Enterprise Manager Administrator's Guide

AgilePoint BPMS v5.0 R2

Document Revision r5.4.12

June 2014

Contents

Preface

Disclaimer of Warranty

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Virus-free software policy

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

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

Document Revision Numbers

AgilePoint documentation uses the revision number format ***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

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

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

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 team**, 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

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

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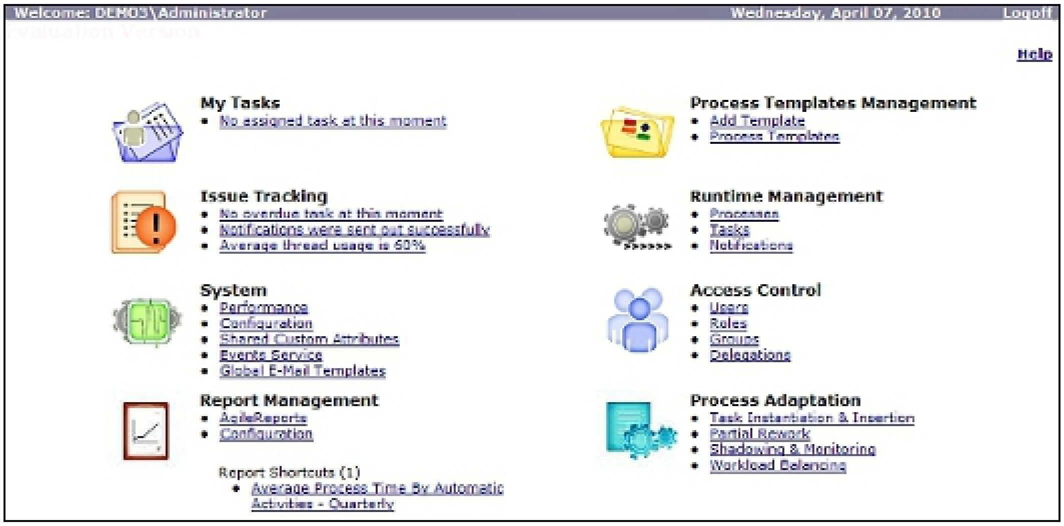
To contact AgilePoint Support, please submit a ticket on the AgilePoint Support Portal: http://support.agilepoint.com/SupportPortal/

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

AgilePoint Enterprise Manager

AgilePoint Enterprise Manager is an ASP.NET application that provides a web-based interface for power users or system administrators to manage, monitor, and audit AgilePoint BPMS and its runtime activities and processes.



Getting Started

The information in this section provides a brief overview for getting started with the application.

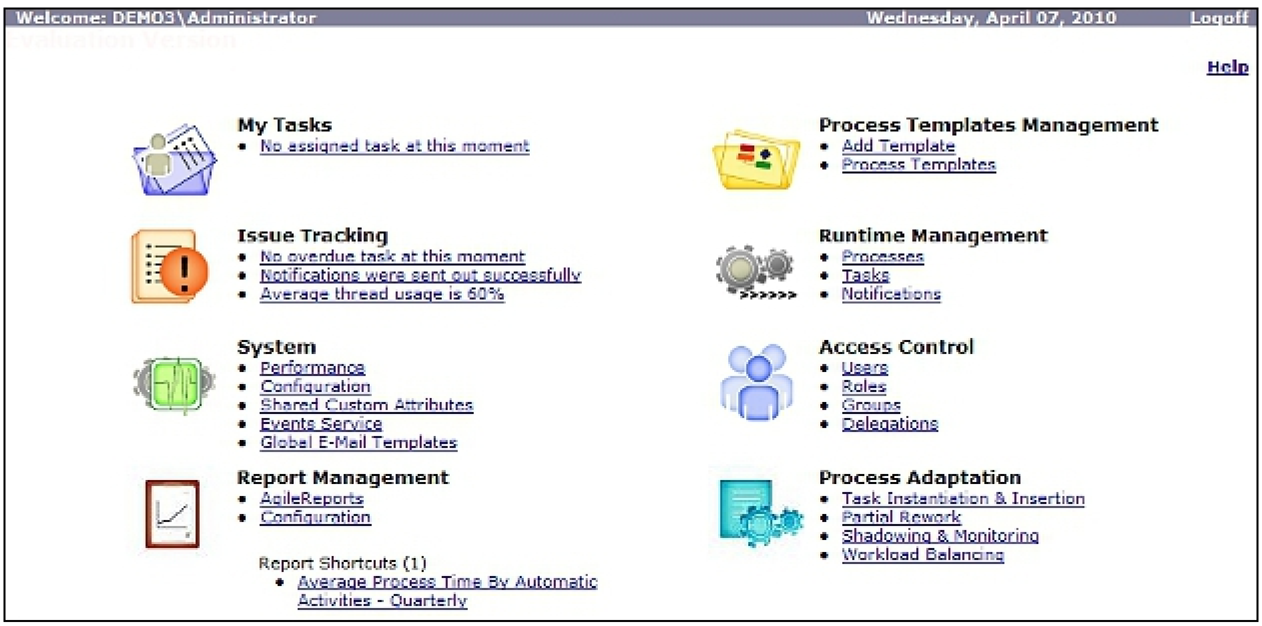
Open Enterprise Manager

To open AgilePoint Enterprise Manager, do the following.

Instructions

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.

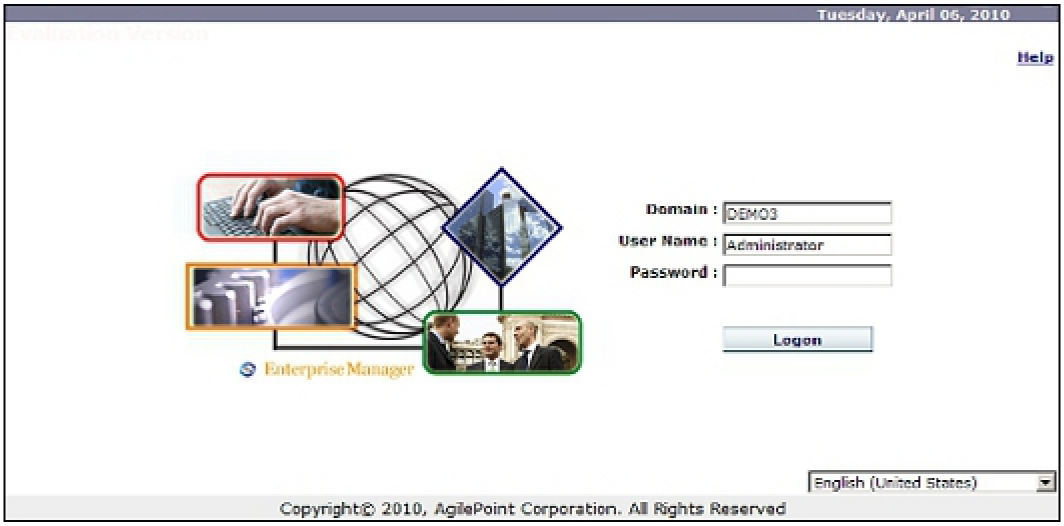


Localization for Enterprise Manager

AgilePoint Enterprise Manager provides localization support for English, Japanese, Chinese, Hebrew, Spanish, and French. Once the localization feature is activated, a drop-down list becomes visible on the Main Page to select the language for which to show. In order to expose this functionality, add the following 'add key' entry into the web.config file for Enterprise Manager.

```
<configuration>
  <appSettings>
    <add key="SupportedLocale" value="en-US;ja-JP;zh-CN;he;es;fr" />
      </appSettings>
</configuration>
```

After adding this configuration, the AgilePoint Enterprise Manager Main Page should look like the following:



System

The System section of the Enterprise Manager Main Page allows the administrator to perform certain functions such as view event processing performance and process information, set AgilePoint system and database configurations, manage shared custom attributes, event services, and global email templates.

Create a Shared Custom Attribute

To create a shared custom attribute, do the following.

Navigation

1. On the Enterprise Manager Main Page, click **Shared Custom Attributes**.
2. On the **Custom Attributes** window, click **Add**.

Note: This page can only be used by administrators and users with the **Modify Shared Custom Attributes** access right.

Instructions

1. Complete the fields on the Custom Attributes Window.

Field Name	Definition
Name	Definition: Specifies the reference name of the custom attribute. Allowed Values: A text string that can contain spaces. Default Value: None
Type	Definition: Determines the data type for the shared custom attribute. Allowed Values: • **String** • **Int32** • **DateTime** • **Decimal** • **Boolean**

Field Name	Definition
	Default Value: String
Value	Definition: The value that is applied to the shared custom attribute at runtime. Allowed Values: A number or a text string that can contain spaces. Default Value: None

Update a Shared Custom Attribute

You can modify a shared custom attribute at runtime either manually using AgilePoint Enterprise Manager or programmatically using the Managed Code C# Snippet.

To update a shared custom attribute using Enterprise Manager, do the following.

Navigation

1. On the Enterprise Manager Main Page, click **Shared Custom Attributes**.
2. On the **Custom Attributes** window, select the shared custom attribute you want to modify.
3. Click **Edit**.

Note: This page can only be used by administrators and users with the **Modify Shared Custom Attributes** access right.

Instructions

1. On the **Custom Attributes** window, edit the fields as required.

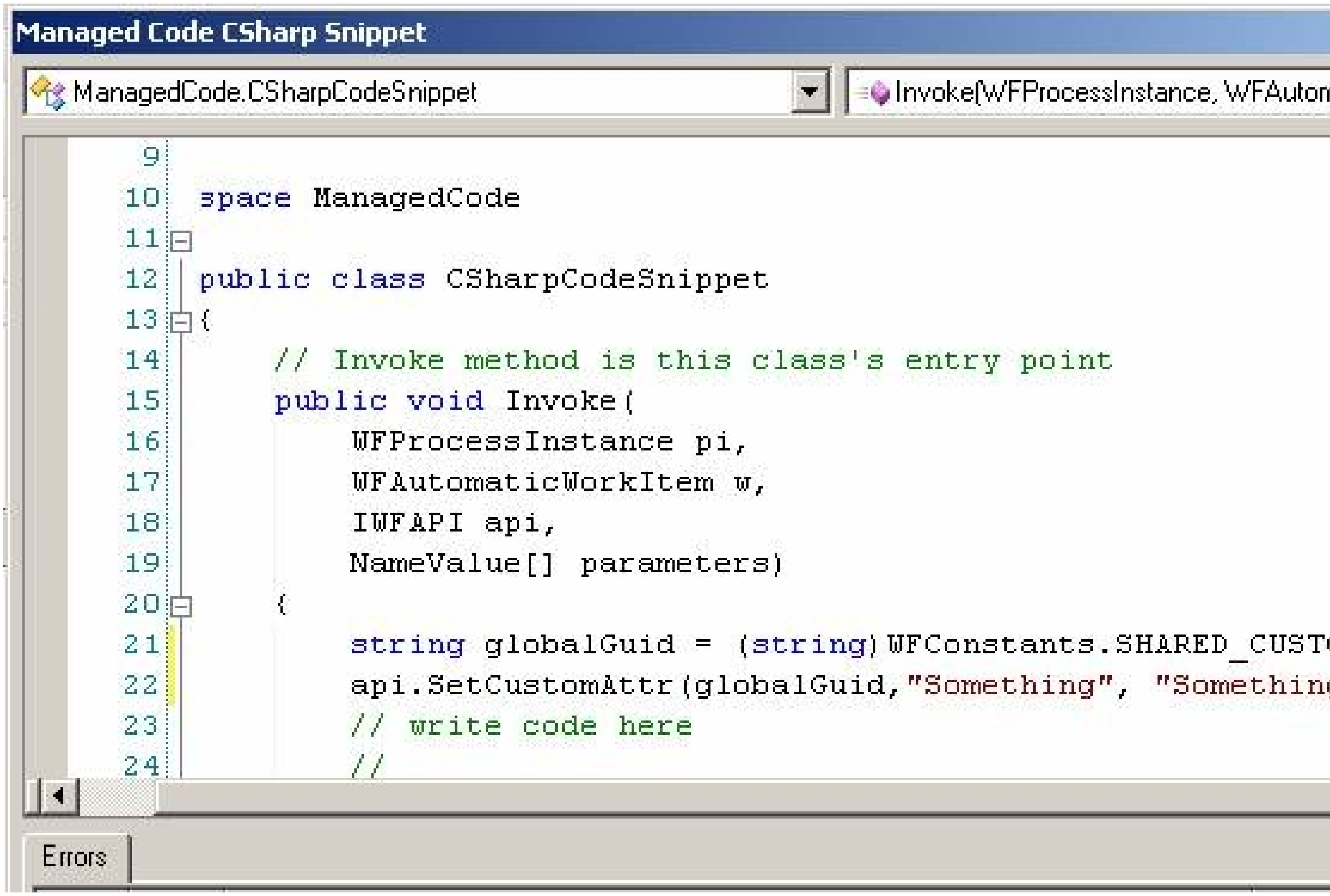
Field Name	Definition
Name	Definition: Specifies the shared custom attribute you want to update. Allowed Values: Read only.
Type	Definition: Determines the data type for the shared custom attribute.

Field Name	Definition
	Allowed Values: • **String** • **Int32** • **DateTime** • **Decimal** • **Boolean** Default Value: String
Value	Definition: The value that is applied to the shared custom attribute at runtime. Allowed Values: A number or a text string that can contain spaces. Default Value: None

To update a shared custom attribute programmatically using the Managed Code C# Snippet, do the following:

For example, you have defined a shared custom process attribute called "Something" in Enterprise Manager. You set the value of the shared custom process attribute in Enterprise Manager. You now want to use a Managed Code C# Snippet to dynamically change the value of the shared custom process attribute "Something".

The following is the syntax to update the value of the shared custom process attribute "Something".

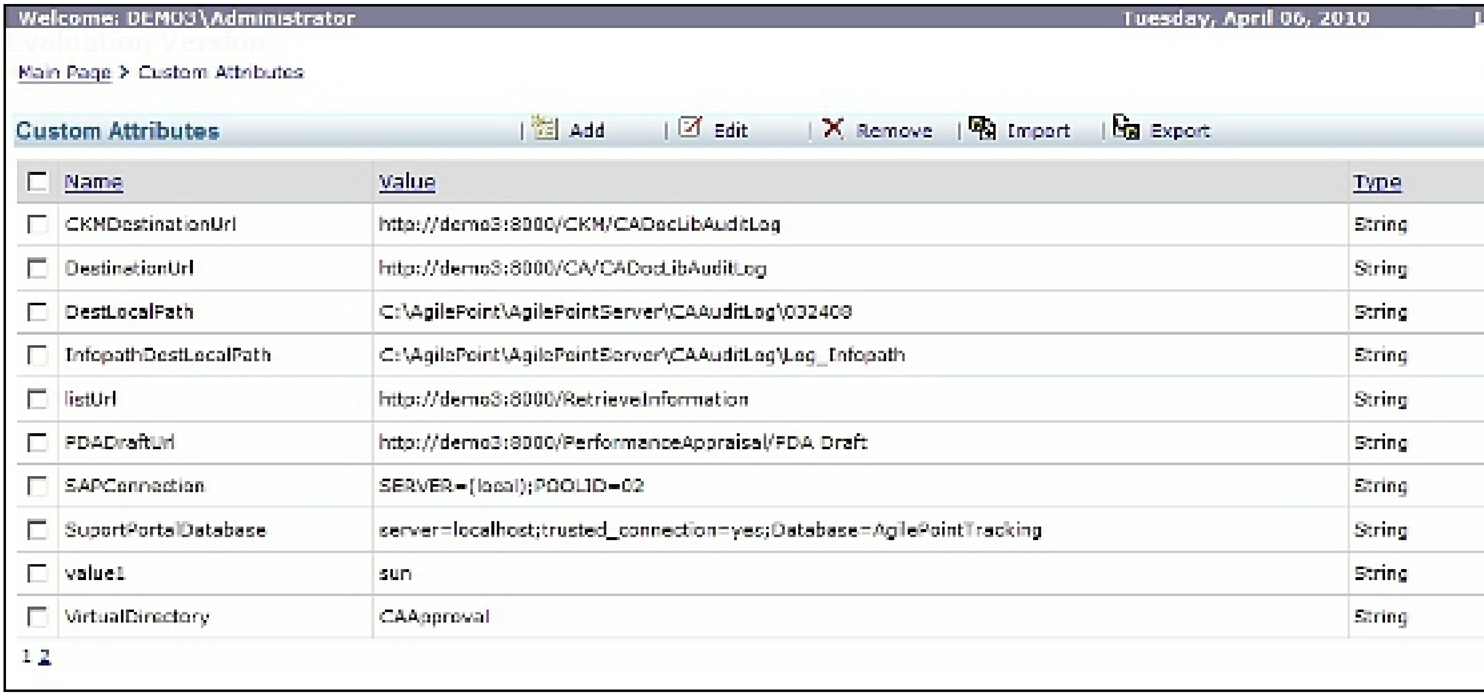


Pages

This section provides a description of the pages in the System section of Enterprise Manager.

Shared Custom Attributes Page

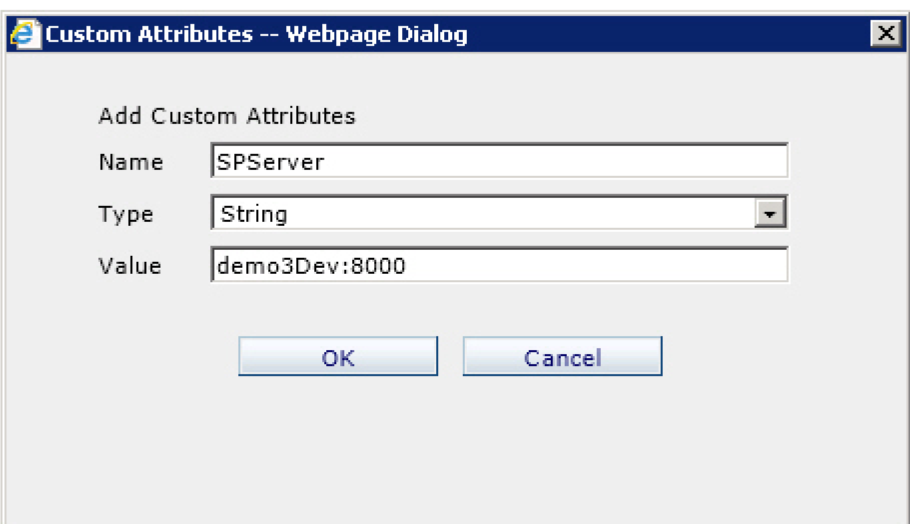
This page allows the administrator to view and configure shared custom process attributes that can be accessed from all processes running on the server (regardless of which process template the process is associated with).



Custom Attributes Window

Creates a new shared custom attribute.

A shared custom attribute is a user defined attribute that can be used or shared across different processes or environments using Enterprise Manager. For example, you can use the same custom attribute in various environments: development, test, and production.



Navigation

1. On the Enterprise Manager Main Page, click **Shared Custom Attributes**.

2. On the **Custom Attributes** window, click **Add**.

Note: This page can only be used by administrators and users with the **Modify Shared Custom Attributes** access right.

Field Definitions

Field Name	Definition
Name	Definition: Specifies the reference name of the custom attribute. Allowed Values: A text string that can contain spaces. Default Value: None
Type	Definition: Determines the data type for the shared custom attribute. Allowed Values: • **String** • **Int32** • **DateTime** • **Decimal** • **Boolean** Default Value: String
Value	Definition: The value that is applied to the shared custom attribute at runtime. Allowed Values: A number or a text string that can contain spaces. Default Value: None

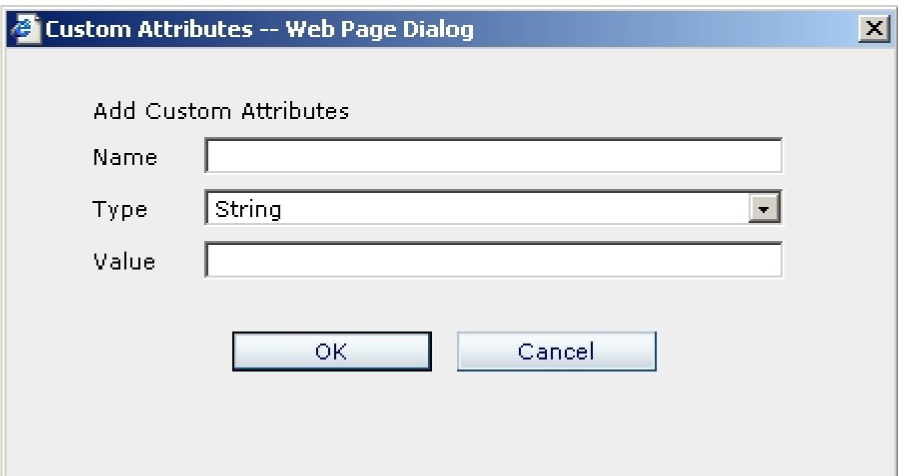
Add/Edit Shared Custom Attribute Page

The value of a shared custom process attribute can be modified at run time either manually via AgilePoint Enterprise Manager or programmatically via the Managed Code C# Snippet.

To modify the value of a shared custom process attribute via Enterprise Manager:

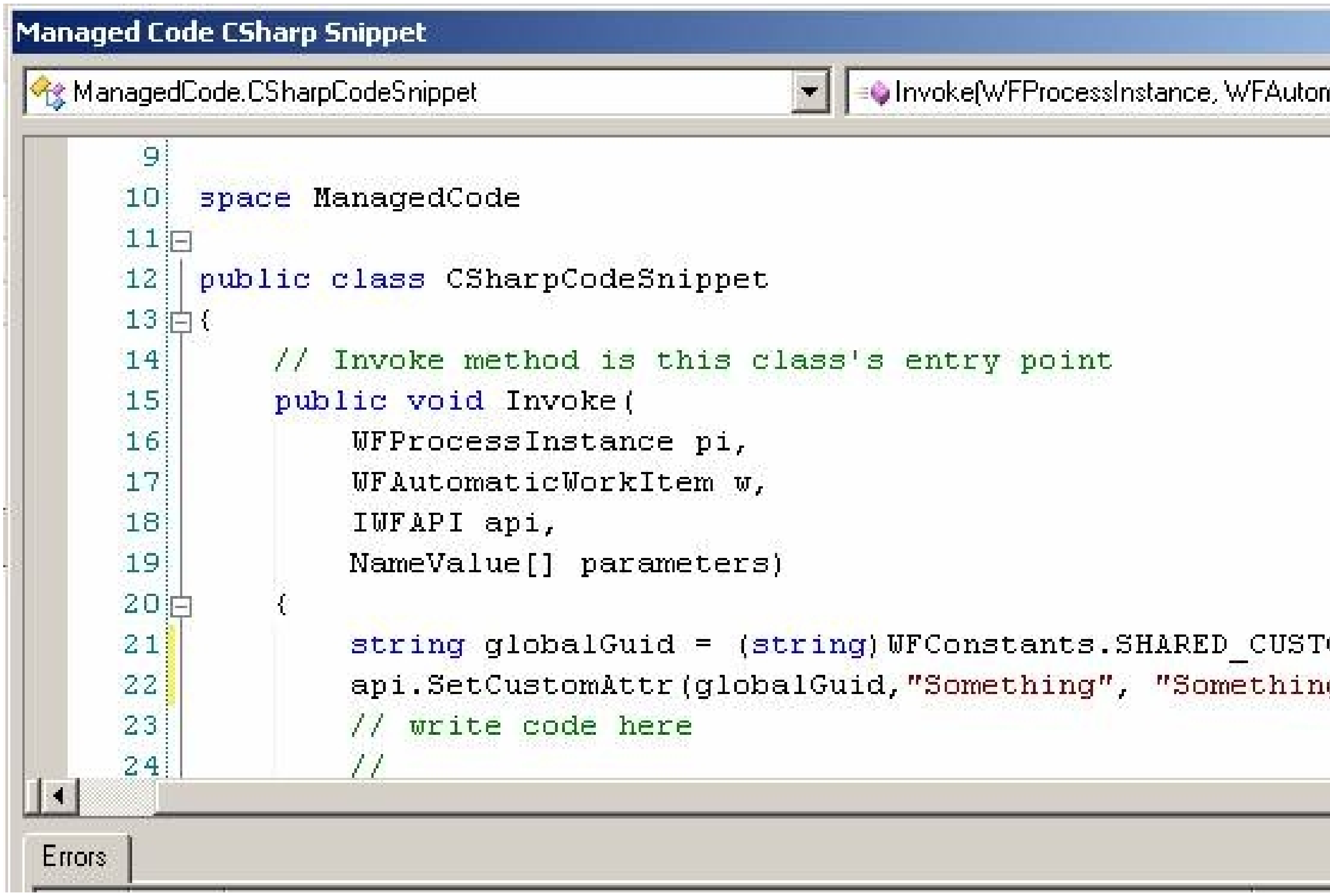
Note: This page can only be used by administrators and users with the **Modify Shared Custom Attributes** access right.

This page allows the administrator add or edit a specific shared custom process attribute.



To modify the value of a shared custom process attribute programmatically via the Managed Code C# Snippet:

For example, you have defined a shared custom process attribute called "Something" in Enterprise Manager. You set the value of the shared custom process attribute in Enterprise Manager. You now want to use a Managed Code C# Snippet to dynamically change the value of the shared custom process attribute "Something". Below is the syntax to update the value of the shared custom process attribute "Something"?



Import Shared Custom Attributes Page

In Enterprise Manager, click **Custom Attributes > Import** to modify the system's current Shared Custom Attributes by uploading an XML file containing the new values. For an example of a valid XML file, use the Export Shared Custom Attributes page.

Export Shared Custom Attributes Page

In Enterprise Manager, click Custom Attributes > Export to download a ZIP-compressed XML file containing the system's current Shared Custom Attributes.

Event Service Page

This page allows the administrator to initiate processes automatically via scheduling, email, database, or file dropping. All event listeners can be configured via AgilePoint Enterprise Manager.

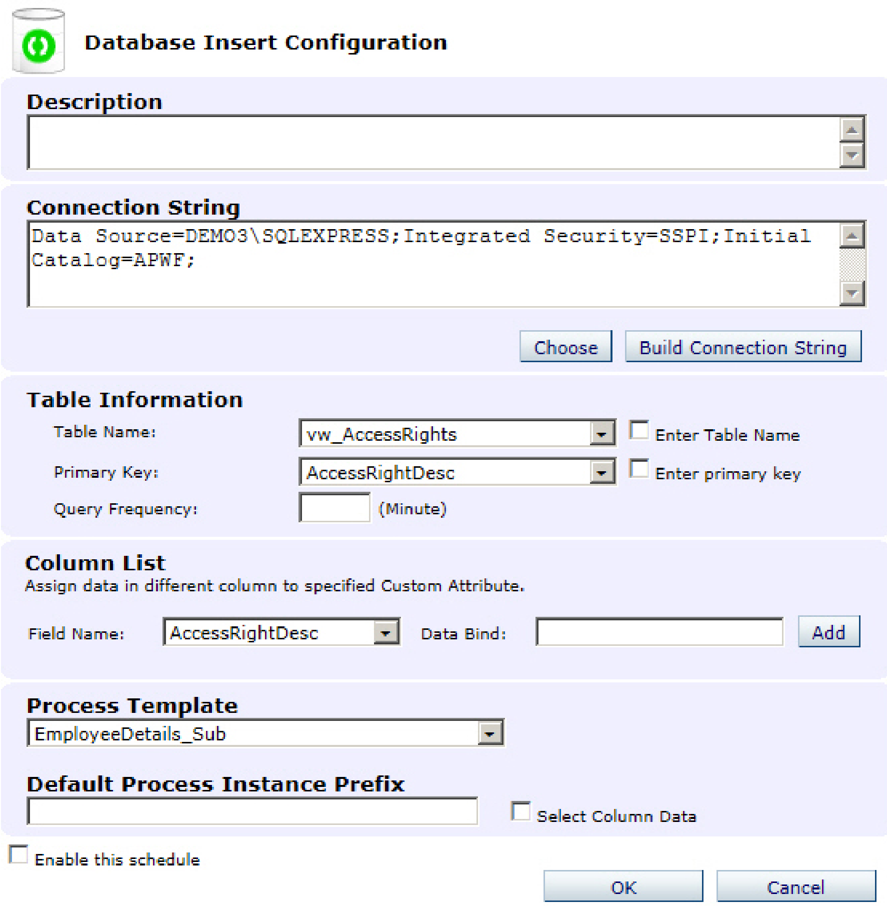
Note: The Event Service AgileConnector must be added via the AgilePoint Server Configuration utility before using the Event Service.

Database Insert Configuration Window

Sets up the database insert event to trigger a process.

Prerequisites

- Only Microsoft SQL Server is supported at this time.
- As a best practice it is recommended to use a separate database table that is used for the Database Update monitoring, this is because once the new database update process is triggered, the new database table row and records will be deleted.



Navigation

1. On the Enterprise Manager Main Page, click **Events Service**.
2. On the **Event Service** page, click **Database Insert > Add**.

Field Definitions

Field Name	Definition
Description	Definition: A free text description of the event. Allowed Values: Multiple lines of text. Default Value: None. Custom Attributes: No
Connection String	Definition: Specifies the database connection string to be used to connect to the database at runtime. Allowed Values: Multiple lines of text. Default Value: None Custom Attributes: No
Choose	Opens the Following Window: Browse Shared Custom Attributes Purpose of this Window: Enables you to choose a connection string from the list of global custom attributes in the in the format of a database connection string. Select the connection string you want, and click OK.
Build Connection String	Opens the Following Window: Connection String Builder Window Purpose of this Window: Creates a connection string to connect AgilePoint Event Services and a database.
Table Name	Definition:

Field Name	Definition
	Specifies the name of the database table you want. Allowed Values: The name of your table. If you select the Enter Table Name check box, the Table Name list becomes unavailable to select a table name. Type a table name in the box. Default Value: None
Enter Table Name	Definition: Specifies that you want to enter a custom database table name in the Table Name field. Allowed Values: • **Deselected** - The Table Name field is not editable. • **Selected** - The Table Name field allows a custom table name to be entered. Default Value: Deselected
Primary Key	Definition: Specifies the primary key for the database table. Allowed Values: The name of your primary key. If you select the Enter primary key check box, the Primary Key list becomes unavailable to select a primary key. Type a primary key in the box. Default Value: None
Enter Primary Key	Definition: Allows to type a primary key in the Primary Key box. Allowed Values: • **Deselected** - Specifies to select a primary key from the Primary Key list. • **Selected** - Specifies to type a primary key in the Primary Key box. Default Value:

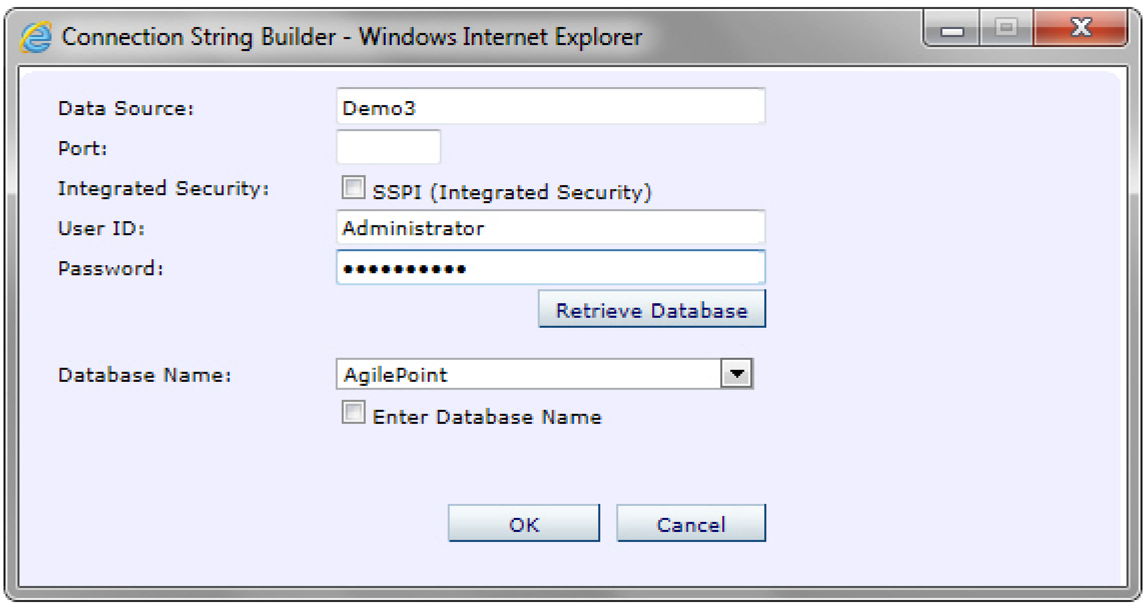
Field Name	Definition
	Deselected
Query Frequency	Definition: Specifies the query frequency in minutes. Allowed Values: An integer. Default Value: None Custom Attributes: No
Field Name	Definition: Specifies the database column name you want. Allowed Values: The name of your database column name. Default Value: None Custom Attributes: No
Data Bind	Definition: Specifies a custom attribute as a data field to be assigned to the database column's data. Allowed Values: A custom attribute. Default Value: None
Add	Function: Assigns the specified custom attribute to the database column's data and displays the values in a tabular format.
Process Template	Definition: Specifies the name of the process model to be triggered to create a process instance when database insert event occurs.

