• AGILEPOINT

AgilePoint Envision User's Guide

AgilePoint BPMS v5.0 R2

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Contents

| тетасе | 9 |
|---|---|
| Disclaimer of Warranty | 9 |
| Copyright | 9 |
| Trademarks | 9 |
| Government Rights Legend | 9 |
| Virus-free software policy | 9 |
| Document Revision Numbers | 9 |
| AgilePoint Documentation in PDF and HTML | |
| Opening the Documentation Library | |
| Finding Information in the Documentation Library | |
| Downloading Files and Sharing Links from the Documentation Library. | |
| Contacting AgilePoint Sales | |
| Contacting Customer Support | |
| nilePoint Envision | 13 |
| | 10 |
| pening AgilePoint Envision | 14 |
| | |
| | 4 5 |
| gileShapes | |
| GIIeShapes AgileWork - Common Setup | |
| GIIeShapes AgileWork - Common Setup Configuration Windows | |
| GIIeShapes AgileWork - Common Setup Configuration Windows Instructions | |
| GIIeShapes. AgileWork - Common Setup Configuration Windows Instructions Troubleshooting | 15 15 36 61 72 |
| GIIeShapes. AgileWork - Common Setup Configuration Windows Instructions Troubleshooting AgilePart - Common Setup | 15 15 36 61 72 72 |
| GIIeShapes. AgileWork - Common Setup Configuration Windows Instructions Troubleshooting AgilePart - Common Setup Configuration Windows | 15 15 36 61 72 72 83 |
| GIIeShapes. AgileWork - Common Setup Configuration Windows Instructions Troubleshooting AgilePart - Common Setup Configuration Windows Instructions | 15 15 36 61 72 72 83 92 |
| gileShapes. AgileWork - Common Setup Configuration Windows Instructions Troubleshooting AgilePart - Common Setup Configuration Windows Instructions Troubleshooting | 15 15 36 61 72 72 83 92 92 |
| gileShapes. AgileWork - Common Setup Configuration Windows Instructions Troubleshooting AgilePart - Common Setup Configuration Windows Instructions Troubleshooting Configuration Windows Instructions Troubleshooting Generic BPM | 15 15 36 61 72 72 72 83 92 92 93 |
| gileShapes. AgileWork - Common Setup. Configuration Windows. Instructions. Troubleshooting. AgilePart - Common Setup. Configuration Windows. Instructions. Troubleshooting. Generic BPM. AgilePart Shape. | 15 15 36 61 72 72 72 83 92 92 92 93 93 |
| gileShapes. AgileWork - Common Setup. Configuration Windows. Instructions. Troubleshooting. AgilePart - Common Setup. Configuration Windows. Instructions. Troubleshooting. Generic BPM. AgilePart Shape. AgileWork Shape. | 15 15 36 61 72 72 72 83 92 92 92 93 93 93 94 |
| gileShapes. AgileWork - Common Setup. Configuration Windows. Instructions. Troubleshooting. AgilePart - Common Setup. Configuration Windows. Instructions. Troubleshooting. Generic BPM. AgilePart Shape. AgileWork Shape. And. | 15 15 36 61 72 72 83 92 92 92 92 93 93 93 93 |
| gileShapes. AgileWork - Common Setup Configuration Windows Instructions Troubleshooting AgilePart - Common Setup Configuration Windows Instructions Troubleshooting AgilePart - Common Setup Configuration Windows Instructions Troubleshooting. Generic BPM AgilePart Shape AgileWork Shape And Email. | 15 15 36 61 72 72 83 92 92 93 93 94 95 99 |
| gileShapes. AgileWork - Common Setup Configuration Windows Instructions Troubleshooting AgilePart - Common Setup Configuration Windows Instructions Troubleshooting Generic BPM AgilePart Shape AgileWork Shape And Email Manual | 15 15 36 61 72 72 72 92 92 93 93 94 95 99 100 |
| gileShapes. AgileWork - Common Setup. Configuration Windows. Instructions. Troubleshooting. AgilePart - Common Setup. Configuration Windows. Instructions. Troubleshooting. Generic BPM. AgilePart Shape. AgileWork Shape. And. Email. Manual With Timeout. | 15 15 36 61 72 72 72 83 92 92 93 93 93 94 95 99 100 101 |
| gileShapes. AgileWork - Common Setup | 15 15 36 61 72 72 83 92 92 93 93 93 93 94 95 99 100 101 104 |
| gileShapes. AgileWork - Common Setup Configuration Windows Instructions Troubleshooting. AgilePart - Common Setup Configuration Windows Instructions Troubleshooting. Generic BPM AgilePart Shape AgileWork Shape And Email Manual. Manual With Timeout Multiple Condition | 15 15 36 61 72 72 72 83 92 92 93 93 93 94 95 99 100 101 104 122 |
| gileShapes. AgileWork - Common Setup. Configuration Windows. Instructions. Troubleshooting. AgilePart - Common Setup. Configuration Windows. Instructions. Troubleshooting. Configuration Windows. Instructions. Troubleshooting. Generic BPM. AgilePart Shape. AgileWork Shape. And. Email. Manual. Manual With Timeout. Multiple Condition. Or. Procedure. | 15 15 36 61 72 72 83 92 92 93 93 93 93 93 94 95 99 100 101 104 122 128 |
| gileShapes. AgileWork - Common Setup. Configuration Windows. Instructions. Troubleshooting. AgilePart - Common Setup. Configuration Windows. Instructions. Troubleshooting. Configuration Windows. Instructions. Troubleshooting. Generic BPM. AgilePart Shape. AgileWork Shape. And. Email. Manual. Manual. Multiple Condition. Or. Procedure. Procedure With Timeout. | 15 15 36 61 72 72 72 83 92 92 93 93 93 93 93 93 93 93 94 95 99 100 101 104 122 128 130 |
| gileSnapes. AgileWork - Common Setup. Configuration Windows. Instructions. Troubleshooting. AgilePart - Common Setup. Configuration Windows. Instructions. Troubleshooting. Configuration Windows. Instructions. Troubleshooting. Generic BPM. AgilePart Shape. AgileWork Shape. And. Email. Manual. Manual. Moutliple Condition. Or. Procedure. Procedure With Timeout. Single Condition. | 15 15 36 61 72 72 72 83 92 92 93 93 93 94 95 99 100 101 104 122 128 130 132 |
| gileSnapes. AgileWork - Common Setup. Configuration Windows. Instructions. Troubleshooting. AgilePart - Common Setup. Configuration Windows. Instructions. Troubleshooting. Configuration Windows. Instructions. Troubleshooting. Generic BPM. AgilePart Shape. AgileWork Shape. And. Email. Manual. Manual. Multiple Condition. Or. Procedure Procedure With Timeout. Single Condition. Start. | 15 15 36 61 72 72 72 83 92 92 93 93 93 93 93 93 93 93 93 94 95 99 100 101 104 122 128 130 132 137 |
| gileSnapes. AgileWork - Common Setup. Configuration Windows. Instructions. Troubleshooting. AgilePart - Common Setup. Configuration Windows. Instructions. Troubleshooting. AgilePart - Common Setup. Configuration Windows. Instructions. Troubleshooting. Generic BPM. AgilePart Shape. AgileWork Shape. And. Email. Manual. Manual Multiple Condition. Or. Procedure. Procedure With Timeout. Single Condition. Start. Stop. | 15 15 36 61 72 72 72 83 92 92 93 93 93 93 93 94 95 99 100 101 104 122 128 130 132 137 139 |

| | Cancel Tasks | 152 |
|-------|--------------------------------------|-----|
| | Delay | 153 |
| | Dynamic Group | 160 |
| | Dynamic Parallel Approval | 164 |
| | Dynamic Sequential Approval. | 180 |
| | Process Adaptation | 194 |
| | Update Custom Attributes | 209 |
| | Update Parent Process | 218 |
| | Vote | 224 |
| | Web Form | 242 |
| | Workload Balance | 260 |
| Share | Point / Microsoft SPS | 273 |
| | Add User to SP Group | 273 |
| | Approve | 282 |
| | Approve Reject Content | 283 |
| | CAML Query | 284 |
| | Check In File | 312 |
| | Check Out File | 315 |
| | Common Dialog | 317 |
| | Copy Document Set | 327 |
| | Copy Files | 334 |
| | Copy List Item | 338 |
| | Create Document Set | 344 |
| | Create SharePoint List | 349 |
| | Create List Item | 357 |
| | Create SP Group | 363 |
| | Delate Document Set | 370 |
| | Delete Elec | 375 |
| | Delete Flies | 270 |
| | Delete List Itom | 201 |
| | Delete Dist lielli | 201 |
| | Develoed Decuments from Decument Set | 201 |
| | Download Documents from Document Set | 390 |
| | Dowinodu Files | 405 |
| | | 410 |
| | | 432 |
| | | 444 |
| | | 459 |
| | ListForm | 4/1 |
| | Move Document Set | 482 |
| | | 488 |
| | Move List Item | 491 |
| | | 499 |
| | New Form Library | 501 |
| | New Library | 506 |
| | New Site | 511 |
| | New Site Collection | 516 |
| | Portal Listing | 523 |
| | | 527 |
| | Publish Content | 528 |
| | Remove SP Group | 529 |
| | Remove User from SP Group | 533 |
| | Restore File Version | 540 |
| | Retrieve List Item | 548 |
| | Single Condition | 556 |

| Submit | 560 |
|--|-----|
| Submit File to Record Center | 560 |
| Undo Check Out File | 569 |
| Update InfoPath | 571 |
| Update Meta Data | 576 |
| Update SP Group | |
| Upload Documents to Document Set | 594 |
| Upload Files | 602 |
| Advanced Extension | 608 |
| C# | 608 |
| External Command | 612 |
| Java | 616 |
| Pass Milestone | 618 |
| Sequential Workflow | 619 |
| VB | 621 |
| Wait For Milestone | 625 |
| WF Rule | 628 |
| Web Services | 628 |
| Web Service | 628 |
| Web Service Extension (WSE) | 639 |
| Windows Communication Foundation (WCF) | 662 |
| Exchange Server | |
| Create Appointment | |
| Create Meeting | 690 |
| Yammer | 698 |
| Post Message | |
| Reply Message | 711 |
| Post Attachment | 720 |
| Invite User | 734 |
| Create User | 742 |
| Update User | 750 |
| Delete User | 757 |
| Database | 764 |
| Batch Insert | 764 |
| Delete Records | 777 |
| Insert Database | |
| Query Database | 798 |
| Stored Procedure | 815 |
| Update Database | |
| Extender | 836 |
| Service Level Agreement (SLA) | |
| Miscellaneous | |
| DateTimeOperation | |
| HTTP Post | 853 |
| PDF Converter | |
| Read File | 860 |
| Text File Writer | |
| Word | 878 |
| XML Manipulation | |
| Active Directory | 901 |
| Create User | 902 |
| Update User | 904 |
| Remove User | |
| Disable User | |

| Create Group | 911 |
|-----------------------------------|--------|
| Remove Group | 914 |
| Remove User from Group | 917 |
| Retrieve User Information | 920 |
| Add User to Group | 922 |
| XRM Manual Activities 2011 | 925 |
| Create Appointment | 925 |
| Create Manual Task | 934 |
| Create Intranet Task | 940 |
| Email Activity | 944 |
| Fax Activity. | 959 |
| Generic Activity | 968 |
| Letter Activity. | 975 |
| Phone Call Activity | 983 |
| Service Activity. | 991 |
| XRM Automatic Activities 2011 | 1000 |
| Add Note | 1000 |
| Assign to Manager | . 1002 |
| Attach Document | 1003 |
| Change Ownership | 1005 |
| Change Ownership (Multi) | 1007 |
| Converter | . 1009 |
| Convert Lead | 1011 |
| Create Association | 1014 |
| Create Connection (AgileXRM 2011) | 1017 |
| Create Entity | 1021 |
| Delete Entity | 1025 |
| Delete Entity (Multi) | 1026 |
| Detach Document. | 1029 |
| Search XRM | 1031 |
| Send XRM Email | 1033 |
| Set Status | 1037 |
| Set Status (Multi) | 1039 |
| Subprocess | 1042 |
| Subprocess (Multi) | 1053 |
| Update Entity | 1065 |
| Update Entity (Multi) | 1069 |
| Wait for Update (AgileXRM 2011) | 1073 |
| XRM Workflow | 1076 |
| XRM AgileDialogs 2011 Stencil | 1077 |
| Page Form | 1077 |
| SubDialog | 1079 |
| Dialog Task | 1086 |
| Intranet Dialog Task | 1101 |
| XRM External Connector Stencil | 1113 |
| Internet Task | 1113 |
| Internet Dialog Task | 1116 |
| SAP Integration | 1117 |
| Configuring iNet BPS | 1117 |
| SAP Integration AgileConnector | 1118 |
| Call SAP Function. | 1120 |
| Begin SAP Transaction | 1124 |
| End SAP Transaction | 1125 |
| AgileForms Stencil | 1125 |

| AgileForm Shape | |
|--|------|
| AgileForm Serial | 1128 |
| AgileForm Parallel | 1132 |
| AgileForm Dynamic Group | |
| AgileForm Process Adaptation | |
| Common AgileShape Configuration Windows | 1141 |
| Attaching Files to Activities at Runtime | 1141 |
| Browse Custom Attributes Window | |
| Configure Attachments Window | |
| Custom Mapping Code Window | 1145 |
| Enabling Sequential Approvals by Multiple Participants | 1148 |
| Database Connection Configuration Window | 1150 |
| Excel Services Configuration Window - Write Tab | 1152 |
| Excel Services Configuration Window - Read Tab | |
| Exchange Server Configuration Window | 1165 |
| Get SharePoint Document Library Window | 1170 |
| Logging on to SharePoint from a Process Template or AgileShape | 1173 |
| Login Window | 1176 |
| Log on to AgilePoint Server | |
| Schema Mapper Window | 1180 |
| Select User Window | |
| Select XPath from Attributes Window | |
| Set Context Properties Window | 1189 |
| Setting Up Custom Classes in C# and Visual Basic | |
| User Defined Properties Window | |
| Web Service Explorer Window | 1196 |
| Yammer Credentials Window | |
| | |

| Menu Options Overview | 1201 |
|-----------------------|------|
| File Menu Options | 1201 |
| View Menu Options | 1214 |
| Shape Menu Options | 1216 |
| Help Menu Options | 1217 |

| Process Templates | |
|--|------|
| Process Template Types | |
| Generic Process Template | |
| Microsoft InfoPath Process Template | |
| Microsoft SPDoc Process Template | |
| Microsoft SPList Process Template | |
| AgileForms Process Template | 1219 |
| Select a Process Template Type | |
| Open an existing Process Template | |
| Convert a Visio Diagram to a Process Model | 1219 |
| Process Template Properties | |
| Process Template Properties Overview | |
| Process Template Properties | |
| Convert a Visio Shape to an AgileShape | 1223 |
| Add an AgileShape to a Process Model | |
| Remove an AgileShape from a Process Model | |
| Change an AgileShape's Display Name | |
| Configure AgileShape Properties | |

| Connecting AgileShapes To Each Other | |
|--|------|
| Using Swim Lanes in Envision | 1226 |
| Registering a custom AgileShape | |
| Logging on to SharePoint from a Process Template or AgileShape | |
| Logging on to AgilePoint Server from Envision | |
| Connecting to Server Window | |
| Service Proxy Factory Window | |

| Data Services | |
|---|------|
| Configure the Windows Service for Data Services | |
| Change the Logon Credentials | |
| Modify the Enterprise Manager web.config | |
| Enabling the DataService AgileConnector | |
| Data Population | |
| Setting Up Data Population | |
| Mapping Custom Attributes to Multiple Tables | 1241 |
| Data Tracking | |

| Messages and Notifications | |
|--|------|
| Message Template Windows | |
| Email Template Wizard | |
| Lync Template Wizard | |
| Select XPath from Attributes Window | |
| Yammer Template Wizard | |
| SMS Template Wizard | |
| Reminding Mail Window | |
| Creating Messages and Notifications | |
| Creating a Notification Message | |
| Creating a Reminder Email Notification | |
| Setting Up Email Templates in Multiple Languages | |
| Creating Message Responses | |
| Creating Email Templates for Approvals | 1271 |
| Setting Up Responses Using Lync | |
| Setting Up Responses Using SMS | |
| Using Variables in Notification Messages | |
| Creating a Custom Macro | |
| Working with Links in the Email Template Wizard | |
| Creating a Hyperlink in an Email Template | |
| Modifying a Hyperlink in an Email Template | |

| Process Repository | 1286 |
|--|------|
| Verify the Process Repository Template Exists | |
| Set Up a Process Repository | 1286 |
| Setup Process Discovery in AgilePoint Envision | 1287 |
| Associate Process Documentation at the Process Model Level | 1287 |
| Associate Process Documentation at the Activity Level | 1289 |
| Publish Process Documentation to SharePoint | 1292 |
| Open the Process Repository in SharePoint | 1294 |

| Edit Stencil Images | |
|---|------|
| Create and Save a New Stencil | 1297 |
| Create a New Master Icon | 1297 |
| Associate a Master Shape with the Icon Image | 1300 |
| Finalize the Shape | 1300 |
| Edit an Icon Image on a Stencil | 1301 |
| Edit Master Shape | |
| Custom Configured Stencils (My Stencil) | 1303 |
| Create an AgileShape with Preconfigured Properties | 1303 |
| Modify an AgileShape with Preconfigured Properties | 1303 |
| | |
| BPMN | |
| Adding or Modifying BPMN Properties for an AgileShape | 1305 |
| Converting an AgilePoint Process Model to BPMN | |
| | |
| Data Binding | |
| XML Schema Support for ASP.NET Applications. | 1309 |
| Schema XMI Binding | 1309 |
| SPDoc Metadata Binding | |
| | |
| Process Attributes | |
| Common Process Attributes | |
| Process Attributes for SharePoint | |
| Process Attributes for AgileXRM | |
| Built-In Macros | 1318 |
| Manage Process Attributes | |
| How Do I Modify the Value of a Shared Custom Process Attribute? | |
| Using XPath to Retrieve Inner XML String from Custom Attributes | |
| Applying Process Attributes | 1322 |

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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Web site: www.agilepoint.com

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

Contacting Customer Support

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 Envision

AgilePoint Envision is the Microsoft Visio-based business process modeling component of the AgilePoint Business Process Management (BPM) suite. Envision extends Visio into a powerful BPM tool that enables users to model and directly deploy end-to-end business processes that can encompass the full lifecycle of business operations including the system-to-system, human-to-system, and human-to-human activities.

In addition to the many customizable workflow activities that are built in, Envision provides an extensible framework that enables IT assets to be exposed as AgileShapes in Envision.



Opening AgilePoint Envision

To open AgilePoint Envision:

1. Click Start > All Programs > AgilePoint > AgilePoint Envision.

AgileShapes

This section provides detailed information on the features, functionality, purpose, and intended usage of the AgileShape components included in the AgilePoint BPMS Suite. "AgileShape" is the collective term applied to all of the shapes (e.g. activities, conditions, end points, etc.) that can be used in an AgilePoint business process to represent an activity. AgilePoint Envision comes with several built-in AgileShapes for common business activities that can be grouped into three different categories; Basic, AgileParts, and AgileWorks.

The Basic AgileShapes are special activities that are used for modeling certain portions of business processes that are common among most (or all) process templates. These include Start and Stop points, conditional shapes (i.e. branching and decision flow shapes), etc.

An AgilePart is an AgileShape (either built-in or custom) that represents a specific automatic activity (e.g. Web Service, Insert Database, Copy Files, etc). It implements specific design-time features and runtime functionality that allows AgilePoint Server to perform (or cause to be performed via interaction with another server or system) the actual work represented by the AgileShape. In addition to the built-in AgileParts, you can also create your own custom AgileParts using the AgilePart project template included as part of AgilePoint Developer. Custom AgileParts allow application developers the extensibility framework to implement more complex process and application logic, and develop domain specific extensions.

An AgileWork is an AgileShape (either built-in or custom) that represents a specific Manual Activity (e.g. Manual, Web form, Vote, etc.). It implements specific design-time features and runtime functionality that allows AgilePoint Server to properly handle (e.g. assign, reassign, monitor, display, etc.) the actual task(s) represented by the AgileShape. In addition to the built-in AgileWorks, you can also create your own custom AgileWorks using the AgileWork project template included as part of AgilePoint Developer. Custom AgileWorks allow application developers the extensibility framework to implement more complex process and application logic, and develop domain specific extensions. An AgileWork is similar to an AgilePart, but for a Manual Activity instead of an Automatic Activity. The main differences between AgileParts and AgileWorks are the same as the differences between any automatic and manual activity. For example, Manual activities are usually assigned to participants, so AgileWork components have additional properties and functionality related to participants, participant reassignment, etc. that AgilePart components do not have.

The AgileShapes will be defined in accordance with the Visio Stencil Pane for which the AgileShape is associated.

AgileWork - Common Setup

In general, *AgileWork* refers to any manual activity in AgilePoint — that is, an activity that is performed by a human being, or requires human intervention.

Technically, AgileWork is a .NET source code template from which all manual activities are derived. This .NET template is available in AgilePoint Developer.

All AgileWorks have the same basic functionality. This section describes the design time properties, configuration settings, and instructions common to all AgileWorks.

