



## **Demo Environment**

### **AgilePoint BPMS for SharePoint**

#### **AgilePoint BPMS v5.0 R2**

Document Revision r5.0.8

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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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## 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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**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)

# Demonstration Environment

This document provides instructions for downloading, installing, and using a set of fully functioning demonstration processes from AgilePoint. These processes allow you explore AgilePoint processes in a live environment.

Some of the processes in the Demo Environment use InfoPath forms. InfoPath integration is a paid, add-on component that is not available for all editions of AgilePoint BPMS. For more information, contact [AgilePoint Sales](#).

# Downloading the AgilePoint Demo Environment

To download the AgilePoint Demo Environment, do the following.

## Prerequisites

- A compatible version of AgilePoint BPMS installed in your environment.
- SharePoint 2010 or 2013 installed in your environment.
- AgilePoint SharePoint Integration installed in your environment.
- Microsoft SharePoint Foundation Sandboxed Code service is running.
- SharePoint 2010 or 2013 User Code Host service is running.

## Instructions

1. In a web browser, navigate to one of the following links, depending upon your installed version of SharePoint:
  - **SharePoint 2010** - <https://agilepoint.box.com/s/d3cro8uc4td10uxkl5dw>
  - **SharePoint 2013** - <https://agilepoint.box.com/s/7zcs8a0tv4sbnk1ykvz>
2. Download the installation demo environment installation file to your SharePoint machine.

# Installing the AgilePoint Demo Environment

To install the AgilePoint Demo Environment, do the following.

## Prerequisites

- A compatible version of AgilePoint BPMS installed in your environment.
- SharePoint 2010 or 2013 installed in your environment.
- AgilePoint SharePoint Integration installed in your environment.
- Microsoft SharePoint Foundation Sandboxed Code service is running.
- SharePoint 2010 or 2013 User Code Host service is running.

## Navigation

1. Download the AgilePoint Demo Environment installer.
2. Double-click the file **OneClickDemoInstaller** to extract the installer files to your local machine.
3. Navigate to the expanded installation folder.

## Instructions

1. Double-click the file **Setup.exe**.
2. The installer checks the following items.
  - If all the checks pass, click **Next**.
  - If any checks do not pass, fix the issue as described in the following table, and click **Recheck**.

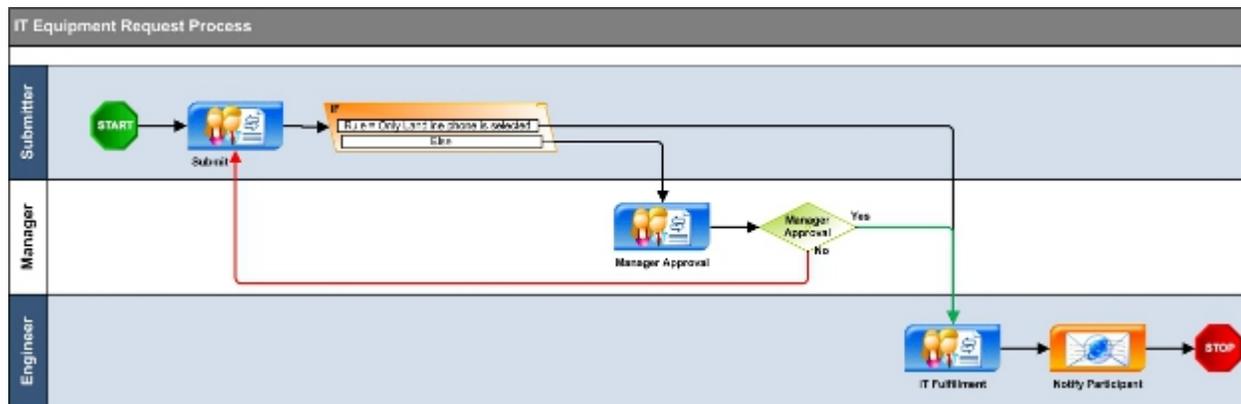
Issue	Resolution
Checking version of SharePoint	Install a supported version of SharePoint. Each Demo Environment version supports only 1 SharePoint release.
Verifying AgilePoint Feature activation	Install AgilePoint SharePoint Integration.
Verifying Microsoft SharePoint Foundation Sandboxed Code service is started.	Start the required windows service.
Verifying SharePoint 2010 User Code Host service is started.	Start the required windows service.

3. Select the SharePoint site collection to which you want to deploy the AgilePoint demo process application, and click **Next**.
4. On the **Installation Log** screen, when the installation is complete, click **Finish**.
5. The SharePoint site opens with the demo process application.