Field Name	Definition
	Allowed Values: The name of your process model. Default Value: None
Default Process Instance Prefix	Definition: Specifies the prefix to be added to the process instance name that is created when database insert event occurs. Allowed Values: A text string. If you select the Select Column Data check box, a list is available to select a data column. The selected data column's value is added as a prefix to the process instance name. Default Value: None Custom Attributes: No
Select Column Data	Definition: Specifies that you want to use the data column's value of the newly inserted record as a process instance prefix. Allowed Values: • **Deselected -** The Default Process Instance Prefix field is editable. Enter the text you want to be added as a prefix to the process instance name. • **Selected -** The Default Process Instance Prefix field allows to select a data column. The selected data column's value is added as a prefix to the process instance name. Default Value: Deselected
Enable this schedule	Definition: Determines whether the database insert trigger is to be activated. Allowed Values:

Field Name	Definition
	• **Deselected** - Deactivates the database insert trigger. • **Selected** - Activates the database insert trigger. Default Value: Deselected

Connection String Builder Window

Creates a connection string to connect AgilePoint Event Services and a database.



Navigation

1. On the Enterprise Manager Main Page, click **Events Service**.
2. On the **Event Service** page, click **Database Insert > Add**.
3. On the **Database Insert Configuration** window, click **Build Connection String**.

Field Definitions

Field Name	Definition
Data Source	Definition: Specifies the database server name, where SQL Server has been installed. Allowed Values:

Field Name	Definition
	A valid database server name. <u>Default Value:</u> None. <u>Custom Attributes:</u> No <u>Example:</u> Demo3
Port	<u>Definition:</u> Specifies the port number to connect to the database server. <u>Allowed Values:</u> A valid port number. <u>Default Value:</u> None. <u>Custom Attributes:</u> No
Integrated Security	<u>Definition:</u> Determines whether the SSPI integrated security is to be activated. <u>Allowed Values:</u> • **Deselected** - Specifies not to activate the SSPI integrated security. • **Selected** - Specifies to activate the SSPI integrated security. <u>Default Value:</u> Deselected
User ID	<u>Definition:</u> Specifies the user name for database authentication. <u>Allowed Values:</u> A valid user name. <u>Default Value:</u> None

Field Name	Definition
	Custom Attributes: No
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: No
Retrieve Database	Function: Retrieves the names of existing databases from the data source.
Database Name	Definition: Specifies the name of the database you want. Allowed Values: The name of your database. If you select the Enter Database Name check box, the Database Name list becomes unavailable to select a database name. Type a database name in the box. Default Value: None
Enter Database Name	Definition: Specifies that a custom database name is entered in the Database Name field. Allowed Values: • **Deselected** - Specifies to select a database name from the Database Name list. • **Selected -** Specifies to type a database name in the Database Name field. Default Value: Deselected

Field Name	Definition
OK	Function: Generates the connection string.

Process Template Management

The Process Template Management section of the Enterprise Manager Main Page allows the administrator to perform certain functions to process templates that have been deployed to AgilePoint Server such as adding a process template, deleting a process template, check out/in process templates, saving a process template as XML, and checking process templates for AgilePart/AgileWork dependencies.

Add a Process Template

This function allows the administrator to upload XML-formatted AgilePoint process template files to AgilePoint Server.

1. On the Enterprise Manager Main Page, click the **Process Templates** link. The Process Templates page appears.
2. Click the **Add** button. The Add Process Template page appears.
3. Select the time you would like the process template to be released:
   - **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.
4. Click **Browse**, and select the XML-formatted AgilePoint process template for which you would like to add.
5. Click **Submit**. The XML-formatted AgilePoint process template is added to Enterprise Manager.

Delete a Process Template

This function allows the administrator to delete a process template from AgilePoint Server.

1. On the Enterprise Manager Main Page, click the **Process Templates** link. The Process Templates page appears.
2. Click the option button next to the process template for which you would like to delete and click the **Delete** button.

Check Out and In a Process Template

This function allows the administrator to check in/out a process template for modification. This prevents more than one user from updating the same process template at the same time. When you want to revise the XML-formatted AgilePoint process template, first do **Check Out** from the Process Templates page in Enterprise Manger. You will now modify the original process template in Envision. When you have the new version of the template ready to upload (save again as XML in Envision), do **Check In** from the Process Templates page and check in the latest XML file that you generated. It will prompt you for the new version number. When you check-in a new version of a process model directly from AgilePoint Enterprise Manager, it will be loaded into AgilePoint Server with the status **Created**, but it will not be automatically **Released.** You can therefore deploy all of your process model changes to AgilePoint, and then "Release" all of the new versions once all of the changes are deployed.

Save as File

The Save as File function allows the administrator to save a process template as XML. Once the process template XML is saved, it can be imported into AgilePoint Envision and saved as a .vsd file. This can be helpful if you have lost your master process template .vsd and want to recover it.

Good to Know

- When you import the XML version of the process model, some formatting may be lost. The images for some AgileShapes do not get imported, and some reformatting may occur, but the process functions as designed.

Navigation

1. On the Enterprise Manager Main Page, click the **Process Templates** link.

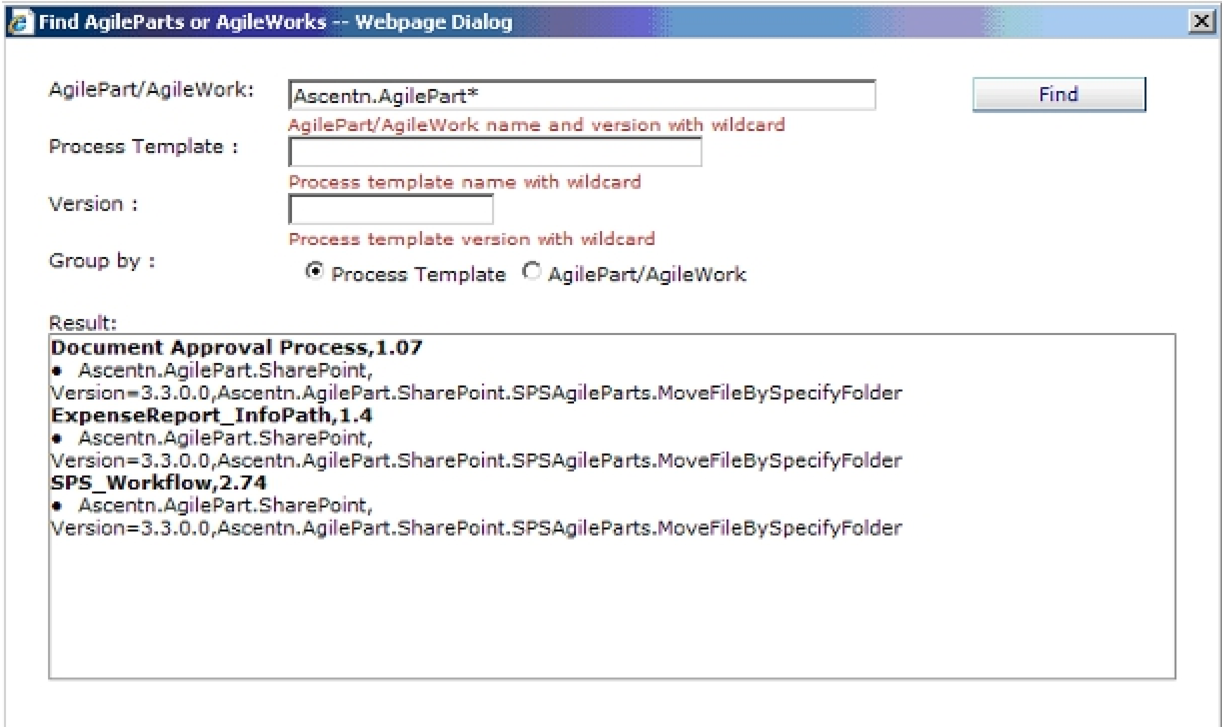
Instructions

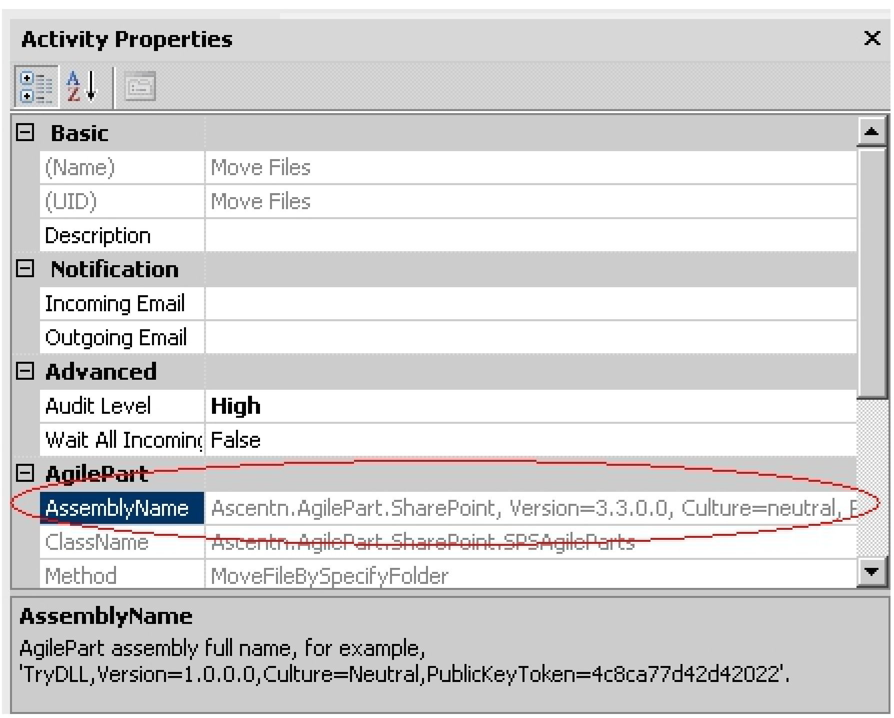
1. On the Process Templates page, select the process template for which you would like to save as a XML file and click the **Save as File** button. The Save Process Template File page appears.
2. Click the **Download** link and save the .zip file to the desired directory.
3. The process template XML file can now be imported into Envision via **File** > **Export & Import** > **Import Process Template XML** and saved as a .vsd file.

Find AgilePart and AgileWork

The Find AgilePart and AgileWork function allows the administrator to search for AgileParts and AgileWorks in deployed process templates. This function can be used for analyzing the dependencies of a process template. For example, the administrator can see what AgileParts/AgileWorks (and the version) are associated with a process template.

1. On the Enterprise Manager Main Page, click the **Process Templates** link. The Process Templates page appears.
2. Click the **Find AgilePart & AgileWork** button. The Find AgileParts or AgileWorks page appears.





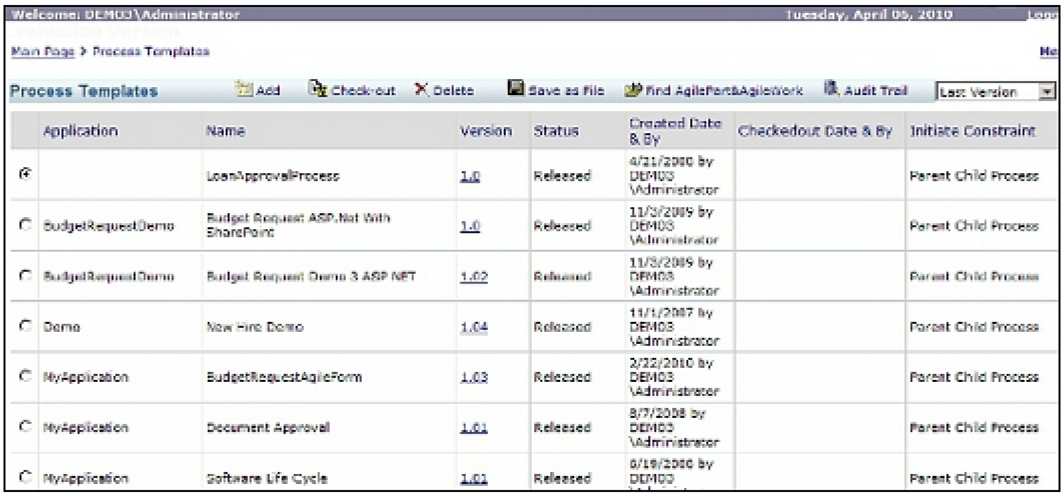
3. Enter the search criteria in the text boxes provided. For example, in the AgilePart/AgileWork text box, type the AgilePart/AgileWork assembly name and click **Find**. You can also search on process template name or process template version.

Note: Wild cards are accepted for all the search text boxes. For example, you can type Ascentn.AgilePart* as shown above to return all AgileParts that begin with the assembly name Ascentn.AgilePart.

Process Templates Page

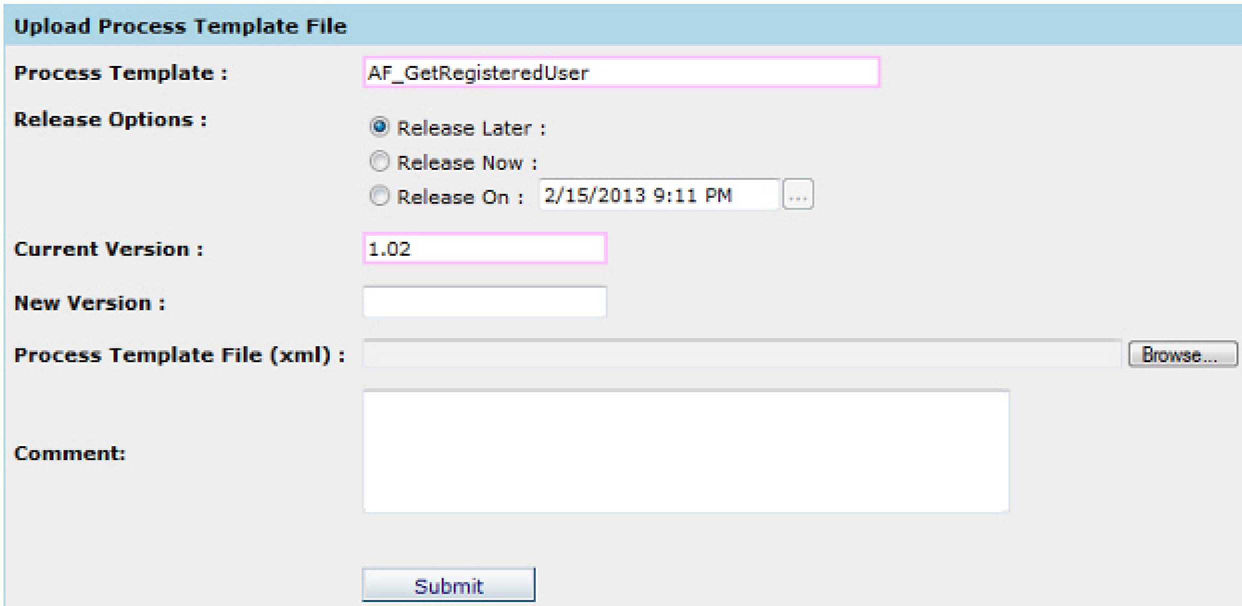
This page allows the administrator to review, search for, and update (e.g. check out) the individual AgilePoint process templates deployed to AgilePoint Server. The Process Templates page also allows the administrator to examine process templates for AgilePart and AgileWork dependencies.

The Process Templates page is pictured below:



Upload Process Template File Window

Specifies the details for checking in a process model as an XML file.



Navigation

1. On the Enterprise Manager Main Page, click **Process Templates**.
2. On the **Process Templates** page, select the process template you want, and then click **Check-in**.

Field Definitions

Field Name	Definition
Process Template	Definition: Displays the name of your process model. Allowed Values: Read only.
Release Options	Definition: Specifies when to release the process model. Allowed Values: • **Release Later** - Checks in the process template to the repository, but does not release it. • **Release Now** - Releases the process template as soon as it is checked in to the repository. • **Release On** - Releases the process template at a particular time you specify. Default Value:

Field Name	Definition
	Release Later
Current Version	Definition: Displays the current version number of the file you are checking in to the repository. Allowed Values: Read only.
New Version	Definition: Specifies the new version number of the file you are checking in to the repository. Allowed Values: A valid file version number. • **A major file version number -** A whole number • **A minor file version number -** [major version number].[minor version number] • **Blank (null)** - If you do not enter any number, the last number in the current version number is incremented. Default Value: None Custom Attributes: No Example: • A major file version number - 1 or 1.0 • A minor file version number - 1.3 In this example, 1 is the major version; 3 is the minor version.
Process Template File (xml)	Definition: Displays the file name for your XML process model. Allowed Values: Read only - The file name is populated when you select the file using the Browse button.
Comment	Definition: Specifies optional, free text comments about the file version or check-in procedure. Allowed Values:

Field Name	Definition
	Multiple line of text. Default Value: None. Custom Attributes: No

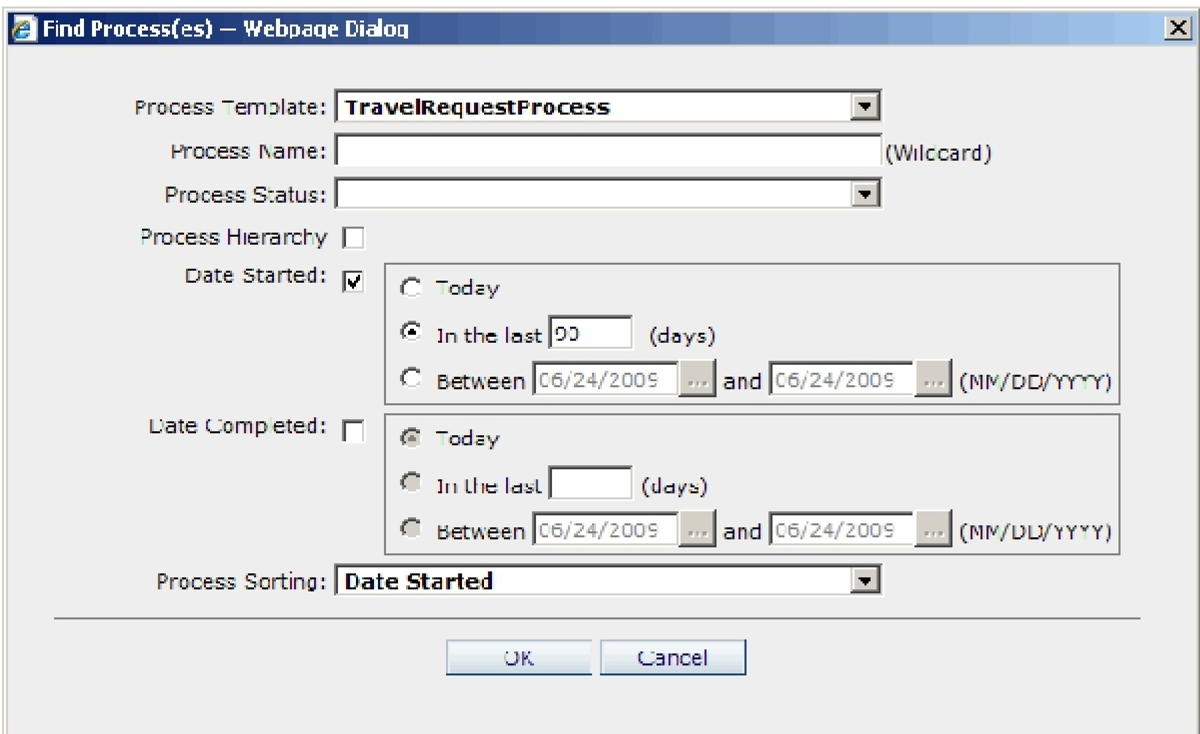
Runtime Management

The Runtime Management section of the Enterprise Manager Main Page allows the administrator to perform certain functions such as suspend/resume, rollback, cancel, and migrate process instances, and manage task and notifications.

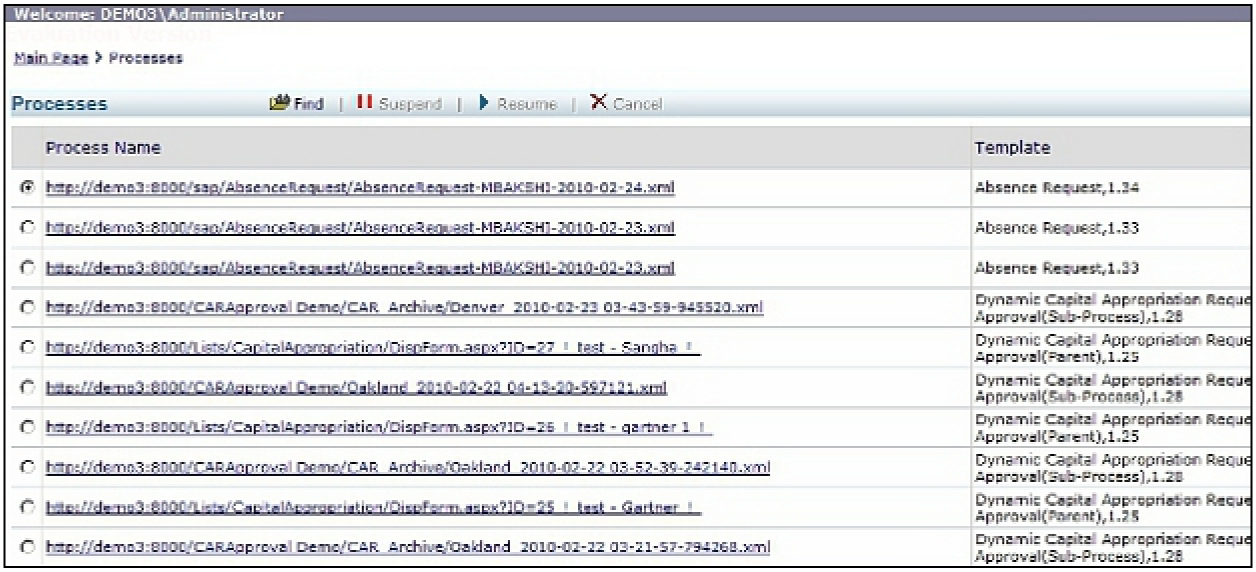
Find a Process Template

This function allows the administrator to find the desired process instance(s).

1. On the Enterprise Manager Main Page, click the **Processes** link. The Processes page appears.
2. Click the **Find** button. The Find Process(es) page appears.



3. Enter the search criteria and click **OK**. The process(es) that match the specified criteria are returned. The process instance link opens the Process page that can be used to drill down into the process to expose detailed information about the process instance.



Suspend a Process

To suspend a running process, do the following.

Prerequisites

- A running process instance.

Navigation

Find the process instance you want to manage:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.

Instructions

1. In the search results on the **Find Process(es)** page, select your process instance.
2. On the Enterprise Manager Main Page, click the **Tasks** link. The **Tasks** page appears.
3. Click **Suspend**.

Resume a Suspended Process

To resume a suspended process, do the following.

Prerequisites

- A suspended process instance.

Navigation

Find the process instance you want to manage:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.

Instructions

1. In the search results on the **Find Process(es)** page, select your process instance.
2. Click **Resume**.

Roll back within a Process Instance

To roll back a process instance to a specified activity, do the following.

Prerequisites

- A running process instance.

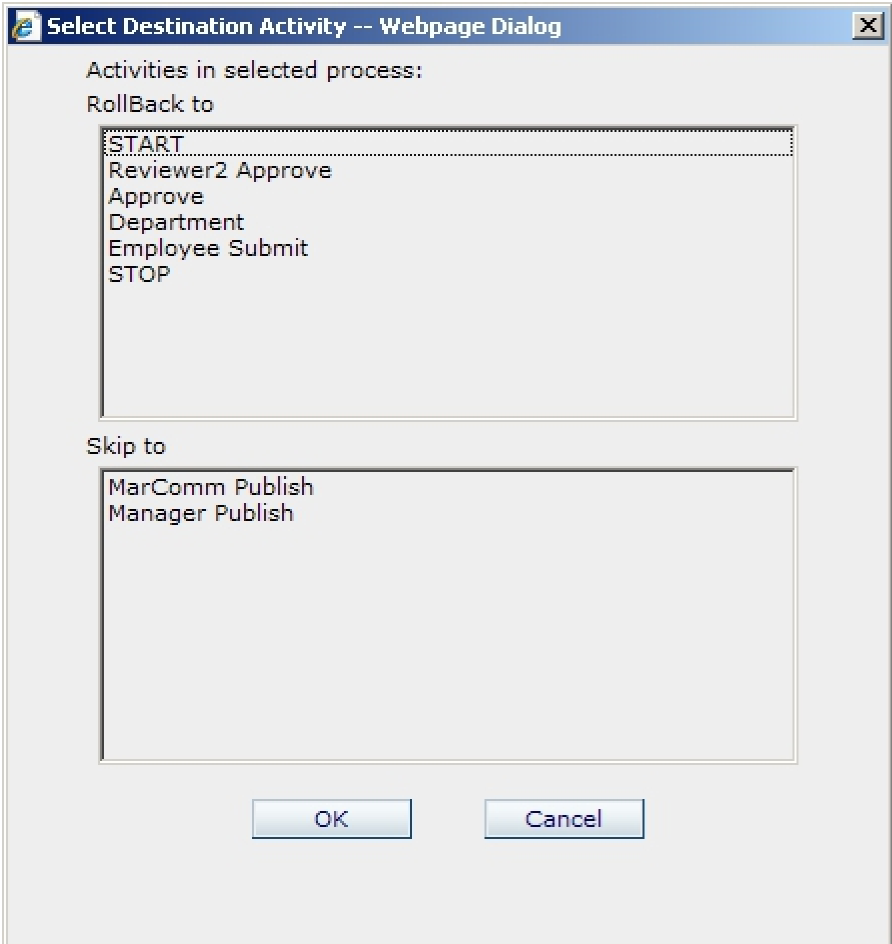
Navigation

Open the Process Detail page for the process you want to manage:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.
4. In the search results on the **Find Process(es)** page, click the process name. The process detail page appears.

Instructions

1. On the process detail page, click **Rollback & Skip**. The **Select Destination Activity** page appears.



2. In the **Rollback to** box, select the activity to which you want to rollback, and click **OK**.

Skip within a Process Instance

To skip forward within a process instance to a specified activity, do the following.

Prerequisites

- A running process instance.

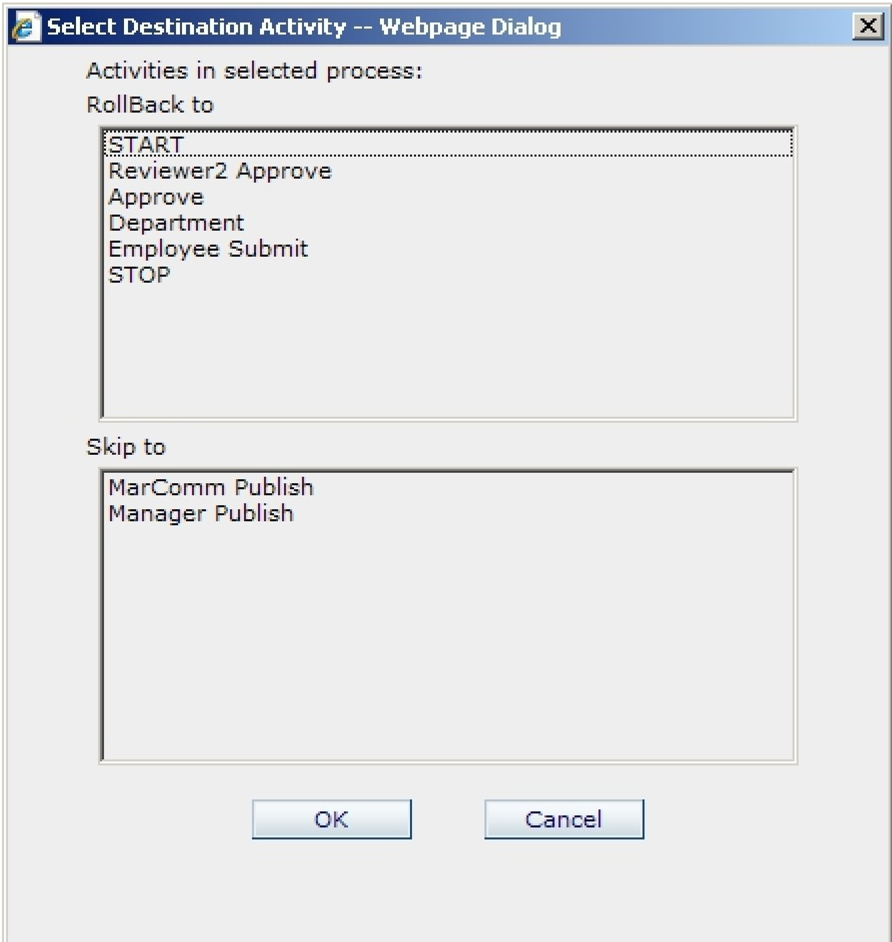
Navigation

Open the Process Detail page for the process you want to manage:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.
4. In the search results on the **Find Process(es)** page, click the process name. The process detail page appears.

Instructions

1. On the process detail page, click **Rollback & Skip**. The **Select Destination Activity** page appears.



2. In the **Skip to** box, select the activity to which you want to skip, and click **OK**.

Bypass or Update a Delay

To update or bypass the delay on the Delay AgilePart during runtime, do the following. This can prevent a process from becoming stuck because circumstances change the requirements for a delay while a process instance is running. Examples include schedule changes due to project requirements or participants' availability.

Prerequisites

- A running process instance that is waiting to move forward based on a delay set by the Delay AgilePart.

Navigation

Open the Process Detail page for the process you want to manage:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.
4. In the search results on the **Find Process(es)** page, click the process name. The process detail page appears.
5. Click the **Process Monitor** tab.

Instructions

1. On the **Process Monitor** tab, page, click the Delay AgilePart you want to update, and then click **Update Delay**.
2. On the Update Delay dialog box, do one of the following, and then click **OK**:
   - To simply bypass the delay and move the process forward, click **Bypass Delay**.
   - To update the date and time on which the delay should expire, click **Update Delay**, and then set the date and time you want.

Cancel a Process Instance

To cancel (manually stop) a process instance, do the following.

Note that it is also possible to cancel a process instance using the Process Instance List web part in SharePoint.

Prerequisites

- A process instance in any status other than Completed or Canceled.

Navigation

Find the process instance you want to manage:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.

Instructions

1. In the search results on the **Find Process(es)** page, select your process instance.
2. Click **Cancel**.

   Once a process instance is canceled, all assigned tasks will be removed from the participants' task lists.

Migrate a Process Instance

You can migrate a suspended process instance from one process template version to another version at run time without losing any of the information collected prior to migration. You can migrate to a newer version or an older version of a process instance.

This feature enhances the exception handling capabilities by allowing you to select from a list the process instance for which you would like to migrate for handling the specific exception at hand.

Prerequisites

- A running process instance.

