAC in their local development environment. (To deploy to a test or production environment, you must still use the AgilePoint Deployment Utility.) Prior to AgilePoint Developer Version 5.0, users were required to deploy AgileShapes to their local environments manually.



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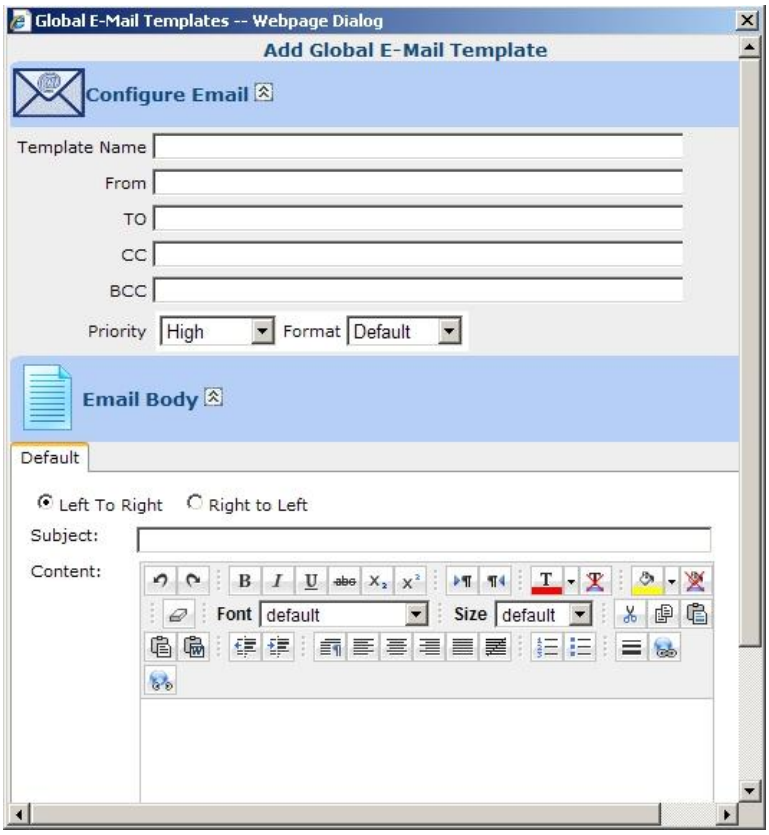
6. Enhancements for Enterprise Manager

6.1 Global Email Templates

Description: You can create global email templates in Enterprise Manager. Global email templates enable you to create email templates that can be used across process templates in Envision. Global email templates provide a way of setting up some commonly used templates which can then be imported and modified in Envision.

For details about setting up and managing global email templates, see the Enterprise Manager Online Help. For details about using Global Email Templates in Envision, see the Envision Online Help.



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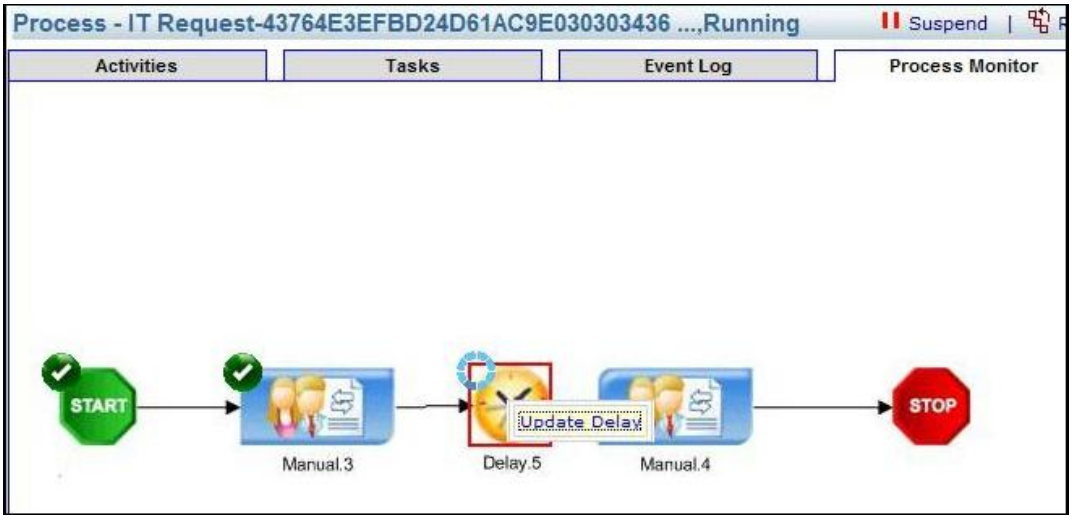
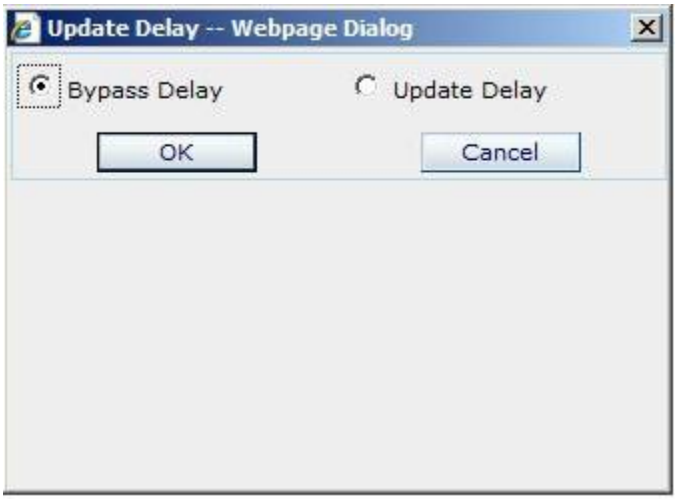
6.2 Update or Bypass the Delay on a Delay Shape

Description: A system administrator can update or bypass the delay on a Delay AgilePart on the fly in Enterprise Manager. In prior versions, it was not possible to update a delay on the fly by directly modifying the shape.

For details, see the Enterprise Manager Online Help.





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6.3 Rollback Button Moved from Processes Page to Process Detail Page

Description: In AgilePoint Envision Version 5.0, the process instance rollback option has been moved from the Processes page to the Process Detail page. This provides all relevant options for a process instance in one place. The button is now also called **Rollback & Skip**.

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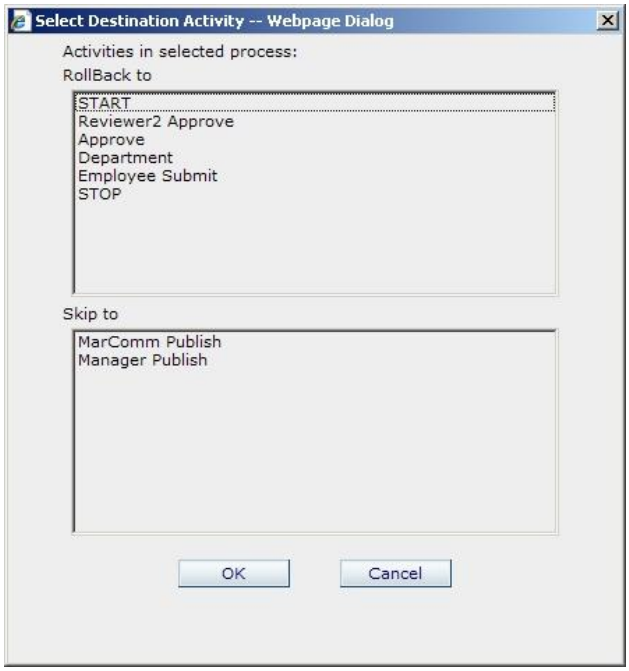
6.4 Skip Option Added to Process Detail Page

Description: In addition to rolling back a process to a previous activity, system administrators can now also skip one or more activities in a process.

In Enterprise Manager on the Process Detail page, click the **Rollback & Skip** button.

On the **Select Destination Activity** dialog box in the **Skip to** box, select the activity to which you want to skip. Then click **OK**.