Common AgileWork Properties

The following table shows the core properties for an AgileWork. Technically, these properties exist within each AgileWork, or manual activity. However, to avoid displaying unnecessary options that do not apply to an activity, only a limited set of these properties is visible for some AgileWorkss in the Envision Design Tasks pane. For completeness, all of the AgileWork properties are provided here for reference.

| Field Name | Definition |
|----------------|--|
| Name | Definition: The display name for the AgileShape. The name is defined within the source code for the AgileShape. It is visible in the design time properties for information only. Allowed Values: Read only. Property Group: Basic |
| (UID) | Definition: An ID that uniquely identifies this AgileShape from all others within the same process template. The UID is defined within the source code for the AgileShape. It is visible in the design time properties for information only. Allowed Values: Read only. Property Group: Basic |
| Description | Definition: Specifies a free text description of the AgileShape. This property is primarily used as a means of recording additional notes, comments, and details about an AgileShape to make the process model more understandable. This property is ignored at runtime. Allowed Values: A free text description. Default Value: None Custom Attributes: Yes Property Group: Basic |
| Mobile Support | Definition: |

| Field Name | Definition |
|------------|--|
| | Specifies whether users can view the task associated with the AgileWork on a mobile device. |
| | Allowed Values: |
| | True - Features are enabled to support mobile devices. |
| | If you select True, you must also set up the mobile view using the Configure Mobile View option. |
| | False - Features are not enabled to support mobile devices. |
| | Default Value: |
| | False |
| | Property Group: |
| | Basic |
| Optional | Definition: |
| | this AgileShape can be manually canceled using AgilePoint Enterprise Manager. |
| | Allowed Values: |
| | • True - The activity can be manually canceled. |
| | False - The activity cannot be manually canceled. |
| | Default Value: |
| | False |
| | Property Group: |
| | Basic |
| Time Span | Definition: |
| | Specifies the maximum amount of time that should be allowed for the completion of the activity associated with this AgileShape before it is considered overdue. This is an combination of the Length and Time Unit fields. |
| | Allowed Values: |
| | Read Only. |
| | Property Group: |
| | Basic |

| Field Name | Definition |
|---------------|---|
| Business Time | Definition: Determines whether the time span represents |
| | actual time, or business hours only. |
| | Allowed Values: |
| | True - The time span represents a span of business hours only. For example, 5 days of business time might be equivalent to 7 days of actual time. 8 hours of business time might be equivalent to 24 hours of actual time. |
| | False - The time span represents actual time. It is unaffected by any business time configuration settings. |
| | Default Value: |
| | False |
| | Example: |
| | The Business Time property is set to True, and business hours are configured as 9 a.m. to 5 p.m. A Manual AgileShape with a Time Span of 6 business hours is entered at 4 p.m. on Tuesday, then the activity must be completed by 2 p.m. on Wednesday. |
| | Property Group: |
| | Basic |
| Length | Definition: |
| | The number of time units represented by the time span. |
| | If you use a custom attribute in this property, the value can be a number, or a specific date. The value is dynamically determined by the data type of the input field — Integer or DateTime. |
| | If the value is in DateTime format, the Time Unit must be set to Day. Otherwise, the Time Span, and thus the and Length, are ignored at runtime. |
| | Allowed Values: |
| | Any positive integer. |
| | Default Value: |
| | 10 |
| | Custom Attributes: |
| | Yes |

| Field Name | Definition |
|-----------------|--|
| | Example: |
| | If the Length is set to 10, and the Time Unit is set to minutes, this indicates 10 minutes. For example, this is determined to determine the deferred time for an email, or to set a delay. |
| | |
| Time Unit | Definition: The type of time unit represented by the Time Span property. |
| | Allowed Values: |
| | Second |
| | • Minute |
| | • Hour |
| | • Day |
| | • Week |
| | Month |
| | <u>Default Value:</u> Minute |
| | Property Group: Basic |
| Work to Perform | Definition: |
| | Specifies the name of the task that appears in a participant's Task List. |
| | In most cases, for processes that use ASP.NET forms, this value also determines the file names for the .aspx form pages. |
| | For the Web Form AgileShape, this property does not determine the file names for the web form. Instead, use the Web Form URL Window. |
| | Allowed Values: |
| | The values for this property vary, depending on the type of process model you are using: |
| | • Generic - Does the following: |
| | Specifies the name that appears in the participant's Task List for this activity. |
| | If you create an ASP.NET project for this process in AgilePoint Developer, a |

| Field Name | Definition |
|--------------------------------|--|
| | new .aspx page is created for each manual activity with the file name equivalent to the value of the Work to Perform property. |
| | SPList and SPDoc - Specifies the name that appears in the participant's Task List for this activity. |
| | InfoPath - Does the following: |
| | Specifies the name that appears in the participant's Task List for this activity. |
| | Specifies the view from the InfoPath form that is associated with the process model. These values are loaded from the InfoPath form. |
| | It is possible to add a new work performer name. However, this is not recommended. A new name would indicate a different type of form, such as an ASP.NET form. This functionality is technically supported, but you would need to write code to implement it. |
| | AgileForms - Specifies the name that appears in the participant's Task List for this activity. |
| | The default value for this field is FormRender. It is recommended to change this value. |
| | Default Value: |
| | None, except for AgileForms process models. |
| | Property Group: |
| | Basic |
| Activity Entry Message (Email) | Definition: |
| | Specifies the name of an email template used to generate an automatic email notification when this AgileShape is entered at runtime. |
| | Allowed Values: |
| | An existing email template name - Applies the selected, predefined template to the email. |
| | Add Mail Template - Opens the Email Template Wizard, where you can add a new email template. |
| | • None - Specifies that no email is sent. |
| | Default Value: |
| | None |

| Field Name | Definition |
|---------------------------------|---|
| | Property Group: |
| | Email Notification |
| Reminder Message (Email) | Opens the Following Window: |
| | Reminding Mail Window |
| | Purpose of this Window: |
| | Specifies the email template and schedule for a reminder email. |
| | Property Group: |
| | Email Notification |
| Task Completed Message (Email) | Definition: |
| | Specifies the name of an email template used to send a message when a task is completed. |
| | Allowed Values: |
| | An existing email template name - Applies the selected, predefined template to the email. |
| | Add Mail Template - Opens the Email Template Wizard, where you can add a new email template. |
| | • None - Specifies that no email is sent. |
| | Default Value: |
| | None |
| | Property Group: |
| | Email Notification |
| Task Reassigned Message (Email) | Definition: |
| | Specifies the name of an email template used to generate an automatic email notification when this AgileShape is reassigned to new participants at runtime. |
| | Allowed Values: |
| | An existing email template name - Applies the selected, predefined template to the email. |
| | Add Mail Template - Opens the Email Template Wizard, where you can add a new email template. |
| | • None - Specifies that no email is sent. |
| | Default Value: |

| Field Name | Definition |
|-------------------|--|
| | None |
| | Property Group: |
| | Email Notification |
| Max. Participant | Definition: |
| | Specifies the number of group members who need to be assigned as participants for a work item. |
| | Allowed Values: |
| | Any positive integer - Specifies a specific number of participants within a group that are required to complete an activity. |
| | Maximum - Specifies that all members of a group are required to participate. |
| | Default Value: |
| | 1 |
| | Custom Attributes: |
| | If the Participants property is set to a group of users, and Max. Participant is 2, then 2 members of the group actually are required to participate in the activity. |
| | Property Group: |
| | Participants |
| Participants | Specifies the users who can be assigned to complete the task. |
| | This property can be set to a specific user, group of users, or a user role. To specify multiple participants, separate the user names with a semicolon (;). |
| | The actual assignments may be determined by the rules defined in your process, or other factors at the time the process is running - for example, participants' current workloads using the Workload Balance AgileShape. |
| | For more information, see Adding Participants to an Activity in the Documentation Library. |
| | Opens the Following Window: |
| | Participants Window |
| | Purpose of this Window: |
| | Specifies the participants for an activity. |
| Reuse Participant | Definition: |

| Field Name | Definition |
|-------------|--|
| | Specifies whether, if an AgileShape is entered multiple times at runtime, the same participants must complete the activity each time. |
| | Allowed Values: |
| | • True - If an AgileShape is entered multiple times at runtime, the same participants who took assignment the first time are also assigned the activity each subsequent time. |
| | False - If an AgileShape is entered multiple times at runtime, any participants can take assignment each time. |
| | Default Value: |
| | The |
| | Example: |
| | A review activity, has participants Ann, Bob, Carol, and Don. Max. Participant is set to 2, and Reuse Participant is set to True. Ann and Don are assigned as the participants for the review activity, and they reject the input. Because Reuse Participant is True, the next time the same incoming input routes back to the review activity, the same users, Ann and Don, are again assigned to work on the activity. |
| | Property Group: |
| | Participants |
| Audit Level | Definition: Specifies the amount of detailed process-related data that is recorded to the AgilePoint workflow database. This property can be set at either the Process Template Properties level or at the individual AgileShape level. |
| | Allowed Values: |
| | • High - Specifies that AgilePoint will record all data about the activity or process to the database. |
| | At the process model level, or at the AgileShape level for manual or automatic activities, all records for manual activities are kept when the process completes. |
| | • Low - Specifies that AgilePoint will only allow a certain amount of data to be recorded to the database. This option enables you to selectively filter out unnecessary data. |

| Field Name | Definition |
|---------------|---|
| | At the process model level, the records for manual work items with status of Removed and New are deleted from the database. After leaving the manual activity, the manual work items with status of Removed are deleted first, then after the whole process is completed, the manual work items with status of New are deleted. Also the records for unreached activity instances are deleted from the database. |
| | Setting the Audit Level to Low has no effect on automatic activities at the process model level. |
| | At the AgileShape level for automatic activities, the records are deleted from database after leaving the activity. No record are kept for the activity. |
| | Default Value: |
| | High |
| | Example: |
| | Setting the Audit Level to Low at the process model level is useful if you assign a group to a manual activity. Manual work items with status of Removed and New are not meaningful data after the process completed. |
| | Setting the Audit Level to Low at the AgileShape level is useful for a Delay AgilePart that goes through a large number of loops. Usually organizations are not interested in the information about the Delay AgilePart, so setting the audit level for Delay AgilePart to Low deletes the records immediately, and the database size will not grow as fast. <u>Property Group:</u> |
| | Advanced |
| Auto Complete | Definition: |
| | Specifies whether the status of a work item is set to completed. |
| | Allowed Values: |
| | True - The first time a work item is entered at runtime, it is automatically marked as completed. |

| Field Name | Definition |
|------------|--|
| | If the work item is entered again at runtime, it is not automatically marked as completed. This helps to avoid an infinite loop. |
| | • False - A work item is not automatically marked as completed. |
| | Default Value: |
| | False |
| | Property Group: |
| | Advanced |
| Debug | Definition: |
| | Troubleshoots and monitors the performance of an AgileShape. |
| | Allowed Values: |
| | True - Indicates that the AgileShape will log additional progress and debugging messages to the AgilePoint Server log file at runtime. Debugging information includes, for example, data being passed to or from the AgileShape, or database connection information. |
| | These messages are often helpful in verifying that the AgileShape is functioning properly and/or with troubleshooting any problems or suspected problems with the AgileShape's runtime behavior or configuration. |
| | False - Indicates that the AgileShape will not log additional progress and debugging messages to the AgilePoint Server log file at runtime. |
| | Default Value: |
| | False |
| | Custom Attributes: |
| | No |
| | Property Group: |
| | Basic |
| Priority | Definition: Specifies the priority level for the task to be shown in the user's task list at runtime. |
| | Allowed Values. |

| Field Name | Definition |
|-------------------|---|
| | High - Shows a red icon in the users task list next to the task. |
| | Normal - Shows a green icon in the users task list next to the task. |
| | • Low - Shows a yellow icon in the users task list next to the task. |
| | • Custom attribute - Sets the priority to a value you specify using a custom attribute. |
| | Default Value: |
| | Normal |
| | Custom Attributes: |
| | Yes |
| | Property Group: |
| | Advanced |
| SessionMode | Definition: |
| | Specifies how to handle open tasks if the same AgileShape is entered multiple times within a process instance. |
| | Allowed Values: |
| | • Single - If the same AgileShape is entered more than once in a process model, any task that is not complete from a previous iteration are canceled, and a new task is created. |
| | Multiple - If the same AgileShape is entered more than once in a process model, a new task is created, but any tasks that are not open from previous iterations are not canceled. |
| | Default Value: |
| | Single |
| | Property Group: |
| | Advanced |
| Wait All Incoming | Definition: |
| | Specifies which direct predecessor AgileShapes to wait for before entering the AgileShape at runtime. |
| | Allowed Values: |
| | • False - Specifies that the AgileShape is entered as soon as any one of the AgileShape's direct predecessors is exited. |

| Field Name | Definition |
|---------------------|---|
| | True (Static) - Specifies that the AgileShape is entered only after all of the AgileShape's direct predecessors are exited. |
| | • Note: If any of the direct predecessors are un-enterable, this AgileShape will never be entered, and the process instance may be permanently delayed at this AgileShape. |
| | This setting is the logically the same as having an And AgileShape with Dynamic set to False. |
| | True (Dynamic) - Specifies that the AgileShape is entered only after all of the AgileShape's direct predecessors are exited that are not bypassed because of the process's logic. If any of the direct predecessors are bypassed, they are ignored by the WaitAllIncoming property. This prevents the process from becoming delayed indefinitely by an AgileShape that cannot be entered. |
| | This setting is the logically the same as having an And AgileShape with Dynamic set to True. |
| | Default Value: |
| | False |
| | Property Group: |
| | |
| Wait Work Performed | Definition: |
| | Specifies whether data entry is required before a work item can be completed in Enterprise Manager. |
| | Allowed Values: |
| | • True - Specifies that some data entry is required before an activity can be Complete. If there is a form for a task, then data must be entered in the form. |
| | • False - Specifies that data entry is optional before an activity can be completed in Enterprise Manager. |
| | Default Value: |
| | True |
| | Example: |
| | This property might be set to False if an activity requires some work that does not include data entry, such as delivering items to the post office. |

| Field Name | Definition |
|------------------------------|---|
| | Property Group: |
| | Advanced |
| Enable Lync | Definition: |
| | Specifies whether the Lync is enabled to send a message. |
| | Allowed Values: |
| | • False - The Lync feature is disabled. |
| | • True - The Lync feature is enabled. This value must be set to True, even if messaging templates are enabled. |
| | Default Value: |
| | False |
| Reminder Message (Lync) | Definition: |
| | Specifies a reminder message for an overdue task sent via Lync. |
| | Allowed Values: |
| | Add Mail Template - Opens the Lync Template Wizard, where you can add a new Lync template. |
| | • None - Specifies that no message is sent. |
| | Default Value: |
| | None |
| | Property Group: |
| | Lync |
| Task Assigned Message (Lync) | Definition: |
| | Specifies the name of a Lync template used to send a message to one or more participants when the task is assigned to them. |
| | Allowed Values: |
| | • Add Mail Template - Opens the Lync Template Wizard, where you can add a new Lync template. |
| | • None - Specifies that no message is sent. |
| | Default Value: |
| | None |
| | Property Group: |

| Field Name | Definition |
|--------------------------------|--|
| | Lync |
| Task Cancelled Message (Lync) | Definition: Specifies the name of a Lync template used to send a message when a task is cancelled. |
| | <u>Allowed Values:</u> <u>Add Mail Template</u> - Opens the Lync Template Wizard, where you can add a new Lync template. <u>None</u> - Specifies that no message is sent. |
| | None |
| | Property Group: Lync |
| Task Completed Message (Lync) | <u>Definition:</u> Specifies the name of a Lync template used to send a message when a task is completed. <u>Allowed Values:</u> Add Mail Template - Opens the Lync Template Wizard, where you can add a new Lync template. None - Specifies that no message is sent. <u>Default Value:</u> None <u>Property Group:</u> Lync |
| Task Reassigned Message (Lync) | <u>Definition:</u> Specifies the name of a Lync template used to send a message to one or more participants when the task is assigned to them after previously being assigned to another participant. <u>Allowed Values:</u> <u>Add Mail Template</u> - Opens the Lync Template Wizard, where you can add a new Lync template. <u>None</u> - Specifies that no message is sent. |

| Field Name | Definition |
|-----------------------|---|
| | None |
| | Property Group: |
| | Lync |
| Configure Mobile View | Opens the Following Window: Mobile View Configuration Window - Form Data Tab - Specifies the non-repeating data fields that appear in a task on a mobile device. Mobile View Configuration Window - Repeating Data Tab - Specifies repeating data items to display on a mobile device. Repeating data groups are repeating parent XML nodes with child nodes. A common example would be a parent node called User, with child nodes called First Name, Last Name, Email Address, and so on. Mobile View Configuration Window - Task Options Tab - Specifies the user input options for a task on a mobile device. |
| | Mobile |
| ConfigureAttachments | Opens the Following Window: Configure Attachments Window Purpose of this Window: Specifies files to attach to an AgileShape from a process repository. Property Group: Process Repository |
| Reference URL | Definition: Associates a URL with an AgileShape or process model in the Process Viewer. Users can click the URL in the Process Viewer to access additional information or resources. Image: Comparison of the process viewer to access additional information or resources. Image: Comparison of the process viewer to access additional information or resources. Image: Comparison of the process viewer to access additional information or resources. Image: Comparison of the process viewer to access additional information or resources. Image: Comparison of the process viewer to access additional information or resources. Image: Comparison of the process viewer to access additional information or the process. Image: Comparison of the process viewer to access additional information or the process. Image: Comparison of the process viewer to access additional information or the process. Image: Comparison of the process viewer to access additional information or the process. Image: Comparison of the process viewer to access additional information or the process. Image: Comparison of the process viewer to access additional information or the process. Image: Comparison of the process viewer to access additional information or the process. Image: Comparison of the process viewer to access additional information or the process. Image: Comparison of the process viewer to access additional information or the process viewer to access additinterviewer to access additional information or tresources. |

| Field Name | Definition |
|-----------------------------|---|
| | Custom Attributes: |
| | Yes |
| | Property Group: |
| | Process Repository |
| Enable SMS | |
| | Definition: |
| | message. |
| | Allowed Values: |
| | • False - The SMS feature is disabled. |
| | True - The SMS feature is enabled. This value must be set to True, even if messaging templates are enabled. |
| | Default Value: |
| | False |
| Reminder Message (SMS) | |
| Treminder Message (SNO) | Definition: |
| | Specifies a reminder message for an overdue task sent via SMS. |
| | Allowed Values: |
| | Add Mail Template - Opens the SMS Template Wizard, where you can add a new SMS template. |
| | • None - Specifies that no message is sent. |
| | Default Value: |
| | None |
| | Property Group: |
| | SMS |
| Task Assigned Message (SMS) | Definition: |
| | Specifies the name of an SMS template used to send a message to one or more participants when the task is assigned to them. |
| | Allowed Values: |
| | Add Mail Template - Opens the SMS Template Wizard, where you can add a new SMS template. |
| | • None - Specifies that no message is sent. |
| | Default Value: |

| Field Name | Definition |
|-------------------------------|---|
| | None |
| | Property Group: |
| | SMS |
| Task Cancelled Message (SMS) | Definition: |
| | Specifies the name of an SMS template used to send a message when a task is cancelled. |
| | Allowed Values: |
| | Add Mail Template - Opens the SMS Template Wizard, where you can add a new SMS template. |
| | • None - Specifies that no message is sent. |
| | Default Value: |
| | None |
| | Property Group: |
| | SMS |
| Task Completed Message (SMS) | Definition: |
| | Specifies the name of an SMS template used to send a message when a task is completed. |
| | Allowed Values: |
| | Add Mail Template - Opens the SMS Template Wizard, where you can add a new SMS template. |
| | • None - Specifies that no message is sent. |
| | Default Value: |
| | None |
| | Property Group: |
| | SMS |
| Task Reassigned Message (SMS) | Definition: |
| | Specifies the name of an SMS template used to send a message to one or more participants when the task is assigned to them after previously being assigned to another participant. |
| | Allowed Values: |
| | Add Mail Template - Opens the SMS Template Wizard, where you can add a new SMS template. |

| Field Name | Definition |
|------------------------------|--|
| | • None - Specifies that no message is sent. |
| | Default Value: |
| | None |
| | Property Group: |
| | SMS |
| Configure Yammer Credentials | Opens the Following Window: |
| | Connecting to Server Window |
| | Yammer Credentials Window |
| | Purpose of this Window: |
| | Specifies the unique identifiers for the Yammer application. |
| | Property Group: |
| | Yammer |
| Enable Yammer | Definition: |
| | Specifies whether Yammer is enabled to send a message. |
| | Allowed Values: |
| | • False - The Yammer feature is disabled. |
| | • True - The Yammer feature is enabled. This value must be set to True, even if messaging templates are enabled. |
| | Default Value: |
| | False |
| Reminder Message (Yammer) | Definition: |
| | Specifies a reminder message for an overdue task sent via Yammer. |
| | Allowed Values: |
| | Add Mail Template - Opens the Yammer Template Wizard, where you can add a new Yammer template. |
| | • None - Specifies that no message is sent. |
| | Default Value: |
| | None |
| | Property Group: |

| Field Name | Definition |
|---------------------------------|--|
| | Yammer |
| Task Assigned Message (Yammer) | Definition: Specifies the name of Yammer template used to send a message to one or more participants when the task is assigned to them. |
| | Allowed Values: Add Mail Template - Opens the Yammer Template Wizard, where you can add a new Yammer template. None Specifies that no message is cont |
| | None - Specifies that no message is sent. |
| | Default Value: |
| | None |
| | Property Group: |
| | Yammer |
| Task Cancelled Message (Yammer) | <u>Definition:</u> Specifies the name of a Yammer template used to send a message when a task is cancelled. <u>Allowed Values:</u> Add Mail Template - Opens the Yammer Template Wizard, where you can add a new Yammer template. None - Specifies that no message is sent. <u>Default Value:</u> None <u>Property Group:</u> Yammer |
| Task Completed Message (Yammer) | <u>Definition:</u> Specifies the name of an SMS template used to send a message when a task is completed. <u>Allowed Values:</u> <u>Add Mail Template</u> - Opens the Yammer Template Wizard, where you can add a new Yammer template. <u>None</u> - Specifies that no message is sent. <u>Default Value:</u> None |

| Field Name | Definition |
|----------------------------------|---|
| | Property Group: |
| | Yammer |
| Task Reassigned Message (Yammer) | <u>Definition:</u> Specifies the name of Yammer template used to send a message to one or more participants when the task is assigned to them after previously being assigned to another participant. <u>Allowed Values:</u> Add Mail Template - Opens the Yammer Template Wizard, where you can add a new Yammer template. None - Specifies that no message is sent. <u>Default Value:</u> None Property Group: Yammer |
| AssemblyName | Definition: The name of the .NET assembly containing the specific AgilePart component with which this AgileShape instance is associated. Allowed Values: Read only. Property Group: AgilePart |
| ClassName | Definition: The fully qualified Type name, including the namespace, of the .NET class (in the .NET assembly specified by the AssemblyName property) that represents the AgilePart component with which this AgileShape instance is associated. Allowed Values: Read only. Property Group: AgilePart |