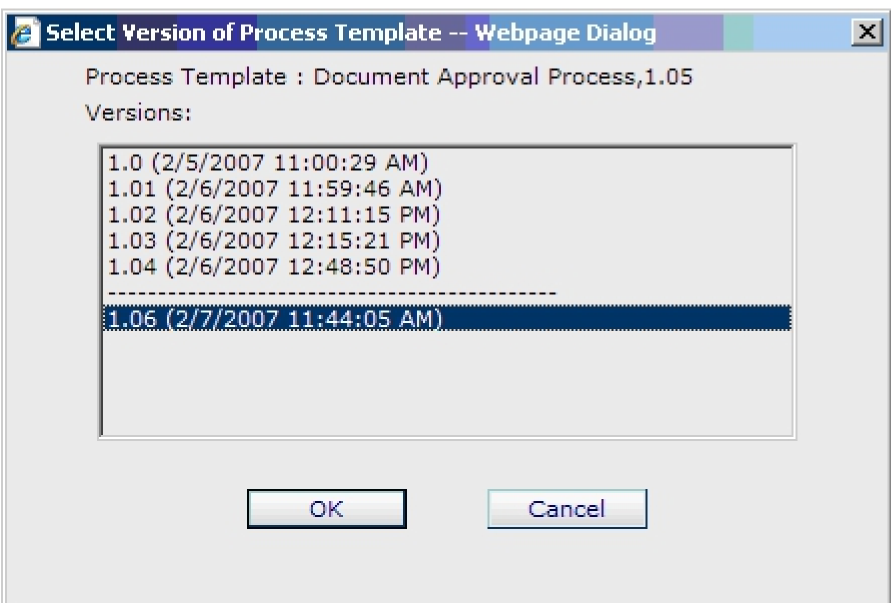
Navigation

Suspend your process:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.
4. In the search results on the **Find Process(es)** page, select your process instance.
5. Click **Suspend**.

Instructions

1. In the search results on the **Find Process(es)** page, click the process name. The process detail page appears.
2. Click **Migrate**. The **Select Version of Process Template** page appears.

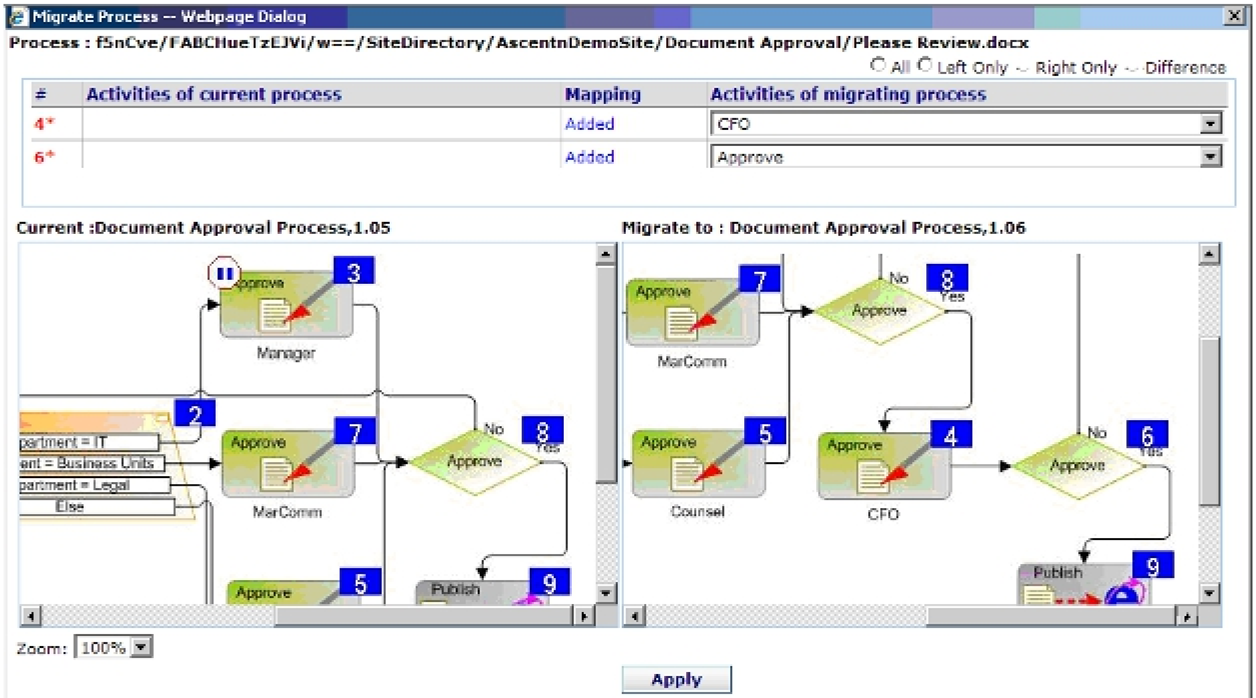


3. Select the process instance for which you would like to migrate to and click **OK**.
4. Use the **Migrate Process** window to view information about the current process instance activities as well as the activities of the new process instance.

   The following options are available:

   - **All** - Shows all activities in both the source and destination process instances.
   - **Left Only** - Shows all activities in the source process instance.

- **Right Only** - Shows all activities in both the destination process instance.
- **Difference** - Shows the activities in destination process instance that are not included in the source process instance.



5. If you want to perform bulk migration to migrate multiple process instances using the same options, select **Save the migration instruction**.
6. Click **Apply**. The suspended process instance is migrated to the new process instance.
7. If you selected **Save the migration instruction**, the file **Instruction_[ID].xml** opens in a new browser window. Save this file to the folder [AgilePoint Server installation folder]\Tools\

   For more information, see Bulk Migration.
8. Resume the process instance to bring it to a running state.

Bulk Migration

You can perform a bulk migration on multiple process instances once you have migrated an individual process instance.

Prerequisites

- A file named Instruction_[ID].xml that was generated by previously migrating a process instance.

  If you followed the instructions for migrating a process instance, this file should reside in [AgilePoint Server installation folder]\Tools\.

  However, the default folder is [AgilePoint Enterprise Manager installation folder]\tmp.

- The process instances you want to migrate must match the original process instance exactly to be included in the bulk migration. For example, the target process instances must be at the same running state as the original process instance.

Navigation

Open the APADM Utility Tool:

1. Open the following file:

```
[AgilePoint Server installation]\Tools\apadm.exe
```

Instructions

1. Run the following APADM command line prompt:

```
apadm -mgproc  [Process Migration Instruction XML File]
   [AgilePoint Server URL]
```

The command prompt window provides the status of each process instance migration.

Note: To rollback, migrate all process instances back to the desired version.

Partial Rework

Partial rework is the capability to dynamically modify or "redo" a previously completed activity without interrupting the overall flow of the process instance.

When you create a partial rework, the task you want to rework is added to the current task as an additional Work to Perform.

This differs from a rollback, in that the entire process does not roll back to the previously completed activity. Only the identified activity is considered.

Prerequisites

- A running process instance with at least one manual activity in Completed status, and at least one manual activity in Active status.

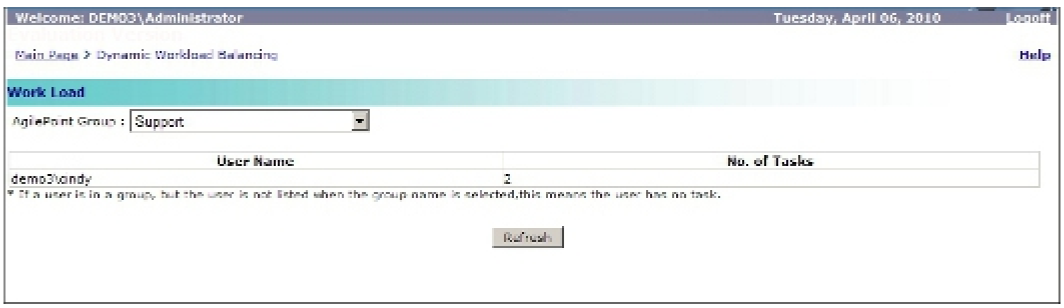
Instructions

1. On the Enterprise Manager Main Page, click **Partial Rework**.
2. On the **Partial Rework** page, in the **Process Template** list, select your process template.
3. In the **Running Process Instances** list, select your process instance.
4. In the **Active Manual Activity(s)** list, select the activity to which you want to add the reworked task.
5. In the **Tasks To Rework** list, select the tasks you want to rework.
6. Click **Apply**.

The tasks you selected in the **Tasks To Rework** list are added as Works to Perform to the activity you selected in the **Active Manual Activity(s)** list.

Workload Balance

Workload Balancing is a tool for viewing information associated with the Work Load Balance Agile Work, where it is shown, the number of global tasks assigned to a user in a particular group.



Pseudo Tasks

A pseudo task is an item that appears in the Task List of one user in order to monitor or manage the task of another user.

The most common use case for a pseudo task is a manager who wants to monitor the tasks of their subordinates. A pseudo task appears in the manager's task list, where he can view the subordinate's task status, and manage the task. The manager, however, cannot complete the task.

A pseudo task will not block the process from moving forward.

In the following example, the process model includes three activities.

- Submit
- Manager Approval
- CFO Approval

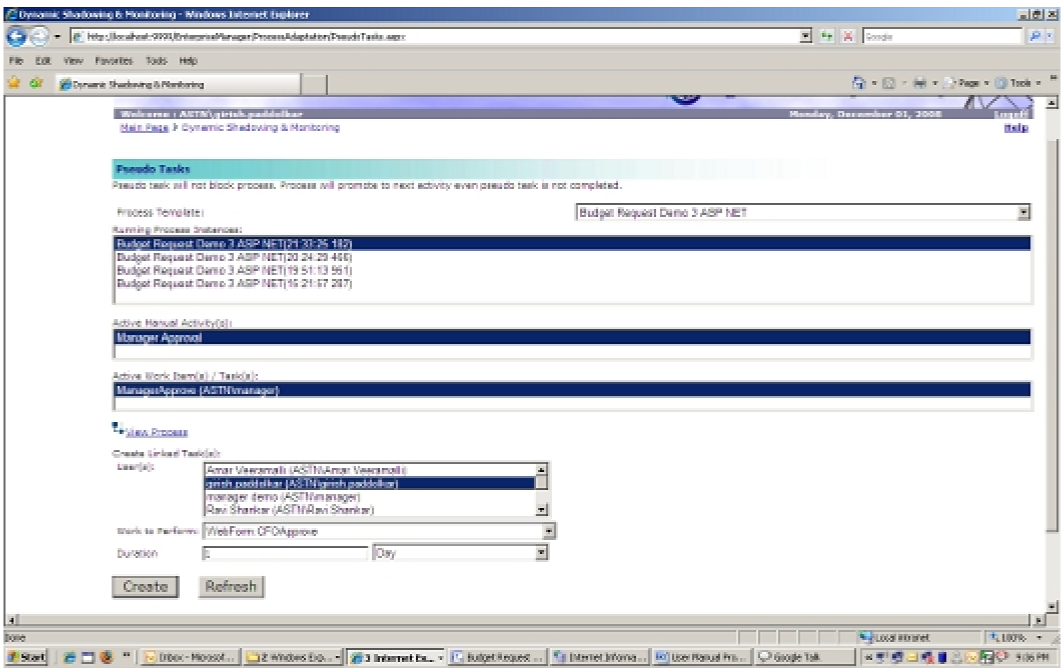
The CFO wants to monitor the Manager Approval tasks. A pseudo task at the CFO activity will be created to track the Manager Approval.

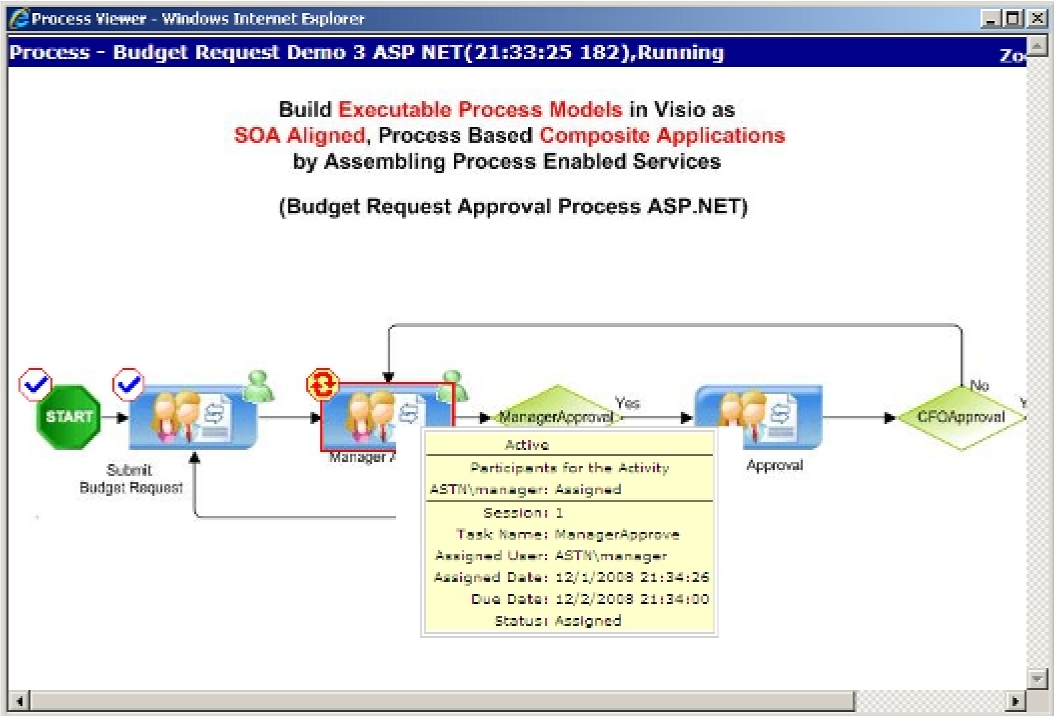
To add a pseudo task:

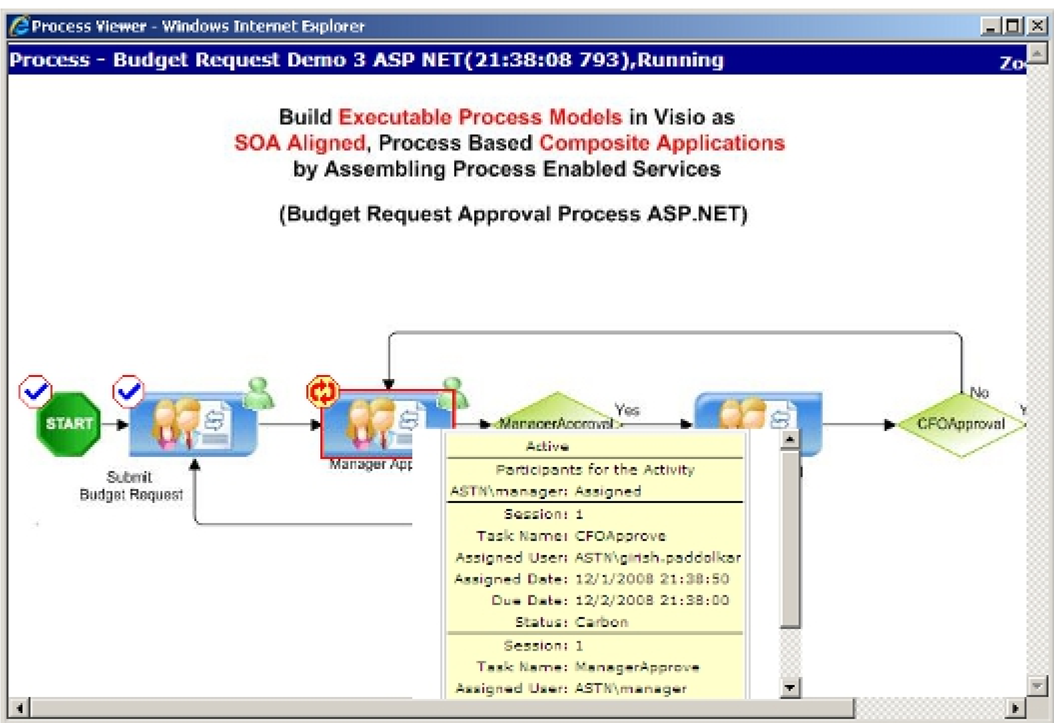
1. Initiate a Process and complete the Submit activity.
2. Logon to Enterprise Manager.
3. Click on **Shadowing and Monitoring** link in the **Process Adaptation** section.
4. Select the **Budget Request Process**.
5. Select the **CFO Approval** from the Work To Perform drop-down list and select the user.
6. Click **Create**.
7. You can see a task has been created with status **carbon**.

This task will be completed in two cases:

- If the user completes their own task.
- If the task gets canceled, if all the tasks are completed.




Process Viewer - Windows Internet Explorer
Process - Budget Request Demo 3 ASP NET(21:33:25 182),Running
Build Executable Process Models in Visio as
SOA Aligned, Process Based Composite Applications
by Assembling Process Enabled Services
(Budget Request Approval Process ASP.NET)
START
Submit Budget Request
ManagerApproval
Yes
No
CFOApproval
Approval
Active
Participants for the Activity
ASTN\manager: Assigned
Session: 1
Task Name: ManagerApprove
Assigned User: ASTN\manager
Assigned Date: 12/1/2008 21:34:26
Due Date: 12/2/2008 21:34:00
Status: Assigned

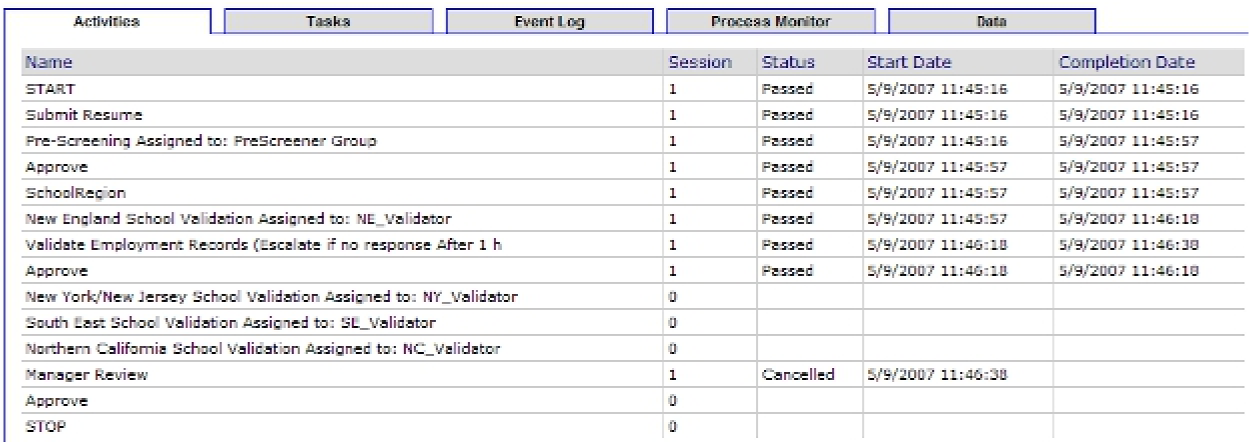

Process Viewer - Windows Internet Explorer
Process - Budget Request Demo 3 ASP NET(21:38:08 793),Running
Build Executable Process Models in Visio as
SOA Aligned, Process Based Composite Applications
by Assembling Process Enabled Services
(Budget Request Approval Process ASP.NET)
START
Submit Budget Request
Yes
No
CFOApproval
Active
Participants for the Activity
ASTN\manager: Assigned
Session: 1
Task Name: CFOApprove
Assigned User: ASTN\girish.paddalkar
Assigned Date: 12/1/2008 21:38:50
Due Date: 12/2/2008 21:38:00
Status: Carbon
Session: 1
Task Name: ManagerApprove
Assigned User: ASTN\manager

View Activities

The Activities tab allows the administrator to review detailed information about the activities associated with the process.

The following information about each activity is available:

- Name of the activity
- Session for which this activity was completed
- Status of the activity (e.g. Active, Passed, Canceled)
- Start date for the activity
- Completion date for the activity



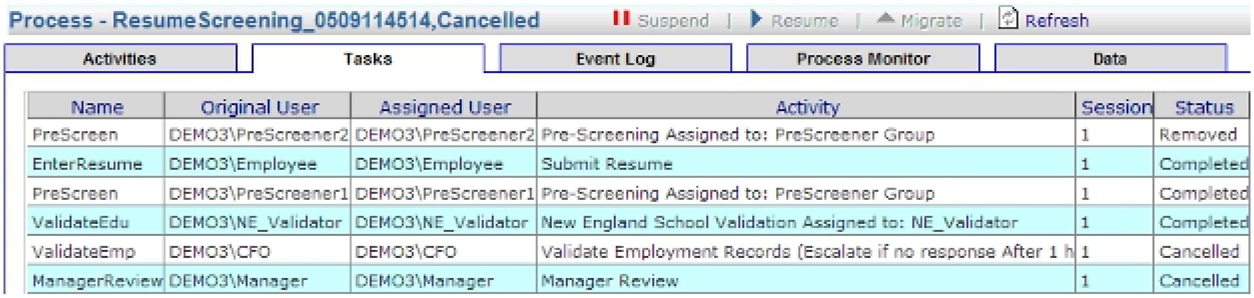
Name	Session	Status	Start Date	Completion Date
START	1	Passed	5/9/2007 11:45:16	5/9/2007 11:45:16
Submit Resume	1	Passed	5/9/2007 11:45:16	5/9/2007 11:45:16
Pre-Screening Assigned to: PreScreener Group	1	Passed	5/9/2007 11:45:16	5/9/2007 11:45:57
Approve	1	Passed	5/9/2007 11:45:57	5/9/2007 11:45:57
SchoolRegion	1	Passed	5/9/2007 11:45:57	5/9/2007 11:45:57
New England School Validation Assigned to: NE_Validator	1	Passed	5/9/2007 11:45:57	5/9/2007 11:46:18
Validate Employment Records (Escalate if no response After 1 h	1	Passed	5/9/2007 11:46:18	5/9/2007 11:46:38
Approve	1	Passed	5/9/2007 11:46:18	5/9/2007 11:46:18
New York/New Jersey School Validation Assigned to: NY_Validator	0			
South East School Validation Assigned to: SE_Validator	0			
Northern California School Validation Assigned to: NC_Validator	0			
Manager Review	1	Cancelled	5/9/2007 11:46:38	
Approve	0			
STOP	0			

View Tasks

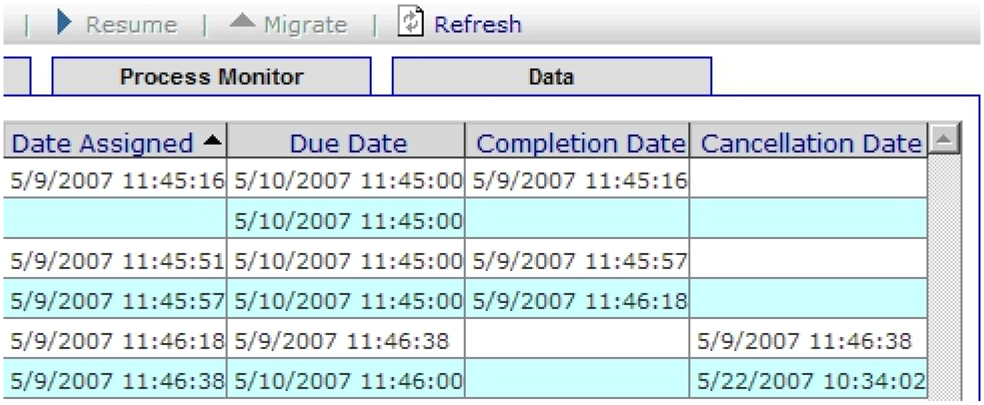
The Tasks tab allows the administrator to review detailed information about the manual activities associated with the process.

The following information about each manual activity is available:

- Name of the manual activity
- Original user
- Assigned user
- Description of the activity
- Session for which this activity was completed
- Status of the activity (e.g. Removed, Completed, Canceled)
- Date the activity was assigned
- Due date for the activity
- Completion date of the activity
- Cancellation date of the activity



Name	Original User	Assigned User	Activity	Session	Status
PreScreen	DEMO3\PreScreener2	DEMO3\PreScreener2	Pre-Screening Assigned to: PreScreener Group	1	Removed
EnterResume	DEMO3\Employee	DEMO3\Employee	Submit Resume	1	Completed
PreScreen	DEMO3\PreScreener1	DEMO3\PreScreener1	Pre-Screening Assigned to: PreScreener Group	1	Completed
ValidateEdu	DEMO3\NE_Validator	DEMO3\NE_Validator	New England School Validation Assigned to: NE_Validator	1	Completed
ValidateEmp	DEMO3\CFO	DEMO3\CFO	Validate Employment Records (Escalate if no response After 1 h	1	Cancelled
ManagerReview	DEMO3\Manager	DEMO3\Manager	Manager Review	1	Cancelled



Date Assigned	Due Date	Completion Date	Cancellation Date
5/9/2007 11:45:16	5/10/2007 11:45:00	5/9/2007 11:45:16	
	5/10/2007 11:45:00		
5/9/2007 11:45:51	5/10/2007 11:45:00	5/9/2007 11:45:57	
5/9/2007 11:45:57	5/10/2007 11:45:00	5/9/2007 11:46:18	
5/9/2007 11:46:18	5/9/2007 11:46:38		5/9/2007 11:46:38
5/9/2007 11:46:38	5/10/2007 11:46:00		5/22/2007 10:34:02

View the Event Log

The Event Log allows the administrator to review particular events that occurred during the execution of the process instance.

The event log displays the following information:

- Name of the event
- Process participant associated with the event
- Status of the event
- Date the event was triggered
- Date the event completed

Prerequisites

- At least one process instance in any status.

Navigation

Open the Process Detail page for the process you want to manage:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.
4. In the search results on the **Find Process(es)** page, click the process name. The process detail page appears.

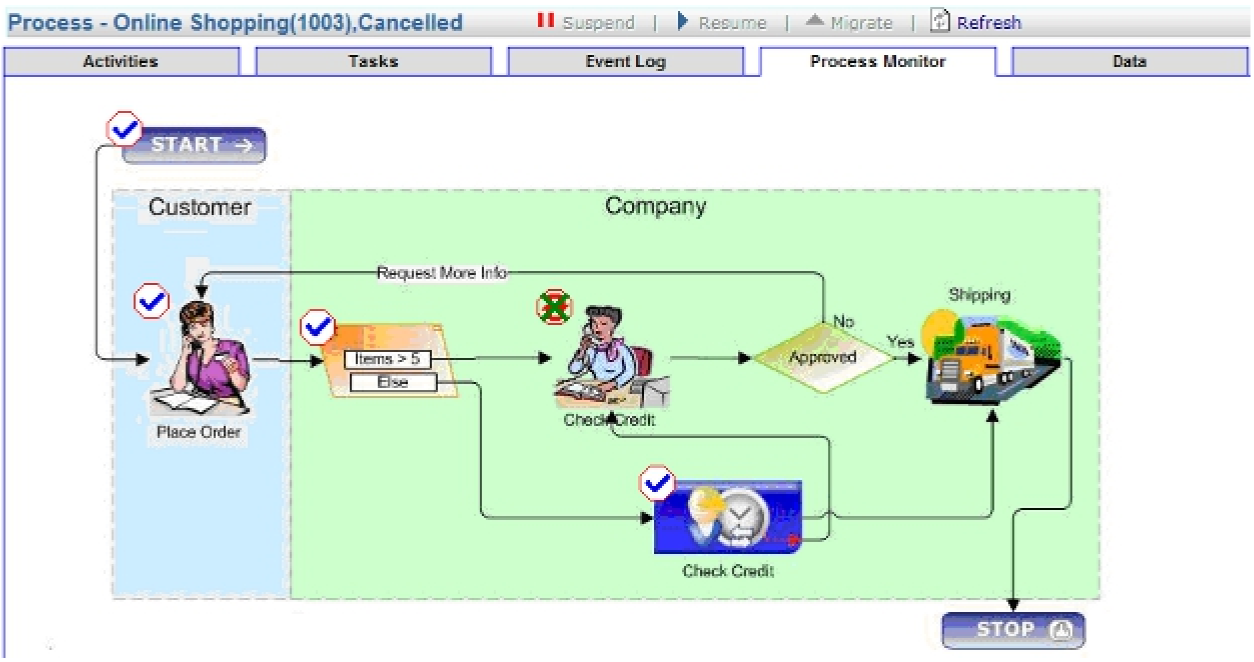
Instructions

1. On the process detail page, click the **Event Log** tab.

View the Process Monitor

The Process Monitor tab allows the administrator to view a process instance in real-time status within the process viewer.

Note that the process viewer can also be accessed by process participants through the SharePoint and ASP.NET Task List web parts.



Prerequisites

- At least one process instance in any status.

Navigation

Open the Process Detail page for the process you want to manage:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.
4. In the search results on the **Find Process(es)** page, click the process name. The process detail page appears.

Instructions

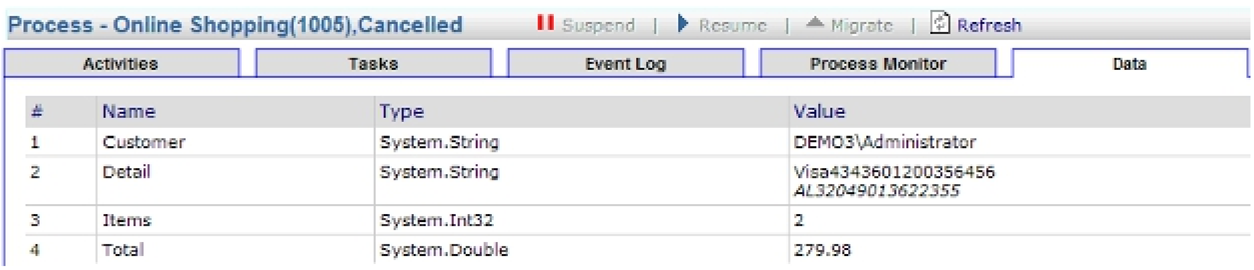
1. On the process detail page, click the **Process Monitor** tab.

View Data

The Data tab allows the administrator to review the custom process attributes and values that have been used in the process instance.

