



# **AgileReports Integration Guide**

**AgilePoint BPMS v5.0 R2**

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# Preface

## Disclaimer of Warranty

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AgilePoint, Inc. makes no representations or warranties, either express or implied, by or with respect to anything in this document, and shall not be liable for any implied warranties of merchantability or fitness for a particular purpose or for any indirect, special or consequential damages.

## Copyright

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## Trademarks

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## Government Rights Legend

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Use, duplication or disclosure by the U.S. Government is subject to restrictions set forth in the applicable license agreement and as provided in DFARS 227.7202-1(a) and 227.7202-3(a) (1995), DFARS 252.227-7013(c)(1)(ii) (Oct 1988), FAR 12.212(a) (1995), FAR 52.227-19, or FAR 52.227-14, as applicable.

## Virus-free software policy

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

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

## Document Revision Numbers

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

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

## AgilePoint Documentation in PDF and HTML

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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](#) in the [Documentation Library](#).

## Opening the Documentation Library

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To open the AgilePoint Documentation Library, do the following.

### Prerequisites

You must have a valid account on the AgilePoint Support Portal.

### Instructions

1. Log on to the AgilePoint Support Portal.
2. Click **Documentation**.
3. On the **Documentation** page, click the documentation library for your AgilePoint release.
  - For AgilePoint BPMS v5.0 SP1 and higher, the web-based documentation library opens in a new tab or window in your web browser.

- For releases prior to v5.0 SP1, a download starts for a Zip file with the PDF documentation for your release.

## Finding Information in the Documentation Library

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The information in this topic will help you to locate information in the AgilePoint Documentation Library.

### Using the Table of Contents

The table of contents in the AgilePoint Documentation Library is divided by content areas. For example, the Installation section includes all the information you need to install AgilePoint BPMS. The AgilePoint API section includes information about the AgilePoint APIs.

You can use the Table of Contents to explore the AgilePoint documentation content and find the information you want.

### Searching

The web-based documentation includes a centralized search for all documentation content. To search for information:

1. In the AgilePoint Documentation Library, click the **Search** tab. In the Search box, enter **1 search term**, and click **Search**.

The search results display in alphabetical order by topic title.

It is important to understand that the third-party software AgilePoint uses to generate web-based documentation allows only 1 search term. More than 1 search term will cause the search to fail.

AgilePoint recommends using a relatively unique search term to find the information you need. For example, entering a common term, such as "process," will return a high percentage of the total documentation topics in the search results.

2. Browse the list of topic titles to find the information you want.

### Printing

The PDF documentation is provided mainly for the purpose of printing and archiving. To print a set of information:

1. Navigate to the main page of the Documentation Library from which you want to print.
2. In the list of documents, click the document name in the **PDF** column.
3. From your PDF reader software, print the portion of the document you want.

## Downloading Files and Sharing Links from the Documentation Library

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You can download and share files AgilePoint's documentation library as you would in any other web page. Note that if you send links to recipients, they must have a Support Portal login to view the file.

These procedures are common examples based on Internet Explorer with the Adobe Reader plug-in. Exact procedures may vary depending on your web browser, PDF viewer, and email client configuration.

## Share a Link to an HTML Topic

1. Navigate to the topic you want to share.
2. Copy the URL in the Location box in your web browser.
3. Paste the URL in an email, IM client, etc.

## Share a Link to a PDF Document

1. In Internet Explorer, navigate to the Documentation Library home page.
2. In the **PDF** column, right-click the name of the PDF file you want to share.
3. In the quick menu, click **Copy shortcut**.
4. Paste the URL in an email, IM client, etc.

## Save a Copy of a PDF Document

1. In Internet Explorer, [open the Documentation Library home page](#).
2. In the **PDF** column, click the name of the PDF file you want to share.
3. In the Adobe Reader plug-in, click **Save** button.