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Reminding Mail Window

Specifies the email template and schedule for a reminder email.

| R | eminding Mail | | × |
|---|----------------|---|---|
| | Specify re | minding E-mail settings | |
| | Mail Template: | (None) | |
| | Start at | 1 🔁 Day 💽 before task expires. | |
| | Frequency: | C Once | |
| | | C Every 1 🔁 Day 🔽 🗖 Business Time Only | |
| | | Stop when 💿 Task expires | |
| | | C Task is inactive (Cancelled, Reassigned,Completed,) | |
| | | 🥪 OK 🔀 Cancel | |

Navigation

1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. On the **Reminder Email** field, click the **Ellipses** button.

| Field Name | Definition |
|--------------------------------|---|
| Mail Template | <u>Definition:</u> Specifies the name of an email template used to generate an automatic reminder email notification when based on a schedule at runtime. <u>Allowed Values:</u> <u>An existing email template name - Applies the selected, predefined template to the email.</u> <u>None - Specifies that no email is sent.</u> <u>Default Value:</u> None |
| Start at _ before task expires | <u>Definition:</u> Specifies a start time for the reminder, relative to the value of the Time Span for the activity. <u>Allowed Values:</u> A number of minutes, hours, days, or weeks. <u>Default Value:</u> 1 Day |
| Frequency | <u>Definition:</u> Specifies the frequency to send a reminder email. <u>Allowed Values:</u> <u>Once</u> - Specifies to send the reminder email only one time. <u>Every</u> - Specifies the frequency to send repeated reminder emails. You can specify a number of minutes, hours, days, or weeks, whether to use business time and whether to stop sending the reminders after the task expires, or after it is inactive for some other reason. <u>Default Value:</u> Once |

| Field Name | Definition |
|----------------------------------|---|
| Field Name Business Time Only | Definition Definition: Determines whether the time span represents actual time, or business hours only. Allowed Values: True - The time span represents a span of business hours only. For example, 5 days of business time might be equivalent to 7 days of actual time. 8 hours of business time might be equivalent to 24 hours of actual time. False - The time span represents actual time. It is unaffected by any business time configuration settings. Default Value: Deselected |
| | Example: The Business Time property is set to True, and business hours are configured as 9 a.m. to 5 p.m. A Manual AgileShape with a Time Span of 6 business hours is entered at 4 p.m. on Tuesday, then the activity must be completed by 2 p.m. on Wednesday. |

- Data Binding
- Using Process Attributes

Participants Window

Specifies the participants for an activity.

| Participant(s) | | | × |
|----------------|-------|------|----------|
| Participar | nt(s) | | |
| | | | |
| Name: | | | |
| Data Binding: | | | |
| | | | |
| | | ؇ ок | X Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. Drag any AgileWork, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In the Participants field, click Add Participant.

| Field Name | Definition |
|------------|---|
| Name | Definition: |
| | The Participants for an activity. |
| | Allowed Values: |
| | In the Name field, click the right arrow (>) to select the type of participant you want to add. Then follow the instructions to add the type of participant of your choice. |
| | AgilePoint User - For information, see Selecting an AgilePoint User Participant |
| | AgilePoint Role - For information, see Selecting an AgilePoint Role Participant |
| | AgilePoint Group - For information, see Selecting an AgilePoint Group Participant |
| | Active Directory Group - For information, see Selecting an Active Directory Group Participant |

| Field Name | Definition |
|--------------|---|
| | SharePoint Group - For information, see Selecting a SharePoint Group Participant |
| | To specify multiple participants, separate the user names with a semicolon (;). |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Data Binding | Definition: Specifies a data field (such as a schema element or custom attribute) used to evaluate the condition. For more information, see Data Binding. Image: The second structure of the second |

- Data Binding
- Using Process Attributes

Set Context Properties Window - AgileWork

Specifies the custom AgileWork to associate with the generic AgileWork AgileShape in Envision.

| Select AgileWork | X |
|----------------------|---------------|
| Choose Activity Type | |
| AgileWork(s): | |
| | _ |
| | |
| | |
| | 🧼 OK 🔀 Cancel |

Prerequisites

- Create a custom AgileWork using the AgileWork project template in AgilePoint Developer.
- Register the custom AgileWork in Envision.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the AgilePart AgileShape, and drop it on the process template.

Field Definitions

| Field Name | Definition |
|--------------|---|
| AgileWork(s) | Definition: Specifies the custom AgileWork to associate with the generic AgileWork AgileShape in Envision. Allowed Values: The name of a custom AgileWork that is registered in Envision. Default Value: None |

Common Configuration Tasks

• Data Binding

• Using Process Attributes

Configure Attachments Window

Specifies files to attach to an AgileShape from a process repository.

| Configure | onfigure Attachments | | |
|-----------|---|---|----|
| F | Select documents from the SharePoint document library | | |
| Attachm | nents | | |
| | Title | Attachment Vie | w* |
| 1 | 2011-12-27T12 | http://win-5qcd1jdlb8g:8000/ErrorTest/2011-12-27T12_3 💟 | |
| | Add Remove Open Open K Cancel | | |
| *View Att | achment in Process V | iewer Page | |

Prerequisites

• Set up an AgilePoint process repository in SharePoint.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileShape, and drop it on the process model.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. On the **Configure Attachments** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|------------------------------|---|
| Add | Opens the Following Window: Get SharePoint Document Library Window Purpose of this Window: Specifies files to attach to an AgileShape from a process repository. |
| Remove | <u>Function:</u> Removes a document from the Attachments list. |
| Open | <u>Function:</u> Opens a document in the Attachments list for preview. |
| Other Predecessor Activities | <u>Definition:</u> Specifies whether to display a link to the attached file in the AgilePoint Process Viewer. <u>Allowed Values:</u> <u>Selected</u> - The link is displayed in the process viewer. <u>Deselected</u> - The link is not displayed in the process viewer. <u>Default Value:</u> Selected |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Get SharePoint Document Library Window

Specifies files to attach to an AgileShape from a process repository.

AgileShapes

| Select documents from the SharePoint document lbrary Connect SharePoint SharePoint Server UH: ttp://myste.com/ResearchLb/Forms/Allitems.aspx | et SharePoint Document Library | | | |
|--|--|---------------------|---|-------------------|
| Connect SharePoint SharePoint Server UH: <pre>http://mysite.com/Researchilds/Forms/Allitems.aspx Domain: WIN-SQCD1JDLB8G User Name: Administrator Password: Windows Authentication Use Form Based Authentication Use Form Office 365 Select a Document Library DecleteDocumentTest DotNetProxyLb ErrorTest Form Templates Instructe Documenta EaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib ReportDocumentLib</pre> | Select docume | nts from the ShareP | oint document library | |
| SharePoint Server Url: Ittp://mysite.com/Research12b/Forms/AllItens.aspx Domain: WIN-5QCD 1JDL88G User Name: Administrator Password: Windows Authentication Use Form Based Authentication Use Form Office 365 Select a Document Library DeceteDocumentTest DotNetProxyLb ErrorTest Form Templates Instructie Documenten LeaveRequest.ib List Template Gallery ProcessTemplate ReportDocumentLib ReportDocumentLib ReportDocumentLib ReportDocumentLib ReportDocumentLib ReportDocumentLib ReportDocumentS Star Assets | Connect SharePoint | | | |
| Domain: WIN-SQCD11DLB8G User Name: Administrator Password: Password: Image: Windows Authentication Use Form Based Authentication Use Form Office 365 Select a Document Library Document Library DecteDocumentTest DotNetProxyLb ErrorTest Form Templates Instructie Documenta LeaveRequest.ib List Template Gallery ProcessTemplate Reporting Templates Shared Documents State Assets Image: Cancel | SharePoint Server Url: | http://mysite.com/ | ResearchLib/Forms/AllItems.aspx 🗸 | 📂 Get Doc Library |
| User Name: Administrator Password: Windows Authentication Use Form Based Authentication Use Form Office 365 Select a Document Library DeleteDocument Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenten LeaveRequestLib List Template Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | Domain: | WIN-5QCD 1JDLB80 | ; | |
| Password: Windows Authentication Use Form Based Authentication Select a Document Library Document Library DetebocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenten LeaveRequest.lb List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentib ReportDocumentib Sta Assets | User Name: | Administrator | | |
| Select a Document Library Document Library DeleteDocumentTest DotNetProxyLb ErrorTest Form Tenplates Instructie Documentnib Reporting Templates Shared Documents Site Assets * *********************************** | Password: | | | |
| Select a Document Library Decument Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenten LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate Reporting Templates Shared Documents Site Assets Image: Concelement Concents | Windows Authentica | ation 🔲 Use Fo | rm Based Authentication Use Form Office 365 | |
| Select a Document Library Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenten LeaveRequestLib List Template Gallery Master Page Galery ProcessTemplate ReportDocuments Shared Documents Site Assets Image: Im | | | | |
| Document Library Image: Second se | Select a Document Lib | rary | Select a document | 7 |
| DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenten LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib ReportIng Templates Shared Documents Site Assets | Document Library | * | Name | |
| DotNetProxyLib ErrorTest Form Templates Instructie Documenten LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | DeleteDocumentTest | | Form 1. xml | |
| ErrorTest Form Templates Instructe Documenten LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib ReportDocumentLib Shared Documents Site Assets | DotNetProxyLib | | 2011-12-27T12_30_56.xml | |
| Instructie Documenten LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib ReportIng Templates Shared Documents Site Assets | ErrorTest | | 2011-12-27T12_43_40.xml | |
| LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | Instructie Documenten | E | 2011-12-27T12_45_01.xml | |
| List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | LeaveRequestLib | | | |
| Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets Current Curren | List Template Gallery | | | |
| ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | Master Dage Callery | | | |
| Report documental b Reporting Templates Shared Documents Site Assets Cancel | Master Page Gallery | | | |
| Shared Documents Site Assets Cancel | ProcessTemplate | | | |
| Site Assets | ProcessTemplate ReportDocumentLib Reporting Templates | | | |
| < · · · · · · · · · · · · · · · · · · · | ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents | | | 🛩 ок |
| | ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | - | | 🛩 ок |

Prerequisites

• Set up an AgilePoint process repository in SharePoint.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileShape, and drop it on the process model.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. On the **Configure Attachments** field, click the **Ellipses** button.
- 5. On the **Configure Attachments** window, click **Add**.

| Field Name | Definition |
|----------------------|--|
| SharePoint Site URL | Definition: The URL of the SharePoint site where your file resides. |
| | <u>Allowed Values:</u> A valid SharePoint site URL. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |
| | Example: • http://[machine name]:[port]/sites/[site name] • \$\{DocUrl\} |
| Get Document Library | <u>Function:</u> Populates the dialog box with data from the specified SharePoint Document Library. |
| Domain | Definition: The authentication domain. This does not apply to Forms-Based Authentication. |
| User Name | Definition: The user name you want to associate with the action. <u>Allowed Values:</u> A user name, not including the domain. <u>Default Value:</u> None <u>Custom Attributes:</u> No |
| Password | Definition: The password for the authentication account. |

| Field Name | Definition |
|--------------------------------|--|
| | Allowed Values: |
| | A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Windows Authentication | Definition: |
| | Specifies whether to use Windows authentication. |
| | Allowed Values: |
| | Selected - The connection uses Windows authentication. |
| | • Deselected - The connection uses Forms authentication. |
| | Default Value: |
| | Selected |
| Use Forms Based Authentication | Definition: |
| | Specifies whether to use Forms authentication. |
| | · Allowed Values: |
| | • Selected - The connection uses Forms-Based Authentication. |
| | Deselected - The connection uses another specified type of authentication. |
| | It is possible to use Office 365 and Forms authentication together. |
| | Default Value: |
| | Deselected |
| Use Office 365 | Definition: |
| | Specifies whether to use claims authentication for Office 365. |
| | Allowed Values: |
| | • Selected - Forms authentication for Office 365 is enabled. |
| | • Deselected -Forms authentication for Office 365 is disabled. |

| Field Name | Definition | |
|------------------|---|--|
| | It is possible to use Office 365 and Forms authentication together. | |
| | Default Value: | |
| | Deselected | |
| Document Library | <u>Function:</u> Displays a list of document libraries on the selected SharePoint site. Select a document library to display the list of stored documents. | |
| Name | <u>Function:</u> Displays a list of documents in the selected document library. Select a document to add it as an attachment. | |

- Data Binding
- Using Process Attributes

Mobile View Configuration Window - Form Data Tab

Specifies the non-repeating data fields that appear in a task on a mobile device.

| pile View Configuration Mobile View Configuration | | 2 |
|---|--|----------------|
| Enable Mobile View for this task Form Data Repeating Data Task Options | de Rencese Inforbation | |
| Dienlay Name | Value | Schema |
| "User Name" | \${/pd:mvFields/pd:Users/pd:UserN | Add |
| "Manager" | <pre>\${/pd:myFields/pd:Users/pd:Manag</pre> | |
| 10 "Email ID" | <pre>\${/pd:myFields/pd:Users/pd:Email</pre> | |
| | | - Kemove |
| | | Con Remove All |
| | | |
| | | |
| | | |
| | 😔 ок | Cancel |

Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. Drag any AgileWork, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the **Mobile View** field, click the **Ellipses** button.
- 6. On the Mobile View Configuration window, click the Form Data tab.

| Field Name | Definition |
|--------------------|--|
| Enable Mobile View | Definition: Specifies whether users can view the task associated with the AgileWork on a mobile device. Allowed Values: |

| Field Name | Definition |
|--|--|
| | Selected - Features are enabled to support mobile devices. |
| | Deselected - Features are not enabled to support mobile devices. |
| | If you have set up a mobile view, and then deselect this option, your options are saved. |
| | Default Value: |
| | Deselected |
| Heading to display for non-repeating data fields | Definition: |
| | Specifies the text you want to display above the non-repeating data fields on a mobile device. |
| | Allowed Values: |
| | A single line of text |
| | <u>Default Value:</u> |
| | Process Information |
| | Custom Attributes: |
| | Yes |
| Display name | Definition: |
| | Specifies the label to display for a data field on a mobile device. |
| | Allowed Values: |
| | A single line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | In the following example, the display name is Participant, and the value is Lily Allen: |
| | Participant: Lily Allen |
| Value | Definition: |
| | Specifies a data value to display on a mobile |
| | device. |
| | Allowed Values: |

| Field Name | Definition |
|------------|---|
| | An Xpath or a custom attribute. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | In the following example, the display name is Participant, and the value is Lily Allen: |
| | Participant: Lily Allen |
| Schema | Opens the Following Window: Select XPath from Attributes Window |
| | Burpage of this Window: |
| | Enables you to select a schema node from the XML schema for your process. |
| | To activate the Schema button, select the row you want. |
| Add | Function: |
| | Adds a field to be displayed when the user takes action on a mobile device. |
| Remove | Function: |
| | Deletes the selected row from the list. |
| Remove All | Function: |
| | Deletes all rows in the list. |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes |
|------------------------------|
| Select XPath from Attributes |
| Schema Process Attributes |
| myFields |
| XPath: |
| ✓ OK X Cancel |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the **Ellipses** button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition:Displays the XML metadata associated with the process in a tree-view structure.Allowed Values: Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Mobile View Configuration Window - Repeating Data Tab

Specifies repeating data items to display on a mobile device. Repeating data groups are repeating parent XML nodes with child nodes. A common example would be a parent node called User, with child nodes called First Name, Last Name, Email Address, and so on.

| Mol | Mobile View Configuration | | | | | | | |
|-----|---------------------------|-------------|----------------------------------|-------------|---------------------------|---------------|--------|-----------|
| | F |) | Mobile View Configuration | | | | | |
| | Enabl | le I ata | Mobile View for this task | | | | | |
| | Head | ing | to display repeating data fields | Item Detail | s | | | 🔁 Schema |
| | Repe | ati | ng field group to display | \${/pd:myFi | ields/pd:Users} | 1 | | |
| | | _ | | | | J | | Clear All |
| | | | Display Name | | Value | | | |
| | ► F | 7 | UserName | | \${/pd:myField | s/pd:Users/pd | i:User | |
| | I. | 7 | Manager | | <pre>\${/pd:myField</pre> | s/pd:Users/pd | i:Mana | 1 |
| | l l | 7 | EmailID | | <pre>\${/pd:myField</pre> | s/pd:Users/pd | d:Emai | |
| | l. | 7 | Language | | <pre>\${/pd:myField</pre> | s/pd:Users/pd | i:Lang | |
| | | | | | | | | 1 |
| | | | | | | | | <u> </u> |
| | | | | | | | | |
| | | | | | | | | |
| | 1 | | | | | | | |
| | | | | | | | OK | |
| | | | | | | <u> </u> | UK | Cancer |

Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the process template.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. On the Mobile View field, click the Ellipses button.
- 5. On the Mobile View Configuration window, click the Repeating Data tab.

| Field Name | Definition |
|--|--|
| Enable Mobile View | <u>Definition:</u> Specifies whether users can view the task associated with the AgileWork on a mobile device. <u>Allowed Values:</u> Selected - Features are enabled to support mobile devices. Deselected - Features are not enabled to support mobile devices. If you have set up a mobile view, and then deselect this option, your options are saved. <u>Default Value:</u> Deselected |
| Heading to display for repeating data fields | Definition: Specifies the text you want to display above the repeating data sets on a mobile device. Allowed Values: A single line of text Default Value: Item Details Custom Attributes: Yes |
| Repeating field group to display | Definition: Specifies the text you want to display above the repeating data sets on a mobile device. Allowed Values: An xpath to a repeating parent schema node for the process model. Click Schema to select the node you want. Valid schema nodes appear in bold. Default Value: None Custom Attributes: |

| Field Name | Definition |
|--------------|--|
| | Yes |
| Display name | Definition: Specifies the label to display for a data field on a mobile device. |
| | Allowed Values: |
| | |
| | <u>Default Value:</u> None |
| | Custom Attributes: |
| | No |
| | Example: |
| | In the following example, the display name is Participant, and the value is Lily Allen: |
| | Participant: Lily Allen |
| Value | Definition: Specifies a data value to display on a mobile device. |
| | Allowed Values: |
| | An Xpath or a custom attribute. |
| | <u>Default Value:</u> |
| | |
| | Yes |
| | Example: |
| | In the following example, the display name is Participant, and the value is Lily Allen: |
| | Participant: Lily Allen |
| Schema | Opens the Following Window: Select XPath from Attributes Window |
| | Purpose of this Window: |
| | Enables you to select a schema node from the XML schema for your process. |
| | To activate the Schema button, select the row you want. |

| Field Name | Definition |
|------------|--|
| Up Arrow | <u>Function:</u> Moves the selected field one row up in the list. |
| Down Arrow | Function: Moves the selected field one row down in the list. |

- Data Binding
- Using Process Attributes

Mobile View Configuration Window - Task Options Tab

Specifies the user input options for a task on a mobile device.

| Mobile View Configuration |
|---|
| Mobile View Configuration |
| I Enable Mobile View for this task |
| Form Data Repeating Data Task Options |
| Heading to display form submission options \${/pd.myFields/pd:DisplayHead |
| Select which action type fits best to complete the task |
| Approve/Reject O Acknowledge O None |
| |
| If S{/pd:myFields/pd:IsApproved} * is True *, that means Approve * |
| is False *, that means Reject * |
| If |
| ✓ Disolay comments field for submitter |
| Store comments in this process attribute \${/pd.myFields/pd.Comment} |
| |
| 🥪 OK 🔀 Cancel |
| |

Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the process template.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. On the Mobile View field, click the Ellipses button.
- 5. On the Mobile View Configuration window, click the Task Options tab.

| Field Name | Definition |
|---|---|
| Enable Mobile View | Definition: Specifies whether users can view the task associated with the AgileWork on a mobile device. |
| | Allowed Values: Selected - Features are enabled to support mobile devices. Deselected - Features are not enabled to support mobile devices. If you have set up a mobile view, and then deselect this option, your options are saved. Default Value: Deselected |
| Heading to display for form submission options | Definition: Specifies the text you want to display above the participant's task options. Allowed Values: A single line of text Default Value: Complete Task Custom Attributes: Yes |
| Select which action type fits best to complete the task | Definition: Specifies the type of action that occurs when a user submits the task on a mobile device. Allowed Values: |

| Field Name | Definition |
|-------------------------|---|
| | Accept/Reject - The user can select an option to accept or reject the task. |
| | Acknowledge - The user acknowledges the task when it is completed. |
| | • None - The user submits the form, and the task is completed with no further updates to the process data. |
| | Default Value: |
| | Accept/Reject |
| If _ is _, that means _ | Definition: |
| | Specifies the attributes to set and their values, depending upon the user input. |
| | Allowed Values: |
| | If A custom attribute or schema node to display on the mobile device. |
| | is Text representing the values that display on the mobile device for the user to select. For example, the values for Accept and Reject can could display as Yes and No instead. |
| | that means The actual value that is set for the variable defined after If This could be text, such as True, or it could be another variable. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | Suppose there is a request a manager must review, and the response type is Accept/Reject . Based on the form data, the manager will either choose to either Approve or Deny the request. Behind the scenes, this action sets the custom attribute \${ManagerResponse} , which takes a simple Boolean value of True or False . |
| | The If _ is _, that means _ fields would be completed as follows: |
| | If \${ManagerResponse} is Approve, that means True. |
| | If \${ManagerResponse} is Deny, that means False. |

| Field Name | Definition |
|--|---|
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want. |
| Display comments field for submitter | <u>Definition:</u> Specifies whether to display a text entry field for comments on a mobile device. <u>Allowed Values:</u> <u>Deselected</u> - A comments field is not displayed on the mobile device. <u>Selected</u> - A comments field is displayed on the mobile device. <u>Default Value:</u> Deselected |
| Store comments in this process attribute | <u>Definition:</u> Specifies a custom attribute or schema node where the comments submitted on the mobile device are stored. <u>Allowed Values:</u> A custom attribute An xpath to a process schema node. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |

- Data Binding
- Using Process Attributes

Yammer Credentials Window

Specifies the unique identifiers for the Yammer application.

| 2 | Yammer Credentials | x |
|--------------------------------|--------------------|---|
| Y⇐ Yammer Credentials | | |
| | | |
| Select Global AppSettings Key | | |
| Application Name : DashBoard | ۷ | |
| Configuration Key : Agilepoint | ¥ | |
| Network Name : AgilePoint, Inc | | |
| | ✓ OK Cancel | |

Prerequisites

• You must set up an Enterprise Social Token for the Yammer application.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the **Yammer** stencil, drag the following AgileShape, and drop it on the process template.
 - Post Message
 - Reply Message
 - Post Attachment
 - Invite User
 - Create User
 - Update User
 - Delete User
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Credential field**, click the **Ellipses** button.