The following information is available:

- Name of the custom attribute
- Date type of the custom attribute
- Value associated with the custom attribute

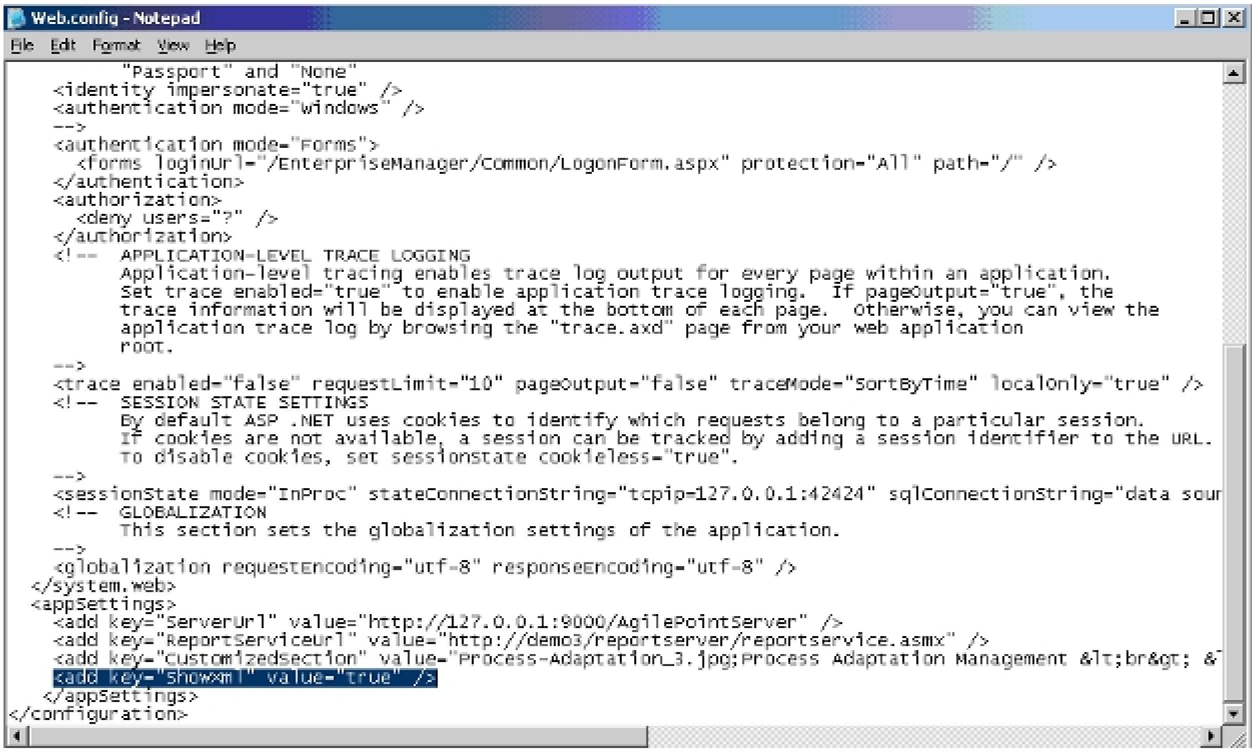


#	Name	Type	Value
1	Customer	System.String	DEMO3\Administrator
2	Detail	System.String	Visa4343601200356456 *AL32049013622355*
3	Items	System.Int32	2
4	Total	System.Double	279.98

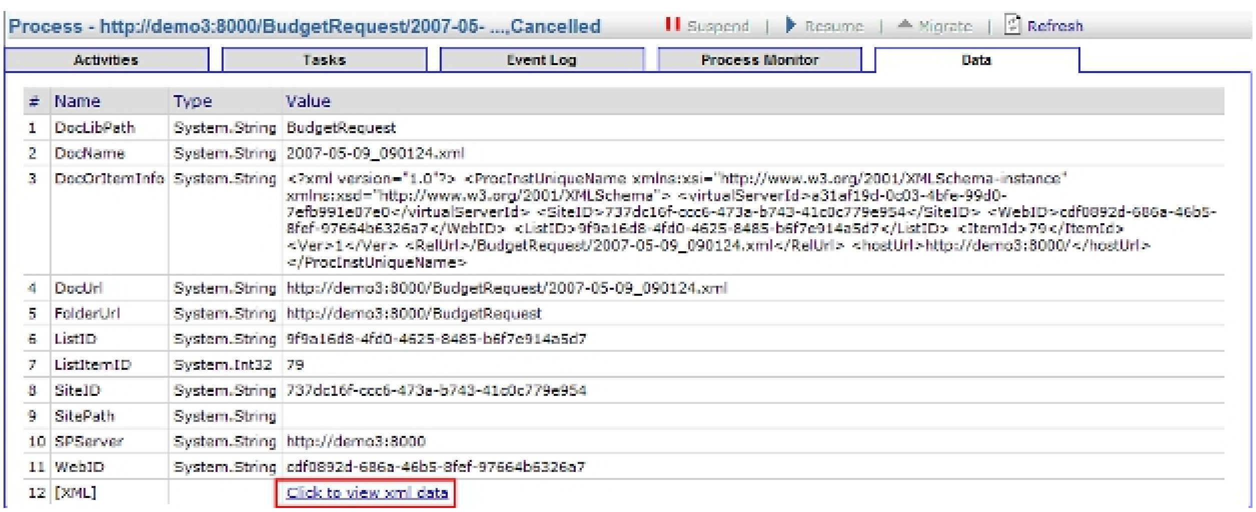
View InfoPath XML Data

For MS InfoPath based processes, you can view additional XML data from the InfoPath form. In order to access this information, you must add a line to the file **[AgilePoint Enterprise Manager installation folder]\web.config** as shown below.

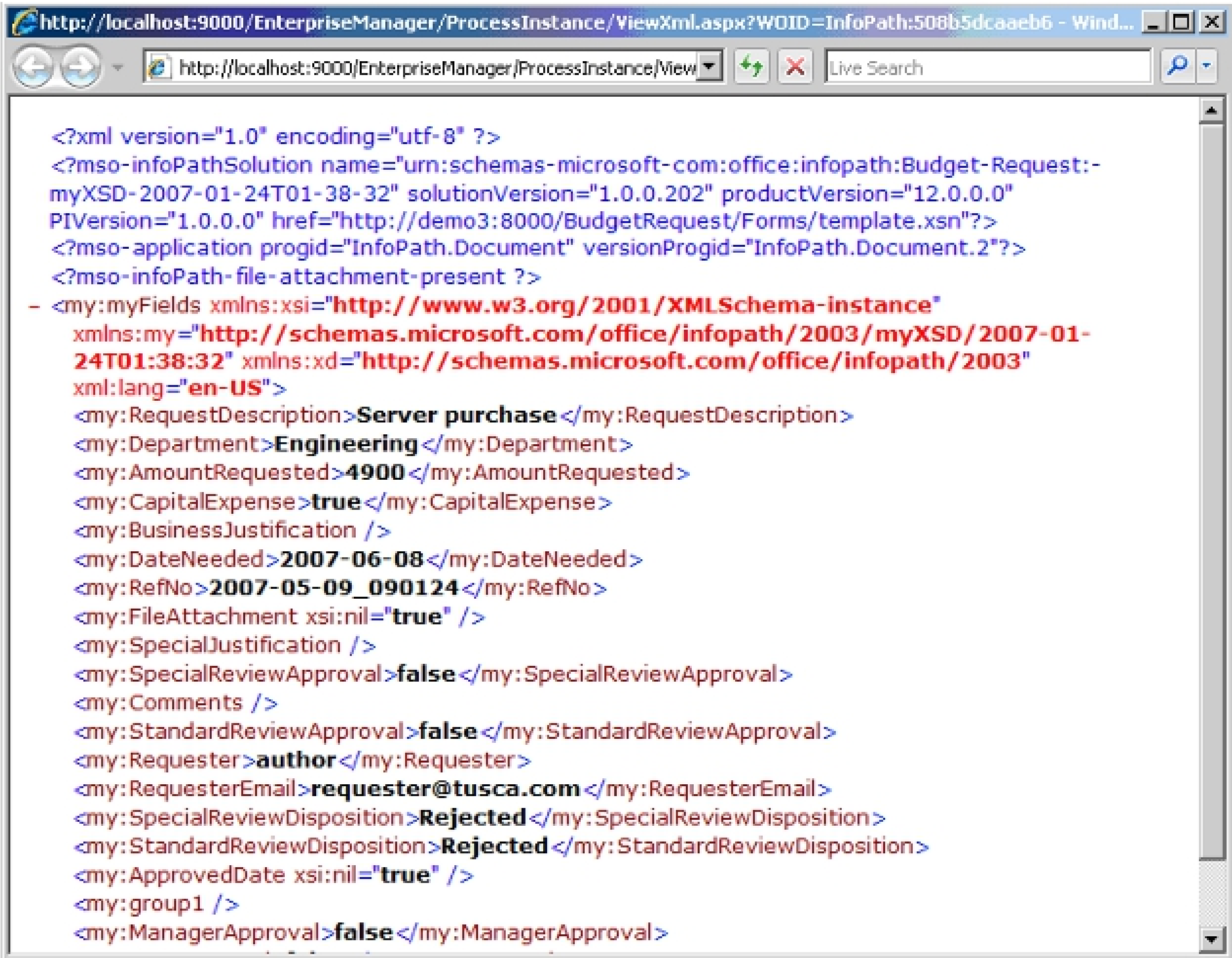
```
<add key="ShowXml" value="true" />
```



After adding this line, you will now see the **Click to view XML data** link.



Click the **Click to view xml data** link. The XML of the MS InfoPath form is displayed in a browser window.



Find Tasks

To find tasks current or past tasks in the AgilePoint system, do the following.

Prerequisites

- At least one process instance in any status.

Instructions

1. On the Enterprise Manager Main Page, click the **Tasks** link. The **Tasks** page appears.
2. Click the **Find** button. The **Find Tasks** page appears.
3. Enter the search criteria and click **OK**. The tasks that match the specified criteria are returned along with information such as the **Work to Perform** and **Status**.

Mark a Task as Complete

To manually mark a task as complete, do the following.

Prerequisites

- A running process instance.

Navigation

Find a task:

1. On the Enterprise Manager Main Page, click the **Tasks** link. The **Tasks** page appears.
2. Click the **Find** button. The **Find Tasks** page appears.
3. Enter the search criteria and click **OK**. The tasks that match the specified criteria are returned along with information such as the **Work to Perform** and **Status**.

Instructions

1. On the **Find Tasks** page, select your task.
2. Click **Mark Completed**.

Reassign a Task

To reassign a task to a different participant, do the following.

Prerequisites

- A running process instance.

Navigation

Find a task:

1. On the Enterprise Manager Main Page, click the **Tasks** link. The **Tasks** page appears.
2. Click the **Find** button. The **Find Tasks** page appears.
3. Enter the search criteria and click **OK**. The tasks that match the specified criteria are returned along with information such as the **Work to Perform** and **Status**.

Instructions

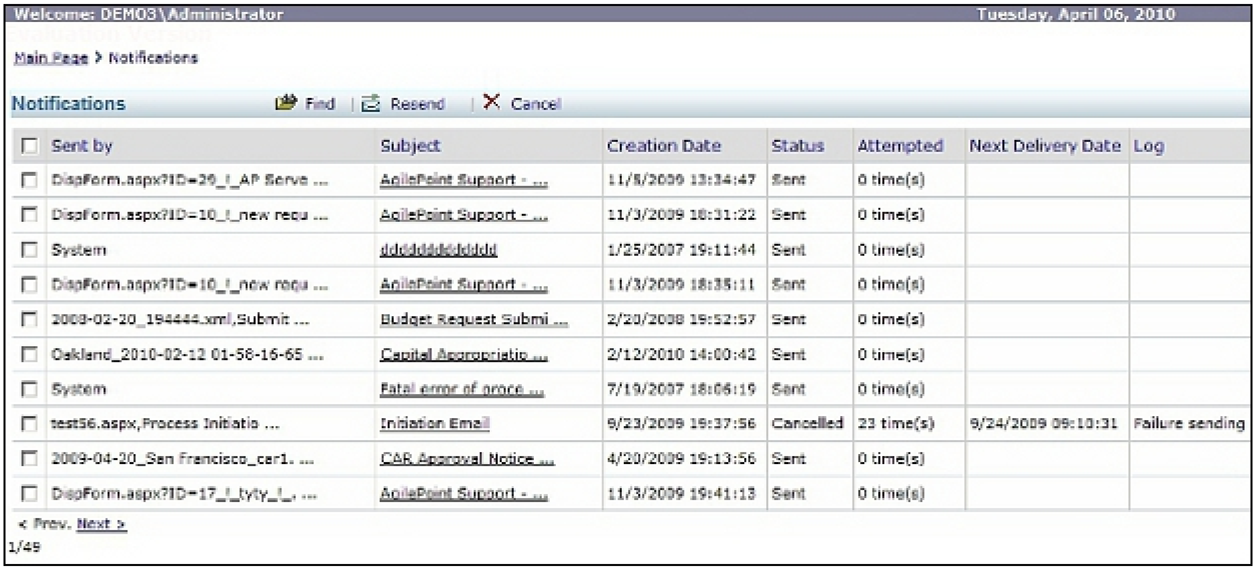
1. On the **Find Tasks** page, select your task.
2. Click **Reassign**.
3. Browse to select the new participant.
4. Click **Submit**.

Manage Notifications

This function allows the administrator to review, search for, and update (e.g. cancel or resend) the individual email notifications managed by AgilePoint Server.

To manage notifications:

1. On the Enterprise Manager Main Page, click the **Notifications** link. The Notifications page appears.
2. Click the **Find** button. The Find Notifications page appears.
3. Enter the search criteria and click **OK**. The notifications that match the specified criteria are returned along with information about the notifications associated with the process instance such as "Sent by" and "Status".



To resend a notification:

1. Click the check box next to the notification for which you would like to resend.
2. Click **Resend**.

To cancel a notification:

1. Click the check box next to the notification for which you would like to cancel.
2. Click **Cancel**.

Event Service Page

This page allows the administrator to initiate processes automatically via scheduling, email, database, or file dropping. All event listeners can be configured via AgilePoint Enterprise Manager.

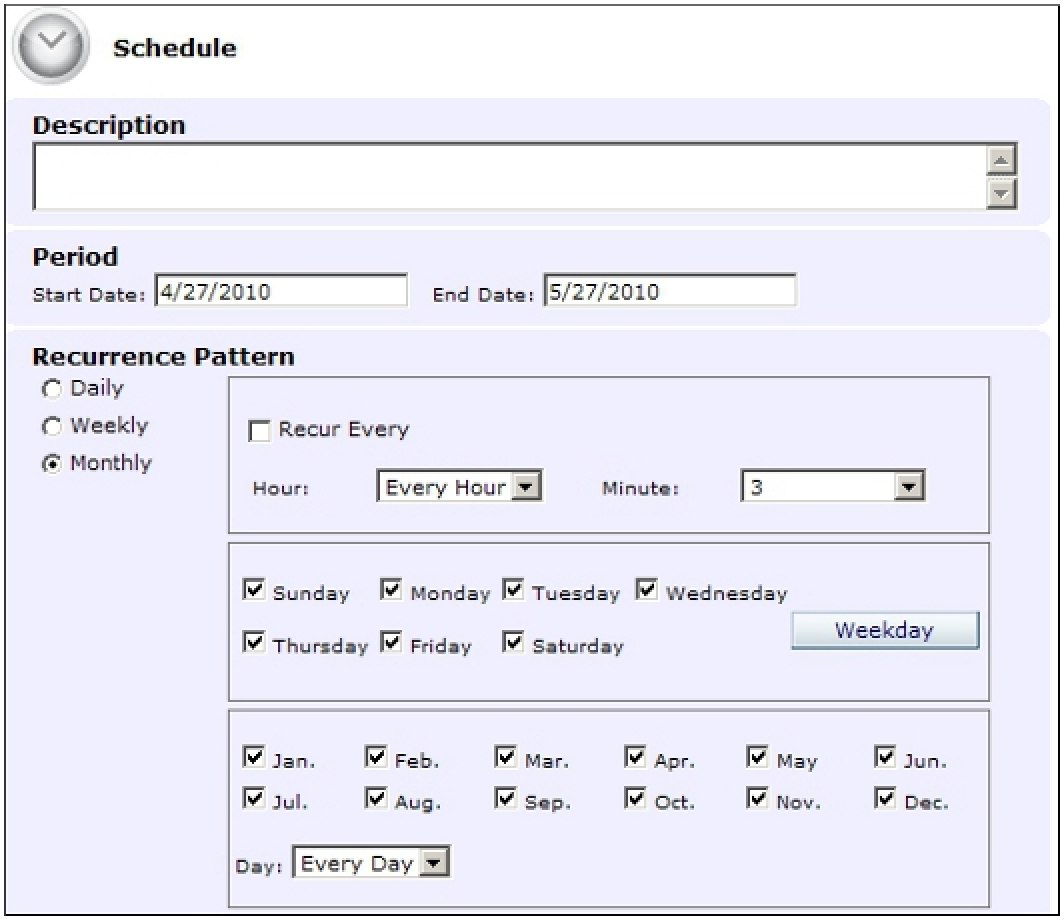
Note: The Event Service AgileConnector must be added via the AgilePoint Server Configuration utility before using the Event Service.

Trigger a Process Based on a Schedule

The trigger a process based on a schedule allows you to automatically trigger an AgilePoint process based on a defined schedule (can be one time or recurring).

To trigger an AgilePoint process based on a schedule:

1. From the **Schedule** section, click the **Add** button. The **Schedule Event Setting** page appears.



2. Enter a description for the trigger.
3. Select a period for the trigger.
4. Configure the Recurrence Pattern.

   The Hour option indicates an hour of the day on a 24-hour clock, and the Minute option indicates a minute during that hour. Select Every Hour to indicate an event that occurs at a particular minute of every hour (for example, 8:30, 9:30, 10:30, and so on). Select Every Minute to indicate an event that occurs once per minute during a specified hour.

   If you want to configure an event to recur at a specified number of hours or minutes, select Recur Every, and then set the number of hours or minutes.
5. Select the Process Template to be triggered.
6. Check the **Enable this schedule** check box to activate the trigger.
7. Click **OK**. Notice that the trigger is now added to the list.

8. Click the **Edit** button or **Delete** button to edit or delete the trigger.

Trigger a Process Based on an Incoming Email

The trigger a process based on an incoming email allows you to automatically trigger an AgilePoint process based on an incoming email.

To trigger an AgilePoint process based on an incoming email, do the following.

Navigation

1. On the Enterprise Manager Main Page, click **Events Service**.
2. On the **Event Service** page, click **Incoming Email > Add**.

Instructions

1. On the **Inbound Email Event Configuration** page, complete the following fields as required.

Field Name	Definition
Description	Definition: Specifies the description of the email trigger. Allowed Values: Multiple lines of text. Default Value: None Custom Attributes: No
Domain	Definition: Specifies your email authentication domain. Allowed Values: A valid domain name. Default Value:

Field Name	Definition
	None Custom Attributes: No
User Name	Definition: Specifies a user name you want to associate with an email event. Allowed Values: A valid user name. Default Value: None Custom Attributes: No
Password	Definition: Specifies the password for your email server. Allowed Values: A single line of text with no spaces. Default Value: None Custom Attributes: No
Email Subject	Definition: Specifies a custom attribute that contains to the subject of your email. When the email account specified receives an email, the data associated with this attribute is stored. It can then be referenced in the process using the specified custom attribute. Allowed Values: A valid custom attribute. Default Value: None Custom Attributes: Yes

Field Name	Definition
Sender	Definition: Specifies a custom attribute that contains to the sender of your email. When the email account specified receives an email, the data associated with this attribute is stored. It can then be referenced in the process using the specified custom attribute. Allowed Values: A valid custom attribute. Default Value: None Custom Attributes: Yes
Mail Body	Definition: Specifies a custom attribute that contains to the body of your email. When the email account specified receives an email, the data associated with this attribute is stored. It can then be referenced in the process using the specified custom attribute. Allowed Values: A valid custom attribute. Default Value: None Custom Attributes: Yes
Mail Body Format	Definition: Specifies the content format for the custom attribute that contains body of an email. Allowed Values: • **HTML -** Stores the content in HTML format. • **TEXT** - Stores the content in text-only format. • **Both HTML & TEXT -** Stores 2 copies of the content: 1 in HTML, and 1 in text-only format. Default Value: HTML

Field Name	Definition
	Custom Attributes: No
Attachment	Definition: Specifies the name of a process attribute that stores the path and file name of the email attachment on the AgilePoint Server machine. The attachments are stored on AgilePoint Server in the format [Attachment Location]\[sender email] - [process instance ID]\[file name] Allowed Values: A text string with no spaces or special characters. Default Value: None Example: MyAttachments
Attachment Location	Definition: The base file path where attachments from the email event service are stored. When AgilePoint Server stores the files, it places them in an auto-generated subfolder. Allowed Values: A valid folder path (without the file name) on the AgilePoint Server machine. Default Value: None Example: C:\Files\MyAttachments
Cc	Definition: Specifies a custom attribute that stores the CC recipients of an email. Allowed Values: A custom attribute. Default Value: None

Field Name	Definition
	Custom Attributes: Yes
Priority	Definition: Specifies a custom attribute that stores the priority of an email. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes
Received Date	Definition: Specifies a custom attribute that stores the received date of an email. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes
Mail Server	Definition: Specifies your email server type. Allowed Values: • MS Exchange • POP3 • IMAP • EWS Default Value: POP3 Custom Attributes: No

Field Name	Definition
Exchange Server Name	Definition: Specifies the URL for your email server. Allowed Values: A valid email server URL. Default Value: None Custom Attributes: No
Allow Duplicate Attachments	Definition: Specifies how to handle multiple emails with the same attachment file. Allowed Values: • **Deselected -** Saves the first attachment file and ignores the subsequent attachments with the same file name and extension. • **Selected -** Saves all the duplicate attachment, and appends the incremented number at the end of the file name. AgilePoint Server kicks off a new process for each duplicate, as if it were a unique file. Default Value: Deselected Example: test.txt, test(1).txt, test(2).txt , test.png,test(1).png
Process Template	Definition: Specifies the process template for which you want the email trigger to create a process instance. Allowed Values: A process template name from the list. Default Value: None Custom Attributes: No
Enable this schedule	Definition:

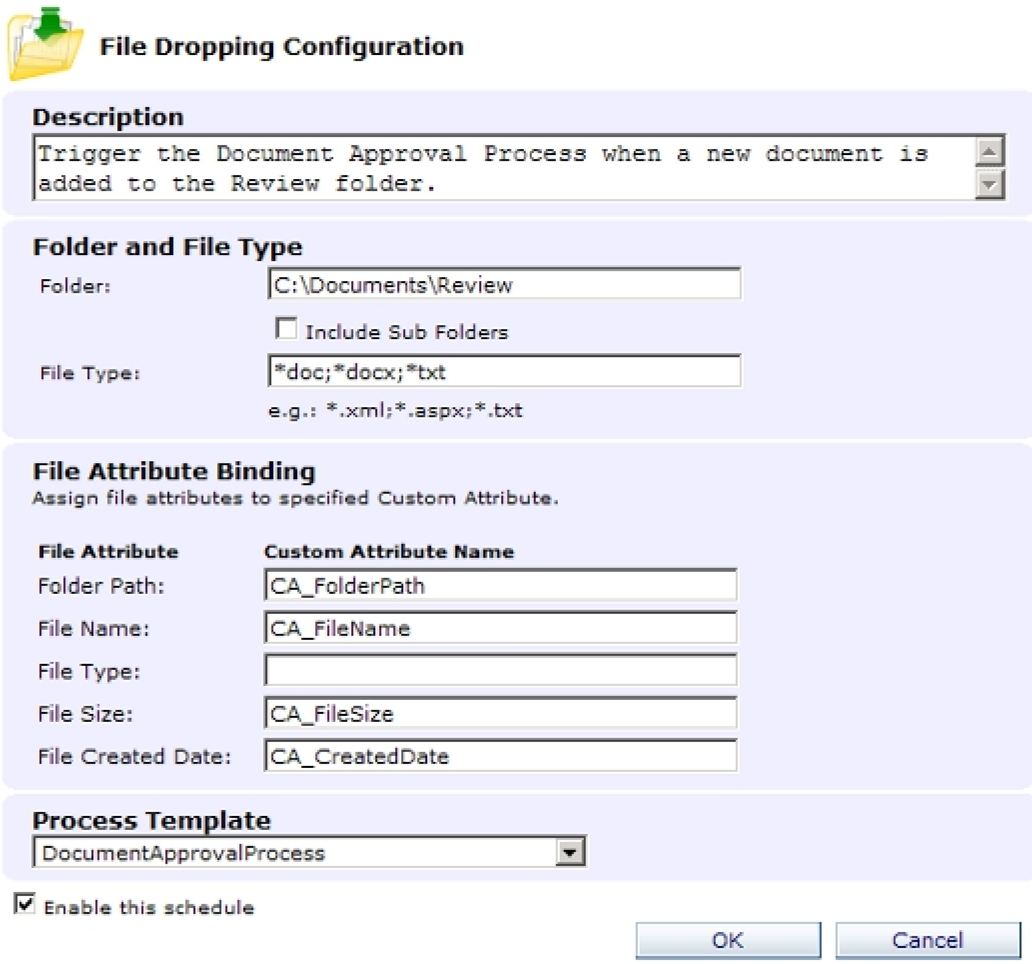
Field Name	Definition
	Specifies whether the email trigger is active. Allowed Values: • **Deselected** - Specifies that the email trigger is inactive. • **Selected** - Specifies that the email trigger is active. Default Value: None Custom Attributes: No

Trigger a Process Based on a File Drop

The trigger a process based on a file drop allows you to automatically trigger an AgilePoint process based on when a file is copied to a location and also is based on the type of file that is added.

To trigger an AgilePoint process based on a file drop:

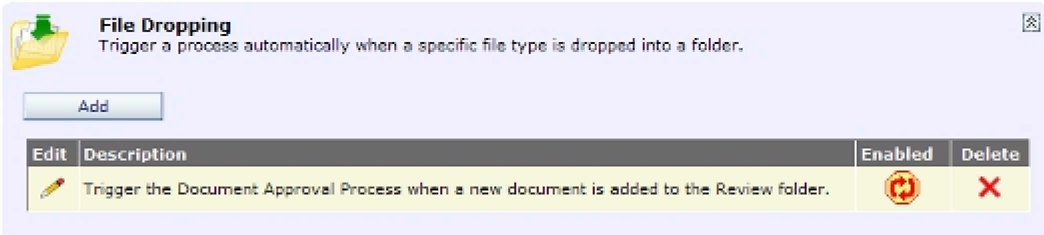
1. From the **File Dropping** section, click the **Add** button. The File Dropping Event Configuration page appears.



2. Enter a description for the trigger.
3. Enter the folder name and file type. File type accepts multiple values separated by a semicolon.

> **Note:** You can also configure to monitor a subfolder. Be cautious of performance issue if your folder depth is too deep.

4. (Optional) Use the **File Attribute Binding** section to specify Custom Attributes (for the Folder Path, File Name, File Type, File Size, and File Created Date) to be set when the process is initiated. When a file is dropped to the specified location, and the process is triggered, the data associated with the Folder Path, File Name, File Type, File Size, and File Created Date will be stored and can be referred to in the process as the Custom Attribute that you defined.
5. Select the Process Template to be triggered.
6. Check the **Enable this schedule** check box to activate the trigger.
7. Click **OK**. Notice that the trigger is now added to the list.



8. Click the **Edit** button or **Delete** button to edit or delete the trigger.

Trigger a Process Based on a Database Update

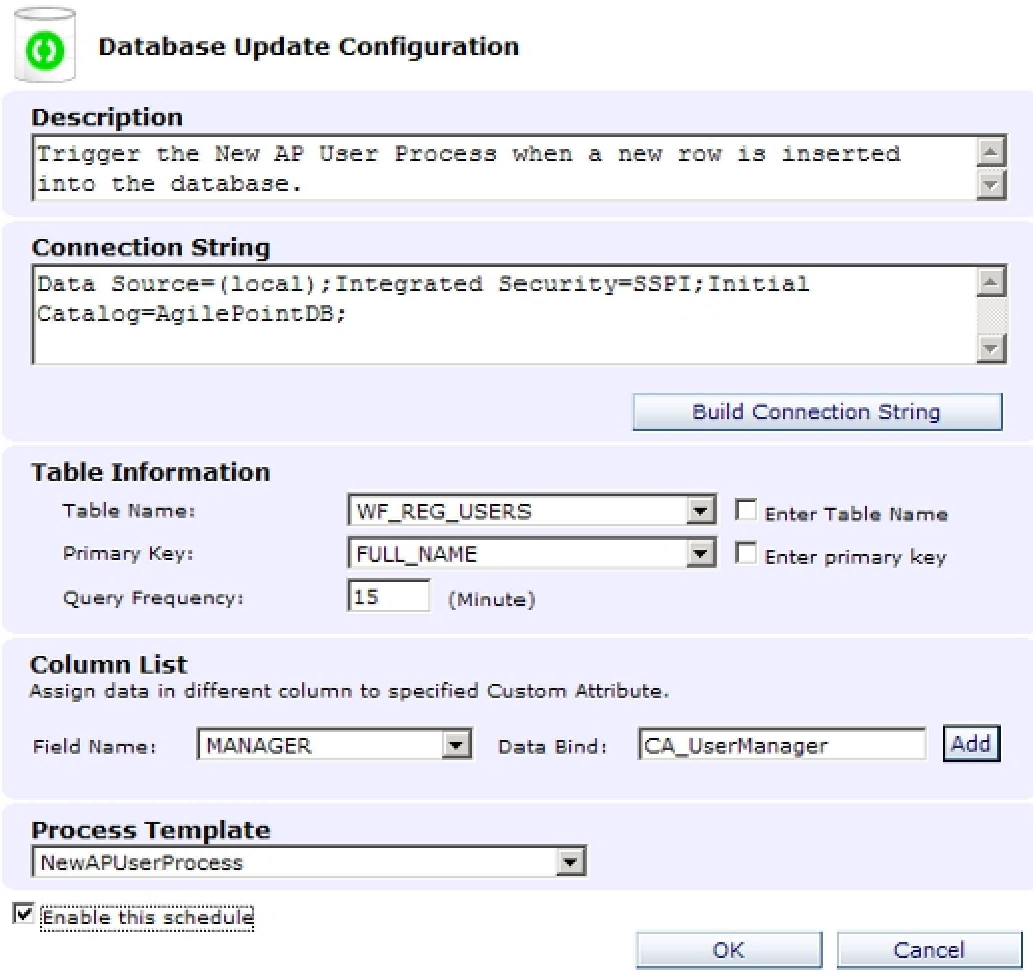
The trigger a process based on a database update allows you to automatically trigger an AgilePoint process based on when a new table row is added to a database.

Note: Only Microsoft SQL Server is supported at this time.

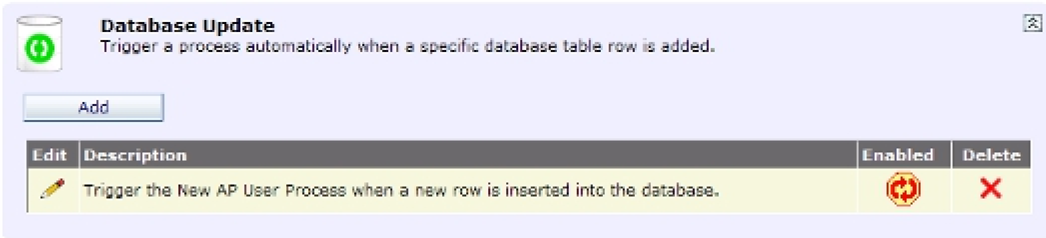
Note: As a best practice it is recommended to use a separate database table that is used for the Database Update monitoring, this is because once the new database update process is triggered, the new database table row and records will be deleted.

To trigger an AgilePoint process based on a database event:

1. From the **Database Update** section, click the **Add** button. The **Database Update Event Setting** page appears.



2. Enter a description for the trigger.
3. Enter the database connection string manually or click the Build Connection String button for assistance in building the connection string. In the Connection String Builder page, enter the data source and user authentication fields and click the Retrieve Database button to retrieve the database name, if you know the database name, you can also check the **Enter Database Name** check box and type the database name directly into the text box. When finished, click OK, the connection string is built for you.
4. After the connection string is generated, specify which table you want to monitor and what is primary key for that table. It is important to ensure that the Primary key is defined properly. Once the event listener successfully initiates a process by retrieving the data from the table specified, it will delete the records. As mentioned above, as a best practice it is recommended to use a separate database table that is used for the Database Update monitoring, this is because once the process is triggered, the new database table row and records will also be deleted.
5. (Optional) Use the **Column List** section to specify Custom Attributes for the columns. One Custom Attribute can only bind to one column, but one column can be assigned to different Custom Attributes.
6. Select the Process Template to be triggered.
7. Check the **Enable this schedule** check box to activate the trigger.
8. Click **OK**. Notice that the trigger is now added to the list.



9. Click the **Edit** button or Delete button to edit or delete the trigger.

Access Control

The Access Control section of the Enterprise Manager Main Page allows the administrator to perform certain functions such as create or modify users, roles, or groups, and delegate, or reassign, user tasks.

Add a User

To add an existing user that is not registered to the AgilePoint system, do the following.

Prerequisites

- An existing user account.