# IT Equipment Request Process

The IT Equipment Request Process provides an in-depth introduction to AgilePoint BPMS functionality.

## Process Model



## Problem Statement

Fulfill a request for physical equipment from an IT department.

## Instructional Goals

This process will enable you to:

- Run an AgilePoint process.
- Interact with input forms for a process.
- View and modify the source files for a process.

## Business Requirements

- IT Equipment can include computers, servers, mobile devices, and landline telephones.
- Landline phones do not require manager approval, but all other requests do.

## Form Technologies

This process is provided using 2 form technologies:

- **InfoPath** - A full-featured form that includes:
  - Custom css/branding
  - Show and hide dynamic fields
  - Dynamic repeating tables
  - Sections

- **SharePoint ListForms** - A form using SharePoint ListForm functionality.  
The inability to add customized form elements is a technical limitation of SharePoint ListForms.

# Running the Process as Administrator

You can run the IT Equipment Request process using InfoPath forms or SharePoint List Forms.

Running the entire process as a local Windows administrator is the simplest way to experience the IT Equipment Request demo process. When you run the process as Administrator, you can complete each step without needing to log on as a different user. However, you do not see the unique views for each users in the AgilePoint Web Parts.

To run the demo process as a local administrator, do the following.

For more information about running the process using multiple users, see [Setting Up Demo Process Users](#) and [Running the Process as Multiple Users](#).

## Prerequisites

- The AgilePoint BPMS demonstration environment is installed on your machine.
- You are logged on as the AgilePoint Administrator.

## Navigation

1. Open the SharePoint site **AgilePoint Demo Site**.
  - This site opens automatically after you run the AgilePoint Demo Installer.
  - Alternately, use the desktop shortcut that is created by the AgilePoint Demo Installer.
2. Do one of the following:
  - **InfoPath** - Click **IT Equipment Request - InfoPath**.
  - **SharePoint ListForms** - Click **IT Equipment Request - ListForm**

## Instructions

1. On the **IT Equipment Request** page, do one of the following:
  - **InfoPath** - Click **Add document**.
  - **SharePoint ListForms** - Click **Add new item**.
2. Complete the **IT Equipment Request** form as required.
3. Do one of the following:
  - **InfoPath** - Click **Submit**.
  - **SharePoint ListForms** - Click **Save**
4. Click the **My Tasks** tab.
5. Refresh the page.
6. On the task list, find your process. In the **Task** drop-down, click **Open Manager Approval**.



**Note:** Click **View Process** in the **Task** drop-down at any time to view the status of the process, such as where it is in the approval or fulfillment phases.

7. On the approval form, do one of the following:
  - **InfoPath** - Click **Approve**.

- **SharePoint ListForms** - Click **Approval**
8. Do one of the following:
    - **InfoPath** - Click **Submit & Close**.
    - **SharePoint ListForms** - Click **Save**
  9. Refresh the page.
  10. On the **AgilePoint Task List** Web Part, find your process. In the **Task** drop-down, click **Open IT Fulfillment**.



**Note:** Click **View Process** in the **Task** drop-down at any time to view the status of the process, such as where it is in the approval or fulfillment phases.

11. On the IT Fulfillment form, do one of the following:
  - **InfoPath** - Ensure **Completed** is selected.
  - **SharePoint ListForms** - Ensure **Processed** is selected.
12. Do one of the following:
  - **InfoPath** - Click **Submit & Close**.
  - **SharePoint ListForms** - Click **Save**
13. Refresh the page.

# Setting Up Demo Process Users

In a real-life scenario, the same user would not run a process from beginning to end. Each participant would have his own login, his own view of the process, and his own tasks to perform.

For security reasons, an installation program cannot create users on your machine. So if you want to observe the process running for multiple users in your AgilePoint demonstration environment, you must create and assign some demo users for the process.

## Creating Demo Users in Windows

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To create demo users for the AgilePoint IT Equipment Request process, do the following.

### Navigation

1. Log on to the AgilePoint Server machine as a local administrator.
2. Access user accounts for your machine. For example, click **Start > Control Panel > User Accounts**.

### Instructions

1. On the AgilePoint Server machine, create 3 users. The following names will be used throughout the AgilePoint demo documentation. You can use any user names you like (for example, the actual users within your environment), but you must keep track of the users for your own reference.
  - Bob
  - Sandy
  - David

## Adding Demo Users in AgilePoint

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To add your demo users to AgilePoint, do the following.