6. On the **Connecting to Server** window, logon as a registered user to connect to the AgilePoint Server.

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 |
| Configuration Key | Definition: Specifies the unique authentication key for your application. This key is associated with an your administrator user account. This key can represent any identifying value for your application. Allowed Values: An alphanumeric string. Default Value: None Custom Attributes: No |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Associating a Form with an AgileWork

To associate an input form with an AgileWork, the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. Drag any AgileWork, and drop it on the process template.

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. In the **Work To Perform** list, specify the form you want to associate to the AgileShape.

| Field Name | Definition |
|-----------------|--|
| Work to Perform | Definition: |
| | Specifies the name of the task that appears in a participant's Task List. |
| | In most cases, for processes that use ASP.NET forms, this value also determines the file names for the .aspx form pages. |
| | For the Web Form AgileShape, this property does not determine the file names for the web form. Instead, use the Web Form URL Window. |
| | Allowed Values: |
| | The values for this property vary, depending on the type of process model you are using: |
| | • Generic - Does the following: |
| | Specifies the name that appears in the participant's Task List for this activity. |
| | If you create an ASP.NET project for this process in AgilePoint Developer, a new .aspx page is created for each manual activity with the file name equivalent to the value of the Work to Perform property. |
| | • SPList and SPDoc - Specifies the name that appears in the participant's Task List for this activity. |
| | • InfoPath - Does the following: |
| | Specifies the name that appears in the participant's Task List for this activity. |
| | Specifies the view from the InfoPath form that is associated with the process model. These values are loaded from the InfoPath form. |
| | It is possible to add a new work performer name. However, this is not recommended. A new name would indicate a different type of form, such as an ASP.NET form. This functionality is technically supported, but you would need to write code to implement it. |

| Field Name | Definition |
|------------|--|
| | AgileForms - Specifies the name that appears in the participant's Task List for this activity. |
| | The default value for this field is FormRender. It is recommended to change this value. |
| | Default Value: |
| | None, except for AgileForms process models. |
| | Property Group: |
| | Basic |

Displaying a Task on a Mobile Device

This topic provides an example of how to display a task on a mobile device using the Mobile View options. This example assumes you are using the AgilePoint mobile apps, but the same would work for any mobile app using the AgilePoint REST API.

Example Process: Budget Request



Example Mobile View: CFO Approval

The following image shows the end result of this example for the CFO Approval AgileWork. The CFO can use this form to approve or reject a budget request.

| ÷ | My Tasks |
|---------------------------------|---|
| Manger Approva | i 🔶 |
| BudgetRequest-5-16 | -2014-5:35 AM(2) |
| Submitted By: VACSO\Bob.Hope | Assigned Date: 05/15/2014 Due Date: Today 10:35 PM |
| Budget Request Sur | nmary |
| Submiter Name | VACSO\Bob.Hope |
| Submission Date | 5/17/2014 12:20:16 AM |
| Budget Amount | \$30,244.00 |
| Employee Details | 1 of 2 |
| Hardware | \$4,904.00 |
| Software | \$8,050.00 |
| Telephone | \$2,000.00 |
| Subtotal | \$14,954.00 |
| Request Approval | |
| O Approve | C Reject |
| Comments: | |
| | |
| | 5 🗘 🗟 |

Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.
- A process model with the following custom attributes.
 - \${SubmitterName} The first and last name of the participant who submitted the budget request.
 - \${SubmissionDate} The date the participant submitted the budget request.
 - **\${BudgetAmount}** The total amount of budget request, adding the per-employee budgets.
 - **\${ManagerResponse}** The approver's response to the request.
 - **\${Comment}** The approver's comments.
 - **\${Employee}** This is a repeating node that represents the budget for each employee. This node includes the following child nodes:
 - **\${Hardware}** The amount requested for hardware.
 - **\${Software}** The amount requested for software.
 - **\${Telephone}** The amount requested for telephone expenses.

• **\${Subtotal}** - The subtotal per employee.

Navigation

- 1. Open your **Budget Request** process model.
- 2. Select the CFO Approval AgileWork.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. On the **Mobile View** field, click the **Ellipses** button.

Instructions

1. On the Form Data tab, complete the following fields:

| Field Name | Value |
|--|------------------------|
| Heading to display non-repeating data fields | Budget Request Summary |

- 2. To enter the fields to be displayed on the mobile device, do the following:
 - a. Click Add.
 - b. In the **Display Name** field, enter the label you want to display on the mobile device.
 - c. In the **Value** field, enter the value to be displayed. This is usually a custom attribute. Repeat this procedure for each of this following fields.

| Display Name | Value |
|-----------------|--------------------|
| Submitter Name | \${SubmitterName} |
| Submission Date | \${SubmissionDate} |
| Budget Amount | \${BudgetAmount} |

- 3. Click the **Repeating Data** tab.
- 4. On the Repeating Data tab, complete the following fields:

| Field Name | Value |
|--|------------------|
| Heading to display non-repeating data fields | Employee Details |

5. Click Schema.

- 6. On the Select XPath from Attributes Window, select \${Employee}.
- In the **Display Name** field, ensure the fields you want to display are selected. The following table shows the sample value for the following fields.

| Display Name | Value |
|--------------|---------------|
| Software | \${Software} |
| Hardware | \${Hardware} |
| Telephone | \${Telephone} |
| Subtotal | \${Subtotal} |

- 8. Click the Task Options tab.
- 9. On the Task Options tab, complete the following fields:

| Field Name | Value | | | |
|---|--|--|--|--|
| Heading to display form submission options | Request Approval | | | |
| Select which action type fits best to complete the task | Approve/Reject | | | |
| If _ is _, that means _ | If \${ManagerResponse} is Approve, that means True. If \${ManagerResponse} is Reject, that means False. | | | |
| Display comments field for submitter | Selected | | | |
| Store comments in this process attribute | \${Comment} | | | |

Adding Participants to an Activity

When you create an activity using an AigleWork, you must add participants — the people who are required to complete the task.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. Drag any AgileWork, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

- 1. In the Participants field, click Add Participant.
- 2. On the Participants Window, to select the participants you want complete the following fields as required:

| Field Name | Definition | | | |
|--------------|---|--|--|--|
| Name | <u>Definition:</u> The Participants for an activity. <u>Allowed Values:</u> | | | |
| | In the Name field, click the right arrow (>) to select the type of participant you want to add. Then follow the instructions to add the type of participant of your choice. | | | |
| | AgilePoint User - For information, see Selecting an AgilePoint User Participant | | | |
| | AgilePoint Role - For information, see Selecting an AgilePoint Role Participant | | | |
| | AgilePoint Group - For information, see Selecting an AgilePoint Group Participant | | | |
| | Active Directory Group - For information, see Selecting an Active Directory Group Participant | | | |
| | SharePoint Group - For information, see Selecting a SharePoint Group Participant | | | |
| | To specify multiple participants, separate the user names with a semicolon (;). | | | |
| | <u>Default Value:</u> None | | | |
| | | | | |
| | Custom Attributes: | | | |
| | Yes | | | |
| Data Binding | Definition: | | | |
| | Specifies a data field (such as a schema element or custom attribute) used to evaluate the condition. For more information, see Data Binding. | | | |
| | Note: On the Participants window, this field is not available for Generic process models. | | | |
| | Allowed Values: | | | |
| | A valid data binding expression. This could be a custom attribute name or an xpath to a schema element. | | | |
| | Default Value: | | | |
| | None | | | |

| Field Name | Definition | | | |
|------------|--------------------|--|--|--|
| | Custom Attributes: | | | |
| | Yes | | | |

3. Click OK.

Selecting an AgilePoint User Participant

To add an AgilePoint user as a participant for an activity, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. Drag any AgileWork, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. In the **Participants** field, click **Add Participant**.
- 6. In the Name field, click the right arrow (>)

Instructions

- 1. Log on to the AgilePoint Server, if required.
- 2. Complete one or more of the user information fields, and click Search.
- 3. In the results list, select the user you want.
- 4. Click OK.

Selecting an AgilePoint Role Participant

Topic paragraph

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. Drag any AgileWork, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. In the Participants field, click Add Participant.
- 6. In the Name field, click the right arrow (>)

Instructions

- 1. Log on to the AgilePoint Server, if required.
- 2. On the Select AgilePoint Role window, select the AgilePoint role you want.
- 3. Click OK.

Selecting an AgilePoint Group Participant

Topic paragraph

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. Drag any AgileWork, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. In the **Participants** field, click **Add Participant**.
- 6. In the Name field, click the right arrow (>)

Instructions

- 1. Log on to the AgilePoint Server, if required.
- 2. On the Select AgilePoint Group window, select the AgilePoint group you want.
- 3. Click OK.

Selecting an Active Directory Group Participant

To select an Active Directory group as a process participant, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. Drag any AgileWork, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. In the Participants field, click Add Participant.
- 6. In the Name field, click the right arrow (>)

Instructions

1. On the Select Group from Active Directory window, complete the following field.

| Field Name | Definition | | |
|----------------|--|--|--|
| Directory Name | Definition: Relative distinguished name (RDN) for an item in the Active Directory. | | |
| | Allowed Values: A valid RDN. | | |
| | <u>Default Value:</u> None | | |
| | <u>Custom Attributes:</u> No | | |

| Field Name | Definition | | | |
|------------|---|--|--|--|
| | Example: | | | |
| | • TUSCA | | | |
| | LDAP://dc=Sales,dc=Tusca,dc=com | | | |

- 2. In the search field, type all or part of a group name. To use wild cards, use an asterisk (*) for example, *Users.
- 3. Click Refresh.
- 4. In the list, select the group you want.
- 5. Click OK.

Selecting a SharePoint Group Participant

Topic paragraph

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. Drag any AgileWork, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. In the Participants field, click Add Participant.
- 6. In the Name field, click the right arrow (>)

Instructions

1. On the Select a SharePoint Group window, complete the following field.

| Field Name | Definition | | |
|------------|---|--|--|
| Site URL | Definition: Specifies the URL for a new SharePoint site where you want to add or remove the associated item such as a SharePoint site, document library, site collection, user, and group. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: | | |

| Field Name | Definition | | | |
|------------|------------|---------|--|--|
| | • | http:// | [machine name]:[port]/sites/[site name] | |
| | | () | Note: You must include the /sites in the Site URL for the site to be created successfully. | |
| | • | \$\{Doo | cUrl\} | |

- 2. Click Connect.
- 3. Log on to SharePoint if required.
- 4. In the list, select the group you want.
- 5. Click OK.

Attaching Files to Activities at Runtime

You an attach one or more files from a process repository to an activity at runtime, so that if a participant or administrator clicks the activity in the Process Viewer, The file title is displayed with a hyperlink to the file.

To attach a file to an activity, do the following.

Prerequisites

Set up an AgilePoint process repository in SharePoint.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileShape, and drop it on the process model.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. On the Configure Attachments field, click the Ellipses button.

Instructions

- 1. On the Configure Attachments Window, click Add.
- 2. On the Get SharePoint Document Library Window, enter the SharePoint Server URL for the SharePoint site where your file attachment resides.
- 3. Modify the authentication information as required.
- 4. Click Get Document Libraries.
- 5. In the **Document Library** list, select the library where your file attachment resides.
- 6. In the Select a document list, select your file.

Creating a Reminder Email Notification

To create a reminder email for an activity, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. Drag any AgileWork, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the Reminder Email field, click the Ellipses button.

Instructions

1. On the Reminding Mail Window, complete the fields as required.

Troubleshooting

The following topics provide troubleshooting information for this AgileShape.

Reassigned Task Does Not Route to the New Participant Set By the Custom Attribute

Symptoms

A manual activity has a dynamic participant (set by a custom attribute). In the desired process scenario, after the manual task is completed, the process will check again to see if the same task need to be performed again by another person and the custom attribute value of the participant will be set accordingly. The process will then be routed back to the manual activity again with the new participant. However, in the process that client implemented, the task is still assigned to the previous participant when the task is routed back with a new participant value. It seems like the new custom attribute value does not take into account at all.

Cause

This occurs because the manual activity's Reuse Participant property set to True. In this case, when the process is routed back to this manual activity, the task will always be assigned to the previous participant regardless of the new value of the Participant property.

Resolution

Set the Reuse Participant property to False.

AgilePart - Common Setup

In general, *AgilePart* refers to any automatic activity in AgilePoint — that is, an activity that is performed by an automated system, rather than a human being.

Technically, AgilePart refers to 2 .NET source code templates from which all automatic activities are derived in the AgilePoint system: standard AgilePart, and Queue Based AgilePart. There are some technical differences between these 2 types of AgileParts.
The main difference concerning AgilePoint Envision users is that Queue Based AgileParts include several properties that standard AgileParts don't include. Otherwise, all AgileParts have the same basic functionality. This section describes the design time properties, configuration settings, and instructions common to all AgileParts. Properties that are unique to Queue Base AgileParts are indicated.

The .NET templates for standard and Queue Based AgileParts are available in AgilePoint Developer. For more information, see AgilePoint Developer in the Documentation Library.

Common AgilePart Properties

The following table shows the core properties for an AgilePart. Technically, these properties exist within each AgilePart, or automated activity. However, to avoid displaying unnecessary options that do not apply to an activity, only a limited set of these properties is visible for some AgileParts in the Envision Design Tasks pane. For completeness, all of the AgilePart properties are provided here for reference.

| Field Name | Definition |
|-------------|---|
| Name | Definition: The display name for the AgileShape. The name is defined within the source code for the AgileShape. It is visible in the design time properties for information only. Allowed Values: Read only. Property Group: Basic |
| (UID) | Definition: An ID that uniquely identifies this AgileShape from all others within the same process template. The UID is defined within the source code for the AgileShape. It is visible in the design time properties for information only. Allowed Values: Read only. Property Group: Basic |
| Description | Definition: Specifies a free text description of the AgileShape. This property is primarily used as a means of recording additional notes, comments, and details about an AgileShape to make the process model more understandable. This property is ignored at runtime. |

| Field Name | Definition |
|-------------|--|
| | A free text description. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Property Group: |
| | Basic |
| Debug | Definition: |
| | Troubleshoots and monitors the performance of an AgileShape. |
| | Allowed Values: |
| | True - Indicates that the AgileShape will log additional progress and debugging messages to the AgilePoint Server log file at runtime. Debugging information includes, for example, data being passed to or from the AgileShape, or database connection information. |
| | These messages are often helpful in verifying that the AgileShape is functioning properly and/or with troubleshooting any problems or suspected problems with the AgileShape's runtime behavior or configuration. |
| | False - Indicates that the AgileShape will not log additional progress and debugging messages to the AgilePoint Server log file at runtime. |
| | Default Value: |
| | False |
| | Custom Attributes: |
| | No |
| | Property Group: |
| | Basic |
| Audit Level | Definition: Specifies the amount of detailed process-related data that is recorded to the AgilePoint workflow database. This property can be set at either the Process Template Properties level or at the individual AgileShape level. |

| Field Name | Definition |
|------------|--|
| | High - Specifies that AgilePoint will record all data about the activity or process to the database. |
| | At the process model level, or at the AgileShape level for manual or automatic activities, all records for manual activities are kept when the process completes. |
| | Low - Specifies that AgilePoint will only allow a certain amount of data to be recorded to the database. This option enables you to selectively filter out unnecessary data. |
| | At the process model level, the records for manual work items with status of Removed and New are deleted from the database. After leaving the manual activity, the manual work items with status of Removed are deleted first, then after the whole process is completed, the manual work items with status of New are deleted. Also the records for unreached activity instances are deleted from the database. |
| | Setting the Audit Level to Low has no effect on automatic activities at the process model level. |
| | At the AgileShape level for automatic activities, the records are deleted from database after leaving the activity. No record are kept for the activity. |
| | Default Value: |
| | High |
| | Example: |
| | Setting the Audit Level to Low at the process model level is useful if you assign a group to a manual activity. Manual work items with status of Removed and New are not meaningful data after the process completed. |
| | Setting the Audit Level to Low at the AgileShape level is useful for a Delay AgilePart that goes through a large number of loops. Usually organizations are not interested in the information about the Delay AgilePart, so setting the audit level for Delay AgilePart to Low deletes the records immediately, and the database size will not grow as fast. |
| | Property Group: |
| | Advanced |

| Field Name | Definition |
|-------------------|--|
| SessionMode | Definition: |
| | Specifies how to handle open tasks if the same AgileShape is entered multiple times within a process instance. |
| | Allowed Values: |
| | Single - If the same AgileShape is entered more than once in a process model, any task that is not complete from a previous iteration are canceled, and a new task is created. |
| | Multiple - If the same AgileShape is entered more than once in a process model, a new task is created, but any tasks that are not open from previous iterations are not canceled. |
| | Default Value: |
| | Single |
| | Property Group: |
| | Advanced |
| Wait All Incoming | Definition: |
| | Specifies which direct predecessor AgileShapes to wait for before entering the AgileShape at runtime. |
| | Allowed Values: |
| | False - Specifies that the AgileShape is entered as soon as any one of the AgileShape's direct predecessors is exited. |
| | True (Static) - Specifies that the AgileShape is entered only after all of the AgileShape's direct predecessors are exited. |
| | Note: If any of the direct predecessors are un-enterable, this AgileShape will never be entered, and the process instance may be permanently delayed at this AgileShape. |
| | This setting is the logically the same as having an And AgileShape with Dynamic set to False. |
| | • True (Dynamic) - Specifies that the AgileShape is entered only after all of the AgileShape's direct predecessors are exited that are not bypassed because of the process's logic. If any of the direct predecessors are bypassed, they are ignored by the WaitAllIncoming property. This prevents the process from becoming |

| Field Name | Definition |
|--------------|---|
| | delayed indefinitely by an AgileShape that cannot be entered. |
| | This setting is the logically the same as having an And AgileShape with Dynamic set to True. |
| | Default Value: |
| | False |
| | Property Group: |
| | Advanced |
| AssemblyName | Definition: The name of the .NET assembly containing the specific AgilePart component with which this AgileShape instance is associated. |
| | Allowed Values: |
| | Read only. |
| | Property Group: |
| | AgilePart |
| ClassName | Definition: The fully qualified Type name, including the namespace, of the .NET class (in the .NET assembly specified by the AssemblyName property) that represents the AgilePart component with which this AgileShape instance is associated. Allowed Values: Read only. Property Group: AgilePart |
| Method | Definition: The name of the method (in the .NET class specified by the ClassName property) that will be invoked when the AgileShape is entered at runtime. Allowed Values: Read only. Property Group: AgilePart |
| Optimizing | Definition: |

| Field Name | Definition |
|------------|--|
| | Specifies the action to take when an exception occurs. |
| | Allowed Values: |
| | Performance - A message from an AgilePart is sent directly to a third-party system without a message queue. |
| | When this is set, the Retries property is always treated as if the value were 0. |
| | Scalability - A message from an AgilePart goes through the internal message queue within AgilePoint Server. |
| | Connectivity - A message from an AgilePart goes through the Azure message queue in the cloud. This requires the AgilePoint Broker to be running in your internal environment. |
| | Configuration - The value is set based on the value of the process attribute, QueuebaseAgilePartOptimizing. You can set the value of this attribute at the process model, application, or global level to one of the following values: |
| | Performance |
| | Scalability |
| | Connectivity |
| | To determine the value the process attribute to use, AgilePoint checks QueuebaseAgilePartOptimizing in the following context: |
| | [Application].[process model Name].QueuebaseAgilePartOptimizing - The process attribute within the context of a specific process model within a specific application. |
| | [Application].QueuebaseAgilePartOptimizing The process attribute within the context of a specific application. |
| | Global.Setting.QueuebaseAgilePartOptimizing The global process attribute. |
| | Even if this process attribute is set, individual AgileParts can have a different property if desired. |
| | Default Value: |
| | Configuration, or Performance. |
| | If the process attribute QueuebaseAgilePartOptimizing has a value, that |