Navigation

1. On the Enterprise Manager Main Page, click **Users**.
2. On the **Users** window, click **Add**.

Instructions

1. Complete the following required fields on the **Add** window.

Field Name	Definition
User Name	Definition: Specifies the user account you want to register in AgilePoint. Allowed Values: A user name, including the domain name, in the following format: [domain]\[user name] Default Value: None Custom Attributes: No Example: MyDomain\Administrator
Full Name	Definition: Specifies the full name of the user. Allowed Values:

Field Name	Definition
	A text string that can contain spaces. Default Value: None Custom Attributes: No

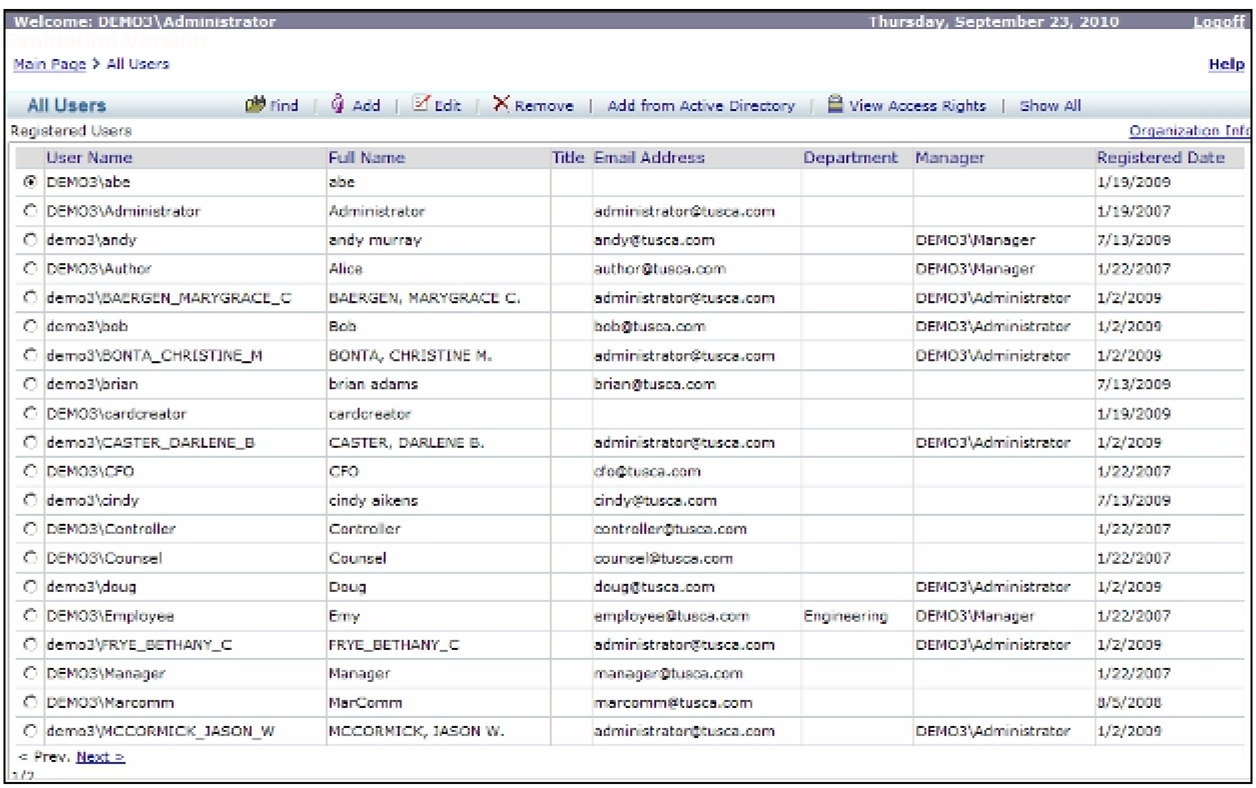
2. On the Add or Edit User Information Window, complete any additional configuration for this user according to your requirements.

Pages

This section provides a description of the pages in the Access Control section of Enterprise Manager.

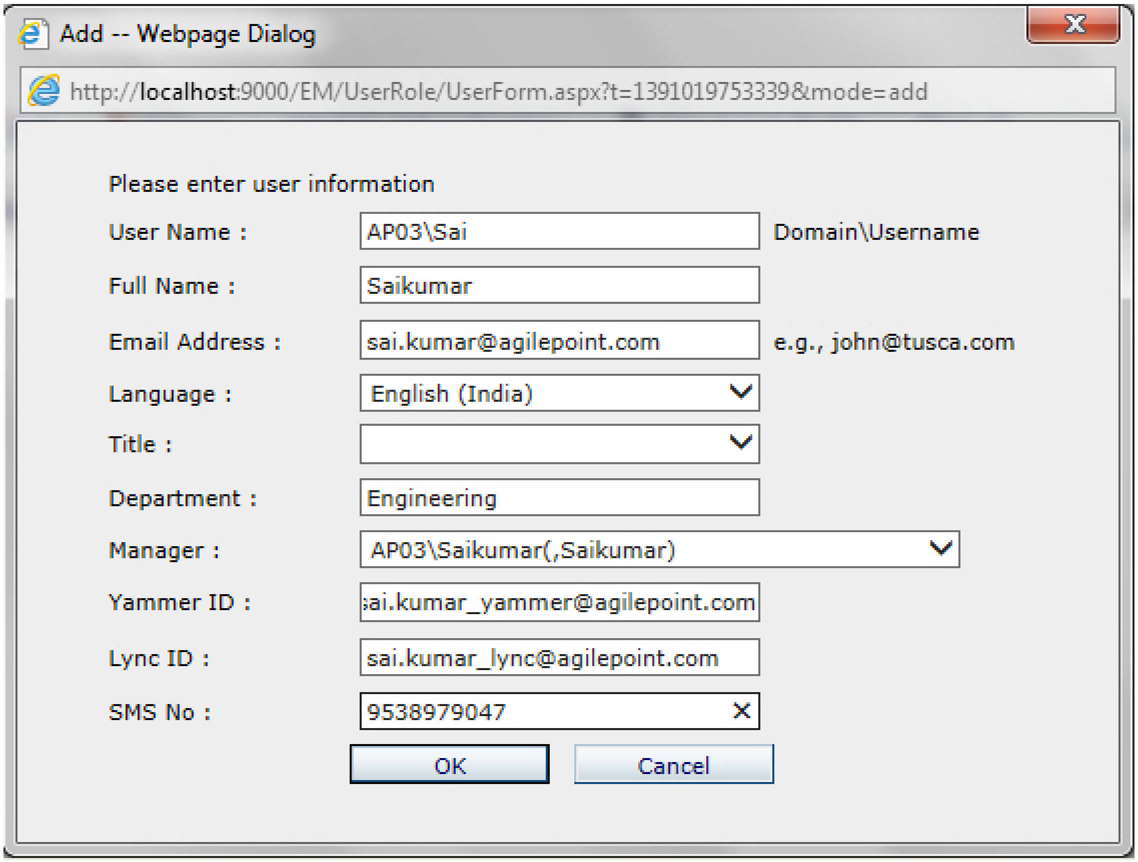
Users Page

This page allows the administrator to view, search for, and update the user account information that is used by AgilePoint Server.



Add or Edit User Information Window

This dialog allows the administrator to add or edit an AgilePoint Server user's information.



Navigation

1. On the Enterprise Manager Main Page, click **Users**.
2. On the **Users** window, click **Add** or **Edit**.

Field Definitions

Field Name	Definition
User Name	Definition: Specifies the user name you want. Allowed Values: Read only.

Field Name	Definition
Full Name	Definition: Specifies the full name of the user. Allowed Values: A text string that can contain spaces. Default Value: None Custom Attributes: No
Email Address	Definition: The user's email address. Allowed Values: A valid email address. Default Value: None Custom Attributes: No
Language	Definition: Specifies the language of the user. Allowed Values: The language you want. Default Value: None Custom Attributes: No
Title	Definition: Specifies the job title of the user. Allowed Values: The name of your job title. Default Value: None Custom Attributes:

Field Name	Definition
	No
Department	Definition: Specifies the company's department the user belongs to. Allowed Values: A text string that can contain spaces. Default Value: None Custom Attributes: No
Manager	Definition: Specifies the manager of the user reports to. Allowed Values: The user name of your manager. Default Value: None Custom Attributes: No
Yammer ID	Definition: Specifies the user's Yammer ID. Allowed Values: A valid Yammer ID. Default Value: None
Lync ID	Definition: Specifies the user's Lync ID. Allowed Values: A valid Lync ID. Default Value: None
SMS No	Definition:

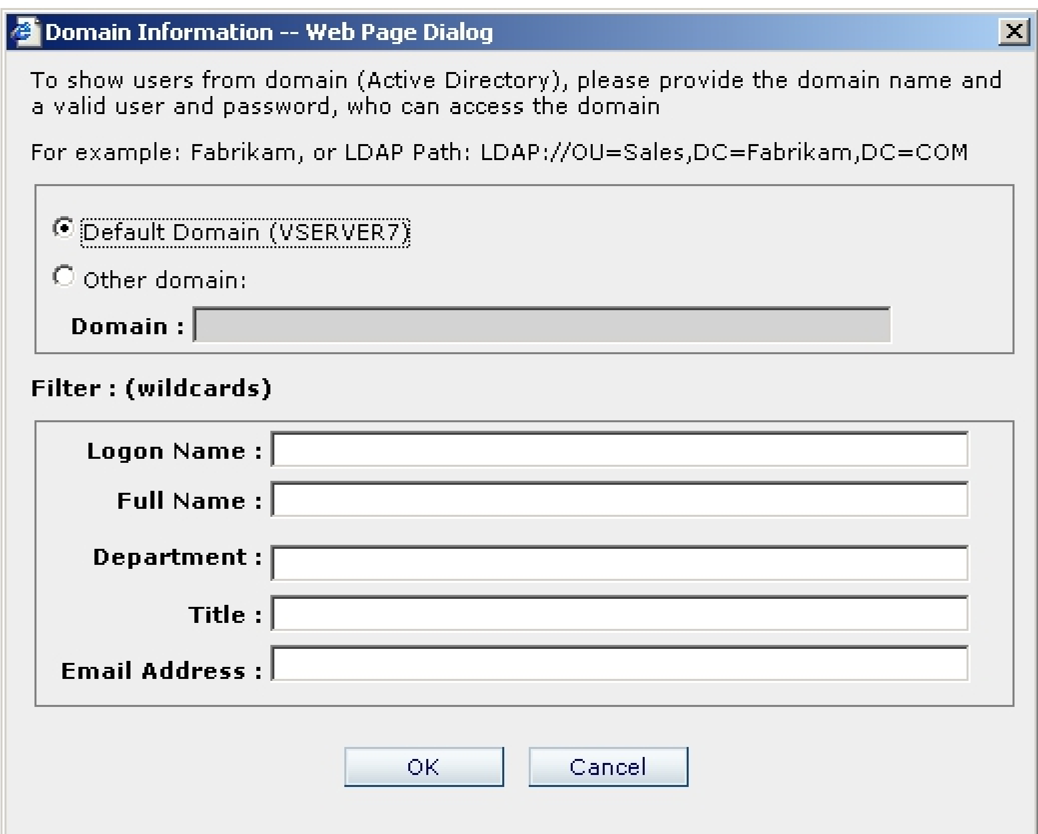
Field Name	Definition
	Specifies a user's telephone number where he or she can receive SMS messages. <u>Allowed Values:</u> A telephone number with integers only and no special characters. <u>Default Value:</u> None

Add User From Active Directory Dialog

This dialog allows the administrator to add new AgilePoint Server users from an Active Directory data source.

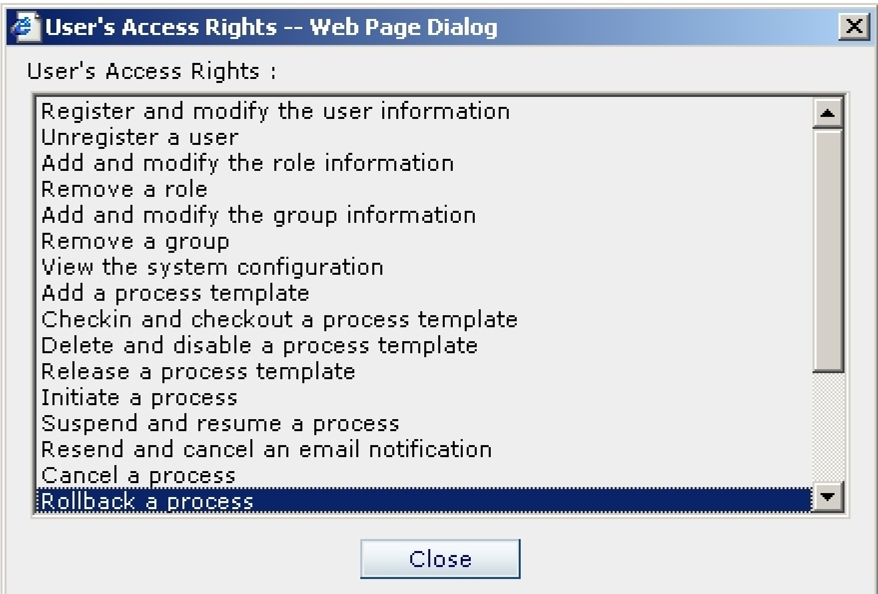
Requirements:

- The AgilePoint System User (as defined in the AgilePoint Server Configuration utility) should belong to the Active Directory domain.
- AgilePoint Server's Application Pool's Identity user account (as configured in IIS) needs to have read permissions to the Active Directory server and data.



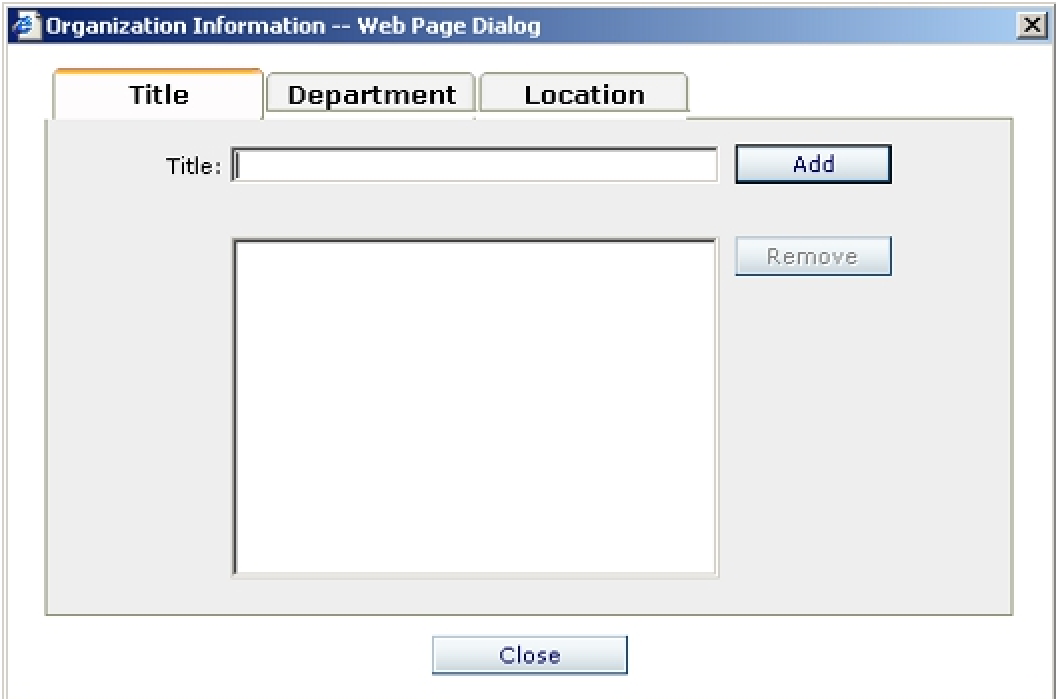
View Access Rights dialog

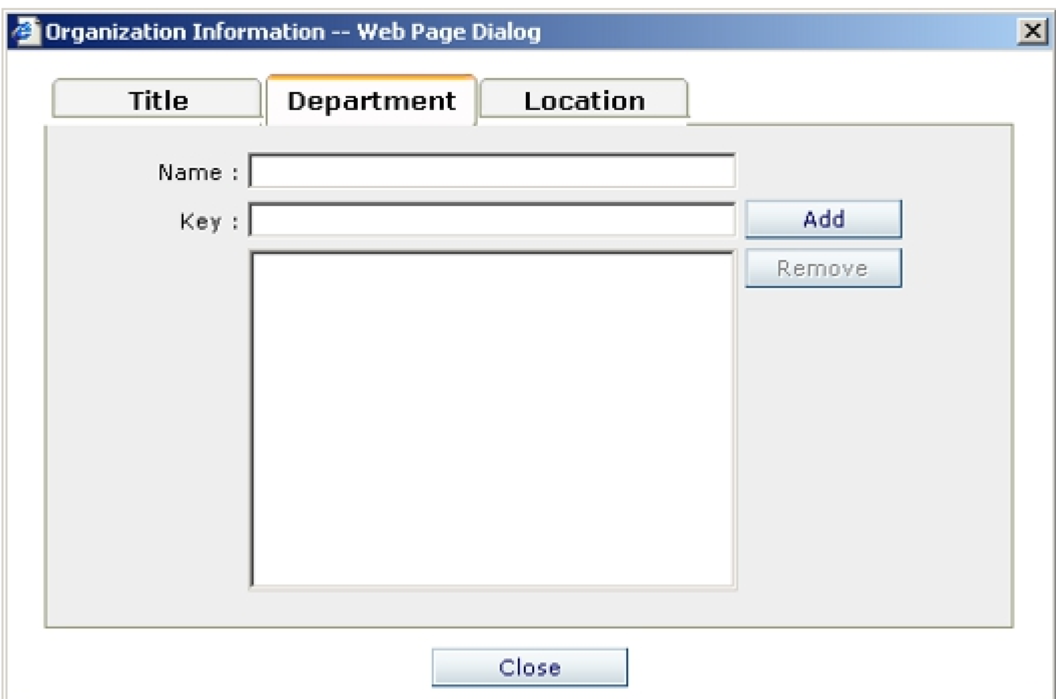
This dialog allows the administrator to view the complete set of AgilePoint access rights possessed by a specific AgilePoint Server user.

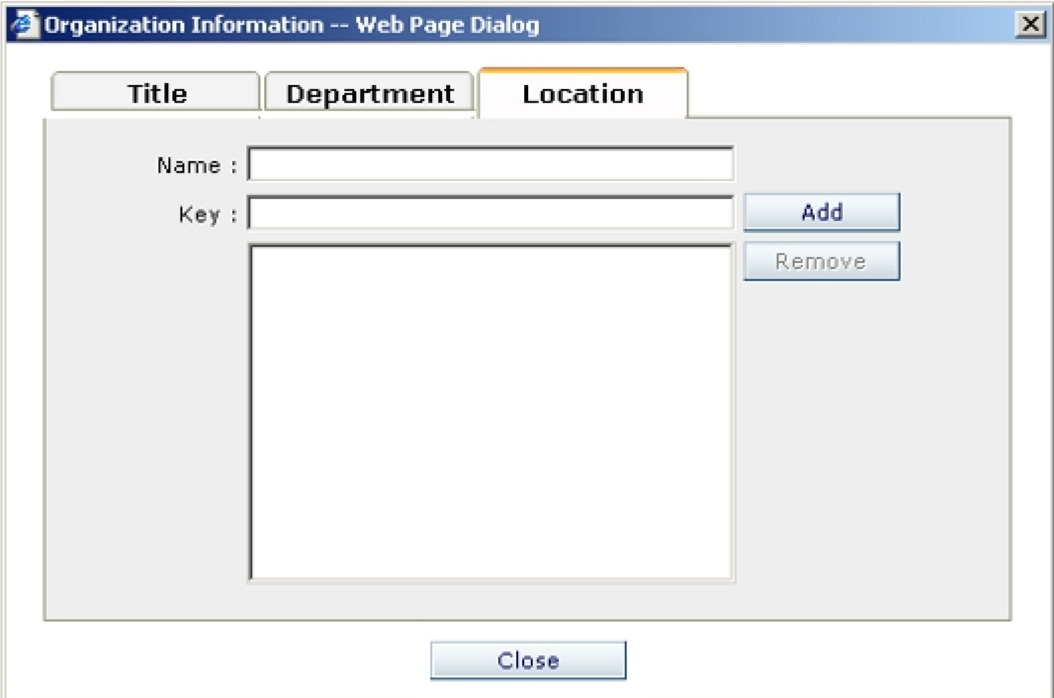


Organization Information Dialog

This dialog allows the administrator to configure the organization information that can be assigned to the AgilePoint Server users.

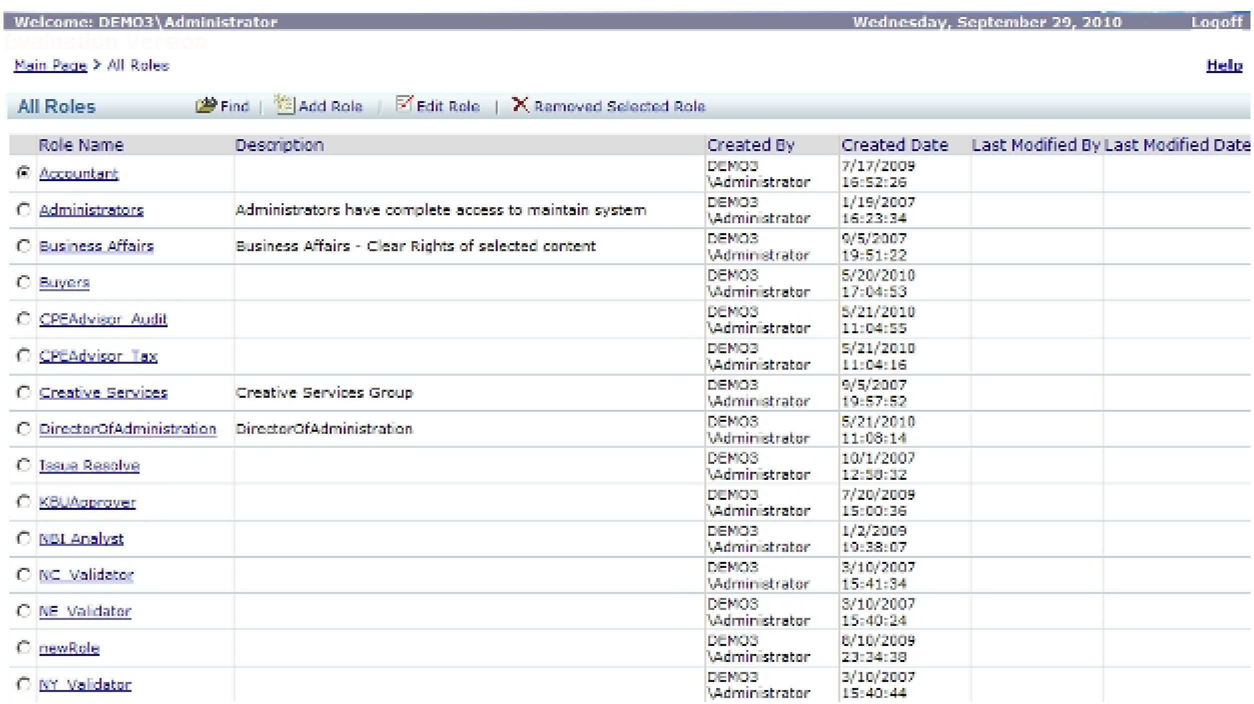

Organization Information -- Web Page Dialog
Title
Department
Location
Title:
Add
Remove
Close


Organization Information -- Web Page Dialog
Title
Department
Location
Name :
Key :
Add
Remove
Close



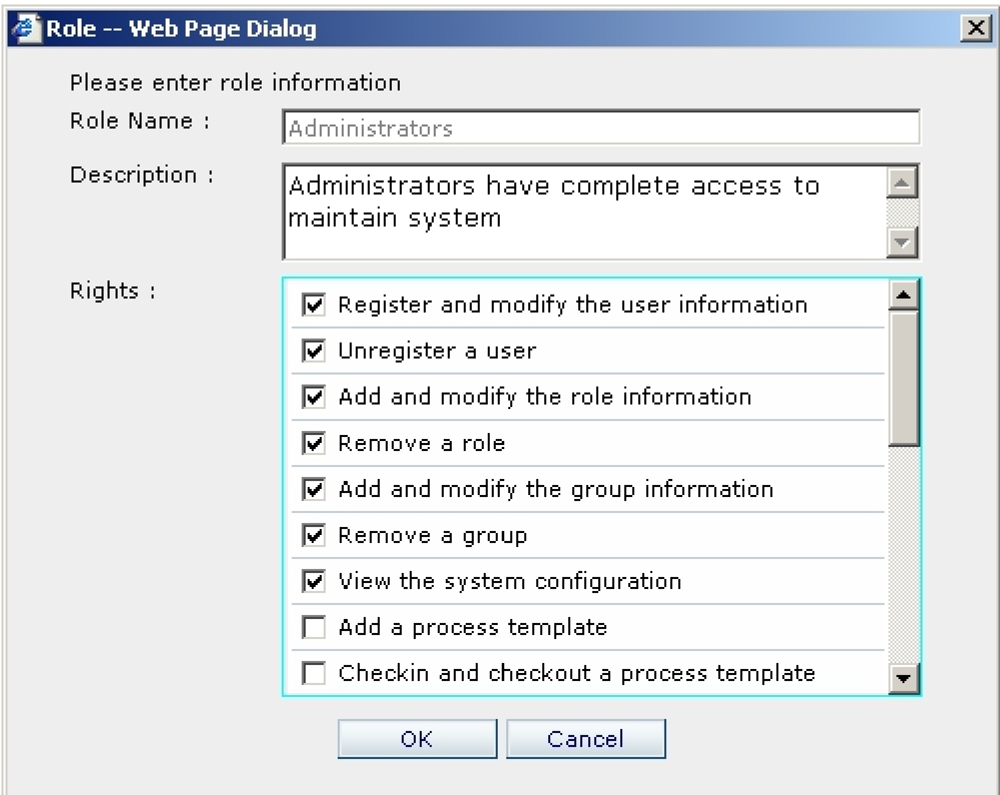
Roles Page

This page allows the administrator to view and update the roles that can be assigned to AgilePoint Server users.



Role Window

Creates or edits a role for AgilePoint users.



Navigation

1. On the Enterprise Manager Main Page, click **Roles**.
2. On the **Roles** window, click **Add Role** or **Edit Role** as appropriate.

Field Definitions

Field Name	Definition
Role Name	Definition: Specifies the name of a role. Allowed Values: A text string that can contain spaces. Default Value: None

Field Name	Definition
	Custom Attributes: No Example: Administrator
Description	Definition: A free text description of the role. Allowed Values: Multiple lines of text. Default Value: None. Custom Attributes: No
Rights	Definition: Determines the privileges to be provided to a role. Allowed Values: Role Access Rights Default Value: None

Role Access Rights

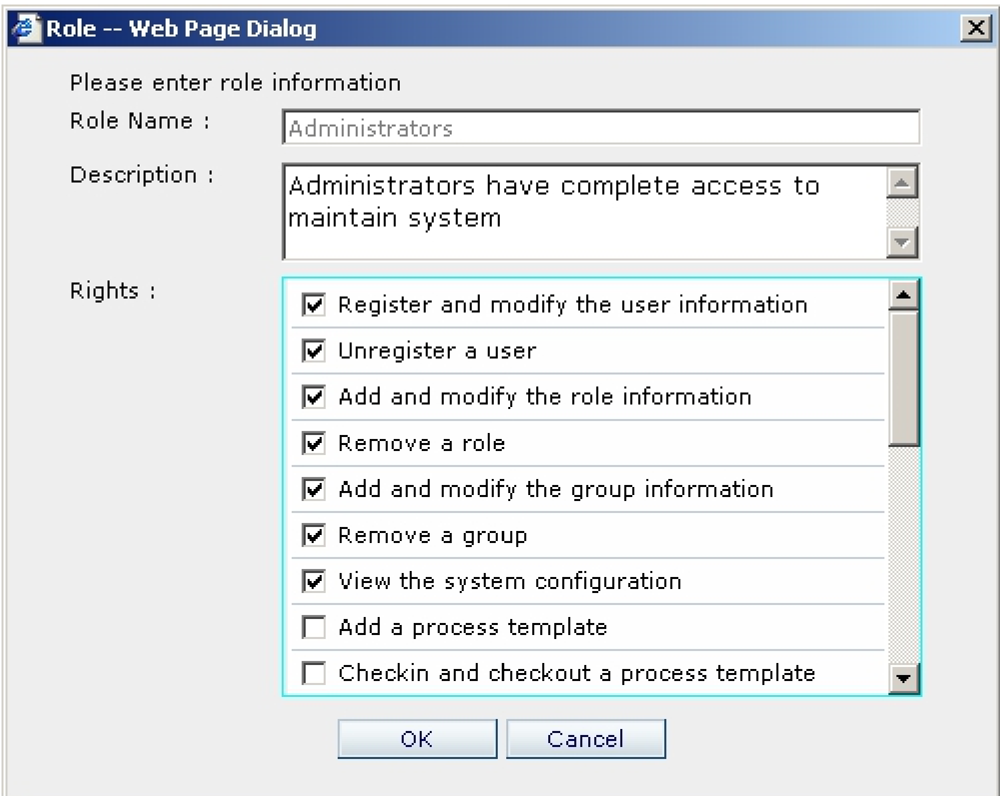
This topic provides a list of access rights.

Access Rights	Description	
Register and modify the user information	Adds a user and modifies the user information.	
Unregister a user	Removes a user from the AgilePoint system.	
Add and modify the role information	Adds and modifies a role.	
Remove a role	Deletes a role.	
Add and modify the group information	Adds and modifies a group.	
Remove a group	Deletes a group.	

Access Rights	Description	
Modify/View the system configuration	Modifies the AgilePoint system configuration. You can also view the system configuration.	
Add a process template	Adds a process template.	
Checkin and checkout a process template	Checks in and checks out a process template from a repository.	
Delete and disable a process template	Deletes and disables a process template.	
Release a process template	Releases a process template.	
Initiate a process	Initiates a process.	
Suspend and resume a process	Suspends and resumes a process.	
Resend and cancel an email notification	Resends and cancels an email notification.	
Cancel a process	Cancels a process.	
Rollback a process	Rollbacks a process.	
Reassign a task	Reassigns a task to another user.	
Cancel a task	Cancels a task.	
Create a task	Creates a task.	
Add, remove, and modify delegation	Adds, removes, and modifies delegation.	
Add, remove, and modify report configuration	Adds, removes, and modifies report configuration.	
Archive and restore process(es)	Archives and restores processes.	
Add, remove, and modify shared custom attributes	Archives and restores processes.	
View process details	Allows to view process details.	
Mark automatic work item completion	Marks an automatic work item as completed by an asynchronous activity.	

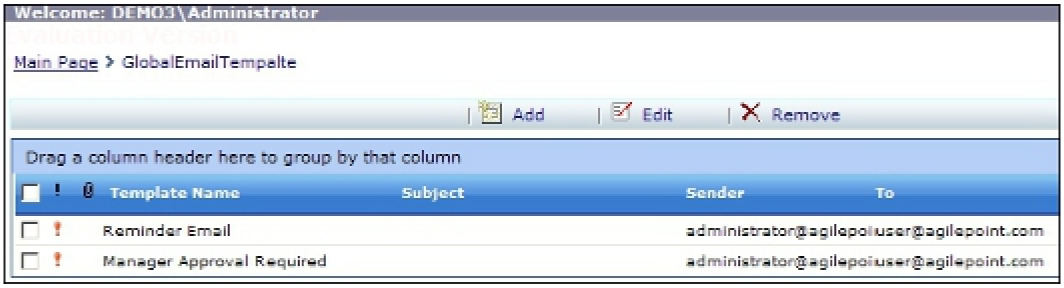
Add/Edit Role Dialog

This dialog allows the administrator to add or edit a role.



Global E-mail Templates Page

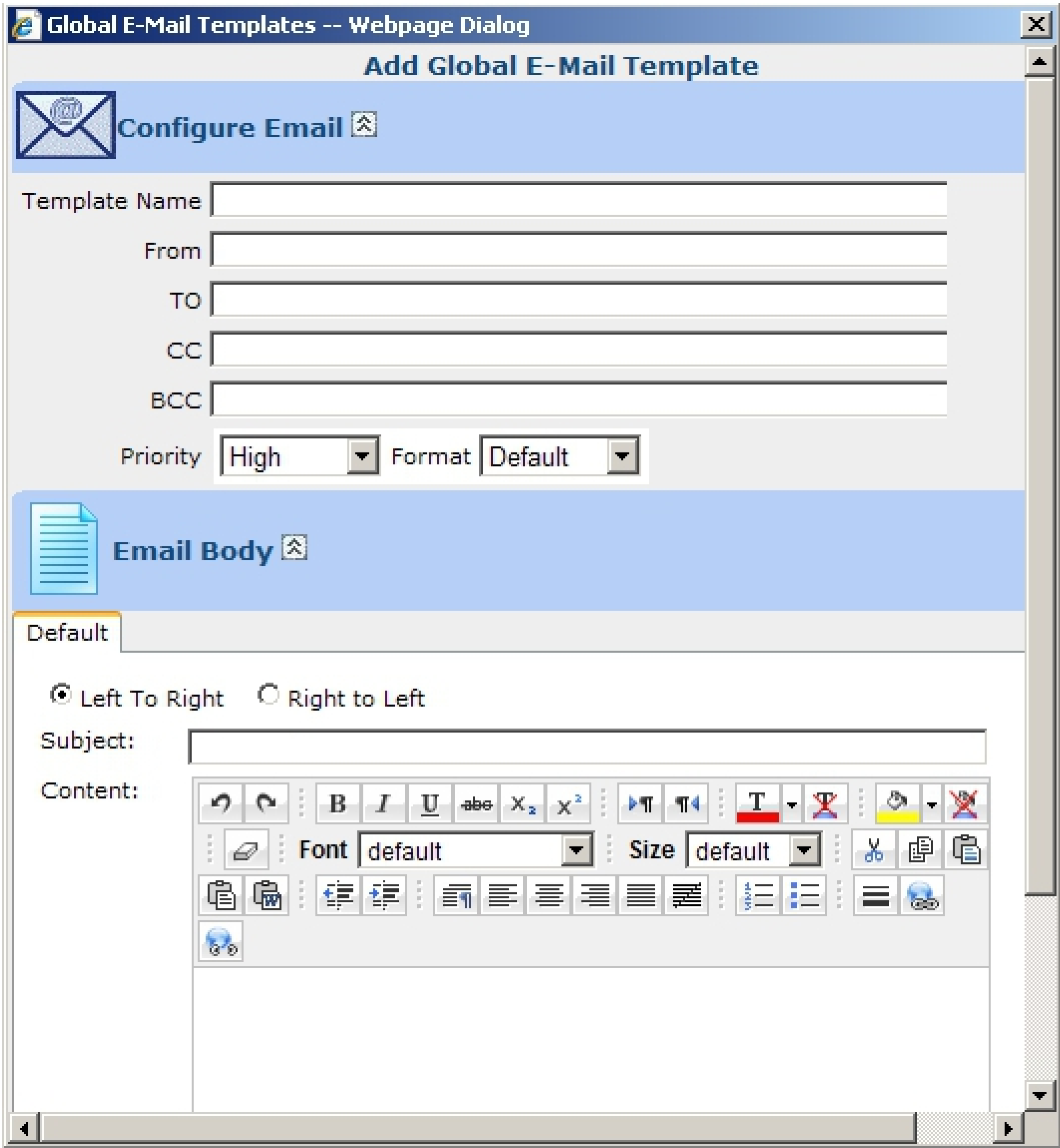
This page allows the administrator to add, update, and delete e-mail templates that AgilePoint Envision users can apply to create emails. You can use email templates to apply default values to an email, such as To, From, CC, BCC, subject, and body. Business users can apply the email templates in AgilePoint Envision.