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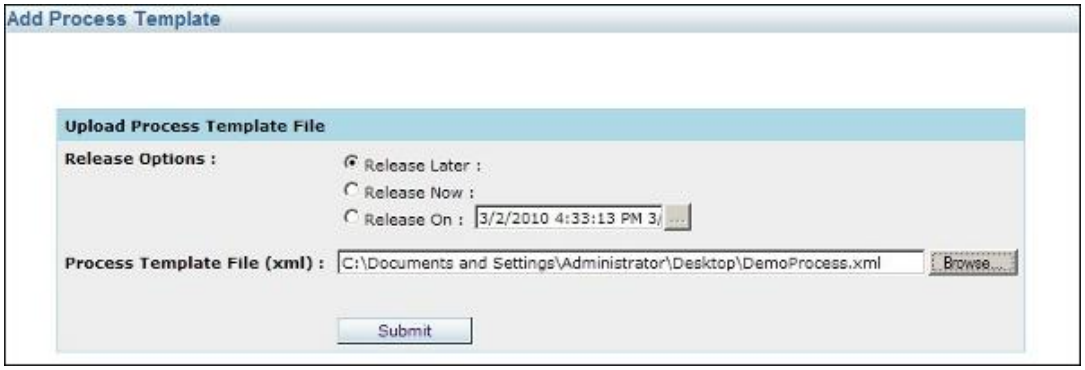
6.5 Specify the Time to Release a Process Template when Adding in Enterprise Manager

Description: When you add a process template to AgilePoint Enterprise Manager from a file system, such as your local hard drive, you can specify a time to deploy the process template:

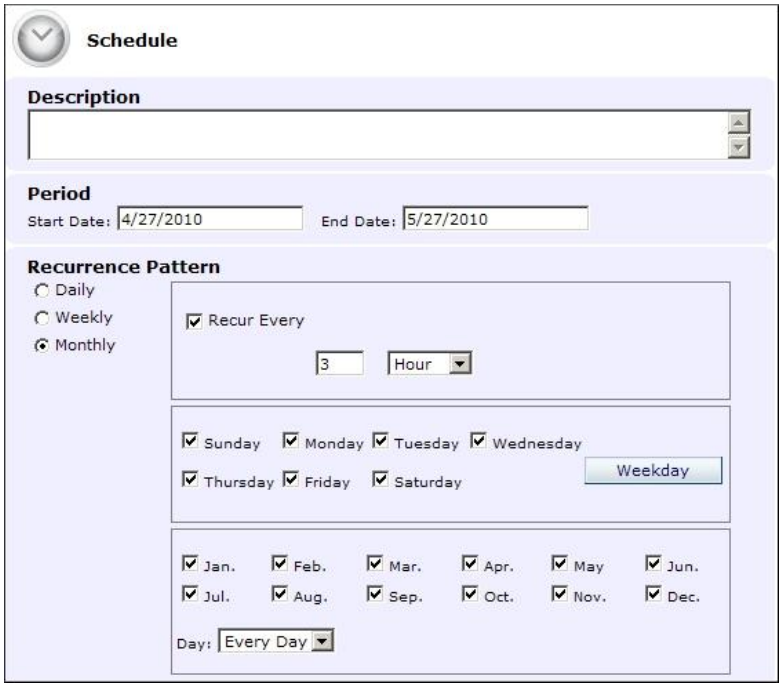
- **Release Later** – Adds the process template to the repository, but does not release it.
- **Release Now** – Releases the process template as soon as it's added.
- **Release On** – Releases the process template at a time you specify.



6.6 Recurrence Pattern in Event Services Improved for Usability

Description: The Recurrence Pattern option in the Event Services module has been enhanced to improve usability.

First, you can now set an event to occur on an interval of a set number of hours or minutes. Select **Recur Every**, and then enter the hours or minutes you want.



Second, of you want an event to occur the same minute every hour, or every minute over the course of a specific hour, you can select the **Every Hour** or **Every Minute** option.

For example, you want an event to occur at the 30-minute mark of every hour (for example, 6:30, 7:30, 8:30, and so on), you would select **Hour: Every Hour**, and **Minute: 30**.

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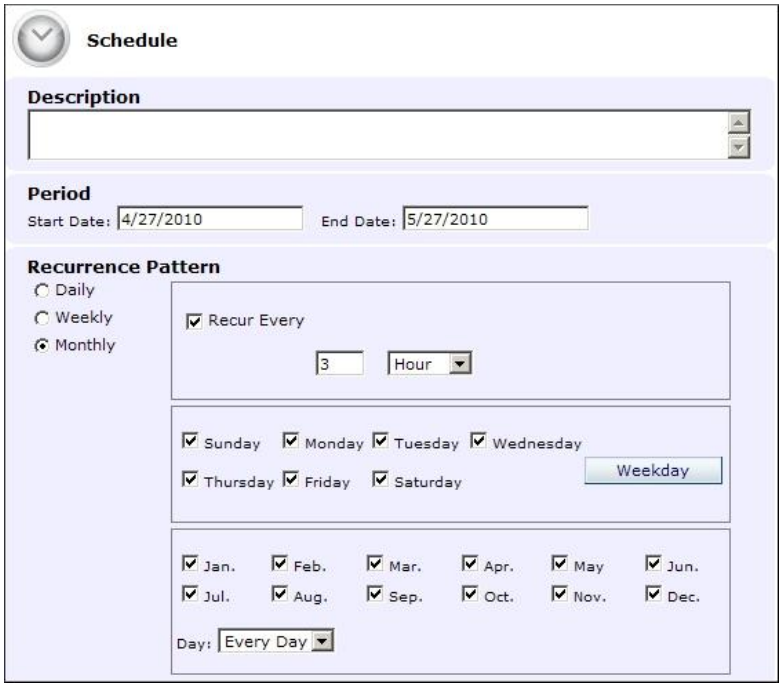

Note that several issues have also been fixed in this module. See Fixes for Enterprise Manager for details.

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7. Enhancements for SharePoint Integration

7.1 Custom Data Sources for Web Parts

Description: AgilePoint SharePoint Integration supports displaying data from a custom data source on the Task List or Process Instance List SharePoint Web Parts.

Out of the box, AgilePoint provides custom data source configurations for SharePoint lists and custom attributes available on AgilePoint Server. However, you can also custom code your own custom data source configuration using the integration tools AgilePoint provides.

For details, see the *AgilePoint BPMS User's Guide*.

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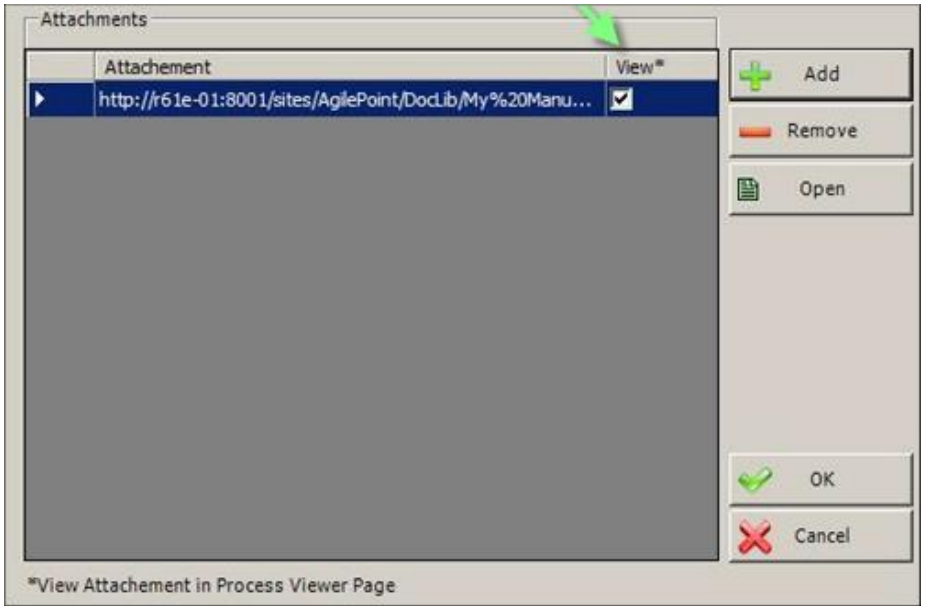
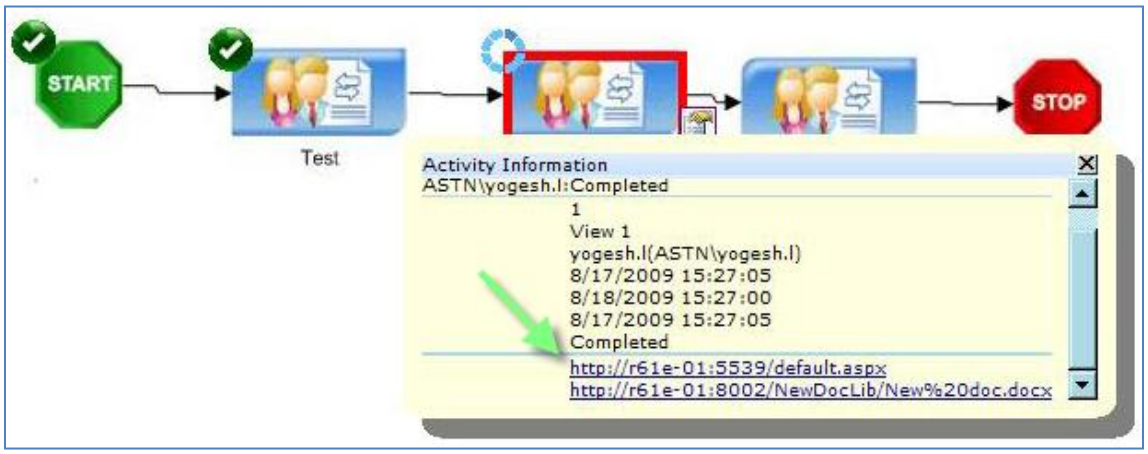
7.2 View Process Artifacts from the Process Viewer