| Field Name | Definition |
|--------------------------------|--|
| | value is used, and Configuration is considered the default setting. |
| | If the value of QueuebaseAgilePartOptimizing is not defined, this property is treated as if Performance were the default value. |
| | Custom Attributes: |
| | No, but the Configuration option uses a process attribute to determine its behavior. |
| | Property Group: |
| | AgilePart (Queue Based AgileParts Only) |
| Activity Entry Message (Email) | Definition: |
| | Specifies the name of an email template used to generate an automatic email notification when this AgileShape is entered at runtime. |
| | Allowed Values: |
| | • An existing email template name - Applies the selected, predefined template to the email. |
| | Add Mail Template - Opens the Email Template Wizard, where you can add a new email template. |
| | • None - Specifies that no email is sent. |
| | Default Value: |
| | None |
| | Property Group: |
| | Email Notification |
| Activity Exit Email | Definition: |
| | Specifies the name of an email template used to generate an automatic email notification when this AgileShape is exited at runtime. |
| | Allowed Values: |
| | An existing email template name - Applies the selected, predefined template to the email. |
| | • Add Mail Template - Opens the Email Template Wizard, where you can add a new email template. |
| | • None - Specifies that no email is sent. |
| | Default Value: |
| | None |

| Field Name | Definition |
|-----------------------|---|
| | Property Group: |
| | Email Notification |
| ConfigureAttachments | Opens the Following Window: |
| | Configure Attachments Window |
| | Purpose of this Window: |
| | Specifies files to attach to an AgileShape from a process repository. |
| | Property Group: |
| | Process Repository |
| Reference URL | Definition: |
| | Associates a URL with an AgileShape or process model in the Process Viewer. Users can click the URL in the Process Viewer to access additional information or resources. |
| | Note: This functionality is not currently supported for AgileXRM. |
| | Allowed Values: |
| | Any URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Property Group: |
| | Process Repository |
| ExceptionHandlerScope | Definition: |
| | Specifies whether AgilePoint Server has the ability to call a custom AgileConnector to handle exceptions. |
| | Allowed Values: |
| | Local - Specifies the exception handling information for an AgileShape is saved to the custom attribute defined in the SaveErrorMessageTo and SaveStatusTo properties for the process instance. |
| | Global - Specifies the exception handling information is handled the same as the Local |

| Field Name | Definition |
|--------------------|--|
| | option, but includes the extended ability to call a custom AgileConnector to handle the exception as desired. |
| | Default Value: |
| | Local |
| | Property Group: |
| | Status and Error Message |
| SaveErrorMessageTo | Definition: |
| | Specifies a custom process attribute that is updated when the AgileShape throws an error at runtime. A message containing information about the error is stored as the value of the specified custom process attribute. |
| | Allowed Values: |
| | An error message. |
| | Default Value: |
| | ErrorMessage |
| | Property Group: |
| | Status and Error Message |
| SaveStatusTo | Definition: |
| | Specifies a custom process attribute that is updated when the AgileShape is exited at runtime. The AgileShape's Status property is stored as a String as the value of the specified custom process attribute. |
| | Allowed Values: |
| | The text of a custom process attribute name, without \$ or \${. For example, Success is a valid value, but \$Success is not. |
| | Default Value: |
| | Success |
| | Example: |
| | A process has a Manual with Timeout AgileShape where SaveStatusTo is set to TimerStatus. At runtime, if the Manual activity is completed before the timer expires, TimerStatus will be set to Complete when the activity exists successfully. If the Manual activity is not completed before the timer expires, TimerStatus will be set to Canceled. |

| Field Name | Definition |
|------------------------------|--|
| | The data from the TimerStatus property could be used to populate other data fields in the process, or for reporting purposes. |
| | Property Group: |
| | Status and Error Message |
| Configure Yammer Credentials | Opens the Following Window: Connecting to Server Window Yammer Credentials Window Purpose of this Window: Specifies the unique identifiers for the Yammer application. Property Group: Yammer |
| | Yammer |
| Retries | Definition: Specifies the number of times to retry an action for a Queue Based AgilePart if it fails. |
| | Allowed Values: |
| | Any integer. |
| | Default Value: |
| | 0 |
| | Custom Attributes: |
| | No |
| | Property Group: |
| | Status and Error Message (Queue Based AgileParts Only) |
| HandleException | Definition: |
| | Specifies the action to take when an exception occurs. |
| | Allowed Values: |
| | Ignore - Writes an error to the error log, and moves the process forward. |
| | SuspendProcess - Writes an error to the error log and suspends the process. |
| | • UserDefined - Uses a custom dll you provide to determine the appropriate action. |

| Field Name | Definition |
|------------|--|
| | Default Value: |
| | Ignore |
| | Custom Attributes: |
| | No |
| | Property Group: |
| | Status and Error Message (Queue Based AgileParts Only) |

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Set Context Properties Window - AgilePart

Specifies the custom AgilePart to associate with the generic AgilePart AgileShape in Envision.

| Select AgilePart | × |
|----------------------|----------|
| Choose Activity Type | |
| AgilePart(s): | |
| | <u> </u> |
| | |
| | |

Prerequisites

- Create a custom AgilePart using the AgilePart project template in AgilePoint Developer.
- Register the custom AgilePart in Envision.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the AgilePart AgileShape, and drop it on the process template.

Field Definitions

| Field Name | Definition |
|--------------|---|
| AgilePart(s) | Definition: Specifies the custom AgilePart to associate with the generic AgilePart AgileShape in Envision. Allowed Values: The name of a custom AgilePart that is registered in Envision. Default Value: None |

Common Configuration Tasks

• Data Binding

• Using Process Attributes

Configure Attachments Window

Specifies files to attach to an AgileShape from a process repository.

| Configure | Configure Attachments | | |
|-----------|-----------------------|---|------------------------------|
| 8 | Select documents f | from the SharePoint document library | |
| Attachm | nents | | |
| | Title | Attachment | View* |
| 1 | 2011-12-27T12 | http://win-5qcd1jdlb8g:8000/ErrorTest/2011-12-27T12_3 | |
| | | | Add Add Remove Open K Cancel |
| *View Att | achment in Process V | iewer Page | |

Prerequisites

• Set up an AgilePoint process repository in SharePoint.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileShape, and drop it on the process model.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. On the **Configure Attachments** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|------------------------------|---|
| Add | Opens the Following Window: Get SharePoint Document Library Window Purpose of this Window: Specifies files to attach to an AgileShape from a process repository. |
| Remove | <u>Function:</u> Removes a document from the Attachments list. |
| Open | <u>Function:</u> Opens a document in the Attachments list for preview. |
| Other Predecessor Activities | <u>Definition:</u> Specifies whether to display a link to the attached file in the AgilePoint Process Viewer. <u>Allowed Values:</u> <u>Selected</u> - The link is displayed in the process viewer. <u>Deselected</u> - The link is not displayed in the process viewer. <u>Default Value:</u> Selected |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Get SharePoint Document Library Window

Specifies files to attach to an AgileShape from a process repository.

AgileShapes

| Select documents from the SharePoint document lbrary Connect SharePoint SharePoint Server Url: http://myste.com//tesearchL5/Forms/Alltems.aspx Domain: WIN-SQCD 1JDLB8G User Name: Administrator Password: | Select documents from the SharePoint document lbrary Connect SharePoint SharePoint Server Url: http://mysite.com/Researchilds/Forma/Allitems.aspx Domain: WIN-SQCD 1DLB8G User Name: Administrator Password: Password: Windows Authentication Use Form Based Authentication Document Library Select a document Decement Library Select a document DetteProxyLb Form1.xml EnorTest 2011-12-27T12_30_56.xml Form Templates 1 Instructive Documenta E Master Page Callery 2011-12-27T12_43_40.xml ProcessTemplate ReportDocumentLib ReportDocuments Immetric Immetric Immetric | SharePoint Document | Library | | × |
|---|---|------------------------|----------------------|---|-------------------|
| Connect SharePoint SharePoint Server Url: http://mysite.com/ResearchLb/Forms/Allitems.aspx Domain: WIN-5QCD JDDL88G User Name: Administrator Password: WINdows Authentication Use Form Based Authentication Use Form Office 365 Select a Document Library DeleteDocument Library DeleteDocument Et Dotument Library DeleteDocument Et Dotument Library DeleteDocument Et Dotument Library DeleteDocument Et Dotument Et Select a Document Document Library DeleteDocument Et Dotument Et Select a Document Document Et Select a Document VIII VIII VIII VIII VIII VIII VIII VI | Connect SharePoint SharePoint Server Url: http://mysite.com/Researchilds/Forms/Allitems.aspx Domain: WIN-SQCD1JDLB8G User Name: Administrator Password: Windows Authentication Use Form Based Authentication Use Form Office 365 Select a Document Library Document Library DedeteDocumentTest DotWetProxyLb ErrorTest Form Templates Instructie Documenten LeaveRequestLb List Template Gallery Master Page Gallery ProcessTemplate Reporting Templates Shared Documents Ste Assets Windows Authentication Windows Authentication Windows Authentication Windows Authentication Windows Authentication Select a document Vise Form Discussion Select a document Vise Form Templates Shared Documents Site Assets Windows Windows Concel Windows Concel Windows Concel Windows Minimited Concel Windows Concel Co | Select docume | nts from the SharePo | oint document library | |
| SharePoint Server Uri: Image: Get Doc Libra Domain: Image: Get Doc Libra Description: Image: Use Form DotSite Form DotSite Form DotSite Form DotSite Form DotSite Forms/Allitems.aspx Select a document Document Library Select a document Document Library Select a document Document Document Dother Form Dother Document Document Document Dother Form Dother Document Document Library Select a document Document Document <a< th=""><th>SharePoint Server Url: i Get Doc Ubr Domain: WIN-SQCD 1DLB8G User Name: Administrator Password: Image: I</th><th>Connect SharePoint</th><th></th><th></th><th></th></a<> | SharePoint Server Url: i Get Doc Ubr Domain: WIN-SQCD 1DLB8G User Name: Administrator Password: Image: I | Connect SharePoint | | | |
| Domain: WIN-SQCD 1JDLB8G User Name: Administrator Password: | Domain: WIN-SQCD 1DLB8G User Name: Administrator Password: | SharePoint Server Url: | http://mysite.com/ | ResearchLib/Forms/AllItems.aspx 👻 | 📂 Get Doc Library |
| User Name: Administrator Password: Windows Authentication Use Form Based Authentication Use Form Office 365 Select a Document Library Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenten LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | User Name: Administrator Password: Windows Authentication Use Form Based Authentication Use Form Office 365 Select a Document Library DecteDocumentTrest DotNetProxyLb ErrorTest Form Templates Instructie Documenten LeaveRequestLib List Template Gallery Master Page Gallery Master Page Gallery Master Page Gallery Master Page Gallery Kassets | Domain: | WIN-5QCD 1JDLB8G | ; | |
| Password: Windows Authentication Use Form Based Authentication Use Form Office 365 Select a Document Library Select a document Document Library Image: Comparison of | Password: Windows Authentication Use Form Based Authentication Use Form Office 365 Select a Document Library Select a document Document Library Select a document DetetDocumentTest Name DotNetProxyLib Form 1.xml ErrorTest 2011-12-27T12_30_56.xml Portest 2011-12-27T12_43_40.xml Instructic Documenten 2011-12-27T12_45_01.xml LeaveRequestLib 2011-12-27T12_45_01.xml List Template Gallery Name Master Page Gallery Virtue with the sellery Master Page Gallery Virtue with the sellery Site Assets Virtue with the sellery | User Name: | Administrator | | |
| Windows Authentication Use Form Based Authentication Select a Document Library Document Library DeteeDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie DocumentLib LeaveRequestLib List Template Gallery ProcessTemplate ReportDocumentLib ReportDocuments Site Assets Image: Complete Structure Structu | Windows Authentication Use Form Based Authentication Use Form Office 365 Select a Document Library Document Library DeteeDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documentni LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib ReportDocuments Site Assets * * ** ** ** ** *** *** *** **** ***** ************************************ | Password | | | |
| Select a Document Library Select a document Document Library Name DeleteDocumentTest Name DotNetProxyLib Form1.xml ErrorTest 2011-12-27T12_30_56.xml Form Templates 2011-12-27T12_43_40.xml Instructie Documenten 2011-12-27T12_45_01.xml LeaveRequest.ib 2011-12-27T12_45_01.xml List Template Gallery ProcessTemplate Reporting Templates Templates Shared Documents Templates Site Assets Time | Select a Document Library Decement Library DeleteDocumentTest DotNetProxyLb ErrorTest Form Templates Instructic DocumentLibrary LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocuments Site Assets Image: Shared Documents Site Assets Image: Shared Documents Site Assets | Windows Authentica | tion 🔲 Lise Fo | rm Based Authentication III Use Form Office 365 | |
| Select a Document Library Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenten LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate Reporting Templates Shared Documents Site Assets | Select a Document Library Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenten LeaveRequestLib List Template Gallery ProcessTemplate ReportDocumentLib ReportDocumentLib ReportDocumentLib ReportDocumentLib ReportDocumentLib ReportIng Templates Shared Documents Site Assets Image: Cancel | | | | |
| Document Library Name DeleteDocumentTest Form 1.xml DotNetProxyLib 2011-12-27T12_30_56.xml ErrorTest 2011-12-27T12_43_40.xml Form Templates 2011-12-27T12_43_40.xml Instructie Documenten 2011-12-27T12_45_01.xml LeaveRequestLib 2011-12-27T12_45_01.xml Vist Template Gallery ProcessTemplate Reporting Templates Shared Documents Site Assets * | Document Library Image: Name DeleteDocumentTest Form 1.xml DotNetProxyLib 2011-12-27T12_30_56.xml ErrorTest 2011-12-27T12_43_40.xml PorcessTemplates 2011-12-27T12_45_01.xml LeaveRequestLib 2011-12-27T12_45_01.xml List Template Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Image: Weight of the second | Select a Document Lib | rary | Select a document | 7 |
| DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenten LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib ReportDocumentS Shared Documents Site Assets | DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenten LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | Document Library | <u> </u> | Name | |
| DotNetProxyLib ErrorTest Form Templates Instructie Documenten LeaveRequestLib List Template Gallery Master Page Galery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | DotNetProxyLib ErrorTest Form Templates Instructie Documenten LeaveRequest.ib List Template Gallery Master Page Galery ProcessTemplate ReportDocumentLib ReportDocuments Site Assets | DeleteDocumentTest | | Form1.xml | |
| ErrorTest Form Templates Instructe Documenten LeaveRequestLib List Template Gallery Master Page Galery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | ErrorTest Form Templates Instructie Documenten LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | DotNetProxyLib | | 2011-12-27T12_30_56.xml | |
| Form Templates Instructie Documenten LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib ReportDocuments Shared Documents Site Assets | Form Templates Instructie Documenten LeaveRequestLib 2011-12-27T12_45_01.xml List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib ReportDocumentLib K Shared Documents K Site Assets K Image: Cancel K | ErrorTest | | 2011-12-27T12_43_40.xml | |
| LeaveRequest.ib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | Form Templates | E | 2011-12-27T12_45_01.xml | |
| List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets \checkmark III \checkmark \checkmark \square \land \square \square \land \square \land \square \square \land \square \land \square \square \square \land \square \square \square \square \land \square | LeaveRequestLib | | | |
| Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | List Template Gallery | | | |
| ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | Master Page Gallery | | | |
| ReportDocumentLID Reporting Templates Shared Documents Site Assets | ReportDocumentLib Reporting Templates Shared Documents Site Assets | ProcessTemplate | | | |
| Shared Documents Site Assets | Shared Documents Site Assets | ReportDocumentLib | | | |
| Site Assets | Site Assets | Shared Documents | | | 💛 ОК |
| | Cancel | Site Assets | - | | |
| | | < III | • | • III • | Cancel |

Prerequisites

• Set up an AgilePoint process repository in SharePoint.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileShape, and drop it on the process model.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. On the Configure Attachments field, click the Ellipses button.
- 5. On the **Configure Attachments** window, click **Add**.

Field Definitions

| Field Name | Definition |
|----------------------|--|
| SharePoint Site URL | Definition: The URL of the SharePoint site where your file resides. |
| | Allowed Values: A valid SharePoint site URL. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |
| | Example: • http://[machine name]:[port]/sites/[site name] • \$\{DocUrl\} |
| Get Document Library | <u>Function:</u> Populates the dialog box with data from the specified SharePoint Document Library. |
| Domain | Definition: The authentication domain. This does not apply to Forms-Based Authentication. |
| User Name | Definition: The user name you want to associate with the action. <u>Allowed Values:</u> A user name, not including the domain. <u>Default Value:</u> None <u>Custom Attributes:</u> No |
| Password | Definition: The password for the authentication account. |

| Field Name | Definition |
|--------------------------------|--|
| | Allowed Values: |
| | A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Windows Authentication | Definition: |
| | Specifies whether to use Windows authentication. |
| | Allowed Values: |
| | • Selected - The connection uses Windows authentication. |
| | • Deselected - The connection uses Forms authentication. |
| | Default Value: |
| | Selected |
| Use Forms Based Authentication | Definition: |
| | Specifies whether to use Forms authentication. |
| | Allowed Values: |
| | • Selected - The connection uses Forms-Based Authentication. |
| | Deselected - The connection uses another specified type of authentication. |
| | It is possible to use Office 365 and Forms authentication together. |
| | Default Value: |
| | Deselected |
| Use Office 365 | Definition: |
| | Specifies whether to use claims authentication for Office 365. |
| | Allowed Values: |
| | Selected - Forms authentication for Office 365 is enabled. |
| | • Deselected -Forms authentication for Office 365 is disabled. |

| Field Name | Definition |
|------------------|---|
| | It is possible to use Office 365 and Forms authentication together. |
| | Default Value: |
| | Deselected |
| Document Library | <u>Function:</u> Displays a list of document libraries on the selected SharePoint site. Select a document library to display the list of stored documents. |
| Name | <u>Function:</u> Displays a list of documents in the selected document library. Select a document to add it as an attachment. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Yammer Credentials Window

Specifies the unique identifiers for the Yammer application.

| 2 | Yammer Credentials | x |
|-----------------------------|--------------------|---|
| Y < Yammer Credentia | ls | |
| Select Global AppSettings | Кеу | |
| Application Name : D | ashBoard 🗸 | |
| Configuration Key : A | gilepoint 🗸 | |
| Network Name : Ag | ilePoint, Inc | |
| | Second Cancel | |

Prerequisites

• You must set up an Enterprise Social Token for the Yammer application.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Yammer** stencil.
- 3. On the Yammer stencil, drag the following AgileShape, and drop it on the process template.
 - Post Message
 - Reply Message
 - Post Attachment
 - Invite User
 - Create User
 - Update User
 - Delete User
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Credential field**, click the **Ellipses** button.
- 6. On the **Connecting to Server** window, logon as a registered user to connect to the AgilePoint Server.

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. |
| | <u>Default Value:</u> None |
| Configuration Key | Definition: Specifies the unique authentication key for your application. This key is associated with an your administrator user account. This key can represent any identifying value for your application. Allowed Values: |

| Field Name | Definition |
|------------|-------------------------|
| | An alphanumeric string. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Attaching Files to Activities at Runtime

You an attach one or more files from a process repository to an activity at runtime, so that if a participant or administrator clicks the activity in the Process Viewer, The file title is displayed with a hyperlink to the file.

To attach a file to an activity, do the following.

Prerequisites

• Set up an AgilePoint process repository in SharePoint.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileShape, and drop it on the process model.
- 3. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 4. On the Configure Attachments field, click the Ellipses button.

Instructions

- 1. On the Configure Attachments Window, click Add.
- 2. On the Get SharePoint Document Library Window, enter the SharePoint Server URL for the SharePoint site where your file attachment resides.
- 3. Modify the authentication information as required.
- 4. Click Get Document Libraries.
- 5. In the **Document Library** list, select the library where your file attachment resides.
- 6. In the Select a document list, select your file.

Troubleshooting

The following topics provide troubleshooting information for this AgileShape.

Error Using CreateWorkItem from AgilePart

Symptoms

Calling CreateWorkItem with the following parameters inside an AgilePart causes the error, "Object reference not set to an instance of an object."

```
api.CreateWorkItem(w.ActivityInstID, "Process Step", "Administrator",
    new WFTimeDuration(1, WFTimeUnit.DAY, false),
    string.Empty);
```

Cause

CreateWorkItem API must be called from a manual activity.

Resolution

CreateWorkItem is an API to create a new work item from an existing manual activity. There is a similar API called CreateLinkedWorkitem which is used to create a new work item that links the new item with the existing work item. Both of these API can be used from an AgileWork. The activity instance ID in CreatWorkItem must be a manual activity instance ID. api.CreateWorkItem(manualActivityInstanceID, ...)

In other words, they can not be used in an AgilePart or AgileStub. This is why the error occurs.

Generic BPM

This section describes the AgileShapes in the Generic BPM stencil.

AgilePart Shape

AgilePoint Envision provides the AgilePart and AgileWork AgileShapes, which enables you to associate your own custom AgileParts or AgileWorks (which you build in AgilePoint Developer) with a common, pre-built AgileShape in Envision. This allows you to use the .NET code for a custom AgilePart or AgileWork without creating a custom Visio shape. This is a shortcut that is often used to test custom AgileParts or AgileWorks. Usually in a production environment, organizations will take the extra step to create a unique AgileShape to associate with the custom AgilePart or AgileWork. These AgileShapes include all of the core properties of AgileParts and AgileWorks. They can also include additional custom properties.



Prerequisites

- Create a custom AgilePart using the AgilePart project template in AgilePoint Developer.
- Register the custom AgilePart in Envision.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the AgilePart AgileShape, and drop it on the process template.
- 4. On the Set Context Properties Window AgilePart, select a custom AgilePart to associate with this instance of the AgileShape.
- 5. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

AgileWork Shape

AgilePoint Envision provides the AgilePart and AgileWork AgileShapes, which enables you to associate your own custom AgileParts or AgileWorks (which you build in AgilePoint Developer) with a common, pre-built AgileShape in Envision. This allows you to use the .NET code for a custom AgilePart or AgileWork without creating a custom Visio shape. This is a shortcut that is often used to test custom AgileParts or AgileWorks. Usually in a production environment, organizations will take the extra step to create a unique AgileShape to associate with the custom AgilePart or AgileWork. These AgileShapes include all of the core properties of AgileParts and AgileWorks. They can also include additional custom properties.