Add a Global Email Template

You can create a global email template, which all Envision users can use to create email notifications.

1. On the Enterprise Manager Main Page, click the **Global Email Templates** link. The Global Email Templates page appears.
2. Click the **Add** button. The Global Email Templates pop-up appears.

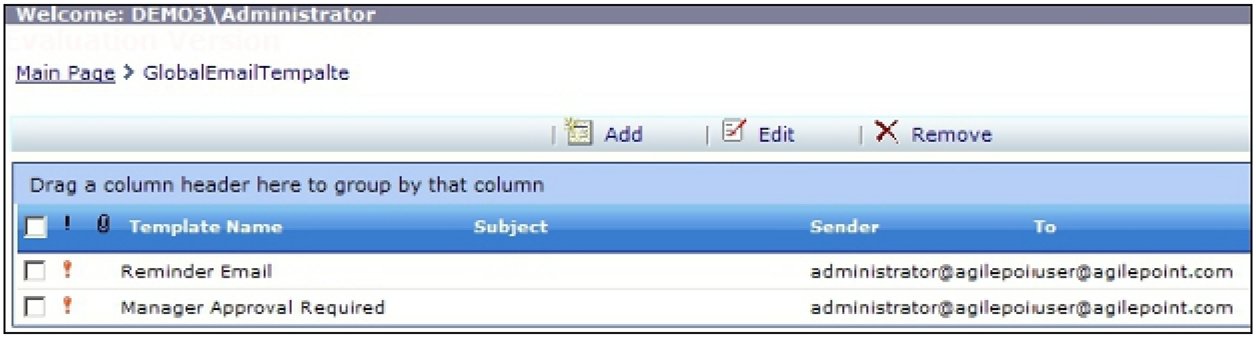


3. On the Global Email Templates pop-up, enter the information you would like to include in the global email template. Note that when Envision users select this template, they can modify it for their needs as required. For more information, see Email Template Wizard in the Documentation Library.
4. When you have finished, click **Add Template**.

Remove a Global Email Template

You can delete, or remove, a global email template.

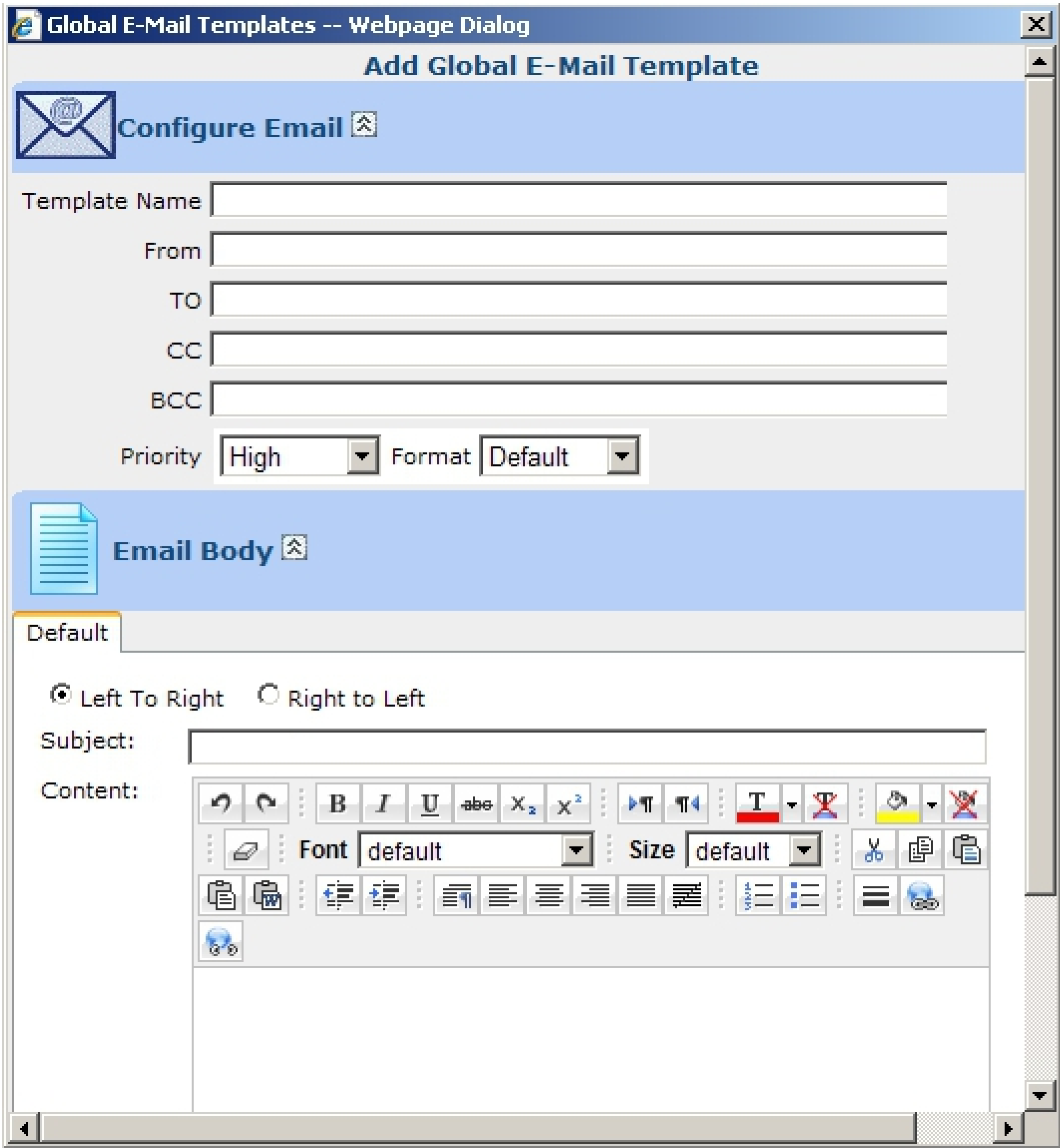
1. On the Enterprise Manager Main Page, click the **Global Email Templates** link. The Global Email Templates page appears.
2. On the **Global Email Templates** page, select the templates you want to remove, and click the **Remove** button.



Edit a Global Email Template

You can edit a global email template that has already been created.

1. On the Enterprise Manager Main Page, click the **Global Email Templates** link. The Global Email Templates page appears.



2. On the Global Email Templates page, select the templates you want to edit, and click the **Edit** button. The Global Email Templates pop-up appears.
3. On the Global Email Templates pop-up, enter or modify the information you would like to include in the global email template. Note that when Envision users select this template, they can modify it for their needs as required. For more information, see Email Template Wizard in the Documentation Library.
4. When you have finished, click **Update Template**.

Enterprise Social Token Management Page

Displays and manages the list of enterprise social tokens. These tokens enable you to connect to third-party social media services, such as Yammer. From this page, you can add, edit, or delete enterprise social tokens.

Navigation

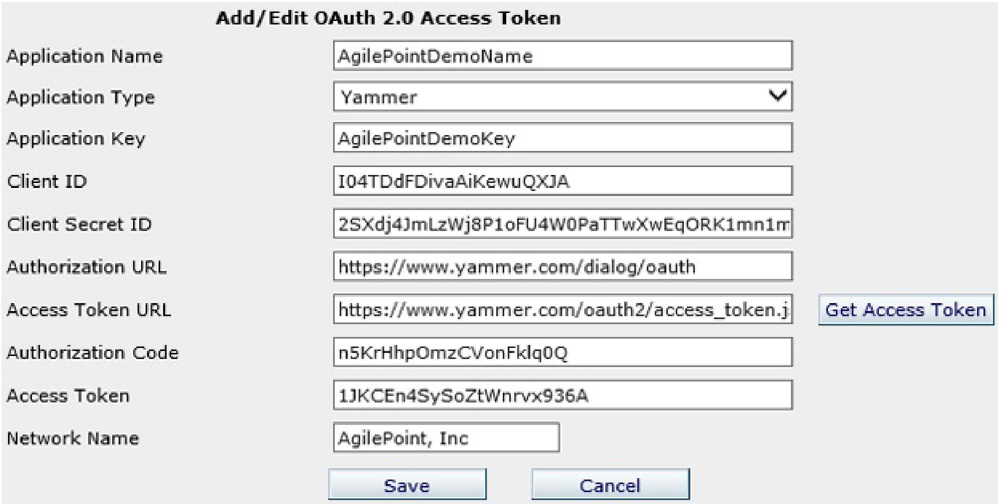
1. On the Enterprise Manager Main Page, click **Enterprise Social Token Management**.

Field Definitions

Field Name	Definition
Add and Edit	Opens the Following Window: Add/Edit Global Application Setting Page Purpose of this Window: Adds or modifies the information for a global application setting, such as an Enterprise Social Token.
Remove	Function: Removes the selected application name from the Enterprise Social Token Management.

Add/Edit Global Application Setting Page

Adds or modifies the information for a global application setting, such as an Enterprise Social Token.



Navigation

1. On the Enterprise Manager Main Page, click **Enterprise Social Token Management**.
2. On the **Enterprise Social Token Management** window, click **Add** or **Edit** as appropriate.

Field Definitions

Field Name	Definition
Application Name	Definition: Specifies a unique name for your application. This key can represent any identifying value for your application. Allowed Values: An alphanumeric string. Default Value: None
Application Type	Definition: Specifies the application type. At initial release, out of the box, the only application type available is Yammer. More application types will be added in later releases. Allowed Values: Yammer Default Value:

Field Name	Definition
	Yammer
Application Key	Definition: Specifies a unique application key. This key can represent any identifying value for your application. Allowed Values: An alphanumeric string. Default Value: None
Client ID	Definition: Specifies the client ID that you registered with your third-party application service, such as Yammer. Allowed Values: An alphanumeric string. Default Value: None
Client Secret ID	Definition: Specifies your client secret ID. This ID is provided when registered your third-party application service, such as Yammer. Allowed Values: An alphanumeric string. Default Value: None
Authorization URL	Definition: Specifies the authorization URL. AgilePoint BPMS uses sends a request to this URL to retrieve an authorization code. Allowed Values: A valid URL. Default Value: An url of the authorization.
Access Token URL	Definition:

Field Name	Definition
	The URL AgilePoint BPMS uses to retrieve an access token for a third-party application service, such as Yammer. AgilePoint BPMS sends a request to this URL along with an authorization code to retrieve the access token. Allowed Values: A valid URL. Default Value: The URL of a Yammer access token.
Get Access Token	Function: Generates the token.
Add Setting	Function: Saves the token in the form of Global Application Settings in the AgilePoint.

Reports Page

This page allows the administrator to manage and configure reports based on AgilePoint related data.

SQL Server Reporting Services

AgilePoint provides special integration features for SQL Server Reporting Services and comes with a set of pre-configured sample reports built using SQL Server Reporting Services. AgilePoint Enterprise Manager provides the user interface for building, viewing, and exporting reports. Although SQL Server Reporting Services is most often used, Crystal Reports, Microsoft Excel, and other reporting technologies can also be used to build your own reports as needed. The AgilePoint database schema is fully documented and can be used to facilitate custom reports. AgilePoint server also exposes a wide range of Web services that can be used to query and retrieve process-related data from AgilePoint Server. This data can be used to generate reports in a variety of ways using a variety of tools. You can also leverage AgilePoint APIs that will return process and run time statistic data in the form of XML. The XML data can then be used in a custom reporting tool that takes XML as an input.

The AgilePoint SQL Server Reporting Services Integration is installed as part of the AgilePoint Enterprise Manager installation. During the installation of Enterprise Manager, the installer will prompt you to install the AgilePoint SQL Server Reporting Services Integration component, which includes a set of pre-configured sample reports. To install this component requires that you have a working instance of Microsoft SQL Server Reporting Services installed. Refer to the AgilePoint Installation Guide for more information on installing the AgilePoint SQL Reporting Services Integration.

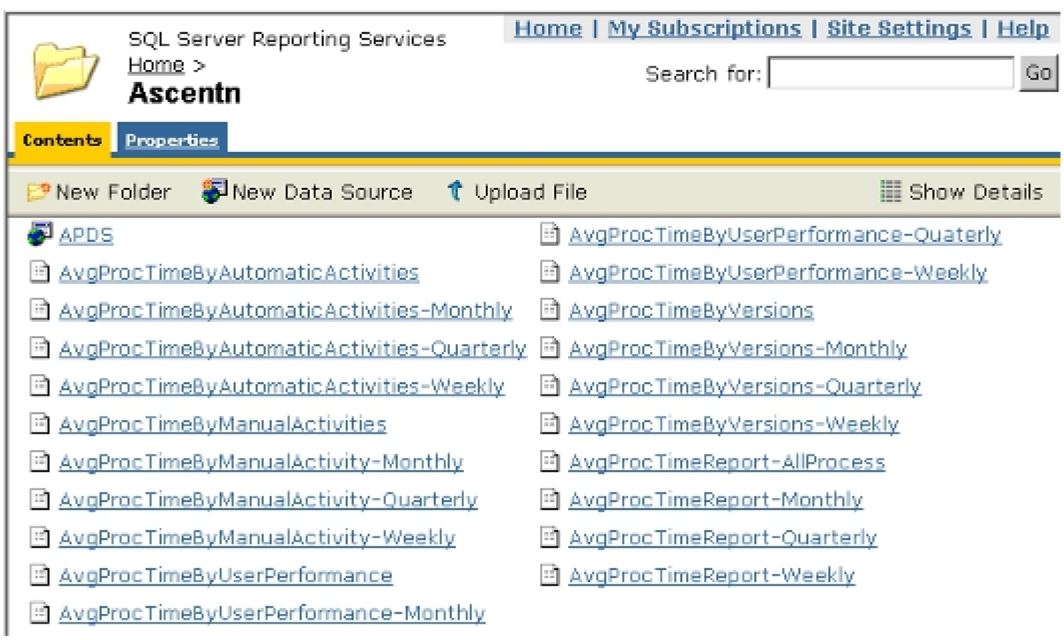
Sample Reports

AgilePoint comes with a number of pre-configured sample reports. Once the AgilePoint SQL Server Reporting Services Integration and the sample reports are installed, you can access them from the Enterprise Manager Reports page. The sample reports include:

- Average Process Time by Automatic Activities
- Average Process Time by Automatic Activities - Monthly

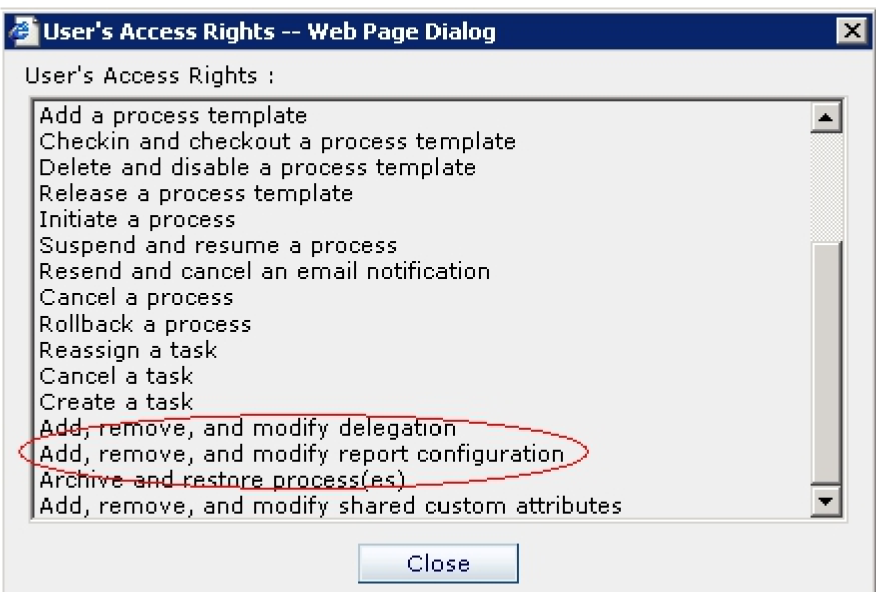
- Average Process Time by Automatic Activities - Quarterly
- Average Process Time by Automatic Activities - Weekly
- Average Process Time by Manual Activities
- Average Process Time by Manual Activities - Monthly
- Average Process Time by Manual Activities - Quarterly
- Average Process Time by Manual Activities - Weekly
- Average Process Time by User Performance
- Average Process Time by User Performance - Monthly
- Average Process Time by User Performance - Quarterly
- Average Process Time by User Performance - Weekly
- Average Process Time by Versions
- Average Process Time by Versions - Monthly
- Average Process Time by Versions - Quarterly
- Average Process Time by Versions - Weekly
- Average Process Time Report - All Process
- Average Process Time Report - Monthly
- Average Process Time Report - Quarterly
- Average Process Time Report - Weekly

The AgilePoint sample reports are deployed to SQL Server Reporting Services during the installation. Open **Microsoft SQL Server > Reporting Services > Report Manager** and click the **AgilePoint** link. The sample reports are stored here, additional reports can be added as desired.



The AgilePoint sample reports are accessed from the Enterprise Manager Main Page by clicking the Configuration link in the Report Management section. The sample reports show on the Reports page. The Reports page allows you to add, edit, or delete a report.

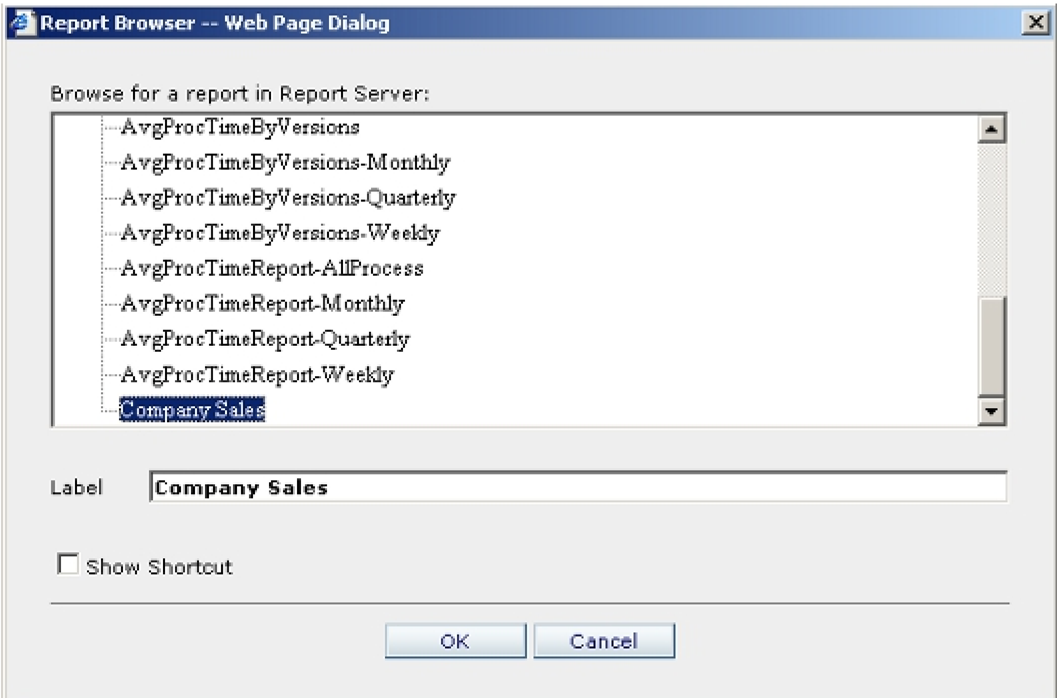
Note: A user must be given access rights in Enterprise Manager in order to see the Configuration link and manage reports. Once the user is given access rights, the Report Management section on the Enterprise Manager Main Page will be visible.



To add a report to Enterprise Manager:

1. Open SQL Server Reporting Services and click the AgilePoint link.
2. Click Upload File.
3. Browse and select the report file for which you want to add. The report file is added.
4. Open Enterprise Manager and click the Configuration link. The Report Management window appears.

5. Click Add. The Report Browser window appears. The Report Browser window displays all the reports that reside on the Report Server. From this window you can select a report from the Report Server to add in Enterprise Manager.



6. Select the newly added report and in the **Label** field, type a name for the report.

   Checking the Show Shortcut check box will display a shortcut link to the report on the AgilePoint Enterprise Manager Main Page. A maximum of three (3) report shortcuts can be displayed on the Enterprise Manager Main Page at a time.

7. Click OK. The report is added. To edit a report in Enterprise Manager:
8. From the Report Management page, click the option button next to the report for which you would like to edit and click Edit. The Report Browser window appears.
9. Change the **Label** name and click **OK**. The report is now renamed to the new name.

To delete a report in Enterprise Manager:

1. From the Report Management page, click the option button next to the report for which you would like to delete and click Delete. Click OK in the confirmation window. The report is deleted from the list.

To create a report:

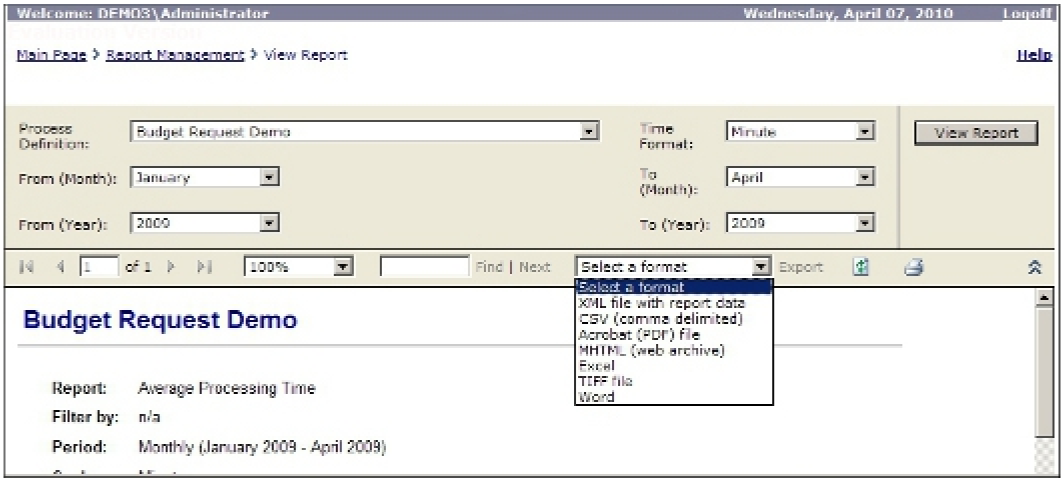
1. From the Report Management page, click the Average Process Time by Automatic Activities link. The View Report page appears. The View Report page requires some configuration parameters.
2. In the **Process Definition** drop-down list, select ExpenseReport_InfoPath as the Process Template you want this report to run against.
3. In the **Time Format** field, select Hour and click View Report to generate the report.

To export a report:

You can export the report into various formats such as HTML, CSV, XML.

1. Click the Select a format drop-down list and select CSV (comma delimited).

2. Click Export.



AgilePoint Licensing and Activation

This section provides information about AgilePoint licensing.

License Usage Calculations

This section provides information about license usage.

How is AgilePoint License Usage Calculated?

Summary

This article provides information about how the AgilePoint licensing percentages are calculated. Based on your AgilePoint license agreement, the following information will help you understand how to retrieve and interpret your Named User License usage and Process Template License usage.

Applies To

- Named User License Usage
- Process Template License Usage

More Information

AgilePoint BPMS displays the Process Template License usage and Named Users License usage percentages on the Enterprise Manager home page, under the Issue Tracking section.

- Process Template License usage is calculated using the following formula:

  [(Total Number of Child Process Templates) / (SubProcess Ration) + (Total Number of Non-Child Process Templates)] / (Total Number of Licensed Process Templates)

  For example, if the total number of Child Process templates is 20, the subprocess ratio is 5, the total number of Non-Child Process Templates is 10, the total number of Licensed Process Templates is 20, the average Process Template License usage would be 20/5 + 10 / 20 = .7 or 70%.

- Named User License usage is calculated using the following formula:

  (Total Number of AgilePoint Registered Users) / (Total Number of Named Users in the License Agreement)

  For example, if the total number of AgilePoint Registered Users is 35, and the total number of named users in the license agreement is 70, the Named User License Usage would be 35/70 = .5 or 50%.

AgilePoint Current User (Floating) License FAQ

What is a Current User (Floating) License ?

For newAgilePoint customers purchasing AgilePoint BPMS v5.0 or higher, the AgilePoint Current User (Floating) License is available. In a floating license model, only the active AgilePoint BPMS system users are counted against the number of purchased license seats. The number of active users is defined as the number of user sessions on the AgilePoint Server at a given time.

A user session lasts from initial login from any application to the time the session times out. (The timeout period is configurable.) If the user logs in before the current session times out, the session and the timeout period are renewed. Applications that can initiate a user session include AgilePoint Envision, AgilePoint Enterprise Manager, SharePoint, customized web applications, or web service calls from Microsoft Internet Explorer.

How can I estimate my number of users for an AgilePoint Current User (Floating) License?

Use the following calculation to estimate the number of users you will require under the AgilePoint Current User (Floating) License. Note that this is a basic estimate to be used as a general guideline intended as a starting point. You can use your own estimating scheme if desired.

[total number of AgilePoint users] * [average number of hours per day each user will be actively using AgilePoint] / [number of hours per work day] = [number of required floating license seats]

Example: 200 total AgilePoint users * **2** hours average usage per user per day / **8** hours per work day = **50** floating user license seats

How is the AgilePoint Current User (Floating) License Model Different from a Traditional Session Connection License Model?

AgilePoint Current User (Floating) License Model Different from a Traditional Session Connection License Model in the following ways.

Characteristic	Traditional Session Connection License	Current (Floating) User License	Comments
Uses a dedicated TCP/IP allocation	Yes, such as a database connection	No	This is important for scalability.
Requires system resource (e.g., memory) allocation to maintain session state at server side	Yes, through database connection or ASP.NET.	No	This is important for performance and memory allocation.
Counts the same user on multiple connections on different machine as multiple sessions	Yes	No	Example: A project manager are accesses AgilePoint on her laptop, and then goes to a meeting using her mobile device for a presentation. The same user session is used, as long as she logs on using the same user account.
Supports partial named user and partial floating user	No	Yes	Example: A company buys 10 floating licenses, but the CEO and CIO may want dedicated licenses so they can access system 24/7. The rest of the users share the

Characteristic	Traditional Session Connection License	Current (Floating) User License	Comments
			remaining 8 licenses as floating.

What happens if my total number of concurrent users exceeds my maximum number of active user license seats?

If your total number of concurrent users exceeds the maximum number of active users allowed by your License Agreement, the AgilePoint Server will generate an email warning to the system administrator. At this point, system performance may slow somewhat.

If you receive a warning regarding your maximum users, AgilePoint recommends that you 1) monitor your license usage, 2) try tuning your session timeout settings to accommodate your current user load, and 3) purchase additional license seats if required.

How can I monitor my actual number of active users once the system is up and running?

To monitor your actual number of users, query the AgilePoint database to analyze your maximum number of users in a day, and the frequency with which that maximum is reached. The AgilePoint system refreshes the user session count every 10 minutes. A record is generated each time the maximum number of license seats is reached.

To monitor your license usage, run the following query against the AgilePoint Database:

select DATE_OCCURRED, OBJECT_INFO, DESCRIPTION as WARNING from WF_AUDIT_TRAILS where CATEGORY=7 order by DATE_OCCURRED desc

The results look like the following. **L=*n*** represents the maximum number of floating license seats. **A=*n*** represents the number of active user sessions.

DATE_OCCURRED

OBJECT_INFO

WARNING

2010-05-10 17:34:40.027

L=2,A=3

The maximum number of concurrent users allowed by your AgilePoint License Agreement is 2, but your actual n ….

2010-05-10 17:29:04.400

L=2,A=2

NULL

In addition, you can run the query in Microsoft Excel to create graphs that will enable you to track your usage over time. For Excel, create the following view:

CREATE VIEW WFV_FLOATING_SESSIONS as select DATE_OCCURRED as [TIME],CONVERT(INT, RIGHT(OBJECT_INFO, LEN(OBJECT_INFO) - CHARINDEX('A=',OBJECT_INFO) - 1)) as ACTIVATED_SESSIONS, DESCRIPTION as WARNING from WF_AUDIT_TRAILS where CATEGORY=7

Then create the following query:

select * from WFV_FLOATING_SESSIONS

TIME

ACTIVATED_SESSIONS

WARNING

2010-05-10 17:34:40.027

3

The maximum number of concurrent users allowed by your AgilePoint License Agreement is 2, but your actual n ….

2010-05-10 17:29:04.400

2

NULL

How can I tune my server settings to better accommodate my current number of user licenses?

If your number of concurrent, active user sessions are exceeding the number of seats in your Current User (Floating) License Agreement, you can change the session timeout interval to better accommodate your usage.

There is a tradeoff between greater numbers of available license seats and system performance. If you have shorter session timeouts, you tend to have a higher number of available license seats, but frequent user session renewals can negatively impact system performance. On the other hand, if you have a longer user session timeout period, performance is better because the system is not renewing user sessions as often. However, longer timeouts can yield fewer available license seats and active sessions for users who are not actively using the AgilePoint system.

To modify the session timeout, in the AgilePoint **neflow.cfg** file in the **<server>** node, modify the value of the **UALExpirationPeriod** attribute (<server UALExpirationPeriod="n" ...>). The unit for this value is minutes. The minimum value is **15**.

How can I purchase additional license seats?

To increase your Current User (Floating) License capacity, contact AgilePoint Sales.

Subscription-Based Licensing

Subscription-based licensing is available fir AgilePoint BPMS. Using subscription-based licensing, you can pay a periodic fee for the AgilePoint service, rather than buying an indefinite license for all users.

For more information, contact AgilePoint Sales.

Finding and Obtaining License Keys

This section provides instructions for finding and obtaining AgilePoint license keys.

Finding the License Key for an Installed AgilePoint Component

Objective

To provide instructions for finding the License Key that is associated with an installed AgilePoint component.

Summary

The License Key for a particular installed AgilePoint component (Envision, Server, Developer) can be found by either using the utility attached below or by navigating the registry.

Resolution

Solution 1:

The easiest way to find the license key associated with a particular installed AgilePoint component is to download and run the **ShowlicenseKey.exe** utility. This utility can be downloaded as an attachment below.