Description: A new "View" checkbox has been added to the Process Repository configuration that allows for documents to be opened and viewed from the Process Viewer. This feature enables users to see process artifacts via the Process Viewer at runtime.





7.3 Linked Task column on the SharePoint Task List Web Part

Description: For the SharePoint Task List Web Part, the task names are now hyperlinked, so that a user can click the name to open the task directly without expanding the action menu.

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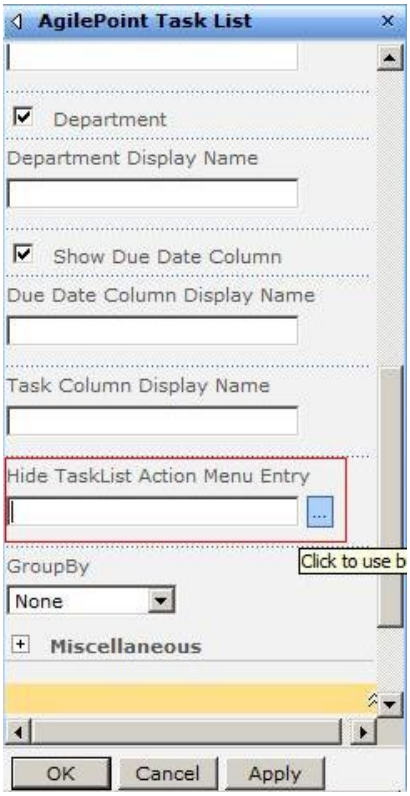
7.4 Remove a Default Action Menu Entry from the AgilePoint Task List and Process Instance List Web Parts

Description: For the AgilePoint Task List and AgilePoint Process Instance List Web Parts in SharePoint, a system administrator can limit the actions that display by default in the drop-down menus.

1. In SharePoint, access the **Modify Shared Web Part** options for either the AgilePoint Task List or AgilePoint Process Instance List Web Part.
2. On the Web Part properties pane, in the **Hide TaskList Action Menu Entry** field, click the **Ellipses** (**…**).



3. On the **Text Entry** dialog, enter the menu item names that you do not want to display in the text field. Type the name exactly as it appears in the drop-down menu. You can enter more than one name, separated by semicolons.

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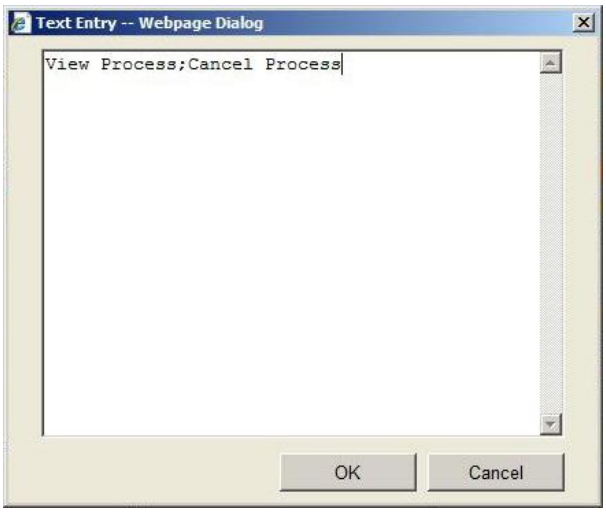

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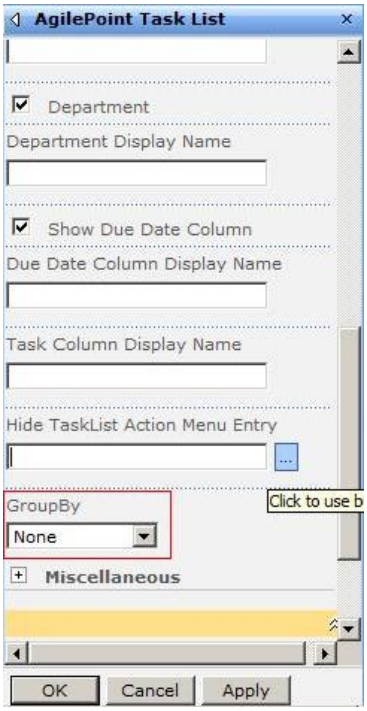
7.5 Default Grouping Property for Task List Web Parts

Description: For the AgilePoint Task List and AgilePoint Process Instance List Web Parts in SharePoint, a system administrator can define the default item grouping – for example by task name or due date.

1. In SharePoint, access the **Modify Shared Web Part** options for either the AgilePoint Task List or AgilePoint Process Instance List Web Part.
2. On the AgilePoint list properties pane, in the **GroupBy** list, select the list you want to use as the default.



Users can now change their list grouping. However, when they leave the SharePoint page and return, the list always displays with the default grouping you defined first.

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7.6 Change the Color of a Task Assigned to a Group when the Task has Reached the Due Date

Description: If a task is assigned to a group of which a user is a member, and the task passes its due date, the color of the task changes to the overdue color (red by default) in the user's SharePoint Task List. Prior to AgilePoint BPMS Version 5.0, the task would change to the overdue color in a user's SharePoint Task List if the task was assigned to the user, but not to a group of which the user was a member.

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7.7 Display a Graphical View of a Process Model in the Process Model List Web Part.

Description: In the SharePoint Process Model Web Part, users can now view the graphical display of a process model. This extends the capability previously available in the Task List Web Part to the Process Model List Web Part.

In the **Process Instance List** Web Part, click the drop-down list for the process name, and click **View Process**. The graphical view of the process instance opens in a pop-up window.

7.8 Support for Content Type Process Association

Description: AgilePoint SharePoint Integration now supports process association with SharePoint Content Types, in addition to SharePoint lists and libraries.

7.9 Open Task in New Window in the SharePoint Task List Web Part

Description: The SharePoint Task List Web Part now enables system administrators to set tasks to display either in a new window or in the same window. In previous releases, a task could display only in a new window.

To set tasks to display in the current window:

1. In SharePoint, open the **AgilePoint Configuration** list.
2. On the **AgilePoint Configuration** list, edit the **OpenTasksInNewWindow** list item.
3. Change the **AP Setting Value** to **False**.
4. Click **OK**.

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8. Enhancements for InfoPath Integration

8.1 Create a Custom InfoPath Button to Submit Data to AgilePoint

Description: AgilePoint InfoPath Integration enables you to update an AgilePoint process from any button created in InfoPath. In previous AgilePoint releases, it was only possible to submit an InfoPath form from an AgilePoint-provided submit button. For more information, see Creating Custom Buttons in InfoPath in the *AgilePoint BPMS User's Guide*.

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9. Web Services API Enhancements

9.1 API Includes Send Mail with Priority

Description: The AgilePoint Web Services API enables you to set a priority when sending an email. For details, see the *Web Services API Guide*.

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10. Enhancements in Beta for this Release

AgilePoint BPMS includes some enhancements in Beta state. This means that after the time of release, the functionality may change as a result of further testing and user feedback. AgilePoint welcomes feedback on these features for future development and integration with the product.