### Prerequisites

- [Create demo users in Windows](#).

### Navigation

1. Click **Start > All Programs > AgilePoint > Enterprise Manager**.
2. On the AgilePoint Enterprise Manager logon page, enter your user name and password.

This may be a user name and password specific to AgilePoint, or it may be the same as your Windows account. This is determined by your AgilePoint administrator.
3. On the Enterprise Manager Main Page, click **Users**.

## Instructions

Repeat the following procedure for each of the following users:

- Bob
- Sandy
- David

To add a user:

1. On the **Users** page, click **Add**.
2. On the Add User window, enter the following information for each user:
  - **User Name**
  - **Full Name**
  - **Email Address**

## Assigning Demo Users to Roles

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To assign demo users to AgilePoint roles for the IT Equipment Request process, do the following.

### Prerequisites

- [Create demo users in Windows.](#)
- [Create demo users in AgilePoint.](#)

### Navigation

1. Click **Start > All Programs > AgilePoint > Enterprise Manager**.
2. On the AgilePoint Enterprise Manager logon page, enter your user name and password.  

This may be a user name and password specific to AgilePoint, or it may be the same as your Windows account. This is determined by your AgilePoint administrator.
3. On the Enterprise Manager Main Page, click **Roles**.

### Instructions

1. On the **Roles** page, click **Engineer**.
2. On the **Role Members** page, click **Add User(s) as Member**.
3. On the **Select User** window in the **Registered Users** list, select **David**.
4. Click **OK**.

## Assigning Manager

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To assign a manager to a demo user, do the following.

## Prerequisites

- [Create demo users in Windows.](#)
- [Create demo users in AgilePoint.](#)
- [Assign demo users to roles.](#)

## Navigation

1. Click **Start > All Programs > AgilePoint > Enterprise Manager**.
2. On the AgilePoint Enterprise Manager logon page, enter your user name and password.  
This may be a user name and password specific to AgilePoint, or it may be the same as your Windows account. This is determined by your AgilePoint administrator.
3. On the Enterprise Manager Main Page, click **Users**.

## Instructions

1. On the **Users** page, select **Bob**.
2. Click **Edit**.
3. On the **Edit User** window in the **Manager** list, select **Sandy**.

# Running the Process as Multiple Users

Do the following to run the IT Equipment Request process as multiple users.

## Prerequisites

- [Set up demo process users.](#)

## Navigation

1. Log on to the AgilePoint demo machine as Bob.
2. Open the SharePoint site **AgilePoint Demo Site**.
  - This site opens automatically after you run the AgilePoint Demo Installer.
  - Alternately, use the desktop shortcut that is created by the AgilePoint Demo Installer.
3. Do one of the following:
  - **InfoPath** - Click **IT Equipment Request - InfoPath**.
  - **SharePoint ListForms** - Click **IT Equipment Request - ListForm**

## Instructions

1. On the **IT Equipment Request** page, do one of the following:
  - **InfoPath** - Click **Add document**.
  - **SharePoint ListForms** - Click **Add new item**.
2. Complete the **IT Equipment Request** form as required.
3. Do one of the following:
  - **InfoPath** - Click **Submit**.
  - **SharePoint ListForms** - Click **Save**
4. Click the **My Tasks** tab.
5. Log on to the AgilePoint machine as Sandy.
6. Open the SharePoint site **AgilePoint Demo Site**.
7. On the task list, find your process. In the **Task** drop-down, click **Open Manager Approval**.



**Note:** Click **View Process** in the **Task** drop-down at any time to view the status of the process, such as where it is in the approval or fulfillment phases.

8. On the approval form, do one of the following:
  - **InfoPath** - Click **Approve**.
  - **SharePoint ListForms** - Click **Approval**
9. Do one of the following:
  - **InfoPath** - Click **Submit & Close**.
  - **SharePoint ListForms** - Click **Save**

10. Log on to the AgilePoint machine as David.
11. Open the SharePoint site **AgilePoint Demo Site**.
12. On the **AgilePoint Task List** Web Part, find your process. In the **Task** drop-down, click **Open IT Fulfillment**.



**Note:** Click **View Process** in the **Task** drop-down at any time to view the status of the process, such as where it is in the approval or fulfillment phases.

13. On the IT Fulfillment form, do one of the following:
  - **InfoPath** - Ensure **Completed** is selected.
  - **SharePoint ListForms** - Ensure **Processed** is selected.
14. Do one of the following:
  - **InfoPath** - Click **Submit & Close**.
  - **SharePoint ListForms** - Click **Save**