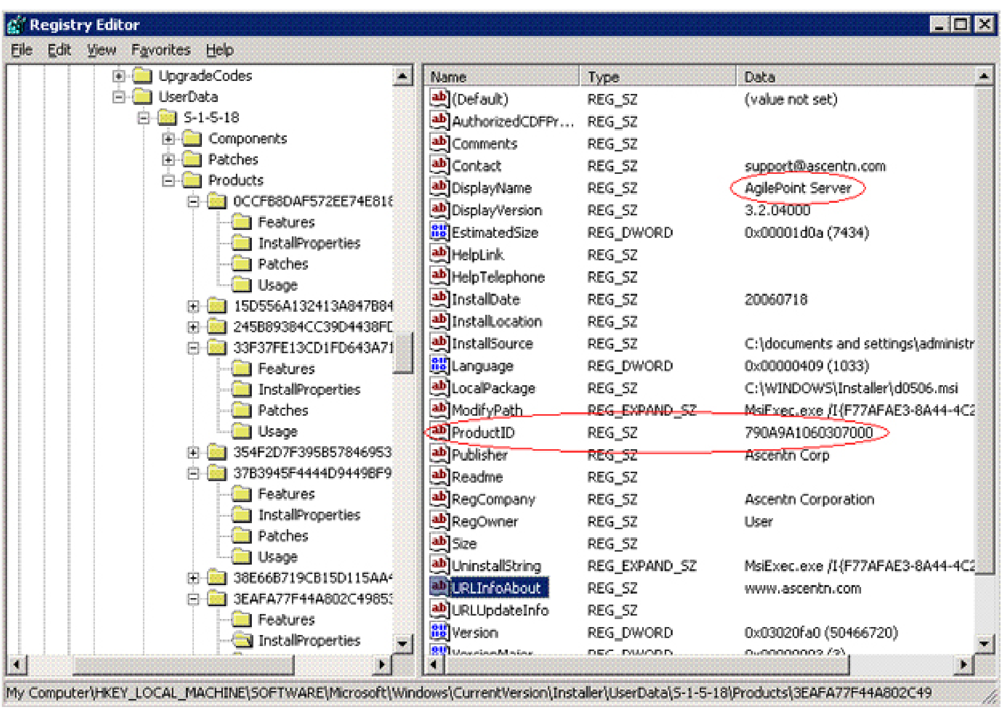
Solution 2:

An alternative solution to finding the license key associated with a particular installed AgilePoint component is via the registry as is detailed below.

1. Click **Start > Run.**
2. In the **Open** field, type **regedit**.
3. Click **OK**.
4. Navigate to the following location:

```
My Computer\HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion
\Installer\UserData\
```

5. Right click on the **UserData** folder and click **Find**.
6. Type **www.ascentn.com** and click **Find Next**.
7. Press the **F3** key until you see "AgilePoint Server" in the **Display Name** field. The Product ID field shows the License Key information as shown below:



8. Continue pressing the **F3** key until you find the AgilePoint Developer and AgilePoint Envision components, each of which displays a Product ID field. This is the License Key used for the installation.

Downloads

ShowLicenseKey.zip.

Obtaining AgilePoint License Keys

Some AgilePoint BPMS components require a license key. When you sign up for an AgilePoint BPMS account or purchase AgilePoint software, AgilePoint will send you the license keys for the components you need. If during installation you find you do not have a license key you need, do the following.

Instructions

To obtain new license keys, contact AgilePoint Customer Support.

When requesting new license keys, please provide the following information:

- Your name.
- The name of your company or organization.
- The version numbers and the names of the AgilePoint products that you are planning to install.
- The type (e.g. Evaluation, Development, Production, or Clustered) of license keys and the quantity for each of the AgilePoint products that you are planning to install.
- If you are requesting a license key as a replacement for a previously issued license key, please provide the original license key as well.

Please note the following:

- Each license key can only be used on one machine.
- Allow at least one full business day for license keys to be provided following your request.

Replacing Temporary License Keys with Production License Keys

Applies To

- AgilePoint Envision
- AgilePoint Developer
- AgilePoint Server

Summary

Can I force my evaluation key to expire early?

Can I extend my evaluation key before it expires?

I have an important demo coming up and I am worried that my evaluation key may expire around the demo time. Is there a way I can reactivate or extend the evaluation key prior to its expiration?

I have purchased permanent keys, how can I replace my evaluation keys with the permanent keys?

Yes. You will need to create a ticket on the AgilePoint Support portal and request the **AgilePointReactivation.zip** package. After you have received the package, you can use the instructions below to force your evaluation keys to expire early and replace your evaluation keys with permanent keys. Then you will be able to re-activate the product(s) using your new keys.

Details

If you want to reactivate AgilePoint Server, simply copy the new **AgilePoint Server.dat** file to the **C:/Program Files/Common Files/Ascentn** folder and replace the existing file. Next time you bring up the AgilePoint Server Configuration (via **Start > All Programs > Ascentn > AgilePoint Server Configuration**), it will prompt you to enter the new license key. Follow the same procedure for AgilePoint Envision and AgilePoint Developer. For more information on activating a particular AgilePoint component, see the related articles below.

Keep these .dat files handy as you may want to use them again later.

NOTE: You will need to request new license keys to extend your evaluation.

Note: Each copy of the AgilePoint SAP Integration installation software is unique, and a unique license key is created for each installation package. If you installed an evaluation copy of AgilePoint SAP Integration during your AgilePoint trial, you must uninstall the evaluation copy and reinstall the software using the official production installation software. The the production license key will not work with an evaluation software installation. For more information, contact AgilePoint Support.

Activating AgilePoint Licenses

This section provides instructions for activating the licensed components of the AgilePoint BPMS Suite:

- AgilePoint Envision
- AgilePoint Developer
- AgilePoint Server

Activating Over the Internet

Internet activation is recommended for all machines with Internet connections.

Prerequisites

- An Internet connection
- Administrator privileges
- You are running a licensed product that meets one of the following conditions:
  - It is the first time you've run the product after installation
  - It is the first time you've run the product after an evaluation license key expired

Navigation

1. Open the application you want to activate. The Activation Wizard appears.

Instructions

1. On the **Activation Wizard**, select **Activate by using Internet**.

2. Click **Next**.

Your product should be activated automatically within a few seconds.

Activating Manually

Use manual installation if you are unable to activate over the Internet.

Prerequisites

- Administrator privileges
- You are running a licensed product that meets one of the following conditions:
  - It is the first time you've run the product after installation
  - It is the first time you've run the product after an evaluation license key expired

Navigation

1. Open the application you want to activate. The Activation Wizard appears.

Instructions

1. On the **Activation Wizard**, select **Activate manually**.
2. Click **Next**.
3. On the **Product ID** window, click the **Activation Key** link.
4. On the web page that appears, copy the URL, and paste it into a web browser on a machine where an Internet connection can be established. The AgilePoint Activation page appears with the Product ID displayed.

   You can also access the AgilePoint Activation page via the following URL: http://act.agilepoint.com/ActivationServer/ActivationKey.aspx . If you choose this method, you will need to type in the Product ID manually.
5. Click **Submit**. The Activation Key appears.

   If this process fails to generate an Activation Key, email the following information to AgilePoint Customer Support:

   - Your name.
   - The name of your company or organization.
   - Appropriate contact information.
   - The Product ID specified by the Activation Wizard.

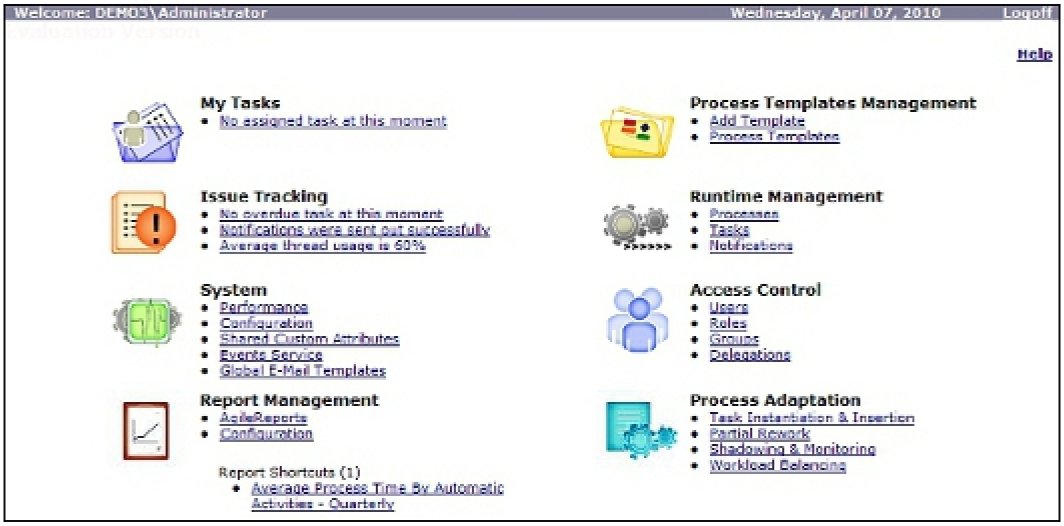
   AgilePoint will reply with the required Activation Key.
6. In the **Activation Wizard** window in the **Activation Key** field, copy and paste the Activation Key.
7. Click **Next**, and then click **Finish**.

Pages

This section provides a list of pages in Enterprise Manager.

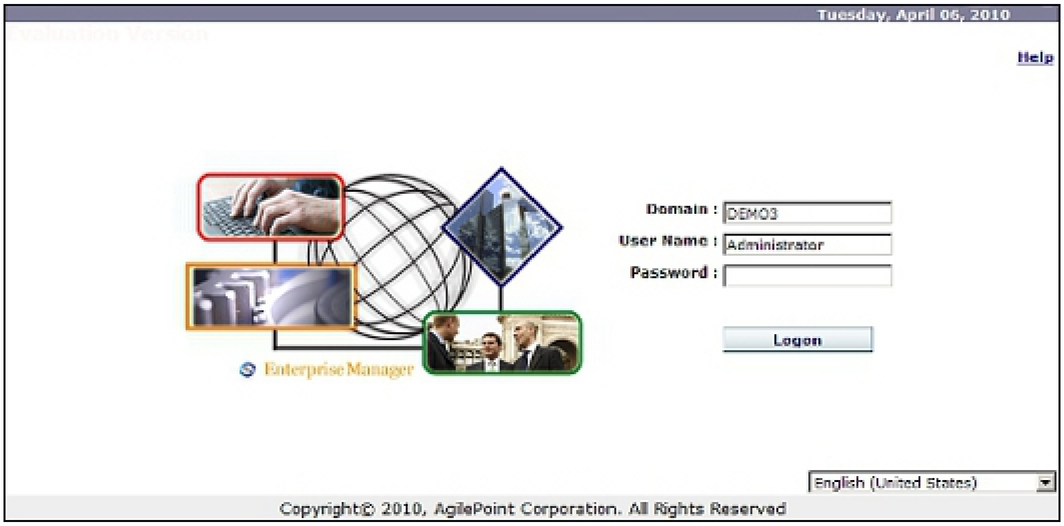
Main Page

This page acts as a portal that allows the administrator to navigate to the various pages of the AgilePoint Enterprise Manager Web application.



Login Page

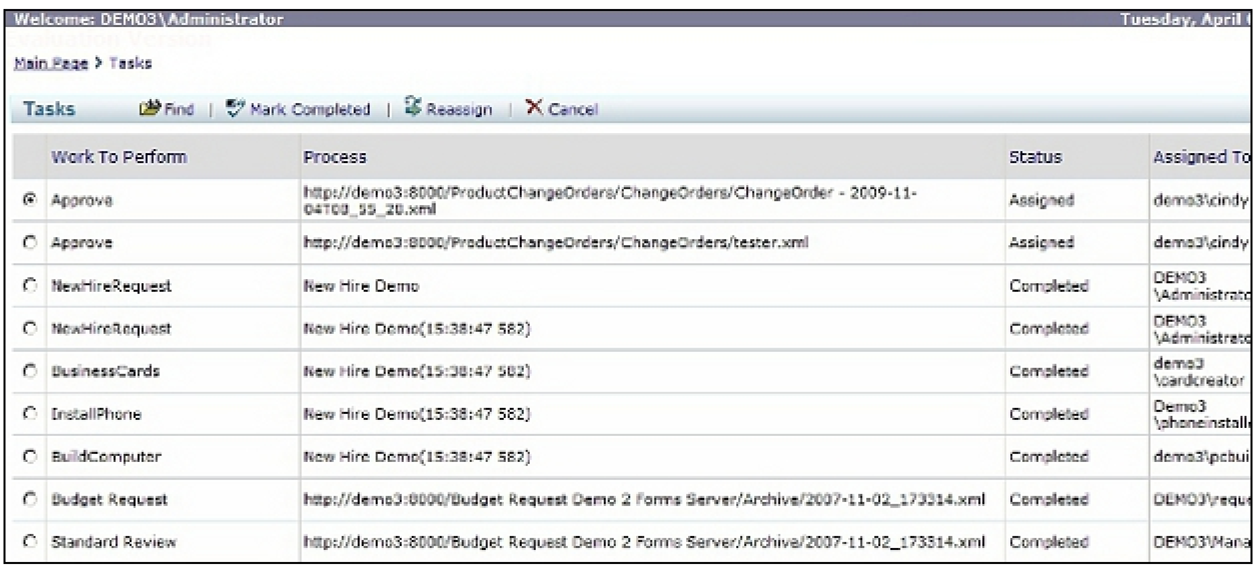
This page allows the administrator to login to the AgilePoint Enterprise Manager Web application.



Tasks Page

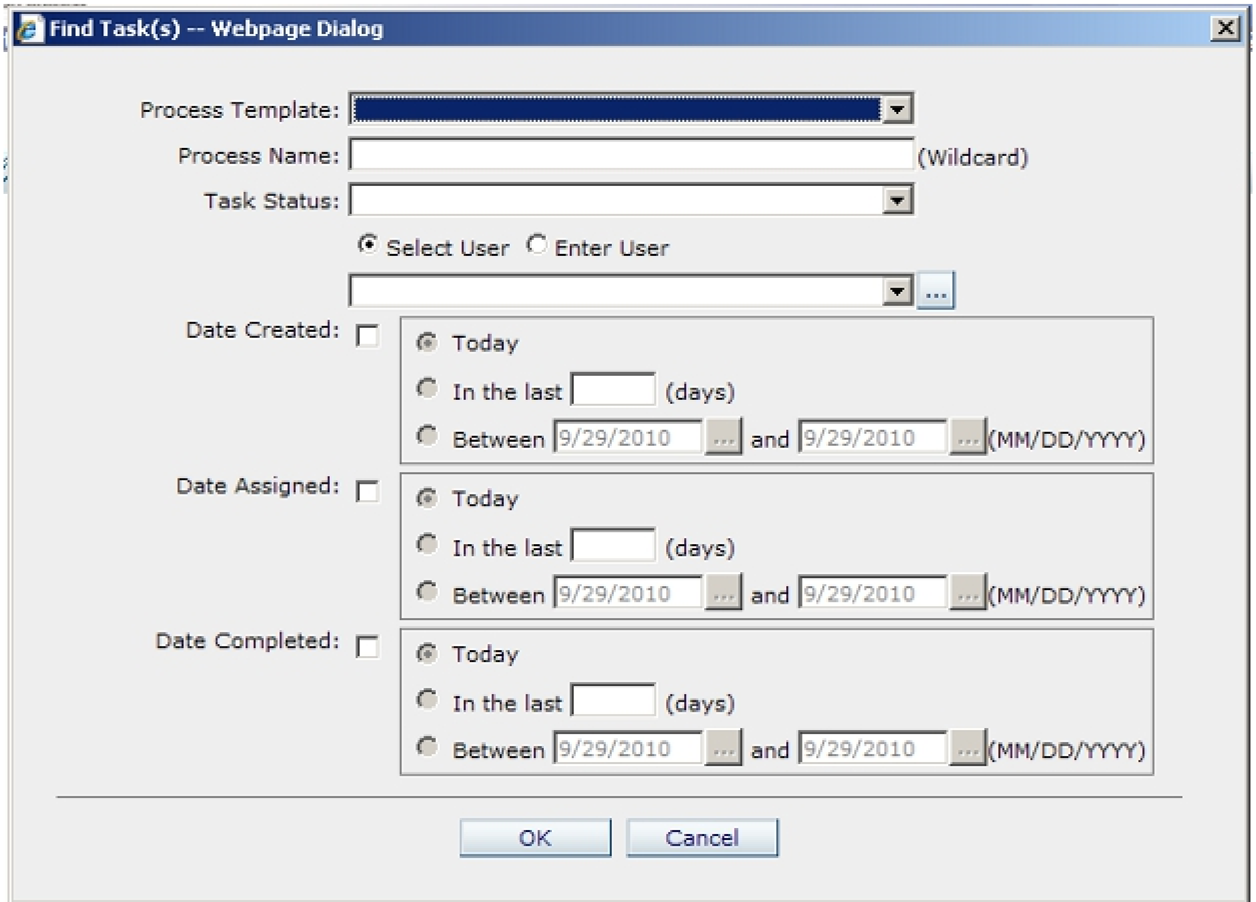
This page allows the administrator to review, search for, and update (e.g. reassign or cancel) the individual workflow tasks managed by AgilePoint Server.

Here is an example of the Tasks page as displayed when using the **My Tasks** link from the main page.



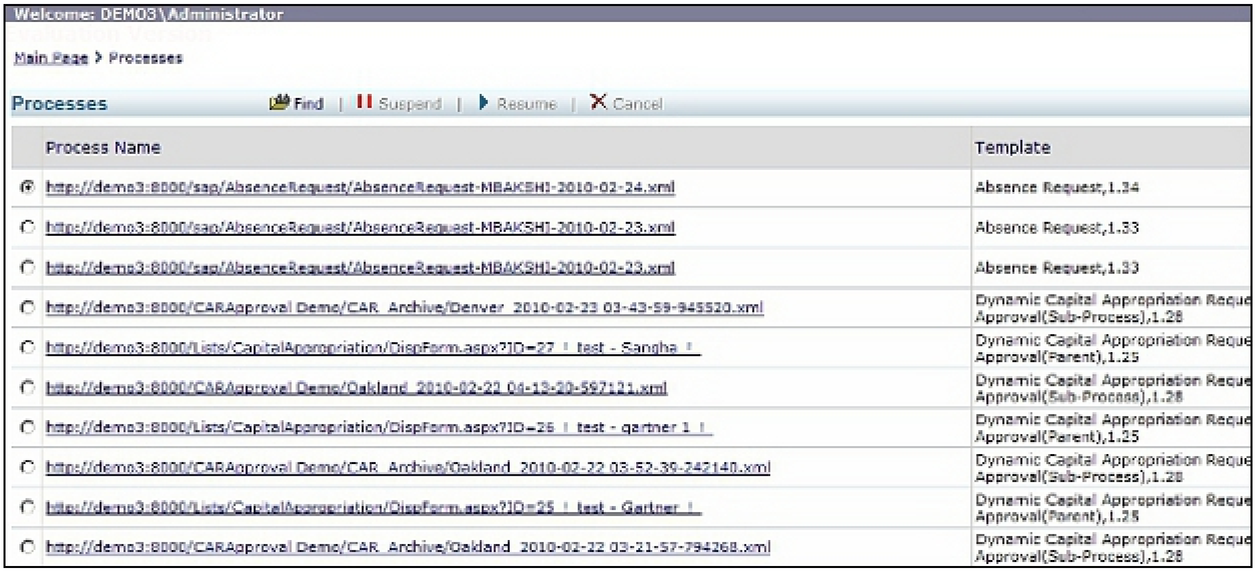
Find Tasks Dialog

This dialog allows the administrator to search for workflow tasks by specific criteria.



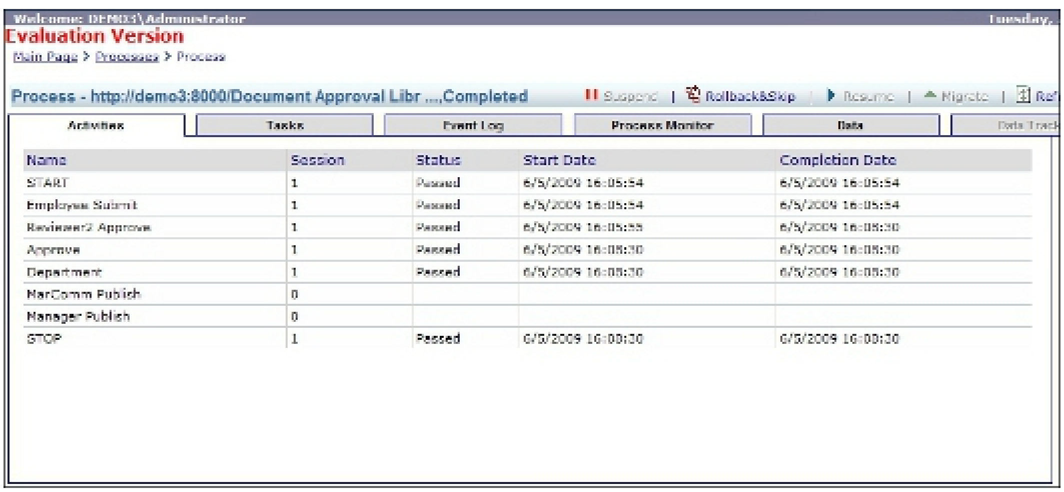
Processes Page

To access the Processes page, click the **Processes** link on the Enterprise Manager Main Menu. The Processes page allows the administrator to first find a process instance for which to perform an action. Once the process is found, actions such as suspend/resume, rollback, cancel, and migrate can be performed on the process instance.



Process Page

The process page provides detailed information about the process instance such as the activities, manual tasks, event log, process monitor, and data elements as shown below. At this layer, the option to migrate the process instance to a new process instance is available.

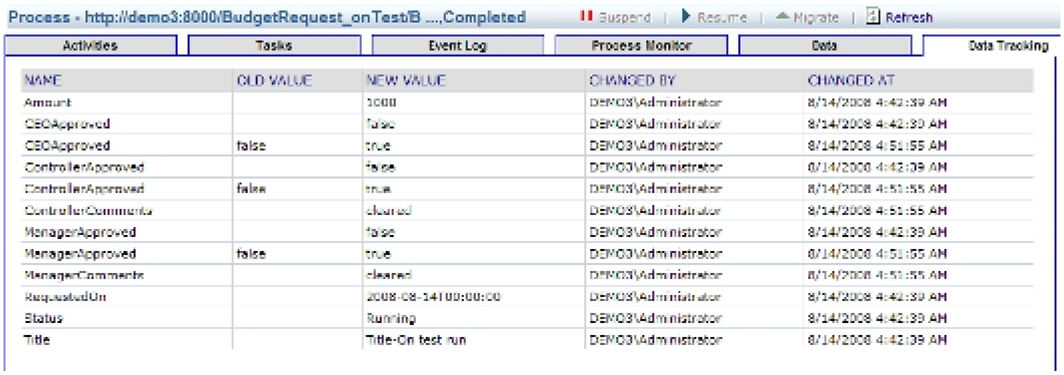


Data Tracking

The DataTracking tab allows the administrator to view for a specific field on a form, the "Old Value" and if the data changes, the "New Value". The following information is available:

- Name of the form field
- Old value before the data was changed

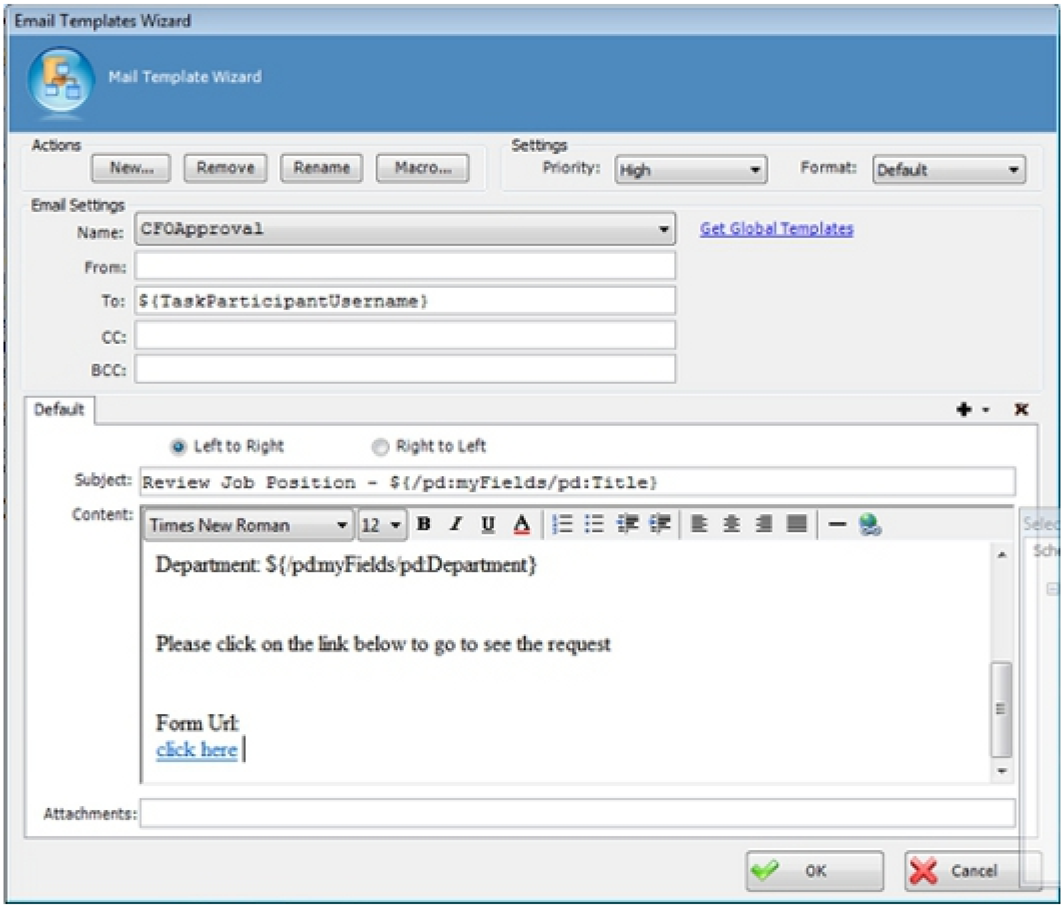
- New value of the data
- The user that changed the data
- The time stamp when the data changed



NAME	OLD VALUE	NEW VALUE	CHANGED BY	CHANGED AT
Amount		1000	DEMO3\Administrator	8/14/2008 4:42:39 AM
CEOApproved		false	DEMO3\Administrator	8/14/2008 4:42:39 AM
CEOApproved	false	true	DEMO3\Administrator	8/14/2008 4:51:55 AM
ControllerApproved		false	DEMO3\Administrator	8/14/2008 4:42:39 AM
ControllerApproved	false	true	DEMO3\Administrator	8/14/2008 4:51:55 AM
ControllerComments		cleared	DEMO3\Administrator	8/14/2008 4:51:55 AM
ManagerApproved		false	DEMO3\Administrator	8/14/2008 4:42:39 AM
ManagerApproved	false	true	DEMO3\Administrator	8/14/2008 4:51:55 AM
ManagerComments		cleared	DEMO3\Administrator	8/14/2008 4:51:55 AM
RequestedOn		2008-08-14T00:00:00	DEMO3\Administrator	8/14/2008 4:42:39 AM
Status		Running	DEMO3\Administrator	8/14/2008 4:42:39 AM
Title		Title-On test run	DEMO3\Administrator	8/14/2008 4:42:39 AM

Email Template Window

This section provides information and instructions about how to use the fields in the Email Template. The fields in the Email Template are used to specify what the participant(s) will see when the Email Notification is opened.



In addition to manually typing in the value of a field, most of the fields in the Email Template allow you to also select from a list of process attributes to dynamically populate that field at run time. To bring up the list of available process attributes, type ${ in the text box and select the process attribute for which you would like to use in that field. For example, you may want to select ${TaskParticipantUserName} in the **To** field of your Email Template. The **To** field will be populated with the user name of the task's participant.

Incoming and Reminder Emails are sent separately for each participant, while Activity Exit Emails are sent per activity (regardless of number of participants). Therefore, if your email address is in the **To** or **CC** field of the email template associated with the Activity Entry Email, you will get X number of copies of the email. If the entire list of (potential) participants is in the **To** or **CC** field, then all of the (potential) participants will receive X number of copies of the email. If you use the **${TaskParticipantUserName}** process attribute in the **To** field instead of specifying the entire list of participants in the **To** field, then for each participant, a separate email will be sent, and none of the participants will receive duplicate copies of the email.

If you want to send a single email to all of the (potential) participants (instead of separate messages), you could use the Email AgileShape to send a single email, instead of associating your template with the Activity Entry Email property of a multi-participant manual activity.

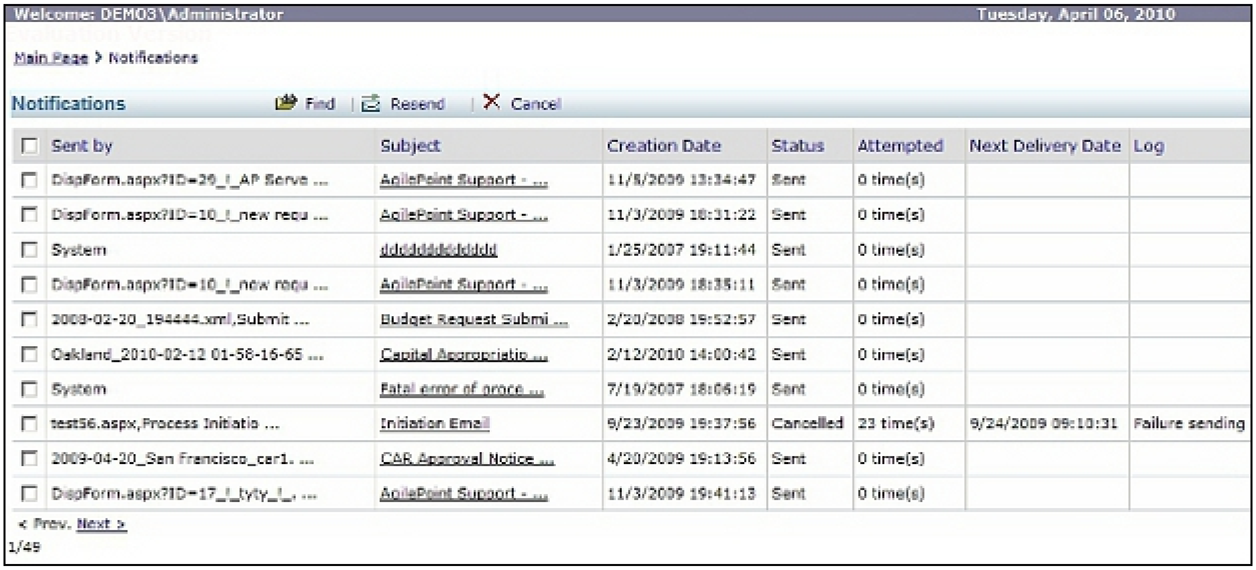
Field Definitions

Field Name	Definition
Name	The Name field is used to display the name of an Email Template. The name specified should be meaningful to the process modeler.
From	The From field is used to specify what gets displayed in the From field of the Email Notification. This field supports the use of pre-defined process attributes. When a pre-defined process attribute is used, the "domain\username" will be converted automatically.
To	The To field is used to specify what gets displayed in the To field of the Email Notification. This field supports the use of pre-defined process attributes. When a pre-defined process attribute is used, the "domain\username" will be converted automatically. You can add multiple entries by separating them with a semicolon.
CC	The CC field is used to specify what gets displayed in the CC field of the Email Notification. This field supports the use of pre-defined process attributes. When a pre-defined process attribute is used, the "domain\username" will be converted automatically. You can add multiple entries by separating them with a semicolon.
Subject	The Subject field is used to specify what gets displayed in the Subject field of the Email Notification. This field supports the use of pre-defined process attributes.
Priority	The Priority field is used to specify the priority setting of the Email Notification. Valid values for this field include: Normal, High, and Low.
Format	The Format field is used to specify the format for which the content of the email will be displayed. Both HTML and plain text are supported formats for email. HTML is set as the default as part of the SMTP settings during the Server Configuration process. To send email in plain text format, select Text from the drop-down list. **Note:** If you have chosen HTML as the format of the email, tags are required for line breaks.