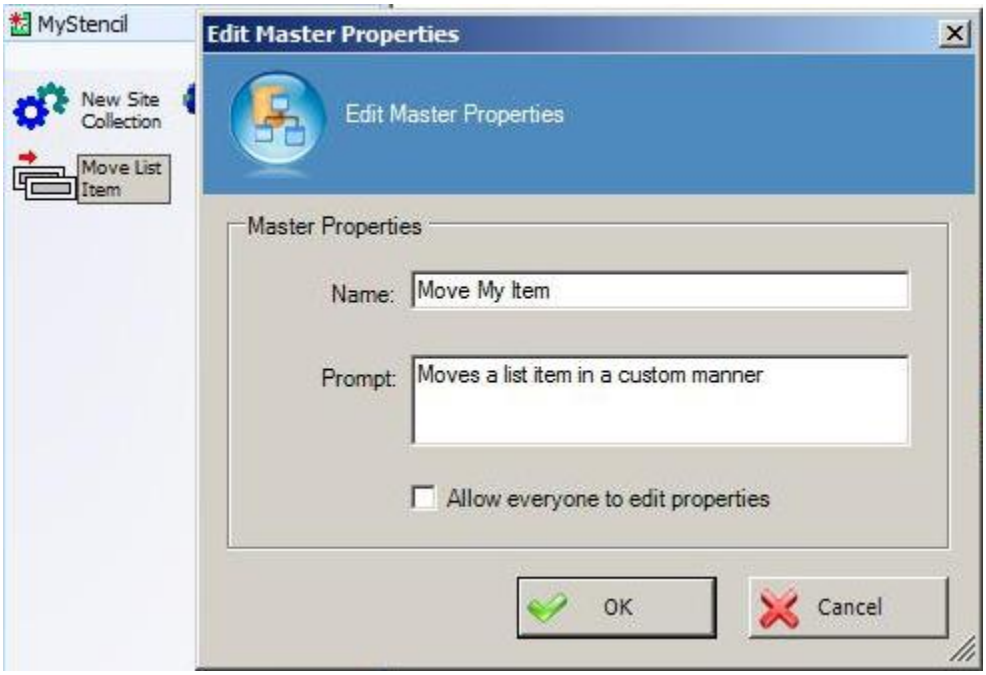
10.1 My Stencil

Description: Envision users or administrators can modify the properties of an AgileShape, and then share them with other Envision users using a special stencil called **My Stencil**. Envision administrators can make the properties for shapes in this stencil read-only if desired.

A common use for this feature is IT staff creating complex configuration settings for an AgileShape, where the settings are common to many users within an organization. The administrator sets up the configuration, and then shares the stencil. Business users then need only to add the shape to their process models to implement the organizational standards.

For the most part, the behavior for sharing AgileShapes in Envision is the same for sharing any shapes in Microsoft Visio. The main functionality that Envision has added are:

- Support for sharing AgileShapes, along with preconfigured properties
- Support for setting all properties collectively to read-only



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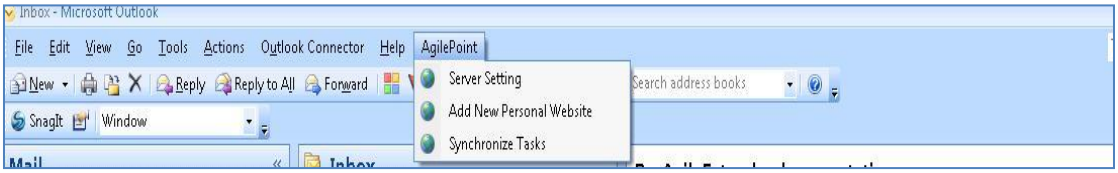
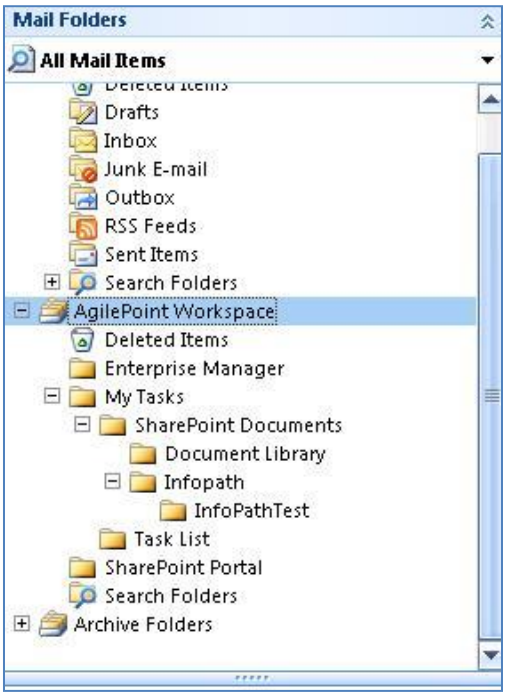
10.2 Outlook Offline Integration

Description: The Outlook Offline integration is an add-in to Microsoft Outlook that allows users to integrate with AgilePoint Server though Microsoft Outlook.

The Outlook Offline Integration is installed as a separate component via the AgilePoint installer under the **AgilePoint Utilities and Other Support Files**.





For information about using Outlook Offline Integration, see the *AgilePoint BPMS User's Guide*. For information about prerequisites, see *System Requirements*.

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11. New Add-On Components

The software components described in this section are offered as add-ons to the AgilePoint BPMS Suite, which require additional software licenses. Please contact AgilePoint for pricing information.

11.1 AgileReports

Description: A new application, AgileReports, is available as an add-on to AgilePoint BPMS. AgileReports provides rich functionality for creating customized reports for AgilePoint. AgileReports includes the following main features. Details can be found in the AgileReports documentation.

11.1.1 Powerful Ad Hoc Reporting

With AgileReports, gone are the days where users had to wait for IT to build reports. Now, all your end users have the freedom and the flexibility to build their own reports to address their everyday business questions.

- **Intuitive report builder with live preview** - Never built a report? No problem. A wizard guides you through the easy process, while a live report preview feature shows you in real time how your report will look.
- **Report scheduling and archiving** - Get critical information to the right people at the right time by scheduling automatic report delivering, and manage your reports easily and efficiently.
- **Easy formatting and customization** - Personalize your report using easy out-of-the-box style options. 'My View' type of report layouts include favorites, most frequently used, most recently used, home page, and more.

11.1.2 Intuitive Ad-hoc Analysis

From sorting, filtering and drill down to impactful visualization tools like heat maps, your users will find it easy to spot and act on critical information.

- **Interactive data viewer** - End-users can perform instant "what-if" analysis on their data and visualize the results at once with this easy-to-use Web-based tool.
- **Interactive heat maps** - Use color and cell-size to instantly display complex data tables into a format that makes immediate sense; drag the color slider and at spot the items needing action.
- **Easy sorting, filtering, drill-down** - Your AgileReports never have to be static. Easily build in sorting, filtering and drill-down capability to give your analysis more leverage.

11.1.3 Interactive Dashboards

AgileReports enables end users to build interactive Web-based dashboards, giving them a unified view of the information that matters most to them, without burdening IT.

- I**nteractive ad hoc dashboards** - Building dashboards in AgileReports is easy and intuitive, thanks to AgileReports familiar Web-based feel.

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- **Advanced visualization** - Get a view of real-time information displayed in impactful and persuasive charts and graphs.
- **Customization features** - Easily pick up images from anywhere, and display them in your reports and dashboards. For example, you could display a logo from a URL.

11.1.4 Easy System Administration

How much effort does it take to set up AgileReports? Surprisingly little. Quickly integrate it with your existing architecture and data sources, set up a meta database to keep your data safe and build the security schema you prefer - all in mere days.

- **Open technology and seamless integration** - Our XML and element-driven technology allows you to quickly connect to multiple data sources (SQL, Oracle and many more).
- **Customizable meta database** - Set up a meta database to keep your data safe and to give end-users intelligible, non-technical and consistent language for their reporting.
- **Comprehensive administration and security** - Enjoy the security and the control of the system without concern while your end-users have the freedom to generate and share their own reports.