## Contacting AgilePoint Sales

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

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**Email:** [info@agilepoint.com](mailto:info@agilepoint.com)

**Web site:** [www.agilepoint.com](http://www.agilepoint.com)

**International:** For AgilePoint EMEA and AgilePoint Asia Pacific, please call the AgilePoint Corporate Office for contact information.

## Contacting Customer Support

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

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

# AgileReports

AgileReports is an add-on to AgilePoint BPMS. AgileReports provides rich functionality for creating customized reports for AgilePoint. For details about AgileReports capabilities, see the AgileReports documentation.



# 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.

# 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** - Get critical information to the right people at the right time by scheduling automatic report delivering, and manage your reports easily and efficiently.
- **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.

# 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.

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

# 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.

## AgilePoint BPMS Tables in AgileReports

AgileReports comes pre-loaded with the AgilePoint tables, so no further integration is required with the database.

# Out of the Box Reports for AgilePoint

AgileReports includes a number of out of the box reports designed specifically for AgilePoint. You can run these reports as designed, or customize them to your needs.

## Activities By Process Template Report

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The Activities By Process Template report provides a bar graph showing the number of instances of each manual activity within a particular process model.

Below the bar graph is a table with details and statistics about the process model and its manual activities.

## Process Instances by Status Report

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The Process Instances by Status report provides a bar graph showing the number of process instances for each process model, grouped by process instance status.

Below the bar graph is a table with details and statistics about the process instance statuses.

## Average Processing Time - Automatic Activities Report

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The Average Processing Time - Automatic Activities report provides a graph showing the average completion time for each automatic activity in a specified process model.

By default, the graph displays as a bar graph, but this is configurable.

If you run this report with parameters, you can filter the results by start and/or end date.

## Average Processing Time - Manual Activities Report

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The Average Processing Time - Automatic Activities report provides a graph showing the average completion time for each manual activity in a specified process model.

By default, the graph displays as a bar graph, but this is configurable.

If you run this report with parameters, you can filter the results by start and/or end date.

## Average Processing Time - By Process Version Report

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The Average Processing Time - By Process Version report provides a graph showing the average processing time for each process model. The processing time for each process model is also depicted according to the version number.

## Average Processing Time Heat Map - By Process Instance Report

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The Average Processing Time Heat Map - By Process Instance report provides a heat map showing the number of process instances and time required for the process instances for each process model. Process models with more process instances are showed larger, and processes with fewer instances are shown smaller. Process instance time is shown based on a color spectrum from green to red, where less time is closer to green, and more time is closer to red.

Below the bar graph is a table with details and statistics about the process model and its manual activities.

## Time Spent Percentage Process Report

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The Time Spent Percentage Process report provides a table showing the percentage of time spent by each activity instance within a process model. This is useful for determining the activities within a process that take the most time.

## Top 10 Longest Running Instances Per Process Model Report

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The Top 10 Longest Running Instances Per Process Model report provides a table showing the 10 longest running process instances for each process model.

## Top 10 Longest Running Tasks By Process Model Report

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The Top 10 Longest Running Tasks By Process Model report provides a table showing the 10 longest running manual activity instances for each process model.

## Group Details Report

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The Group Details report provides a table with information about each group within the AgilePoint system.

## Role Details Report

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The Role Details report provides a table with information about each role, and their access rights, within the AgilePoint system.

## User Group Membership Report

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The User Group Membership report provides a graph that displays the number of members within each group in the AgilePoint system.

## User Role Membership Report

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The User Role Membership report provides a graph that displays the number of members within each group in the AgilePoint system.

## User Participating In Process Report

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The User Participating In Process report provides a graph that displays the number of process instances per process model for which a user is a participant.

By default, the graph displays as a bar graph, but this is configurable.

## User Performance - Process Report

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The User Performance - Process report provides a graph that displays the average time spent for each participant in a process model to complete their tasks for that process.

By default, this information displays as a pie chart.