Prerequisites

- Create a custom AgileWork using the AgileWork project template in AgilePoint Developer.
- Register the custom AgileWork in Envision.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the AgileWork AgileShape, and drop it on the process template.
- 4. On the Set Context Properties Window AgileWork, select a custom AgileWork to associate with this instance of the AgileShape.
- 5. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

And

An AgilePart that converges multiple process branches into a single branch. You can associate multiple activities using the AgileShape. You can specify whether the successful completion of all incoming activities is required to activate the AgileShape, or activities that are bypassed by the process flow are ignored.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the **Generic BPM** stencil, drag the **And** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|--|
| Email | Definition: The name of an email template used to generate the email notification at runtime. |
| | Allowed Values: |
| | • An existing email template name - Applies the selected, predefined template to the email. |
| | Add Mail Template - Opens the Email Template Wizard, where you can add a new email template. |
| | • None - Specifies that no email is sent. |
| | Default Value: |
| | None |
| Dynamic | <u>Definition:</u> Specifies which direct predecessor AgileShapes to wait for before entering the AgileShape at runtime. <u>Allowed Values:</u> True - Specifies that the AgileShape is entered only after all of the AgileShape's direct predecessors are exited that are not bypassed because of the process's logic. If any of the direct predecessors are bypassed, they are ignored by the WaitAllIncoming property. This prevents the process from becoming delayed indefinitely by an AgileShape that cannot be entered. |

| Field Name | Definition |
|------------|---|
| | This setting is the logically the same as setting the Wait All Incoming property for an AgileShape to True (Dynamic). |
| | False - Specifies that the AgileShape is entered only after all of the AgileShape's direct predecessors are exited. |
| | Note: If any of the direct predecessors are un-enterable, this AgileShape will never be entered, and the process instance may be permanently delayed at this AgileShape. |
| | This setting is the logically the same as having an And AgileShape with Dynamic set to True (Static). |
| | Default Value: |
| | True |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Tasks for This AgileShape

Converging Branches of a Process Flow

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Converging Branches of a Process Flow

The And AgileShape enables you to converge all incoming activities to the AgileShape, or to exclude the activities that are bypassed by the process flow. This example shows a scenario where the AgileShape waits for all incoming activities to complete the processing.

Instructional Goals

• Demonstrate how to moderate a process flow using the And AgileShape or the Wait All Incoming property.

Example Process: Respond to Utility Customer Power Outage Report



Problem Statement

Fix a power outage for a utility company consumer.

Business Requirements

- The process is initiated when a utility customer calls in to the customer service department at a utility company to complain of a power outage.
- Fixing the power outage can occur on 2 simultaneous paths:
 - Manual path A technician is called to fix the power outage.
 - **Automated path** A web service is called to check an external monitoring system, which reports whether the power in the area of complaint is live.
- The utility company wants to set the And AgileShape so that the process flow proceeds only when both the automated path and the human path have completed.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the And AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Instructions

1. In the **Dynamic** list, click **False**.

In this example, the And AgileShape waits to move forward until both theSite Visit Complete email notification is complete and Power Condition Check Web Service responds Yes.

Alternately, you could not have an And AgileShape at all and achieve the same effect. In this approach, set Wait All Incoming to True (Static) on the Power On Confirmation Email AgileShape.

Email

An AgilePart that sends an email with the content, subject, recipients, and other details that you specify.

For more information, see Messages and Notifications.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Email AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgilePart

| Field Name | Definition |
|------------|--|
| Email | <u>Definition:</u> The name of an email template used to generate the email notification at runtime. <u>Allowed Values:</u> An existing email template name - Applies the selected, predefined template to the email. Add Mail Template - Opens the Email Template Wizard, where you can add a new email template. None - Specifies that no email is sent. <u>Default Value:</u> None |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Manual

An AgileWork that enables a human resource to participate in an AgilePoint process. The Manual AgileShape is a basic instance of an AgileWork - Common Setup.

You can set up the AgileShape to specify the activity to be performed by the participants. The AgileShape needs to be associated with an input form, such as web form or InfoPath form, that is displayed at runtime to provide the user interface. You can use the Manual AgileShape to perform human activities such as placing an order or approving a request.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Manual AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Manual With Timeout

An AgileWork that enables you to impose a time constraint on a manual activity. The AgileShape is similar to the Manual AgileShape, but with an additional feature that allows the process to move to another activity if the manual activity is not completed within a specified time.

This AgileShape is often used for time-based escalations. For example, if a Tier 1 Customer Support representative does not answer a support query within a specified time, the query is escalated to Tier 2 Customer Support.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the **Generic BPM** stencil, drag the **Manual With Timeout** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileWork

| Field Name | Definition |
|------------------------|-------------|
| Activity Timeout Email | Definition: |

| Field Name | Definition |
|------------|--|
| | The name of an email template used to generate an email notification when the AgileShape becomes overdue at runtime. |
| | Allowed Values: |
| | An existing email template name - Applies the selected, predefined template to the email. |
| | Add Mail Template - Opens the Email Template Wizard, where you can add a new email template. |
| | • None - Specifies that no email is sent. |
| | Default Value: |
| | None |
| | Property Group: |
| | Email Notification |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Tasks for This AgileShape

Setting Time Limits using Manual with Timeout

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Setting Time Limits using Manual with Timeout

This example demonstrates a process escalation using a timeout condition defined in the Manual with Timeout AgileShape. Once the timer expires on the Manual with Timeout AgileShape, the process moves to another specified AgileShape.

Instructional Goals

• Demonstrate how the Manual With Timeout AgileShape affects a process flow.

Example Process: Respond to a Budget Request



Problem Statement

Submit and approve a budget request.

Business Requirements

- The process is initiated when an employee submits a budget request form.
- The budget request must be approved within 2 business days.
- The request goes first to CFO for approval.
- If the CFO does not respond within the 2 day limit, the request is routed to the Manager for approval.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the **Generic BPM** stencil, drag the **Manual With Timeout** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Instructions

1. In the **Time Span** property, using the following options, specify the time limit for the CFO to complete the request, 2 business days:

| Field Name | Value |
|---------------|-------|
| Business Time | Yes |
| Length | 2 |
| Time Unit | Day |

- 2. Connect the CFO Approval AgileShape to the following activities:
 - CFO Approval Condition: Activated when the AgileShape completes the processing within 2 days.
 - Manger Approval: Activated when the AgileShape doesn't complete the processing within the 2 days.

When the CFO Approval AgileShape becomes overdue after 2 business days, the process flow is routed to the Manager Approval AgileShape.

Multiple Condition

An AgilePart that specifies a rule for routing a process based on the evaluation of one or more input values. You can create simple rules based on logical operators (>, <, =, !, and so on), or complex logical expressions.

| IF | × | ٦ |
|----|------|----|
| × | Elso | ٦\ |
| | × | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Multiple Condition AgileShape, and drop it on the process template.
- 4. On the New Condition Activity Window Multiple Condition AgileShape, define your logical rules.
- 5. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------------|--|
| Property Binding | Opens the Following Window: New Condition Activity Window - Multiple Condition AgileShape Purpose of this Window: Associates a set of logical rules with the Multiple Condition AgileShape. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Tasks for This AgileShape

- Evaluating a Rule with Multiple Conditions
- Using the Multiple Condition AgileShape to Check if a Value is Null

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

New Condition Activity Window - Multiple Condition AgileShape

Associates a set of logical rules with the Multiple Condition AgileShape. You can specify a list of conditions either using a single expression for each condition or complex expressions using the AND or OR logical operators.

| New Condition Activity | y X |
|------------------------|--|
| New Cond | ition Activity |
| Name: | Full_Name |
| Data Binding: \$ | /pd:Data/pd:New_Hire_Information_SubForm/pd:New_Hire_Infor |
| Description | Check FullName is Null |
| Туре | String |
| | Advanced Mode V OK X Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Multiple Condition AgileShape, and drop it on the process template.

Field Definitions

| Field Name | Definition |
|--------------|---|
| Name | Definition: The display name for the AgileShape. <u>Allowed Values:</u> A single line of text. <u>Default Value:</u> None <u>Custom Attributes:</u> No |
| Data Binding | Definition: |

| Field Name | Definition |
|-------------|---|
| | Specifies a data field (such as a schema element or custom attribute) used to evaluate the condition. For more information, see Data Binding. Note: On the Participants window, this field is not available for Generic process models. Allowed Values: A valid data binding expression. This could be a custom attribute name or an xpath to a schema element. Default Value: None Custom Attributes: Yes |
| Description | Definition: A free text description of the condition. <u>Allowed Values:</u> Multiple lines of text. <u>Default Value:</u> None <u>Custom Attributes:</u> No |
| Туре | Definition: The data type for the data binding expression. Allowed Values: • String • Integer • DateTime • Double • Short • Float • Decimal Default Value: String Custom Attributes: |

| Field Name | Definition |
|---------------|---|
| | No |
| Advanced Mode | Opens the Following Window: Define Conditions Window Purpose of this Window: Allows you to add, edit, and manage conditions. You can specify a list of conditions using a complex expressions for each condition. |
| ОК | <u>Function:</u> Completes the task. Opens the Condition Window, if you have specified a data binding expression in the New Condition Activity window. This allows you to define multiple conditions with single expression per condition. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Define Conditions Window

Allows you to add, edit, and manage conditions. You can specify a list of conditions using a complex expressions for each condition. You can define expressions for complex branching conditions. Using the Advanced option, you can manually define multiple conditions with complex expressions.
| Define Conditions | X |
|---|-----------|
| Conditions | |
| Description | |
| Checks for Null Condition | New New |
| Conditions | Edit |
| ⊡ · IF((@"\${/pd:Data/pd:New_Hire_Information_SubForm/pd:New_Hire_Information/p | Remove |
| | Advanced |
| | Move Up |
| | Move Down |
| 4 | 🔀 Close |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Multiple Condition AgileShape, and drop it on the process template.
- 4. On the New Condition Activity Window Multiple Condition AgileShape, define your logical rules.
- 5. To add conditions with complex expressions, on the **New Condition Activity** window, click **Advanced Mode**.

| Field Name | Definition | |
|-------------|--|--|
| Description | Definition: A free text description of the condition. | |
| | Allowed Values: | |

| Field Name | Definition | |
|------------|--|--|
| | Multiple lines of text. | |
| | Default Value: | |
| | None | |
| | Custom Attributes: | |
| | No | |
| Conditions | Definition: | |
| | Displays a list of conditions (branching conditions) with all the predetermined expressions. | |
| | Allowed Values: | |
| | Automatically populates the expressions created using the New button. | |
| | You can specify a name for each condition. The name is displayed on the process model as Rule= <name>. For example, Rule=AmoutApproved.</name> | |
| | Default Value: | |
| | None | |
| | Custom Attributes: | |
| | No | |
| New | Opens the Following Window: | |
| | Define Expressions Window | |
| | Purpose of this Window: | |
| | Allows you to add, edit, and validate logical rules. You can nest statements with brackets to create complex logical expressions. | |
| Edit | Opens the Following Window: | |
| | Define Expressions Window with the expression values populated that have been predetermined by a user. | |
| | You need to select an expression from the Conditions box that automatically populates the values in the Define Expression window. | |
| | Purpose of this Window: | |
| | Modifies the predetermined expression values. | |

| Field Name | Definition |
|------------|---|
| | The Edit button is unavailable if you have not specified any expression values using the New button. |
| Remove | <u>Function:</u> Removes the selected condition from the Conditions list. |
| Advanced | <u>Function:</u> Opens a window with the Visual Studio editor where you can type an expression. The editor has an IntelliSense support. You can use custom attributes. You can also validate the expressions written by you. |
| Move Up | <u>Function:</u> Moves the selected condition one step ahead in the list. |
| Move Down | <u>Function:</u> Moves the selected condition one step down in the list. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Define Expressions Window

Allows you to add, edit, and validate logical rules. You can nest statements with brackets to create complex logical expressions.

AgileShapes

| Define | Expressions | ; | | | | | x |
|--------|--------------|--|-----------------------|--------------------|---------|-------|-----|
| | Speci | ify advance condition | | | | | |
| Notic | ce: Custom a | tribute name does not support any of t | he following characte | ers `~!@#\$%^*(),< | >.?∧ | | |
| | Bracket | Name | Operator | Value | Bracket | Logic | |
| 1 | (🖵 | \${/pd:Data/pd:PC_Setup_Info_ | 💌 Nul | I | •)• | 0 6 | |
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| | | | ~ | Validate | ؇ ОК | 🔀 Can | cel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the **Generic BPM** stencil, drag the **Multiple Condition** AgileShape, and drop it on the process template.
- 4. On the New Condition Activity Window Multiple Condition AgileShape, define your logical rules.
- 5. To add conditions with complex expressions, on the **New Condition Activity** window, click **Advanced Mode**.
- 6. To define complex expressions for each condition, on the **Define Conditions** window, click **New**.

| Field Name | Definition | |
|------------|--|--|
| Bracket | Definition: | |
| | Opening and closing brackets are used to create complex expressions. | |

| Field Name | Definition |
|------------|---|
| | Allowed Values: • { } • {{ }} • {{{ }} • {{{ }}} • {{{ }}}} • {{{ }}} • {{{ }}} • {{{ }}} • {{{ }}} • {{{ }}}} • {{{ }}} • {{{ }}} • {{{ }}}} • {{{ }}} • {{ }}} • {{{ }}} • {{ }}} • {{{ }}} • {{ }}} • {{ }}} • {{ }} • {{ }}} • {{ }} • {{ }} |
| Name | Definition: Specifies the name of the data variable. Allowed Values: • A text string that can contain spaces. • A list of predetermined custom attributes. Default Value: None Custom Attributes: Yes |
| Operator | Definition: Displays a list of logical operators for the data types that can be used to define a expression. Allowed Values: Data Type Expression Operators String , ==, StartsWith, EndsWith, Contains, !=, Does Not Contain Data, Contains Data Bool == DateTime , ==, >, >=, <, <=, != |
| | Number , ==, >, >=, <, <=, != |

| Field Name | Definition | | |
|------------|---|--|--|
| | Default Value: | | |
| | None | | |
| Value | Definition: | | |
| | The value for the data variable. | | |
| | Allowed Values: | | |
| | A number or a text string that can contain spaces. | | |
| | • A list of predetermined custom attributes. | | |
| | Default Value: | | |
| | None | | |
| | Custom Attributes: | | |
| | Yes | | |
| Logic | Function: | | |
| | • Plus button - Specifies another expression that can be joined to previous expression using the logical AND or OR operator. | | |
| | • And - Specifies the logical AND operator. | | |
| | • Or - Specifies the logical OR operator. | | |
| | • Minus button - Removes the expression. | | |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Condition Window

Enables you to add, edit, and manage conditions a list of conditional statements. You can specify a list of conditions using a single expressions for each condition.

| Condition | × |
|-----------------|-----------|
| | |
| Expressions | |
| FullName = Null | New |
| Lise | Edit |
| | Remove |
| | Move Up |
| | Move Down |
| | 🔀 Close |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the **Generic BPM** stencil, drag the **Multiple Condition** AgileShape, and drop it on the process template.
- 4. On the New Condition Activity Window Multiple Condition AgileShape, define your logical rules.
- 5. To add conditions with single expressions, on the New Condition Activity window, click OK.

| Field Name | Definition |
|------------|---|
| Expression | Definition: Displays the list of user-defined conditions. An Else statement is always included to handle all other cases. Allowed Values: The list of user-defined rules. Default Value: Else |

| Field Name | Definition |
|------------|---|
| Edit | <u>Function:</u> Opens the Expression Window, where you can edit the selected expression. |
| Remove | <u>Function:</u> Removes the selected condition from the Expressions list. |
| Move Up | <u>Function:</u> Moves the selected condition one step ahead in the list. |
| Move Down | Function: Moves the selected condition one step down in the list. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Expression Window

Enables you to add and edit logical rules in the form an expression.

You can define only one expression for each condition. If you want to give complex expressions for each condition, see Define Conditions Window.

| Expression | | × |
|------------|-----------|-------------|
| | | |
| Name: | Operator: | Value: |
| First_Name | = • | Null 👻 |
| | | |
| | ✓ | OK 🔀 Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Multiple Condition AgileShape, and drop it on the process template.
- 4. On the New Condition Activity Window Multiple Condition AgileShape, define your logical rules.
- 5. To add conditions with single expressions, on the **New Condition Activity** window, click **OK**.
- 6. To define an expressions for each condition, on the **Condition** window, click **New**.

| Field Name | inition | |
|------------|---|-------------------------------------|
| Name | inition: specifies the name of the data var wed Values: text string that can contain spac <u>ault Value:</u> lone <u>stom Attributes:</u> lo | riable. es. |
| Operator | r <u>Definition:</u> Displays a list of logical operators for th that can be used to define a expression <u>Allowed Values:</u> | |
| | Data Type Expres | sion Operators |
| | String =, =(Igr StartsV Contair | noreCase), Vith, EndsWith, ns |
| | DateTime =, Late Than, ! | r Than, Earlier = |
| | nteger =, >, >= | =, <, <=, != |
| | Double =, >, >= | =, <, <=, != |
| | Short =, >, >= | =, <, <=, != |

| Field Name | De | efinition | |
|------------|------------|--|-----------------------------------|
| | | Data Type | Expression Operators |
| | | Float | =, >, >=, <, <=, != |
| | | Decimal | =, >, >=, <, <=, != |
| | <u>D</u> e | <u>efault Value:</u> None | |
| Value | <u>De</u> | <u>efinition:</u> The value for the data var <u>lowed Values:</u> A number or a text string t <u>efault Value:</u> None <u>ustom Attributes:</u> No | iable. hat can contain spaces. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Evaluating a Rule with Multiple Conditions

This example shows a scenario where a process is routed based on the value of a logical rule with multiple conditions using the Multiple Condition AgileShape.

Instructional Goals

• Demonstrate how to route a process based on a logical rule with multiple conditions using the Multiple Condition AgileShape.



Example Process: Budget Request and Fulfillment

Problem Statement

Submit and approve a budget request.

Business Requirements

- The process is initiated when an employee submits a budget request form.
- The request is routed for approval and fulfillment based on one of 3 conditions:
 - If the request is greater than or equal to \$1000, the request goes to the CFO for approval.
 - If the request is greater or equal to \$100 (but less than \$1000), the request is routed to the Manager for approval.
 - If the request is less than \$100, it does not require approval, and goes straight to accounting for fulfillment.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Multiple Condition AgileShape, and drop it on the process template.

Instructions

- 1. On the New Condition Activity Window Multiple Condition AgileShape, complete the fields as required to bind the Multiple Condition AgileShape to the **Budget Amount** field in the Submit Request form.
- 2. Click **OK**.
- 3. On the Condition Window, complete the fields as required to set up the following conditions:
 - BudgetAmount >= 1000 This condition is routed to CFO Approval.
 - BudgetAmount >= 100 This condition is routed to Manager Approval.

• Else - This condition is required. It handles all values not included in the other conditions. In this case, that includes any amount under \$100. These cases are routed directly to Accounting for fulfillment.

Using the Multiple Condition AgileShape to Check if a Value is Null

To use the Multiple Condition AgileShape to check if a value is null, do the following.

Prerequisites

• The Multiple Condition AgileShape must use simple mode.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Multiple Condition AgileShape, and drop it on the process template.
- 4. On the New Condition Activity Window Multiple Condition AgileShape, define your logical rules.
- 5. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Instructions

- 1. On the **Condition** window, click **New**.
- 2. On the Expression window, in the Operator list, click the appropriate operator for example, = or !=
- 3. In the **Value** field, enter the following value exactly:

<NULL>

Example

If you want to determine whether an employee name is not specified by a user while providing the employee related details (using a manual activity). Using the **Multiple Condition** AgilePart, specify the Data Binding property (such as empName of String data type) and then set the value as <NULL> to set up the following conditions:

- **empName = <NULL>** When the employee name is not specified, this condition is routed to the associated activity (may go back in the process to prompt for entering the employee name).
- Else When the employee name is specified, this condition is routed to the associated activity (moves forward in the process).

More Information

• Using the Multiple Condition AgileShape to Check if a Value is Empty

Using the Multiple Condition AgileShape to Check if a Value is Empty

To use the Multiple Condition AgileShape to check if a value is empty, do the following.

Prerequisites

• The Multiple Condition AgileShape must use simple mode.

Navigation

1. In AgilePoint Envision, open a process template.

- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Multiple Condition AgileShape, and drop it on the process template.
- 4. On the New Condition Activity Window Multiple Condition AgileShape, define your logical rules.
- 5. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

- 1. Define a custom attribute named Empty for use throughout the process template:
 - a. In AgilePoint Envision, open a process template, and select the process template to display its properties in the right pane.
 - b. Below the properties box, click the Manage Process Attributes link.
 - c. On the Custom Attributes Editor window, click Add.
 - d. In the Attribute Name column, type Empty.
 - e. In the Attribute Type column, select String.
 - f. Click OK to close the Custom Attributes Editor window.
- 2. Select the custom attribute named Empty (which you want to use):
 - a. Add an Update Custom Attributes AgileShape to your process model.
 - b. In the Activity Properties panel, click Advanced (a property group).
 - c. On the **Configuration** field, click the **Ellipses** button.

The Create or Update Custom Attributes window appears.

- d. Click Add, and then select the newly added row to make the Schema button available for use.
- e. Then, click Schema.

The Select XPath from Attributes window appears.

- a. Click the Process Attributes tab.
- b. Select the Empty attribute, and then click OK to close the Select XPath from Attributes window.
- f. On the **Create or Update Custom Attributes** window, in the **Expression** column for the **Empty** attribute, enter "".
- g. Click OK to close the Create or Update Custom Attributes window.
- 3. Add a Multiple Condition AgileShape to your process model. Do the following:
 - a. On the New Condition Activity window, click Advanced Mode.
 - The Define Conditions window appears.
 - b. Click New. The Define Expressions window appears.
 - a. Enter a **Name** and **Operator** for the condition. For example, empName and == (String comparison operator).
 - b. In the Value list, select <XML Schema>.
 - c. Click OK to close the Define Expressions window.
 - c. On the **Define Conditions** window, in the **Description** box, type a description for the condition, and then click **Close**.