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11.2 SAP Process Integration

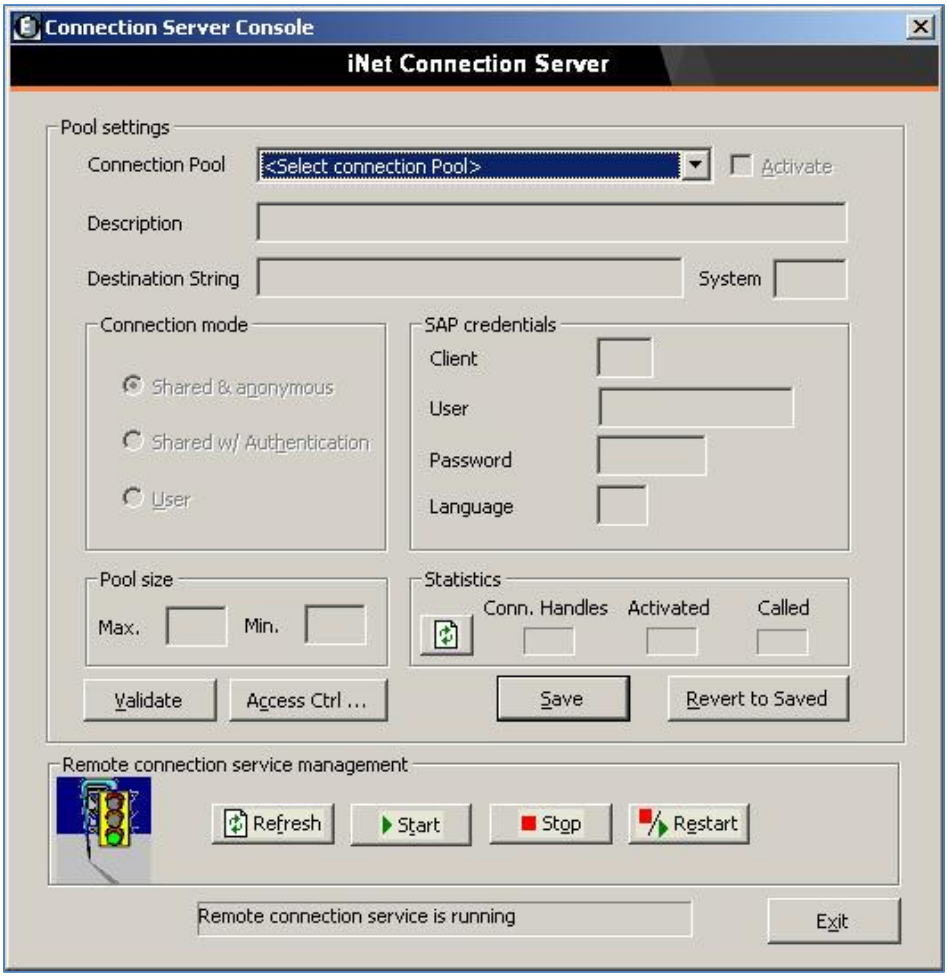
Description: AgilePoint v5.0 offers an additional license for the SAP Process Integration component. This component includes:

- Three new AgileParts for SAP integration: **Call SAP Function**, **Begin SAP Transaction**, and **End SAP Transaction**.
- **iNet BPS** SAP integration software SAP integration software. This is a third-party component from ERP-Link that enables .NET applications to access SAP. This software and license is included with the SAP Process Integration component from AgilePoint.

11.2.1 Configuring iNet BPS

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

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



11.2.2 Configuring the AgilePoint SAP Connector

1. Click **All Programs > AgilePoint > AgilePoint Configuration** to open the **AgilePoint Server Configuration Tool**.
2. Click the **Extensions** tab.
3. Click **Add.**
4. Browse to the assembly **[AgilePoint Server Installation]\bin\Ascentn.AgileConnector.SAPIntegration.dll**, and then click **OK** to add this extension to AgilePoint Server.
5. To throttle the number of concurrent connections that are made to SAP, click the **Configure** button for the SAP Integration AgileConnector.
6. In the configuration window for the SAP Integration AgileConnector, change the number of concurrent threads as required.

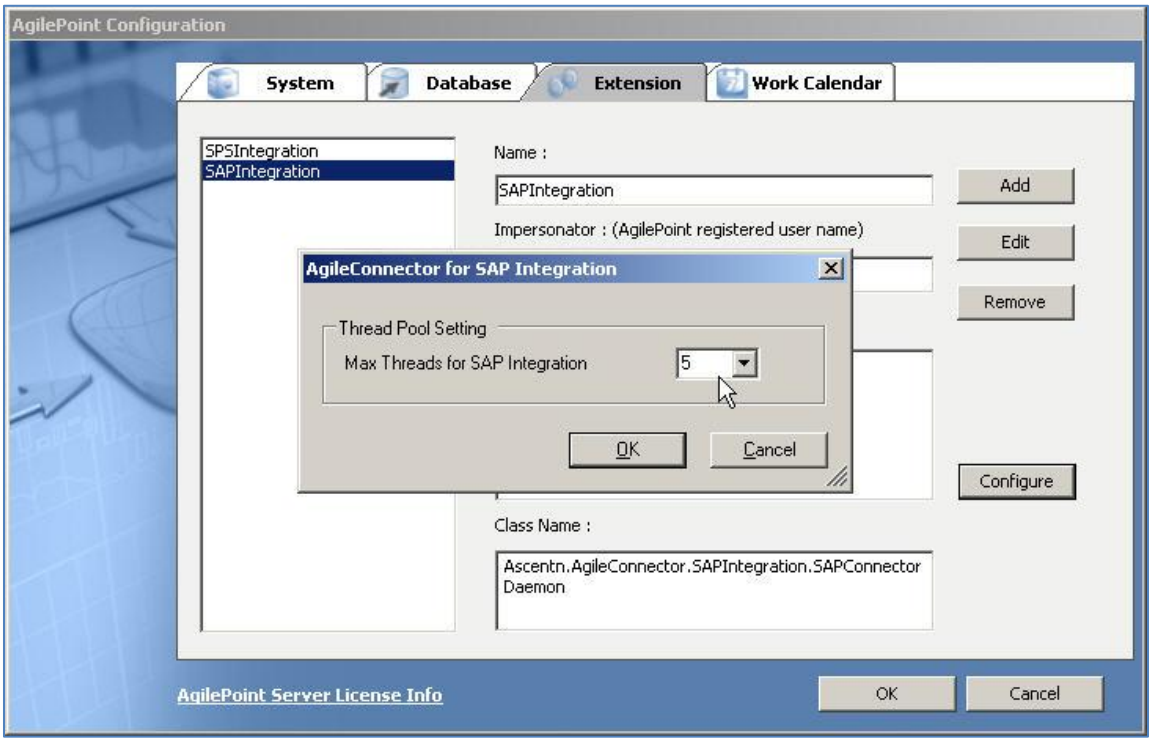


Image: Configure Thread Pool Size

11.2.3 Creating a Process that Includes SAP Integration.

1. Open AgilePoint Envision, and create a new process model of any type.

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NOTE: For Generic processes, create the schema before using the SAP Integration AgilePart. the process schema is necessary for using the AgilePart.

2. Add a **Call SAP Function** AgilePart to your process model from the **SAP Integration** stencil.
3. Select the **Call SAP Function** AgilePart. In the Configuration field, click the **Ellipses** (…).
4. In the **SAP Connection Browser** window, click the **Add SAP System** icon.