Field Name	Definition
Left to Right/Right to Left	The Left to Right and Right to Left option buttons allow you to change the alignment for which text is inserted into the content section of the Email Template.
Content	The Content field is used to type the custom message to be displayed in the body of the Email Notification. This field supports the use of pre-defined process attributes. In order to show a URL link as a clickable HTML link in the email notification, the URL link must be entered into the email template with the HTML tags. The following is an example of how to include an URL link with HTML tags: Please click this link to invoke the Request Form. </br> **Note:** If you have chosen HTML as the format of the email, tags are required for line breaks.
Attachments	The Attachments field is used to specify any files that you would like to include in the Email Notification. To attach a file to the notification, type in the full path of the file e.g., C:\My Documents\sample.doc. You can also use a custom attribute to attach a file to the notification e.g., ${AttachDoc} or ${HomeDirectory}\... **Note:** The file that you would like to attach must reside on the local machine.

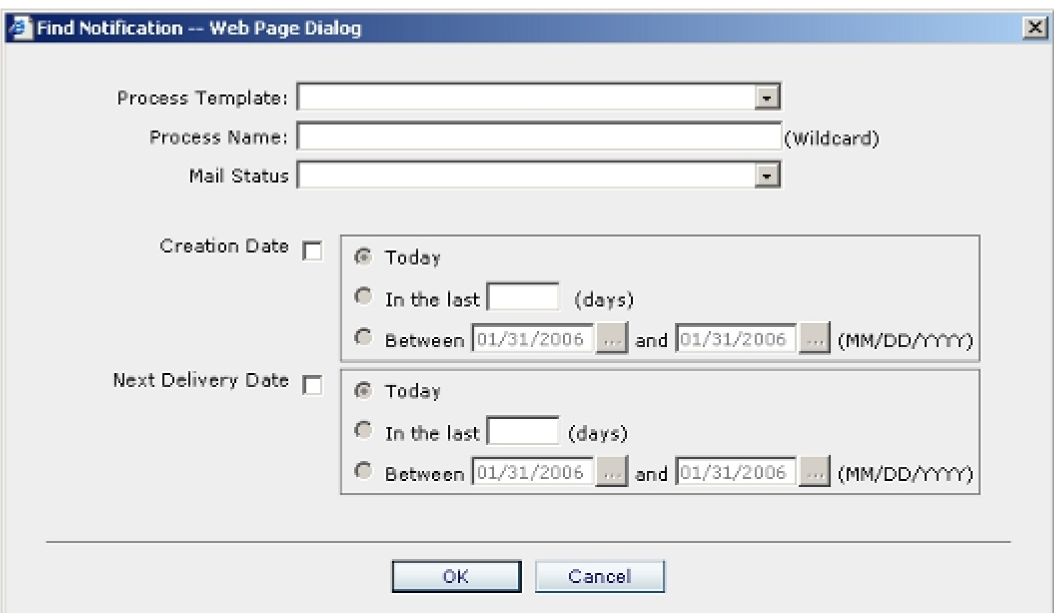
Notifications page

This page allows the administrator to review, search for, and update (e.g. cancel or resend) the individual email notifications managed by AgilePoint Server.



Find Notifications Dialog

This dialog allows the administrator to search for email notifications by specific criteria.

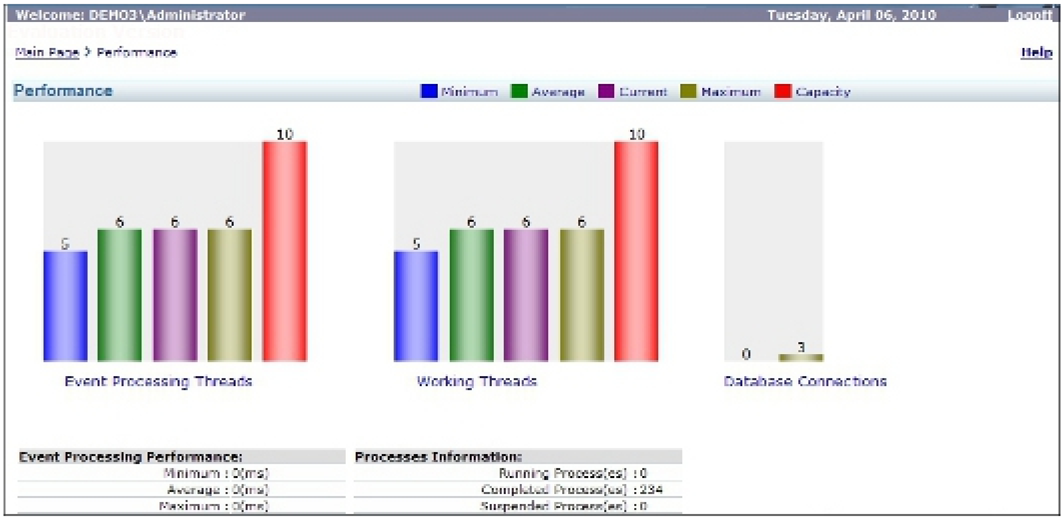


Performance Page

The Performance Page displays data about the runtime performance of AgilePoint Server and the AgilePoint Workflow Engine.

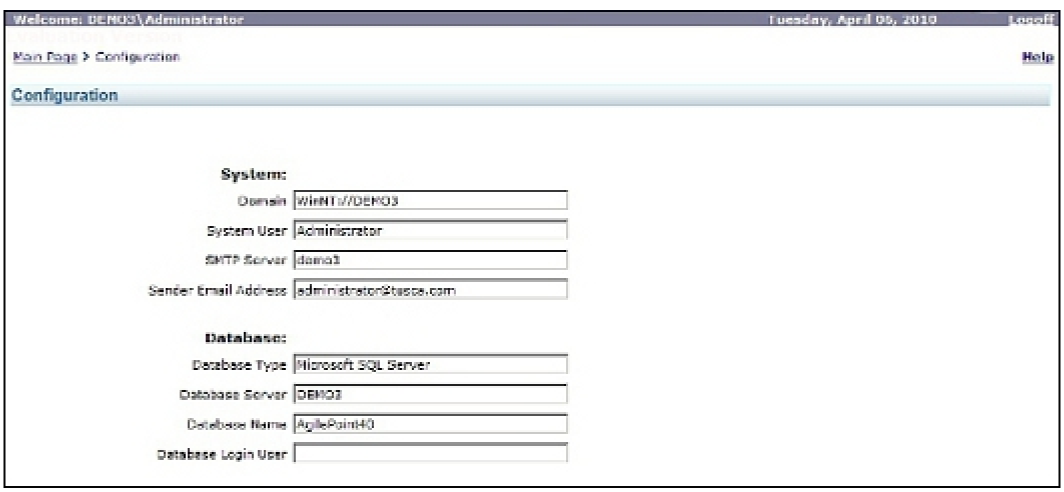
Instructions

1. On the Enterprise Manager Main Page, click **Performance**.



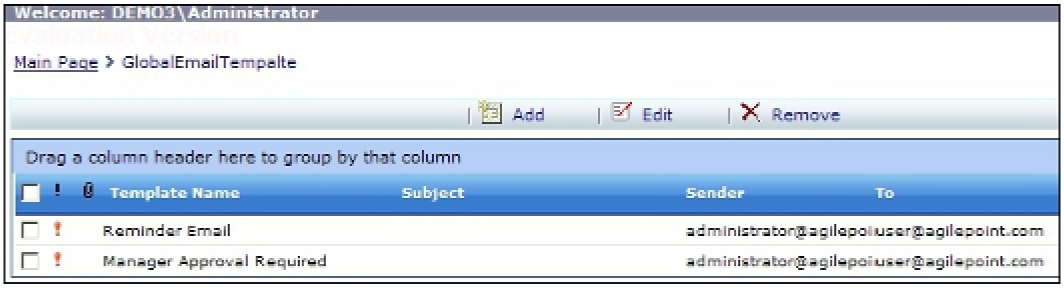
Configuration Page

This page displays the current values of some of the key configuration settings for AgilePoint Server. It does not allow you to change any of these settings. Use the AgilePoint Server Configuration utility to modify the settings.



Global E-mail Templates Page

This page allows the administrator to add, update, and delete e-mail templates that AgilePoint Envision users can apply to create emails. You can use email templates to apply default values to an email, such as To, From, CC, BCC, subject, and body. Business users can apply the email templates in AgilePoint Envision.

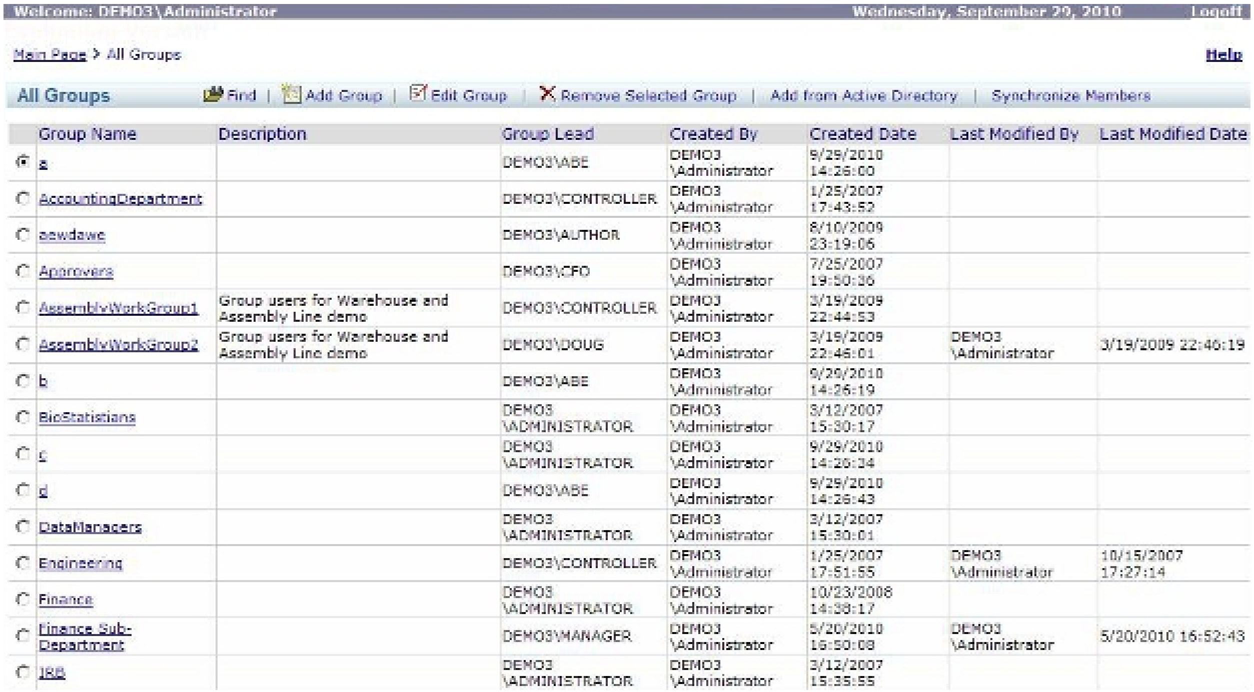


Reports Page

This page allows the administrator to manage and configure reports based on AgilePoint related data.

Groups Page

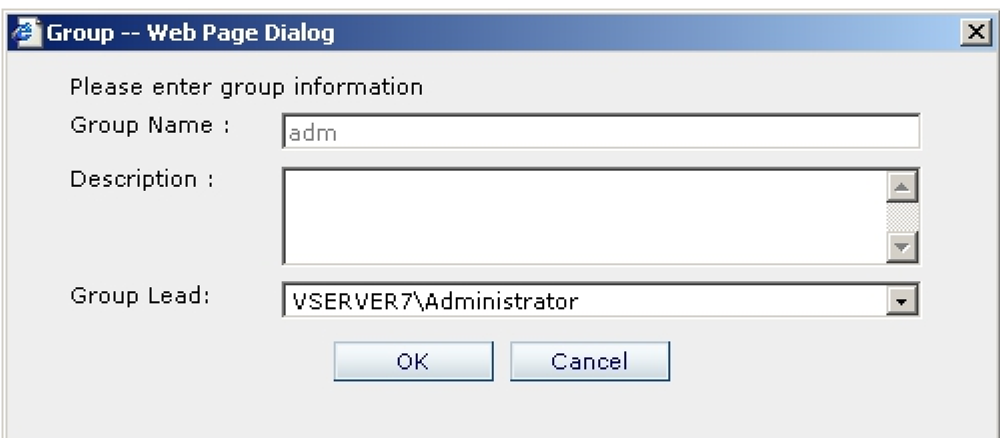
This page allows the administrator to view and update the groups that AgilePoint Server users can belong to.



Group Name	Description	Group Lead	Created By	Created Date	Last Modified By	Last Modified Date
a		DEMO3\ABE	DEMO3 \Administrator	9/29/2010 14:26:00		
AccountingDepartment		DEMO3\CONTROLLER	DEMO3 \Administrator	1/25/2007 17:43:52		
aewdawe		DEMO3\AUTHOR	DEMO3 \Administrator	8/10/2009 23:19:06		
Approvers		DEMO3\CFO	DEMO3 \Administrator	7/25/2007 19:50:36		
AssemblyWorkGroup1	Group users for Warehouse and Assembly Line demo	DEMO3\CONTROLLER	DEMO3 \Administrator	3/19/2009 22:44:53		
AssemblyWorkGroup2	Group users for Warehouse and Assembly Line demo	DEMO3\DOUG	DEMO3 \Administrator	3/19/2009 22:46:01	DEMO3 \Administrator	3/19/2009 22:46:19
b		DEMO3\ABE	DEMO3 \Administrator	9/29/2010 14:26:19		
BioStatistians		DEMO3 \ADMINISTRATOR	DEMO3 \Administrator	3/12/2007 15:30:17		
c		DEMO3 \ADMINISTRATOR	DEMO3 \Administrator	9/29/2010 14:26:34		
d		DEMO3\ABE	DEMO3 \Administrator	9/29/2010 14:26:43		
DataManagers		DEMO3 \ADMINISTRATOR	DEMO3 \Administrator	3/12/2007 15:30:01		
Engineering		DEMO3\CONTROLLER	DEMO3 \Administrator	1/25/2007 17:51:55	DEMO3 \Administrator	10/15/2007 17:27:14
Finance		DEMO3 \ADMINISTRATOR	DEMO3 \Administrator	10/23/2008 14:38:17		
Finance Sub-Department		DEMO3\MANAGER	DEMO3 \Administrator	5/20/2010 16:50:08	DEMO3 \Administrator	5/20/2010 16:52:43
IRB		DEMO3 \ADMINISTRATOR	DEMO3 \Administrator	3/12/2007 15:35:55		

Add/Edit Group Dialog

This dialog allows the administrator to add or edit a group.



The "Group Lead" is intended to specify the manager or head of the organizational unit that the group represents. Although this field doesn't really have any significant effect on the default behavior of AgilePoint at this time, it can be useful in certain situations.

For example, you could have a custom AgileShape that sends an email notification to the Group Lead of any Groups that the participant(s) of an activity belong to when a certain event occurs (such as escalation of overdue activities).

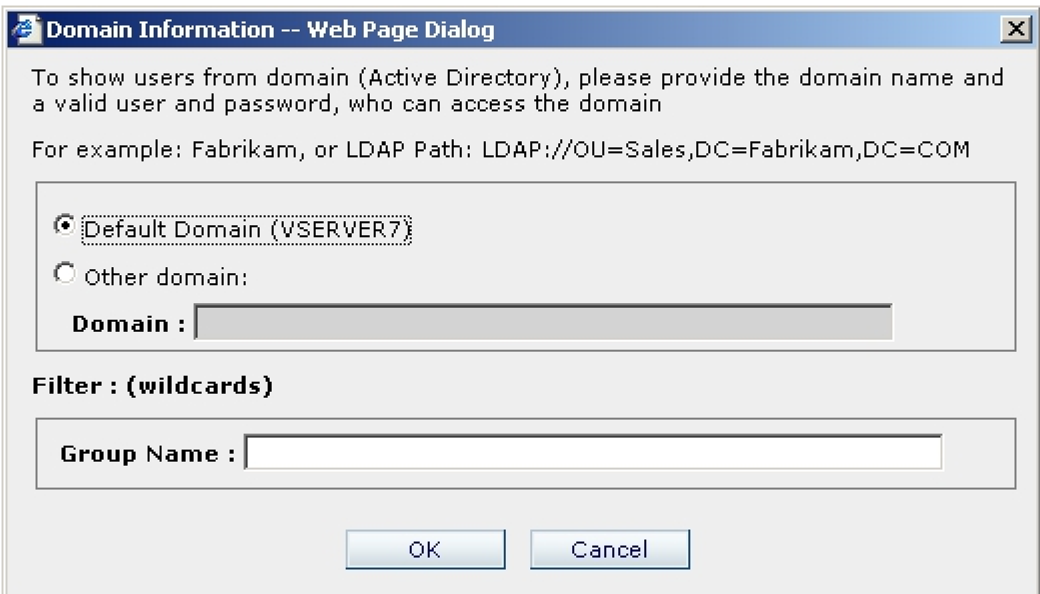
You could also use custom code to query the workflow database and build an organizational chart based on the relationship between group members, groups, and group leads.

Add Group From Active Directory Dialog

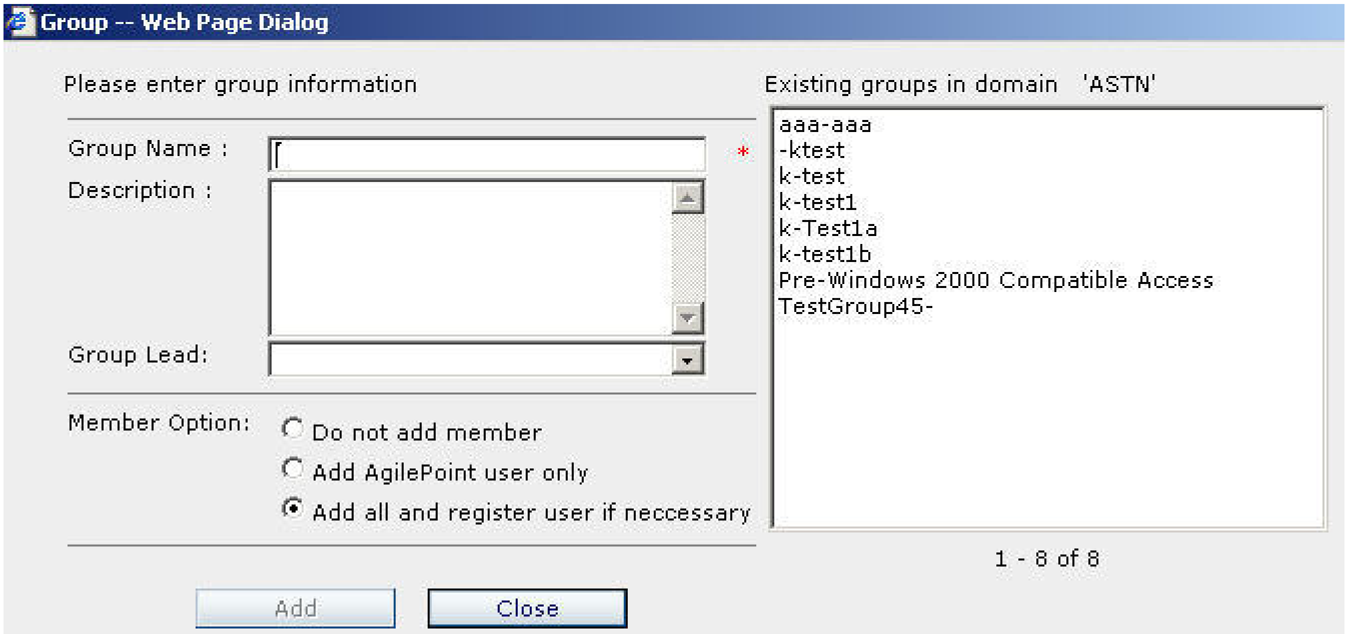
This dialog allows the administrator to add groups from an Active Directory data source. For group names, alphanumeric characters and special characters, or a combination of both are supported. The special characters that are supported include the dash (-) and underscore (_).

Requirements:

- The AgilePoint System User (as defined in the AgilePoint Server Configuration utility) should belong to the Active Directory domain.
- AgilePoint Server's Application Pool's Identity user account (as configured in IIS) needs to have read permissions to the Active Directory server and data.



After the search the following dialog appears:



You can now select a group from the list to add. Select a Group Lead for the group. You can also select one of the three options when adding new members from AD:

- Do not add member – The group will be created with the group lead as the only member
- Add AgilePoint user only – Only members in the AD group that have already been registered as an AgilePoint user will be added to the newly created AgilePoint group.
- Add all and register user if necessary – All of the members in the selected AD group will be added to the AgilePoint group. Any member in the AD group that has not been registered as an AgilePoint user will automatically be registered as an AgilePoint user.

Note: When adding groups from Active Directory, if a member has incomplete user account information in AD, such as a missing email address or the user's full name is blank, AgilePoint will skip the user and the user will not be registered or added to the AgilePoint group.

Note: Group names can include up to 64 characters.

Importing Nested Active Directory Groups

This feature supports the adding of a nested group from Active Directory to AgilePoint with the following behavior:

AgilePoint will not duplicate the entire Active Directory group structure when importing nested groups. Instead, all members of the top level group in Active Directory, as well as members in its sub-groups, will be added to a single group (same name as the top level Active Directory group) in AgilePoint.

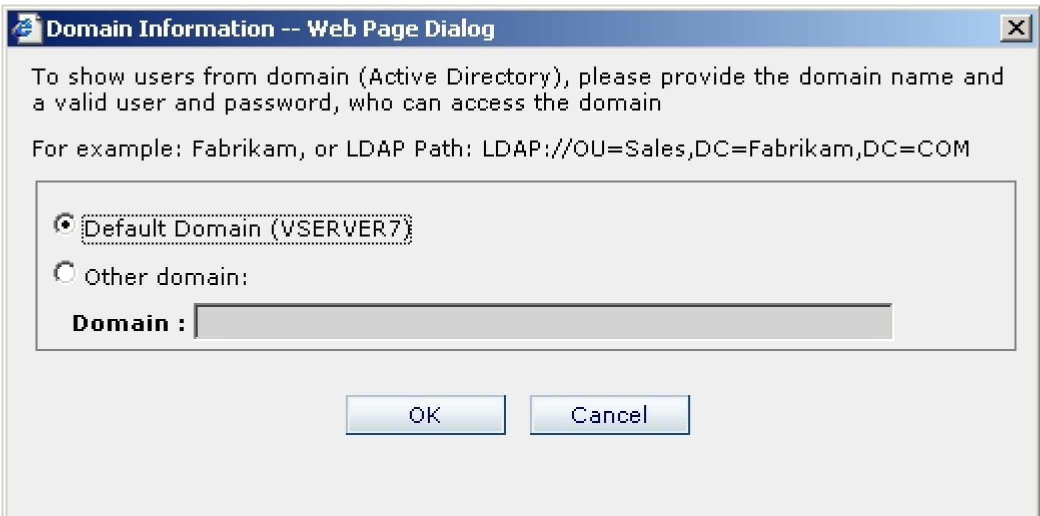
Synchronize Group Members dialog

This dialog allows the administrator to update the AgilePoint users' group memberships based on an Active Directory data source. Synchronizing members for a group will also enable the synchronization of members in the sub-groups in Active Directory. During synchronization, all of the members in each sub-group of an Active Directory group will be combined and added to a single AgilePoint group.

Select the group in the All Groups page of Enterprise Manager and click **Synchronize Members**. The Domain Information window appears.

Requirements:

- The AgilePoint System User (as defined in the AgilePoint Server Configuration utility) should belong to the Active Directory domain.
- AgilePoint Server's Application Pool's Identity user account (as configured in IIS) needs to have read permissions to the Active Directory server and data.



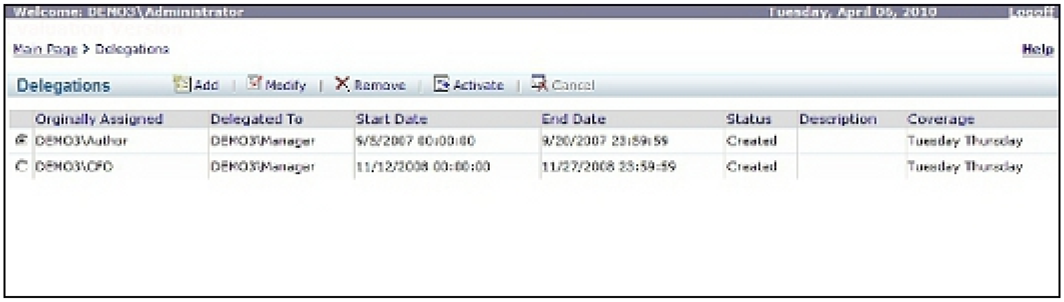
The members that are available for synchronization will have the Add or Remove link, which allows the member to be added or removed from an AgilePoint group.

Click **Apply All**. Clicking on the Apply All link will synchronize all the members that are available for synchronization.

Delegations Page

The Delegations page allows the administrator to view and manage delegation rules. Delegation is the temporary reassignment of tasks to another user — usually a peer or subordinate. Delegation can be used, for example, to temporarily reassign a task when a user is out of the office.

To view the Delegations page, click the **Delegations** link on the Enterprise Manager Main Page. The list of delegations is shown.

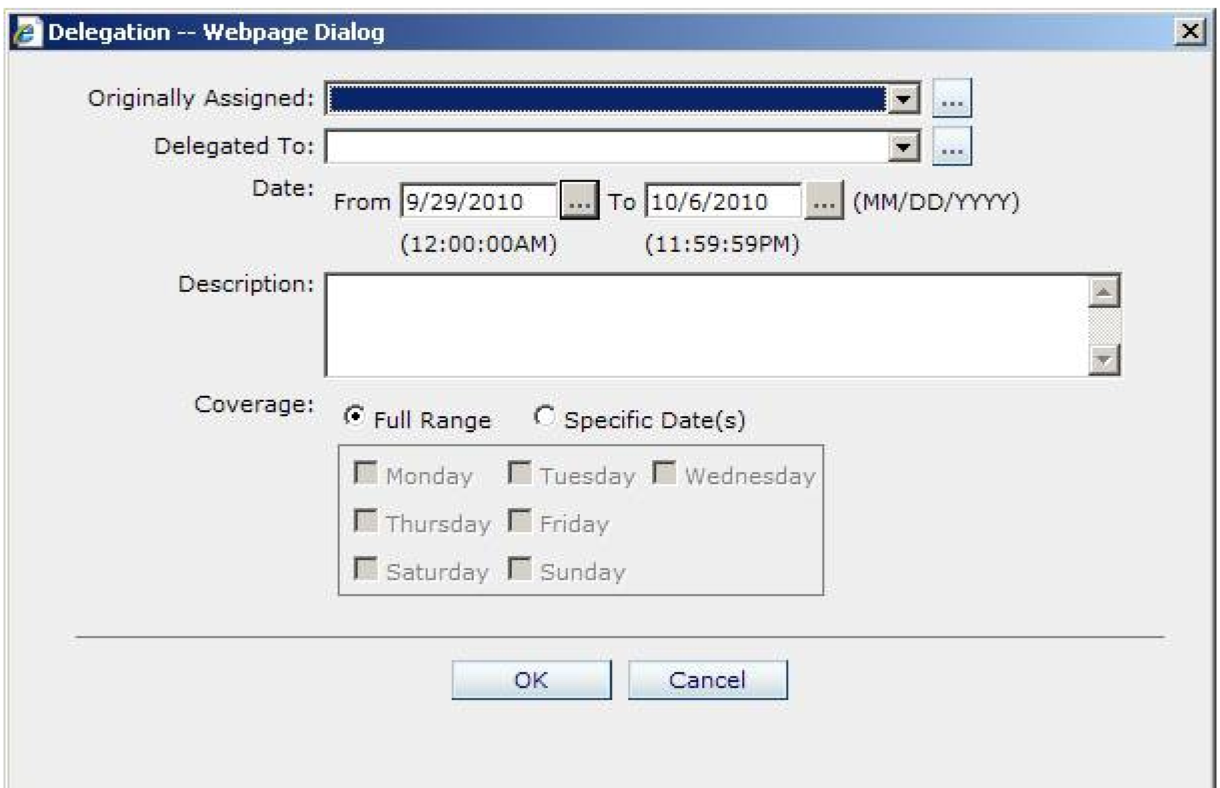


Add/Modify Delegation Dialog

The Delegation dialog allows the administrator to add or modify a delegation.

To add or modify a delegation:

1. Click the Add or Modify button on the Enterprise Manager Main Page. The Delegation dialog appears.



2. Select the Originally Assigned and Delegated To users from the drop-down lists provided.
3. Enter the From and To dates for which the delegation will take effect.
4. (Optional) Enter a description that provides information about why the delegation has taken place.
5. Select the Full Range option button to enable the delegation for all dates, or the Specific Dates option button and select the dates for which the delegation will take effect.
6. Click the OK button. The delegation is now modified or added to the list.

Activate/De-Activate a Delegation

Note: You must activate a delegation in order for it to take effect.

To activate a delegation, select the delegation from the list and click the Activate button. The delegation status is changed to **Active**. The delegation will now take affect based on the rules you defined.

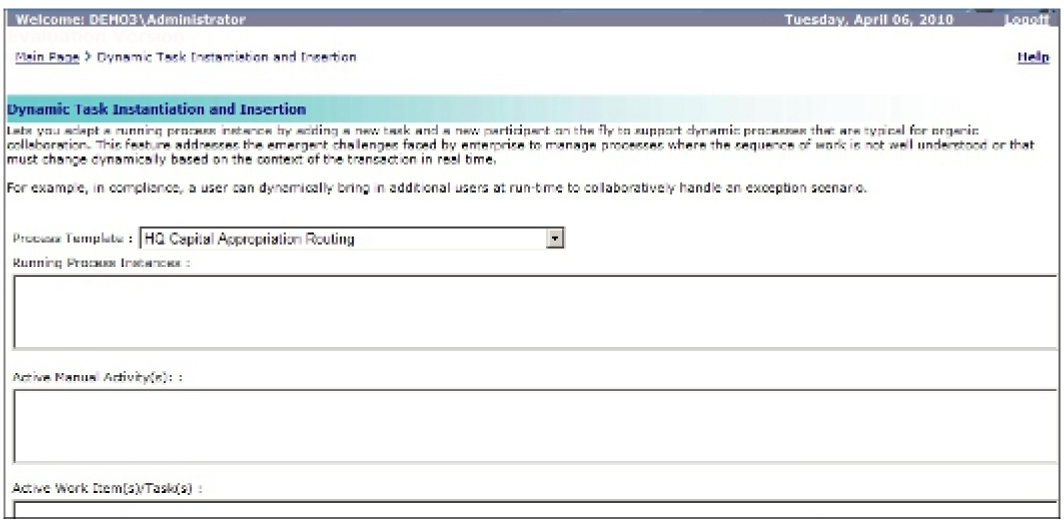
To deactivate a delegation, select the delegation from the list and click the Cancel button. The delegation status is now changed to **Canceled**.

Dynamic Task Instantiation and Insertion Page

The Dynamic Task Instantiation and Insertion page allows the user to add additional participants to an active Process Adaptation AgileWork.

To view the Dynamic Task Instantiation and Insertion page, click the **Dynamic Task Instantiation & Insertion** link on the Enterprise Manager Main Page. The Dynamic Task Instantiation and Insertion page appears.

Note: A user must have **Create a Task** and **Cancel a Task** access rights in AgilePoint Enterprise Manager in order to see the Process Adaptation functionality in AgilePoint Enterprise Manager.



All the fields and buttons will be enabled if the Process Adaptation manual activity is active.

To add a participant to perform the task:

1. In the **Process Template** field, select the process template for which to add a participant to complete a task. The **Running Process Instances**, **Active Manual Activities**, and **Active Work Items/Tasks** for the process appear.
2. Select either **Parallel** or **Sequential**. Sequential means that the task will be delivered in a sequential fashion to 1 participant at a time. Parallel means that all the tasks will be delivered to each of the participants at the same time, there is no particular order for which the task is assigned to the participants.
3. In the **Work to Perform** field, select the Work to Perform for which to add a participant.

4. The **Users** fields provide two list boxes, on the left shows all the users, the right shows the active participants of the Process Adaptation AgileWork. Select the user and click on **>>** to move to active users list and click Confirm. Based on the Approval Type (Parallel or Sequential) it creates a work items for those users.

Note: If the **Approval Type** is sequential, it creates work items sequentially based on the sequence order in the list. You can change the order by using the Up and Down buttons.