This enables you to use the value of \${Empty} as a null value for the purpose of string comparison.

More Information

• Using the Multiple Condition AgileShape to Check if a Value is Null

Troubleshooting

The following topics provide troubleshooting information for this AgileShape.

Why Does an Error Occur When I Try to Add a Condition to a Multiple Condition AgileShape?

Symptoms

When I add a condition to a Multiple Condition AgileShape, the following error occurs: "System.Runtime.InteropServices.COMException (0x86DB0904): Object name not found."

Cause

This occurs rarely, when the Document stencil drops the Contained Rule condition from its shapes within the context of a process model. The cause is not known.

Resolution

To fix this issue:

- 1. In Visio, open your process model where the issue is occurring.
- 2. To open Document stencil, click More shapes > Show Document Stencil.
- 3. Create a new Generic process model.
- In the new process model, click More shapes > Show Document Stencil to open the Document stencil in that file.
- 5. Click the **Restore** button, so that both process models appear side-by-side in the Visio window.
- 6. Drag the **Contained Rule** shape from the **Document** stencil in the new process model to the one **Document** stencil to your process model.
- 7. Save your process model.
- 8. In your process model, add a new condition to a **Multiple Condition** AgileShape. Verify that an error does not occur.

Or

An AgilePart that merges multiple process paths into a single path. You can configure whether the successful completion of one of the incoming activities cancels the activities in other branches of the process, or whether some or all activities are allowed to proceed.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Or AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgilePart

| Field Name | Definition |
|---------------|---|
| Email | Definition: The name of an email template used to generate the email notification at runtime. |
| | Allowed Values: |
| | An existing email template name - Applies the selected, predefined template to the email. |
| | Add Mail Template - Opens the Email Template Wizard, where you can add a new email template. |
| | • None - Specifies that no email is sent. |
| | Default Value: |
| | None |
| Configuration | Opens the Following Window: Select Exclusive Predecessor Activities Window |
| | Purpose of this Window: |
| | Specifies the process activities to cancel once one of the process activities enters the Or AgileShape. |
| Exclusive | Definition: |
| | Determines whether the Select Exclusive Predecessor Activities window is available. |
| | Allowed Values: |
| | True - Specifies that the Select Exclusive Predecessor Activities window is active, and you have the option to cancel the process activities you specify. |
| | However, if this property is set to True, and you do not configure the Select Exclusive Predecessor Activities window, the AgileShape |

| Field Name | Definition |
|------------|---|
| | behaves the same as if this property were set to False. |
| | • False - Specifies that the Select Exclusive Predecessor Activities window is inactive, and the AgileShape will continue to handle all the incoming process activities. |
| | Default Value: |
| | True |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Tasks for This AgileShape

• Canceling Activities Using the Or AgileShape

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Select Exclusive Predecessor Activities Window

Specifies the process activities to cancel once one of the process activities enters the Or AgileShape.

| Select Exclusive Predecesor Activities |
|---|
| Select Exclusive Predecessor Activities |
| Nearest Incoming Activities(Default): |
| Background Check (AgileForm.89) PIT Team (AgileForm.9) |
| Other Predecessor Activities : |
| Hiring Manager (AgileForm.3) |
| Offer Accepted (AgileForm.7) |
| Cancel Manual Tasks |
| Stop System Tasks K Cancel Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Or AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In the **Exclusive** list, click **True**.
- 6. On the **Configuration** field, click the **Ellipses** button.

| Field Name | Definition |
|---------------------------------------|---|
| Nearest Incoming Activities (Default) | Definition: |
| | Displays the names of the activities that immediately precede this AgileShape. |
| | These activities will be canceled under the following conditions: |
| | The activity is in the active status. |
| | Another Nearest Incoming Activity enters the Or AgileShape. |

| Field Name | Definition |
|------------------------------|---|
| | Cancel Manual Activities, Stop System Activities, or both are selected. |
| | Allowed Values: |
| | Read only. |
| Other Predecessor Activities | Definition: |
| | Displays the names of the process activities that precede the Or AgileShape. |
| | Allowed Values: |
| | Selected - Specifies that the predecessor activity will be canceled. |
| | • Deselected - Specifies that predecessor activity will continue to process. |
| | Default Value: |
| | Deselected |
| Cancel Manual Tasks | Definition: |
| | Cancels the manual activities in the Nearest Incoming Activities list, under the following conditions: |
| | • The activity is in the active status. |
| | Another Nearest Incoming Activity enters the Or AgileShape. |
| | Allowed Values: |
| | Selected - Specifies that the incomplete manual Nearest Incoming Activities will be canceled. |
| | Deselected - Specifies that manual Nearest Incoming Activities will continue to process. |
| | Default Value: |
| | Deselected |
| Stop System Tasks | Definition: |
| | Cancels the automated activities in the Nearest Incoming Activities list, under the following conditions: |
| | • The activity is in the active status. |
| | Another Nearest Incoming Activity enters the Or AgileShape. |
| | Allowed Values: |

| Field Name | Definition |
|------------|--|
| | Selected - Specifies that the incomplete automated Nearest Incoming Activities will be canceled. |
| | • Deselected - Specifies that automated Nearest Incoming Activities will continue to process. |
| | Default Value: |
| | Deselected |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Canceling Activities Using the Or AgileShape

The Or AgileShape enables you to allow all incoming activities to complete, or to exclude (and thus cancel) conflicting activities that are entering an Or AgileShape at the same time. This example shows a scenario where conflicting activities are canceled before they enter an Or AgileShape.

Instructional Goals

 Demonstrate how options on the Select Exclusive Predecessor Activities Window for the Or AgileShape affect a process flow.

Example Process: Respond to Utility Customer Power Outage Report



Problem Statement

Fix a power outage for a utility company consumer.

Business Requirements

- The process is initiated when a utility customer calls in to the customer service department at a utility company to complain of a power outage.
- Fixing the power outage can occur on 2 simultaneous paths:
 - Manual path A technician is called to fix the power outage.
 - Automated path A web service is called to check an external monitoring system, which reports whether the power in the area of complaint is live.
- The utility company wants to set the Or AgileShape so that if the automated path (Power Condition Check Web Service) detects that the power is on, any manual activities are canceled.

This way, human resources are not expended working to resolve an issue that does not need to be fixed.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Generic BPM** stencil.
- 3. On the Generic BPM stencil, drag the Or AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

- 1. In the **Configuration** field, click the **Ellipses** button to open the Select Exclusive Predecessor Activities Window
- 2. On the Select Exclusive Predecessor Activities window, select the following options:
 - Cancel Manual Tasks
 - Stop System Tasks

This stops all the activities in the **Nearest Incoming Activities** list if they are active at the time another process branch enters the Or AgileShape.

In this example, if Technician Non-Completion Report is in progress when Power Condition Check Web Service responds Yes, Technician Non-Completion Report is cancelled.

3. In the Other Predecessor Activities list, select On Site Technician Visit.

This ensures that On Site Technician Visit is effectively disabled in the process. If it is active when Power Condition Check Web Service responds Yes, it is canceled. If it has not yet been entered when Power Condition Check Web Service responds Yes, this branch of the process simply stops when it enters this AgileShape.

4. Click OK.

Procedure

An AgilePart that enables to perform server-side, AgilePoint system task. You can associate system-related, automated activities to the AgileShape that needs to be executed. For example, generating a report at the end

of a process, updating a database when a request is approved, and so on. The AgileShape supports application integration either synchronously or asynchronously, using C#, VB.NET, managed C++, COM, XML Web Service, Messaging queue, and others.



Good to Know

• The AgileShape can only be used within a process template that is associated with an AgileStub. If you want to use the AgileShape, you must create an AgileStub using AgilePoint Developer.

The AgilePart and WebService AgileShapes do not require the creation of an AgileStub, and can be used instead of the Procedure AgileShape.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the **Generic BPM** stencil, drag the **Procedure** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|--------------|--|
| Asynchronous | Definition: Determines whether the AgileShape exits immediately after invoking the associated .NET method or waits for the associated .NET method to finish executing before moving forward. |
| | Allowed Values: |
| | False - Specifies that the AgileShape invokes its associated .NET method synchronously. The AgileShape waits for the associated .NET method to finish executing before proceeding further in the process flow. |
| | • True - Specifies that the AgileShape invokes its associated .NET method asynchronously (in a separate thread). The AgileShape exits immediately once the associated .NET method is invoked. |
| | You can use this setting to initiate long-running procedures that do not affect the rest of the process. |

| Field Name | Definition |
|------------|----------------|
| | Default Value: |
| | False |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Procedure With Timeout

An AgilePart that enables to impose a time-constraint on the processing of a procedural activity. The AgileShape is similar to the Procedure AgileShape with an additional feature that allows to process another task when a procedural activity is not completed within the allotted time slot.

You can assign a time limit to the procedural activity to complete the task. After the specified period, another activity must be performed rather than waiting for the procedural activity to complete. You can use the AgileShape for time-based escalations.

Good to Know

• The AgileShape can only be used within a process template that is associated with an AgileStub. If you want to use the AgileShape, you must create an AgileStub using AgilePoint Developer.

The AgilePart and WebService AgileShapes do not require the creation of an AgileStub, and can be used instead of the Procedure AgileShape.



Navigation

AgilePoint BPMS v5.0 R2

1. In AgilePoint Envision, open a process template.

- 2. Navigate to the Generic BPM stencil.
- 3. On the **Generic BPM** stencil, drag the **Procedure With Timeout** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------------------|--|
| Asynchronous | Definition: Determines whether the AgileShape exits immediately after invoking the associated .NET method or waits for the associated .NET method to finish executing before moving forward. |
| | Allowed Values: |
| | False - Specifies that the AgileShape invokes its associated .NET method synchronously. The AgileShape waits for the associated .NET method to finish executing before proceeding further in the process flow. |
| | True - Specifies that the AgileShape invokes its associated .NET method asynchronously (in a separate thread). The AgileShape exits immediately once the associated .NET method is invoked. |
| | You can use this setting to initiate long-running procedures that do not affect the rest of the process. |
| | Default Value: |
| | False |
| Activity Timeout Email | Definition: |
| | The name of an email template used to generate an email notification when the AgileShape becomes overdue at runtime. |
| | Allowed Values: |
| | • An existing email template name - Applies the selected, predefined template to the email. |
| | Add Mail Template - Opens the Email Template Wizard, where you can add a new email template. |
| | • None - Specifies that no email is sent. |
| | Default Value: |
| | None |

| Field Name | Definition |
|------------|--------------------|
| | Property Group: |
| | Email Notification |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Single Condition

An AgilePart that specifies a process decision branch where the process follows one of two paths based on a single Boolean (true/false, yes/no) input value.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Single Condition AgileShape, and drop it on the process template.
- 4. On the New Condition Activity Window Single Condition AgileShape, define the data field whose value you want to evaluate.
- 5. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------------|---|
| Property Binding | Opens the Following Window: New Condition Activity Window - Single Condition AgileShape Purpose of this Window: Associates a Boolean condition with a data field, such as a custom attribute or schema element, for the purpose of routing a process based on the field value. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Tasks for This AgileShape

Evaluating a Single Boolean Condition

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

New Condition Activity Window - Single Condition AgileShape

Associates a Boolean condition with a data field, such as a custom attribute or schema element, for the purpose of routing a process based on the field value.

| New Condition Activit | y X |
|-----------------------|---|
| New Cond | lition Activity |
| Name: | Offer Accepted |
| Data Binding: \$ | /pd:Data/pd:Offer_Decision_SubForm/pd:Offer_Decision/pd:Offe |
| Description | Conditional check whether the offer has been accepted or not. |
| Туре | Boolean |
| | OK Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Single Condition AgileShape, and drop it on the process template.

| Field Name | Definition |
|--------------|---|
| Name | Definition: The display name for the AgileShape. <u>Allowed Values:</u> A single line of text. <u>Default Value:</u> None <u>Custom Attributes:</u> No |
| Data Binding | Definition: |

| Field Name | Definition |
|-------------|---|
| | Specifies a data field (such as a schema element or custom attribute) used to evaluate the condition. For more information, see Data Binding. |
| | Note: On the Participants window, this field is not available for Generic process models. |
| | Allowed Values: |
| | A valid data binding expression. This could be a custom attribute name or an xpath to a schema element. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Description | Definition: |
| | A free text description of the condition. |
| | Allowed Values: |
| | Multiple lines of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Туре | Definition: |
| | The data type for the data binding expression. |
| | Allowed Values: |
| | Boolean |
| | Default Value: |
| | Boolean |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Evaluating a Single Boolean Condition

This example shows a scenario where a process is routed based on the value of a single Boolean condition using the Single Condition AgileShape.

Instructional Goals

• Demonstrate how to route a process based on a Boolean condition using the Single Condition AgileShape.

Example Process: Simple Budget Request



Problem Statement

Submit and approve a budget request.

Business Requirements

- The process is initiated when an employee submits a budget request form.
- The request goes to the CFO for approval.
- If the CFO approves the request the process completes. If he denies the request, it goes back to the submitter.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Single Condition AgileShape, and drop it on the process template.

Instructions

1. On the New Condition Activity Window - Single Condition AgileShape, define the data field whose value you want to evaluate.

Troubleshooting

The following topics provide troubleshooting information for this AgileShape.

Yes and No Conditions Don't Appear on a Single Condition AgileShape

Symptoms

When I add a Single Condition AgilePart to a process model, the Yes and No conditions do not appear.

Cause

This occurs rarely, when the Document stencil drops the Yes and No conditions from its shapes within the context of a process model. The cause is not known.

Details

To fix this issue:

- 1. In Visio, open your process model where the issue is occurring.
- 2. To open **Document** stencil, click **File > Shapes > Open Document Stencil**.
- 3. Create a new Generic process model.
- In the new process model, click File > Shapes > Open Document Stencil to open the Document stencil in that file.
- 5. Click the **Restore** button, so that both process models appear side-by-side in the Visio window.
- 6. Drag the following shapes from the Document stencil in the new process model to the one Document stencil to your process model:
 - Yes (YesRule)
 - No (NoRule)
- 7. Save your process model.
- 8. In your process model, open the **Generic** stencil, and place a **Single Condition** AgilePart on the design surface. Verify the Yes and No conditions appear.

Start

An AgilePart that specifies the starting point of a process flow.



Good to Know

- A process template must have one and only one Start AgileShape.
- The AgileShape can never reenter in the process flow.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.

- 3. On the **Generic BPM** stencil, drag the **Start** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Tasks for This AgileShape

• Creating a Process Model

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a Process Model

To create a process model, do the following.

Instructions

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Start AgileShape, and drop it on the process template.
- 4. On the Generic BPM stencil, drag the Stop AgileShape, and drop it on the process template.
- 5. On the process template, between the **Start** and **Stop** AgileShapes, add the appropriate AgileShapes required to complete the process you want to create.
- 6. Connect the AgileShapes with the Visio connector tool, with arrows pointing in the direction you want the process to move from Start to Stop.
- 7. Configure your AgileShapes as required.



Stop

An AgilePart that specifies the end point of a process flow. When a process reaches this AgileShape, it stops.



Good to Know

• A process template must have one and only one Stop AgileShape.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Stop AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Tasks for This AgileShape

• Creating a Process Model

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a Process Model

To create a process model, do the following.

Instructions

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the Start AgileShape, and drop it on the process template.
- 4. On the **Generic BPM** stencil, drag the **Stop** AgileShape, and drop it on the process template.
- 5. On the process template, between the **Start** and **Stop** AgileShapes, add the appropriate AgileShapes required to complete the process you want to create.
- 6. Connect the AgileShapes with the Visio connector tool, with arrows pointing in the direction you want the process to move from Start to Stop.
- 7. Configure your AgileShapes as required.



SubProcess

An AgilePart that initiates a process as a child of the current process. You can use the child process to complete activities related to the parent process.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the **Generic BPM** stencil, drag the **SubProcess** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|--------------------|---|
| Initial Attributes | Opens the Following Window: Initial Attributes Configuration Window Purpose of this Window: Defines a set of the custom process attributes to pass to a sub process at runtime. |

| Field Name | Definition |
|-------------------|---|
| Sub Process | Opens the Following Window: Configure SubProcess Window - Process Template Tab - Specifies the process template for a sub process. Configure SubProcess Window - Naming Convention Tab - Specifies the format for the name of the sub process. |
| Wait For Complete | <u>Definition:</u> <u>Determines</u> whether the parent process waits for the sub process to complete before moving forward. <u>Allowed Values:</u> False - The AgileShape exits immediately once the sub process is initiated. <u>True</u> - The AgileShape waits for sub process to complete. <u>Default Value:</u> True <u>Custom Attributes:</u> No |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Tasks for This AgileShape

Using Parent and Child Processes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Initial Attributes Configuration Window

Defines a set of the custom process attributes to pass to a sub process at runtime. You can share the parent process's custom attributes with the sub process if the sub process uses the same data.

The sub process can have its own data isolated within the context of the sub process, or can share its data with the parent process. For example, a sub process can optionally access the data of the parent process, such as the reviewer name and review completion date.

| Initial Attributes | | |
|--|---|----------|
| Specify Initial Attributes | | |
| Name | Value | |
| UserName | <pre>\${/pd:myFields/pd:UserName}</pre> | |
| Add Remove Schema | | |
| 📝 This sub process will share custom attributes with parent process | | |
| If initial attributes is for sub process only, please consider this sub process has own custom attributes space | | |
| | 🔶 ок | 🔀 Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the **Generic BPM** stencil, drag the **SubProcess** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Initial Attributes** field, click the **Ellipses** button.

143

| Field Name | Definition |
|---|--|
| Name | Definition: The name of a custom attribute you want to associate with the sub process. <u>Allowed Values:</u> A text string with no spaces. <u>Default Value:</u> None |
| Value | Definition: The value in the child process to associate with the custom attribute in the parent process. Allowed Values: XML metadata defined for the sub process. Default Value: System.String - Indicates that AgilePoint system accepts the values as String data type only. In itself, this is not a valid value. Custom Attributes: Yes |
| This sub process will share custom attributes with parent process | Definition: Allows the sub process to share custom attributes with the parent process. Allowed Values: Selected - The sub process shares custom attributes with the parent process. Deselected - Only the sub process uses custom attributes. If you are using a parent and sub process that use different form types — for example, an AgileForms parent process with a SharePoint ListForm sub process — the processes cannot share custom attributes because the schemas are different. You must deselect this option, and map the custom attributes in this window. Default Value: |
| Field Name | Definition |
|------------|------------|
| | Selected |

- Data Binding
- Using Process Attributes

Configure SubProcess Window - Process Template Tab

Specifies the process template for a sub process.

| Configure Sub Process X |
|--|
| Specify the sub process template and name |
| Process Template Naming Convention |
| Sub Process Template |
| Template Name: Browse to select the sub process file |
| |
| Process Initiator Name |
| Default (Use parent process initiator name) |
| C Custom |
| |
| |
| |
| 🥪 OK 🔀 Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the **Generic BPM** stencil, drag the **SubProcess** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the SubProcess field, click the Ellipses button.

| Field Name | Definition |
|------------------------|---|
| Template Name | Definition: Specifies the name of the process template that is initiated as a sub process when the SubProcess AgileShape is activated at runtime. |
| | Allowed Values: The name of a process template that has been deployed to AgilePoint Server. |
| | If you have defined custom attributes, the schema link is available to configure the sub process name dynamically based on the associated metadata. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Process Initiator Name | Definition: Specifies name of the process that initiates the sub process. |
| | Allowed Values: |
| | • Default (Use parent process initiator name) - Determines that the parent process initiates the processing of the sub process. |
| | Custom - Specifies a process other than the parent process that initiates the activities of sub process. |
| | Enter the name of a process that has been deployed to the AgilePoint Server. If you have defined custom attributes, the Ellipses button is available to configure the process initiator name dynamically based on metadata. |
| | Default Value: |
| | Default (Use parent process initiator name) |
| | Custom Attributes: |
| | Yes |
| Naming Convention | Opens the Following Tab: |

| Field Name | Definition |
|------------|--|
| | Configure SubProcess Window - Naming Convention Tab |

- Data Binding
- Using Process Attributes

Configure SubProcess Window - Naming Convention Tab

Specifies the format for the name of the sub process. For example, the format can contain the name of the process template activated as sub process, session ID, and the activity name. The naming convention is used for management purposes in Enterprise Manager.

| Configure Sub Pro | cess | 23 |
|---|--|----|
| Specif | y the sub process template and name | |
| Process Template | Naming Convention | |
| Sub process name | ne | |
| Oefault | | |
| Name: | \${ProcessName}-\${Session}@\${ActivityName} | |
| Custom | | |
| Name: | | |
| If the sub process name already exists, append the name with: | | |
| | @\${GUID} | |
| | | |
| | 🥪 OK 🔀 Cance | I |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the **Generic BPM** stencil, drag the **SubProcess** AgileShape, and drop it on the process template.

- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **SubProcess** field, click the **Ellipses** button.

| Field Name | Definition |
|--|---|
| Default Name | Definition: Specifies the default format for the sub process name. The name is automatically generated by the AgilePoint system. Allowed Values: Read only. Default Value: \${Process Name}-\${Session}@\${Activity Name} Custom Attributes: |
| Custom Name | Yes Definition: Specifies the user defined format for the sub process name. Allowed Values: A user defined format. Default Value: None Custom Attributes: Yes |
| If the sub process name already exists, append the name with | <u>Definition:</u> Adds a GUID to a custom sub process name when the name already exists in the AgilePoint system. <u>Allowed Values:</u> <u>Selected</u> - Specifies that a GUID is added to the custom sub process name. <u>Deselected</u> - Specifies that a GUID is not added to the custom sub process name. <u>Default Value:</u> Selected <u>Custom Attributes:</u> |

| Field Name | Definition |
|------------------|---|
| | Yes |
| Process Template | Opens the Following Tab: Configure SubProcess Window - Process Template Tab |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Using Parent and Child Processes

This example shows how a sub process can be activated from a parent process using the SubProcess AgileShape. By using a sub process, departments can manage their parts of a process independently, and sub processes can grow and change without affecting the parent process.