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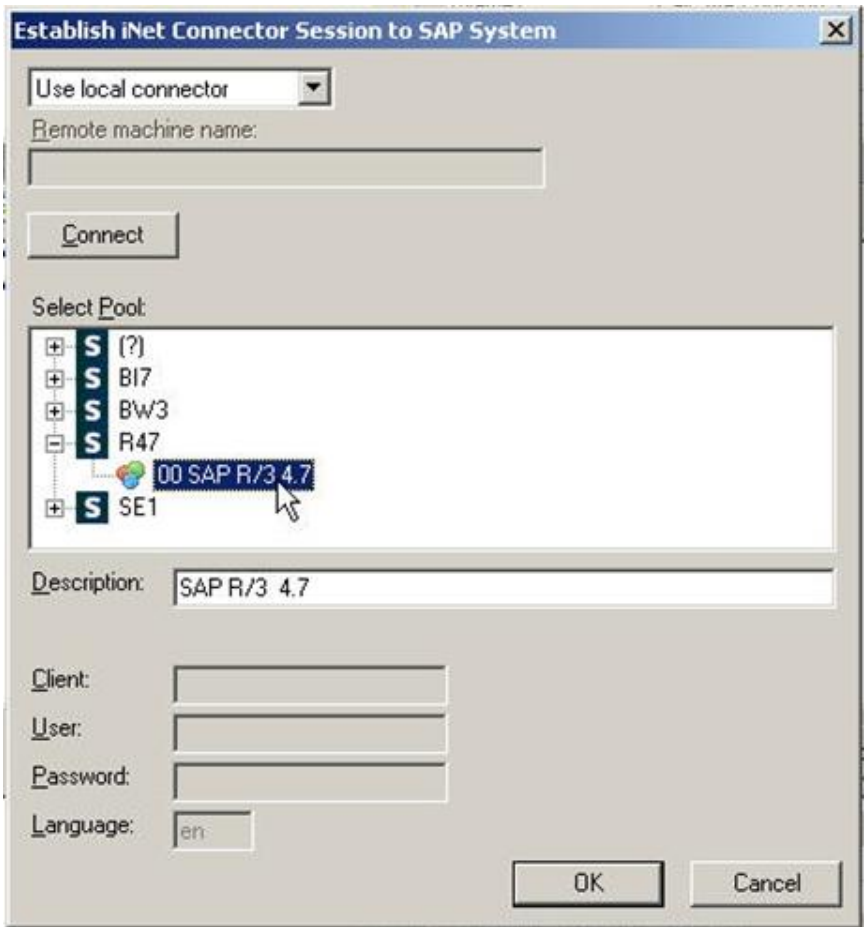
5. In the **Establish iNet Connector Session to SAP System** window, select the SAP server you set up through iNet BPS. The exact steps vary based on your configuration. When you have finished, click **OK**.



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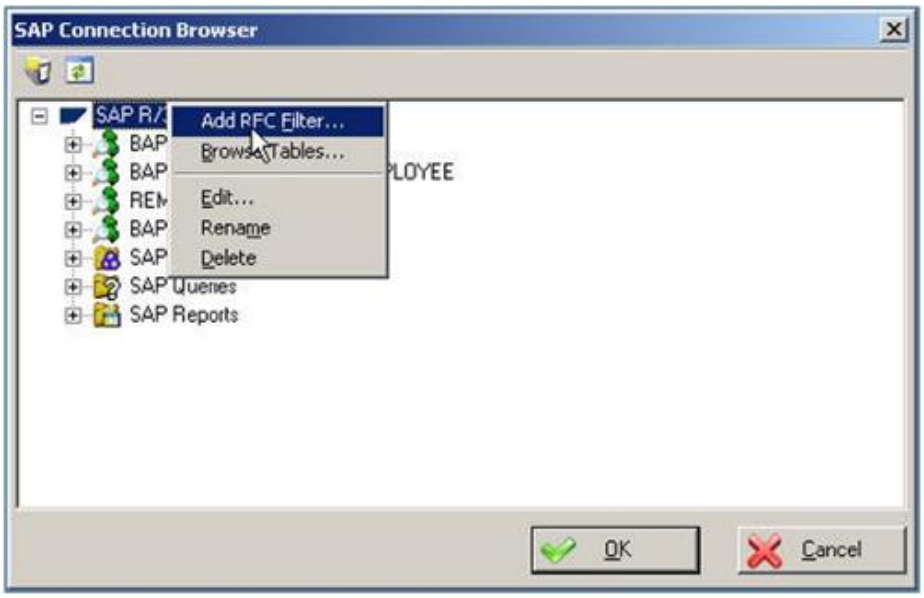
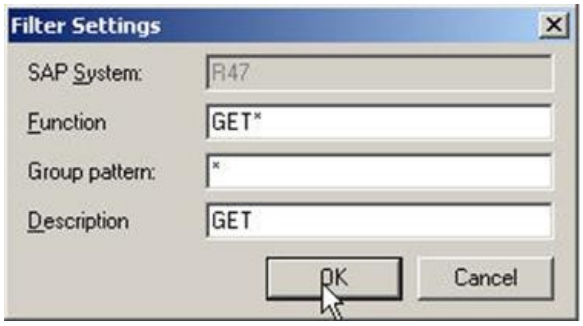
6. If you want to filter the functions for your connection, in the **SAP Connection Browser** window right-click the server name, and click **Add RFC Filter**.



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



8. In the **Description** field, enter a name for the filter.
9. When you have finished creating the filter, click **OK**.
10. In the **SAP Connection Browser** window, select the SAP function you want, and click **OK**.

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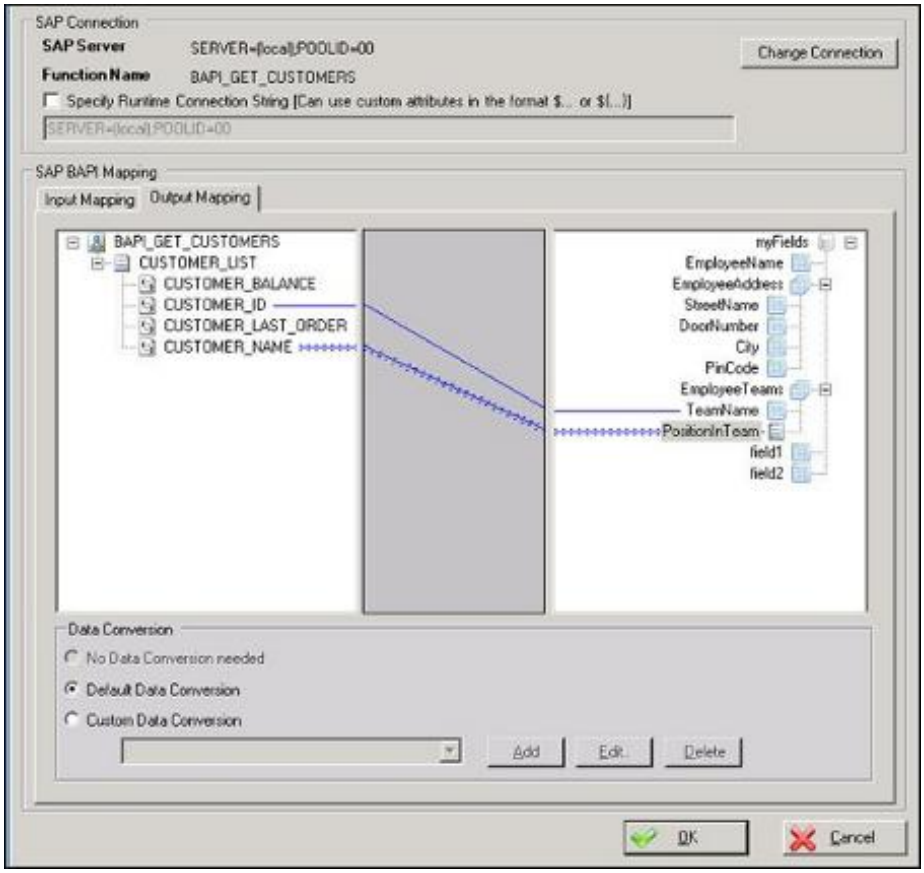
11. In the **SAP Integration Configuration** window, map the fields in your schema to the SAP fields on both the **Input Mapping** tab and the **Output Mapping** tab. If desired, you can modify the **Data Conversion**.



12. If desired, specify a runtime connection string.
13. If desired, click **Change Connection** to select a different SAP database. (This starts the procedure over, beginning at step 4.)
14. When you have finished, click **OK**.

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11.2.4 Begin and End SAP Transaction AgileParts

In addition to the Call SAP Function AgilePart, Begin and End SAP Transaction AgileParts have been created to identify individual SAP transactions within a process model. These AgileParts are used to string together more than one SAP function in a single transaction.

When creating an SAP transaction that requires more than one SAP function, add a **Begin SAP Transaction** AgilePart at the beginning of an SAP transaction, and an **End SAP Transaction** AgilePart at the end of the transaction.

NOTE: If you do not add the Begin SAP Transaction and End SAP Transaction shapes at the beginning and end of the transaction, consecutive Call SAP Function shapes are treated as separate transactions.

The **TransactionName** property identifies the SAP Transaction. So, both the **Begin SAP Transaction** and **End SAP Transaction** must have the same **TransactionName** value, and this value must be unique from other SAP Transaction AgileParts in the process model.

Multiple SAP Functions in a Single Transaction

Multiple SAP Functions as Separate Transactions

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12. Product Fixes

This section includes fixes for 5.0. Note that many of these fixes were also provided as hotfixes to 4.7 SP2, but they are listed here for customers who may not have installed those hotfixes.

12.1 Fixes for Envision

12.1.1 VB Manage Code Shape: Missing Information

In Managed Code C# snippet, you can see the class name, method description and IntelliSense. However, these items do not appear in the Managed Code VB snippet. These items were added to Managed Code VB snippets.

12.1.2 SubProcess AgileShape: Can't Edit Naming Convention Field

For custom naming on sub processes it was not possible to deselect "If the sub process name already exists, append the name with." This issue has been fixed.

12.1.3 Email Templates Default Language Not Loading Correctly

When an email template is created for the first time in Envision, the Language drop-down combo is not initialized correctly and wrongly shows Afrikaans, rather than the default language). For subsequent email templates that are created in the same process, the combo is however correctly initialized. This issue has been fixed.

12.1.4 Active Directory Shapes: Hyphen (-) Should Not Be an Illegal Character

When entering a User Name that contains a hyphen in the context properties of the Active Directory shape in Envision, the hyphen is considered as illegal character, but it should not be. This issue has been fixed.

12.1.5 Process Templates: Maximum Sessions Allowed Property Mislabeled

The property at the process level in Advanced section reads “Maximum Session Allowed Test”. It should read “Maximum Sessions Allowed”. This issue has been fixed.

12.1.6 Reloading an InfoPath Form in Envision Does Not Update Data Types

When an InfoPath form is reloaded in Envision, it does not pick up changed data types in the schema. This issue has been fixed.

12.1.7 AgilePoint Envision Error when Discovering an ASP.NET Page

An error occurs when Envision attempts to discover an ASP.NET page in a location where AgilePoint cannot access. This issue has been fixed.

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12.1.8 Array index out of bound error in Envision (InfoPath project type)

The client is receiving ""Array index out of bound"" error as soon as they associate an InfoPath form (.xsn) file with a process in Envision. The error occurs if the TEMP/TMP environment variable contains a non-English character (an accented ó in this case). (i.e. Tempó). This issue has been fixed.

12.1.9 InfoPath with Non-ASCII Characters in the File Name

When an InfoPath filename has a non-ASCII character in the name, when associated in Envision, Envision then creates a second file, with the non-ASCII character replaced with the ANSI equivalent. For example, Liquidación.xsn generates LiquidaciÃ³n.xsn. This means that filenames are not handled as UTF8 in the code, causing this wrong behavior. This issue has been fixed.

12.1.10 QueryDatabase SqlType="StoredProcedure" Uses 30 second Command Timeout

The Query Database shape SqlType=""StoredProcedure"" is using the default command timeout value of 30 seconds and not the timeout value supplied in the shape. This issue has been fixed.

12.1.11 Collapsing Shapes

If you copy a shape in a process model and then collapse it, then you cannot collapse the copies. In fact if you then Expand the original shape, when you Collapse a copy, the original shape collapses, not the copy. This issue has been fixed.

12.1.12 Active Directory AgilePart: Logon Failure: Unknown User Name or Bad Password

I got a "Logon failure: unknown user name or bad password" when creating a user, but the user is created (but disabled). This issue has been fixed.

12.1.13 Process Adaptation AgileShape Doesn't Support Custom Attributes in the Participants Field

Custom Attributes and Macros (e.g. $MANAGER) were not working for Process Adaptation. This has been fixed.

12.1.14 Validation Error in the WSE Shape

While configuring the WSE, if the cursor is changed from the Endpoint URL, it is performing a validation check, even if the field is null or empty. This issue has been fixed.

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12.1.15 Failed to send a Email when TO and CC field contains a space after a semicolon (;)

Failed to send an email when the To and CC fields contains a space after a semicolon (;). This issue has been fixed.

12.1.16 Cannot Create a User or Group under Organizational Unit (OU) and Under Common Name "Users"

When creating a user or group in Active Directory using the Create User and Create Group Agile Parts of Active Directory, it gets created on the root level. It cannot be created inside OU or CN. This issue has been fixed.

12.1.17 Missing Spanish LCID 3082

In some Spanish installations, the Envision stencils appear in English because of a setting in the Envision installer. This issue has been fixed.

12.1.18 UserDefinedProperties Throwing "key not found" Error in Other Languages

In Envision UserDefinedProperties property dialog was throwing "key not found" error in other languages. This has been fixed.

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12.2 Fixes for SharePoint Integration

This section provides the list of fixes for SharePoint Integration for AgilePoint. Unless otherwise indicated, these fixes apply to both SharePoint Integration v1 and v2.

12.2.1 Colored Border in Process Viewer Has Fixed Size

The Red / Green border that appears on running manual tasks in Process Viewer, has a fixed size, meaning that if a shape is smaller or bigger than the standard rectangle size, it looks wrong in viewer. The size of the shapes are in the process template definition and can be used to adjust the border size accordingly. This occurs in both MOSS and Enterprise Manager Process Viewers. This issue has been fixed.

12.2.2 InfoPath Bottom Tool Bar Issue in IE8 or FireFox 3.5.2

In Internet Explorer 8 or FireFox 3.5.2, the Submit & Close button on the bottom of the page in an InfoPath form was not working. This issue has been fixed.

12.2.3 ListForm Does Not Work with the Issue Tracking List

ListForm did not support Issue Tracking lists. Support has been added for the following list types: List Templates Task, Issues, Project Task, Calendar, Data Connection Library, Links, and Picture Library.

12.2.4 (SharePoint Integration v2 Only) Copy/Delete Files in SharePoint Fails when Running Certain Language Packs

Copy/delete files in SharePoint doesn't work when running certain language packs. This issue has been fixed.

12.2.5 Title Field of a Sub Process Not Showing Up as a Custom Field in the Task List

The title field of a sub process is not showing up as custom field in the Task List using SharePoint custom field functionality. This issue has been fixed.

12.2.6 The SharePoint Submit Page Still Contains the Category Drop-down List

The SharePoint Submit page still contains the Category drop-down list. This issue has been fixed. However, we recommend using the Common Approval Dialog for this functionality beginning with AgilePoint v5.0.

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12.2.7 Activity Information is Not Displayed for a Reassigned Task

Initiate an InfoPath-based process with at least two manual activities in it, enter the values, and submit the form. Click a task, and select the Reassign option and reassign to another user. Log on SharePoint as the reassigned user, and click the task to open it in the Process Viewer. In the Process Viewer dialog, click any manual activity. The processing symbol appears, but the activity information is not displayed, even after waiting for a long time. This issue has been fixed.

12.2.8 (SharePoint Integration v2 Only) Lookup Field in List Prevents AP Process Instantiation

A lookup field within the list prevents the triggering of an AgilePoint process instance. This issue has been fixed.

12.2.9 (SharePoint Integration v2 Only) Some SharePoint AgileShapes were Not Working After Renaming the Document Library After Publishing the Process

If you rename the document library or list after publishing the process, the AgilePart fails. This issue has been fixed.

12.2.10 (SharePoint Integration v2 Only) "Take Assignment and Open" Action Not Working for ASP.NET Tasks

The "Take Assignment and Open" Action for an external ASP.Net web application does not work when invoked from either the Task List Web Part of the Process Viewer page in SharePoint. This issue has been fixed.

12.2.11 (SharePoint Integration v2 Only) Some SharePoint AgileShapes not working if Default View is not "All Documents"

Some SharePoint AgileShapes do not work if the Default View for the document library is other than "All Documents". This issue has been fixed.

12.2.12 (SharePoint Integration v1 Only) formServer.aspx Prevents users from Accessing if a Task is Completed

A user clicks a link after a task is completed, but the form is still displayed. It is desired to prompt the user that the task has been completed and disallow the user to resubmit. This issue has been fixed.

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12.2.13 Having a NULL Value in One of the Items in a Create List Item shape Causes the AgilePart to Crash.

Having a NULL value in one of the items in a Create List Item shape causes the AgilePart to crash. This issue has been fixed.

12.2.14 InfoPath SubProcess Shape: URL for SharePoint was Case Sensitive

When using the InfoPath Sub Process AgileShape, sub processes are failing if they refer to a SharePoint form library where the capitalization (case) has changed in the form library name. This fix ensures that case sensitivity will not affect sub process execution. This fix is recommended for customers using the Sub Process AgileShape.

12.2.15 SharePoint ListForm: Column Name for SharePoint was Case Sensitive

If the capitalization (case) changes in a column name for a SharePoint list, then dynamic rules (for example, enabling or disabling particular fields or values) in related SharePoint List Forms do not work. This fix enables the dynamic rules in the SharePoint list to work as expected, even if the case changes in the column name. This fix is recommended for customers using SharePoint List Forms.

12.2.16 Dynamic Group Shape Creating Duplicate Tasks

Duplicate tasks are rendered in the Task List if the Dynamic Group Shape is used and it is assigned to multiple groups where there are common members among these groups. This issue has been fixed.

12.2.17 Sub Process AgileShape of Envision

In the Sub Process AgilePart, deselect the parent process, and select "This sub process will share custom attributes with the parent process." It shows the task in task list but doesn't display the link to open the InfoPath form. This issue has been fixed.

12.2.18 (SharePoint Integration v2 Only) Portal Listing MOSS AgilePart Does Not Work When a Library Name Does Not Have "Link" in the Name

The Portal Listing Agilepart only works for English sites. This shape creates a link in a link library that must be called "links." To fix this, a parameter was created for the name of the link library with default value "links".

12.2.19 (SharePoint Integration v2 Only) Move Files AgilePart Not Working with Certain Library Names

The Move Files AgilePart does not work if the word "Forms" appears in the library name. This issue has been fixed.

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12.2.20 (SharePoint Integration v2 Only) Move Files AgilePart: Issues Moving Documents to Subfolders

The Move Files shape does not seem to move the file into sub-folders of the target library. (It was working for the root folder.) This issue has been fixed.

12.2.21 (SharePoint Integration v2 Only) InfoPath SubProcess AgilePart Failed in the New Environment

When using the InfoPath Sub Process AgilePart, an InfoPath form is created but the child process does not run. This issue has been fixed.

12.2.22 (SharePoint Integration v2 Only) Dynamic Group Process Viewer Security Issue

On the Process Viewer, the Task link for taking assignment for a Dynamic Group shape was appearing for all users , even if the user did not belong to the associated group or role. This issue has been fixed.

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12.3 Fixes for AgilePoint Server

12.3.1 Data Population and Data Tracking Fails if the WorkObjectID Length > 50 Characters

In AgilePoint Web Application while creating Process Instance if the WorkObjectID custom string is more than 50 characters then the Data Population and Data Tracking will not populate. This issue has been fixed.

12.3.2 Active Directory Import Fails on Certain Groups Due to Restricted Characters in the Group Name

We try to import AD groups in AgilePoint using Enterprise Manager with a front slash (/), but the import failed. This issue has been fixed.

12.3.3 WFEvent.CANCEL_WORKITEM not Fired on Rollback

The engine is not sending ROLLBACK_PROCESS_INSTANCE, ROLLBACK_ACTIVITY_INSTANCE, or CANCEL_WORKITEM when a task is canceled after rolling back a process. This issue has been fixed.

12.3.4 Issue with HTML Tags in Emails Template When the Server Configuration Defaults to Text

For email templates, if the AgilePoint Server Configuration is set to Text and the email template is set to HTML, it does not work. The global setting in the AgilePoint Server Configuration was not being over-ridden by the email template setting. This has been fixed.

12.3.5 Two Issues with Task Rework

The following two issues have been fixed for Task Rework:

- The wrong task ASP.NET page displays once a task has been marked for rework.
- The time span is not inherited correctly for tasks when they are identified for rework.

12.3.6 Occasional License Activation Error

Sometimes when a user tried to activate AgilePoint Server, an exception was thrown. This was caused by an invalid license key. This has been fixed, so that now when the license key is invalid, the user is prompted to re-enter the activation key.

12.3.7 Process Adaptation: Reuse Participant Issue

When using Process Adaptation, the original participant was being reused in sessions after the first, even if ReUseParticipant was set to False. This has been fixed, so that if ReUseParticipant is set to False, subsequent sessions will not retain the previous participants.

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12.3.8 AgilePoint Server Performance

Initial loading issue when AgilePoint Server restarts with a high volume of tasks that have timed out (from status 'Assigned' to 'Overdue'). A lot of .NET timers were created and consumed 80% - 100% CPU. This hotfix includes an optimized algorithm to resolve this issue.

12.3.9 Occasional Issue with AND Shape Due to Multiple Sessions

In very few cases, the AgilePoint Server engine executes the same route twice almost at the same time. It may cause the AND shape to not work properly, send duplicated email, or enter a sub process twice. This issue has been fixed.

12.3.10 Email Issues in NLB Environment

Notification emails stopped when a master AgilePoint Server was restarted in a NLB environment. This issue has been fixed.

12.3.11 Event Services: Monthly Schedule Fails if All Days and Months Selected

In the Event Services Schedule, a Monthly schedule fails if all days and months are selected. This issue has been fixed.

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12.4 Fixes for Enterprise Manager

12.4.1 Slow Performance on Enterprise Manager Main Page

The Enterprise Manager main page experienced long load times due to many method calls. The number of method calls was reduced to improve performance.

12.4.2 UserFromActiveDirectory Class Does Not Show Inner Exception

The UserFromActiveDirectory class is not providing definitive message when it encounters an error. It throws the error "Exception has been thrown by the target of an invocation," which suggest that there could be inner exceptions that are not displayed. This has been fixed, so the inner exception is displayed.

12.4.3 Email Event - Exchange Server URL Issue

The URL is not resolved when a user in an email event uses an MS Exchange mail account where the Exchange server URL does not have a front slash (/) at the end of address. The email event does not check the end of the URL string; it simply appends "exchange/" to the URL. This issue has been fixed.

12.4.4 Repetitive Ghost Email Triggers -Event Services

For Email Event Services, a client reported repetitive ghost email triggers. This issue has been fixed.

12.4.5 Recursive Rendering (Process Hierarchy) Not Working

The recursive rendering of the Process Hierarchy in the Enterprise Manager is only working up to the second level. This issue has been fixed.

12.4.6 Unexpected Validation Error When Configuring a New Event Service Schedule

If I configure the start and end dates for a new event service schedule at "Enterprise Manager --> Event Service page --> Schedule --> add schedule", an unnecessary validation error occurs. This issue has been fixed.

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12.5 Fixes for AgileConnector

12.5.1 Unable to populate data to a table with Identity Key column – Data Population issue

When using the data population feature, if I have an Identity key or default values set for a column, the table to which I have linked my workflow does not get populated. This issue has been fixed.

12.5.2 ScheduledJobEventListener.cs Log Message

The log message for the ScheduledJobEventListener.cs class needs to be updated to reflect the actual class in order to facilitate actual tracking of the created process instance. This issue has been fixed.

12.5.3 ScheduledJob-Event Service Spawns Two Process Instances

When using the AgilePoint Event Services module - particularly within the Scheduled Job option - duplicate process instances are being created in some cases. This fix eliminates these duplicate process instances. This fix is recommended for customers using the AgilePoint Event Services module.

12.5.4 DataServices WF_DATA_SERVICE_ERRORDB Oracle ORA-00955

When installing AgilePoint Data Services, the ORACLE script tries to create the WF_DATA_SERVICE_ERRORDB, but fails on the second reference of “STORE AS BASICFILE” for the NEW_XML LOB. The error thrown is “ORA-00955: Name is already used by an existing object.” This issue has been fixed.

12.5.5 Event Service - Daily at 10 AM - does not save correctly

When configuring the Event Service and saving a Daily 10 AM schedule, it does not seem to be recorded properly in the WF_INTEGRATED_APPS table. This issue has been fixed.

12.5.6 Process Initiator Event Configurations still shows Unencrypted Password

In the Event Service component, the saving of the Process Initiator Event Configurations in WF_INTEGRATED_APPS table still shows an unencrypted password value. This issue has been fixed.

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12.5.7 DEFAULT or NULL are Not Allowed as Explicit Identity Values (DataPopulation)

The datapopulation cannot deal with an autonumber (identity seed) as we get following error: "DEFAULT or NULL are not allowed as explicit identity values." This issue has been fixed.

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12.6 Fixes for AgilePoint Developer

12.6.1 WFBoxList Control Not Supporting Multiple Selection

The Multiple selection for the WFListBox control was not working. This issue has been fixed.

12.6.2 WFComment - Wrap Property in the Comment History

A property to wrap text has been exposed in the Comment History for WFComment.

12.6.3 WFComment.CurrentCommentText

Line breaks were not supported in the WFComment control. This issue has been fixed.

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