Instructional Goals

• Demonstrate how to call a sub process from a parent process using the SubProcess AgileShape.

Example Parent Process: Execute a Software Change Request



Example Sub Process: QA Test the Change Request



Problem Statement

Fulfill a change request (CR) for a software product.

Business Requirements

- The process is initiated when someone submits a CR.
- Engineering implements the CR.
- Once the CR is implemented in the code, the Quality Assurance (QA) department tests it. The QA department has the following unique requirements:
 - QA for this product requires complex preparation, where test cases must be written and real-world system configurations and data must be set up prior to testing to ensure proper implementation of fixes and enhancements. This requirement carries a unique set of needs for resources and logistics.
 - The QA department is managed separately from Engineering, and follows its own internal processes. They want to maintain autonomous control over their processes.
 - There is an initiative in the company to improve the QA process in order to improve efficiency and product quality. Therefore, the QA review process is likely to change more frequently than the overall Change Request process.

To meet the QA department's requirements, the company uses a sub process to define and manage the QA review process.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the SubProcess AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Configure the properties for the SubProcess AgileShape as follows:

| Field | Configuration |
|--------------------|---|
| SubProcess | On the Configure SubProcess Window - Process Template Tab, select the QA Test process model to associate it as a child of the parent process, Execute a Software Change Request. |
| Initial Attributes | On the Initial Attributes Configuration Window, enter the names and values of any custom attributes you want to share with the sub process. In this example, that would include information from the CR, and any information added by Engineering, such as instructions or comments. |
| Wait for Complete | True - Specifies that the process will not move forward until the QA Test sub process completes. It is required for the QA Test process to complete because the result is evaluated in the final process step. |

Mapping Custom Attributes in a Sub Process

To map custom attributes in a sub process, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the **Generic BPM** stencil, drag the **SubProcess** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Initial Attributes** field, click the **Ellipses** button.

Instructions

- 1. On the Initial Attributes Configuration Window, click Add.
- 2. Complete the following fields as required:

| Field Name | Definition |
|------------|--|
| Name | Definition: The name of a custom attribute you want to associate with the sub process. <u>Allowed Values:</u> A text string with no spaces. <u>Default Value:</u> None |
| Value | Definition: The value in the child process to associate with the custom attribute in the parent process. Allowed Values: XML metadata defined for the sub process. Default Value: System.String - Indicates that AgilePoint system accepts the values as String data type only. In itself, this is not a valid value. Custom Attributes: Yes |

Adding a Sub Process that Uses a Different Form Technology than the Parent Process

If the parent process and sub process use different form types, the processes cannot share custom attributes since the schemas are different. For example this situation could occur with an AgileForms parent process with a SharePoint ListForm SubProcess.

To add a sub process that uses a different form technology than the parent process, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Generic BPM stencil.
- 3. On the Generic BPM stencil, drag the SubProcess AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Initial Attributes field, click the Ellipses button.

Instructions

- 1. On the Initial Attributes Configuration Window, deselect **This sub process will share custom attributes** with parent process.
- 2. Map the custom attributes from your parent process to your sub process.

Premier Extension

This section describes the AgileShapes in the Premier Extension stencil.

Cancel Tasks

An AgilePart that cancels all tasks that have a status of Assigned or Overdue.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. On the **Premier Extension** stencil, drag the **Cancel Tasks** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Delay

An AgilePart that causes the process to pause for a specified duration before allow the process to continue to the next AgileShape.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. On the **Premier Extension** stencil, drag the **Delay** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|---|
| Configure | Opens the Following Window: Set Time for Delay Activity Window Purpose of this Window: Specifies the duration associated with the Delay AgileShape. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Set Time for Delay Activity Window

Specifies the duration associated with the Delay AgileShape.

| Set Time for Delay Activity | |
|-----------------------------|----------------------|
| Set Time for | Delay Activity |
| SetTime | |
| Time Period: | |
| Unit: | Minute |
| Length: | 10 |
| Business Time: | |
| O Designated Date: | (must be a variable) |
| Date: | |
| | ✓ OK Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. On the **Premier Extension** stencil, drag the **Delay** AgileShape, and drop it on the process template.

- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------|---|
| Time Period | <u>Definition:</u> Indicates that the process is delayed for a specified span of time before moving to the next AgileShape. <u>Allowed Values:</u> <u>Selected</u> - The delay expires based on a timed duration. <u>Deselected</u> - The delay expires based on a date. <u>Default Value:</u> Selected |
| Unit | Definition: The type of time unit represented by the Time Period property. Allowed Values: • Second • Minute • Hour • Day Default Value: Minute |
| Length | Definition: The number of time units represented by the time period. If you use a custom attribute in this property, the value can be a number, or a specific date. The value is dynamically determined by the data type of the input field — Integer or DateTime. If the value is in DateTime format, the Unit must be set to Day. Otherwise, the Time Period, and thus the and Length, are ignored at runtime. Allowed Values: • Any positive integer |

| Field Name | Definition |
|-----------------|---|
| | A custom attribute |
| | |
| | |
| | |
| | Custom Attributes: |
| | Yes |
| Business Time | Definition: |
| | Determines whether the time span represents actual time, or business hours only. |
| | Allowed Values: |
| | • Deselected - The time span represents actual time. It is unaffected by any business time configuration settings. |
| | • Selected - The time span represents a span of business hours only. For example, 5 days of business time might be equivalent to 7 days of actual time. 8 hours of business time might be equivalent to 24 hours of actual time. |
| | Default Value: |
| | Deselected |
| | Example: |
| | The Business Time property is set to True, and business hours are configured as 9 a.m. to 5 p.m. A Manual AgileShape with a Time Span of 6 business hours is entered at 4 p.m. on Tuesday, then the activity must be completed by 2 p.m. on Wednesday. |
| Designated Date | Definition: |
| | Indicates that a process is delayed until a specified date occurs before moving to the next AgileShape. |
| | Allowed Values: |
| | • Deselected - The delay expires based on a timed duration. |
| | • Selected - The delay expires based on a date. |
| | Default Value: |
| | Deselected |
| Date | Definition: |

| Field Name | Definition |
|------------|--|
| | Specifies a the date the delay for the Delay AgileShape ends, and the process can move forward to the next AgileShape. |
| | Allowed Values: |
| | A variable that contains the date value. |
| | You can specify a date using a variable only. Use the Ellipses button to specify a variable. |
| | Default Value: |
| | \$VariableForDesignatedDate |
| | Custom Attributes: |
| | Yes |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Delaying a Process

To delay, or pause, a process temporarily, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. On the **Premier Extension** stencil, drag the **Delay** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the Set Time for Delay Activity Window, complete the following fields as required to configure your delay.

| Field Name | Definition |
|-------------|---|
| Time Period | Definition: Indicates that the process is delayed for a specified span of time before moving to the next AgileShape. |

| Field Name | Definition |
|---------------|---|
| | Allowed Values: |
| | Selected - The delay expires based on a timed duration. |
| | Deselected - The delay expires based on a date. |
| | Default Value: |
| | Selected |
| Unit | Definition: |
| | The type of time unit represented by the Time Period property. |
| | Allowed Values: |
| | • Second |
| | Minute |
| | • Hour |
| | ● Day |
| | Default Value: |
| | Minute |
| Length | Definition: |
| | The number of time units represented by the time period. |
| | If you use a custom attribute in this property, the value can be a number, or a specific date. The value is dynamically determined by the data type of the input field — Integer or DateTime. |
| | If the value is in DateTime format, the Unit must be set to Day. Otherwise, the Time Period, and thus the and Length, are ignored at runtime. |
| | Allowed Values: |
| | Any positive integer |
| | • A custom attribute |
| | Default Value: |
| | 10 |
| | Custom Attributes: |
| | Yes |
| Business Time | Definition: |

| Field Name | Definition |
|-----------------|---|
| | Determines whether the time span represents actual time, or business hours only. |
| | Allowed Values: |
| | • Deselected - The time span represents actual time. It is unaffected by any business time configuration settings. |
| | • Selected - The time span represents a span of business hours only. For example, 5 days of business time might be equivalent to 7 days of actual time. 8 hours of business time might be equivalent to 24 hours of actual time. |
| | <u>Default Value:</u> |
| | Deselected |
| | Example: |
| | The Business Time property is set to True, and business hours are configured as 9 a.m. to 5 p.m. A Manual AgileShape with a Time Span of 6 business hours is entered at 4 p.m. on Tuesday, then the activity must be completed by 2 p.m. on Wednesday. |
| Designated Date | Definition: |
| | Indicates that a process is delayed until a specified date occurs before moving to the next AgileShape. |
| | Allowed Values: |
| | Deselected - The delay expires based on a timed duration. |
| | • Selected - The delay expires based on a date. |
| | Default Value: |
| | Deselected |
| Date | Definition: |
| | Specifies a the date the delay for the Delay AgileShape ends, and the process can move forward to the next AgileShape. |
| | Allowed Values: |
| | A variable that contains the date value. |
| | You can specify a date using a variable only. Use the Ellipses button to specify a variable. |

| Field Name | Definition |
|------------|-----------------------------|
| | Default Value: |
| | \$VariableForDesignatedDate |
| | Custom Attributes: |
| | Yes |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup

Dynamic Group

An AgileWork that specifies a group or role as the participant for a task. When users are added or removed from the group or role, the change is recognized dynamically while the process is running.

| | * 63 | Ì |
|---|-----------------|---|
| 2 | Dynamic Group.1 | ļ |
| | 8 | ļ |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. On the **Premier Extension** stencil, drag the **Dynamic Group** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|---|
| Group/Role | <u>Definition:</u> Determines whether a task is performed by an AgilePoint group or an AgilePoint role. <u>Allowed Values:</u> <u>AgilePointGroup</u> - Specifies that an AgilePoint group performs the task. <u>AgilePointRole</u> - Specifies that an AgilePoint role performs the task. <u>Default Value:</u> |

| Field Name | Definition |
|-----------------|--|
| | AgilePointGroup |
| Group/Role Name | Opens the Following Window: Opens one of the following windows, depending upon the settings configured in the Group/Role field: Select AgilePoint Group Window - Specifies the name of the AgilePoint group that is assigned as the participant for the task. Select AgilePoint Role Window - Specifies the name of the AgilePoint role that is assigned as the participant for the task. |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Select AgilePoint Group Window

Specifies the name of the AgilePoint group that is assigned as the participant for the task.

| Select AgilePoint Group | X |
|-------------------------|-----------------|
| Select AgilePoint Group | |
| | |
| GrpA | |
| GrpB | |
| | |
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| | 🤍 OK 🛛 💥 Cancel |
| | |
| | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. On the **Premier Extension** stencil, drag the **Dynamic Group** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In the Group/Role field, select AgilePointGroup.
- 6. On the **Group/Role Name** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------------------|---|
| Select AgilePoint Group | Definition: Specifies the AgilePoint group to assign the task. |
| | Allowed Values: An AgilePoint group selected from the list. |
| | <u>Default Value:</u> None |

| Field Name | Definition |
|------------|--------------------|
| | Custom Attributes: |
| | No |

- Data Binding
- Using Process Attributes

Select AgilePoint Role Window

Specifies the name of the AgilePoint role that is assigned as the participant for the task.

| Select AgilePoint Role | |
|---|---------------|
| Select AgilePoint Role | |
| Administrators | |
| Process Runtime Managers Process Template Designers Users | |
| | 🖌 ОК 🔀 Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. On the **Premier Extension** stencil, drag the **Dynamic Group** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

- 5. In the Group/Role field, select AgilePointRole.
- 6. On the Group/Role Name field, click the Ellipses button.

Field Definitions

| Field Name | Definition |
|------------------------|--|
| Select AgilePoint Role | Definition: Specifies the AgilePoint role to assign the task. <u>Allowed Values:</u> An AgilePoint role selected from the list. |
| | <u>Default Value:</u> None <u>Custom Attributes:</u> No |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Dynamic Parallel Approval

An AgileWork that specifies multiple manual activities that must be completed before the process can move forward. This AgileShape is typically used to request approval for an activity from a dynamic set of approvers.



- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. On the **Premier Extension** stencil, drag the **Dynamic Parallel Approval** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|-----------------------|---|
| UserDefinedProperties | Opens the Following Window: User Defined Properties Window Purpose of this Window: Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable- like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want. |
| WorkToPerforms | Opens the Following Window: Participants and WorkToPerforms Window Purpose of this Window: Assigns participants and Work to Perform values for a list of parallel tasks. |
| EnabledExchangeServer | <u>Definition:</u> Integrates the AgileShape with Microsoft Exchange Server. The AgileShape's associated tasks are visible in the Microsoft Outlook's task list to the assigned participants. <u>Allowed Values:</u> False - The AgileShape in not integrated with Microsoft Exchange Server. True - The AgileShape is integrated with Microsoft Exchange Server that enables the participants to view the assigned tasks in Microsoft Outlook. <u>Default Value:</u> False |
| ExchangeServer | Opens the Following Window: Exchange Server Configuration Window Purpose of this Window: |

| Field Name | Definition |
|------------|--|
| | Integrates an AgileShape with Microsoft Exchange Server. When this connection is properly configured, the AgileShape will then insert, update, and remove tasks for the assigned participants, so that the tasks can be viewed directly from Microsoft Outlook. |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

User Defined Properties Window

Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable-like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want.

| User Defined Properties | operties | | | × |
|-------------------------|----------|-------------------------------|---------|--------------------------------|
| Name | Z | Value | Туре | Schema |
| ManagerApproval | \${/p | d:myFields/pd:ManagerApproval | Boolean | Goucina |
| | | | | Add Remove Remove All C Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Dynamic Parallel Approval
 - Dynamic Sequential Approval
 - Process Adaptation
 - Vote
 - Web Form
 - Workload Balance
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the UserDefinedProperties field, click the Ellipses button.

| Field Name | Definition |
|------------|---|
| Add | <u>Function:</u> Creates a row where you can specify a ClientData property. |

| Field Name | Definition |
|------------|--|
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want. |
| Name | Definition: Specifies the name for the ClientData. Image: Construction of the clientData property is used to store data related to the AgileWork AgileShapes. This is like defining a variable to store specific values. Allowed Values: A text string with spaces. Default Value: None Custom Attributes: Yes |
| Value | Definition: The value for the ClientData variable. Allowed Values: A number or a text string that can contain spaces. You can dynamically set the value for the variable by using XML metadata. Default Value: None Custom Attributes: Yes |
| Туре | Definition: Determines the data type for the ClientData variable. <u>Allowed Values:</u> • Integer |

| Field Name | Definition |
|------------|---|
| | String |
| | • Float |
| | • Decimal |
| | DateTime |
| | • Boolean |
| | Default Value: |
| | None |
| Remove | Function: |
| | Deletes the selected row from the user defined properties list. |
| | |
| Remove All | Function: |
| | Deletes all rows from the user defined properties list. |

- Data Binding
- Using Process Attributes

Participants and WorkToPerforms Window

Assigns participants and Work to Perform values for a list of parallel tasks.

| Participants and WorkToPerforms Participants and WorkToPerforms | | X |
|---|---------------|--------|
| Participant | WorkToPerform | |
| \${/pd:myFields/pd:ManagerApproval} | AdminReview | |
| | | Schema |
| | | |
| | | Remove |
| | | 🖋 ок |
| | | Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. On the **Premier Extension** stencil, drag the **Dynamic Parallel Approval** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **WorkToPerforms** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------|--|
| Add | <u>Function:</u> Adds a row for Participant and WorkToPerform where you can specify parallel tasks, and assign participants to complete them. |
| Participant | <u>Definition:</u> Specifies the user to whom the task is assigned. <u>Allowed Values:</u> A text string that can contain spaces. |

| Field Name | Definition |
|-----------------|---|
| | A list of predetermined custom attributes. |
| | You can specify only one user name in the Participant field. You cannot specify multiple participants such as group of users, or a user role for the task at a time. However, you can add multiple instances of a Work to Perform, each with a different Participant assigned. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Work To Perform | Definition: |
| | Specifies the name of the task that appears in a participant's Task List. |
| | In most cases, for processes that use ASP.NET forms, this value also determines the file names for the .aspx form pages. |
| | For the Web Form AgileShape, this property does not determine the file names for the web form. Instead, use the Web Form URL Window. |
| | Allowed Values: |
| | A text string that represents the name of the task. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Remove | Function: Deletes the selected row. |

- Data Binding
- Using Process Attributes

Exchange Server Configuration Window

Integrates an AgileShape with Microsoft Exchange Server. When this connection is properly configured, the AgileShape will then insert, update, and remove tasks for the assigned participants, so that the tasks can be viewed directly from Microsoft Outlook.

| Excl | nange Server Configuration | |
|--|--|------|
| Server Url and | Authentication | |
| Exchange | 2003/2007 C Exchange 2010 | |
| Url: | https://agilepoint:8000 | |
| Domain: | agilepoint | |
| Username: | user@agilepoint.com | |
| Password: | **** | |
| | | |
| Get help for | Point System User At Runtime | Test |
| Get help for Get help for Task Propertie Import the s | Point System User At Runtime <u>configuring Microsoft Exchange Server Mailb</u> es on Exchange Server subject, body and priority from the following | Test |
| Get help for Get help for Task Propertie Import the : Acknowledg | Point System User At Runtime <u>configuring Microsoft Exchange Server Mailb</u> es on Exchange Server subject, body and priority from the following jement | Test |
| Get help for Get help for Task Propertie Import the s Acknowledg Category: | Point System User At Runtime <u>configuring Microsoft Exchange Server Mailb</u> es on Exchange Server subject, body and priority from the following gement | Test |
| Use Agilel Get help for Task Propertie Import the s Acknowledg Category: <default></default> | Point System User At Runtime configuring Microsoft Exchange Server Mailb es on Exchange Server subject, body and priority from the following jement | Test |
| Get help for Get help for Task Propertie Import the : Acknowledg Category: <default></default> | Point System User At Runtime configuring Microsoft Exchange Server Mailb es on Exchange Server subject, body and priority from the following gement | Test |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Dynamic Parallel Approval
 - Dynamic Sequential Approval
 - Vote
 - Web Form
 - Workload Balance
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In the EnabledExchangeServer field, click True.

6. In the **ExchangeServer** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------------------------------|---|
| Exchange 2003/2007 or Exchange 2010 | Definition: Specifies the version of your Microsoft Exchange Server. Allowed Values: |
| | Exchange 2003/2007 - Enables to configure this AgileShape to access Exchange Server 2003/2007. Exchange 2010 - Enables to configure this |
| | AgileShape to access Exchange Server 2010. |
| | Default Value: |
| | Exchange 2003/2007 |
| Url | Definition: |
| | Specifies the Exchange Server URL. |
| | Allowed Values: |
| | Exchange 2003/2007 - https://[machine name]: [port] |
| | Exchange 2010 - https://[machine name]:[port]/ EWS/Exchange.asmx |
| | Default Value: |
| | https://[MachineName]:[Port] |
| | Custom Attributes: |
| | No |
| | Example: |
| | Exchange 2003/2007 - https:// mydomain.com:2030 |
| | Exchange 2010 - https://mydomain.com:2030/ EWS/Exchange.asmx |
| Domain | Definition: |
| | The authentication domain. |
| | Allowed Values: |
| | A valid domain. |
| | Default Value: |

| Field Name | Definition |
|---------------------------------------|--|
| | None |
| | Custom Attributes: |
| | None |
| Username | Definition: |
| | The user name for an Exchange Server administrator. |
| | Allowed Values: |
| | A valid user name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Password | Definition: |
| | The password for the authentication account. |
| | Allowed Values: |
| | A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Use AgilePoint System User at Runtime | Definition: |
| | Specifies whether to use the AgilePoint system user account (usually the same as the AgilePoint Service account) for the action when the process is running. |
| | Allowed Values: |
| | Selected - Uses the AgilePoint system user account for the action at runtime. |
| | • Deselected - Uses the credentials specified on this window at runtime. |
| | Default Value: |
| | Deselected |
| | Custom Attributes: |
| | No |

| Field Name | Definition |
|--|---|
| Import the subject, body, and priority from the following email template | <u>Definition:</u> Specifies an email template to be used for sending emails from Microsoft Outlook. <u>Allowed Values:</u> A list of automatically populated email templates if designed for the process. None - Specifies that no email template is created within the process. <u>Default Value:</u> None |
| Category | Definition: Specifies an Outlook category to associate with the task. A category provides a way to group tasks that are created using the same AgileShape. For example, if different AgileShapes have been configured to use Exchange Server, then in this case, a category acts as a keyword which uniquely identifies the tasks created using one AgileShape. Allowed Values: A text string. Default Value: <default> Keyword Attributes: No</default> |
| Remove Outlook Task if workflow Task is cancelled. | Definition: Determines whether to delete the task item from the participant's task list on Microsoft Outlook when the task is cancelled in the process. Allowed Values: • Selected - Deletes the task item from Microsoft Outlook when the task is cancelled in the process. • Deselected - The task item is not updated on Microsoft Outlook even if the task is cancelled in the process. • Deselected - The task item is not updated on Microsoft Outlook even if the task is cancelled in the process. • Default Value: |

| Field Name | Definition |
|------------|------------|
| | Selected |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes |
|-----------------------------------|
| Select XPath from Attributes |
| Schema Process Attributes |
| myFields imig empName (String) |
| XPath: |
| DataType: |
| 🥪 OK 🔀 Cancel |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.

- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the Ellipses button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|--|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. |
| | <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | Definition:Displays the process attributes associated with the process in a tree-view structure.Allowed Values: Read only. Click to select the process attribute you want to use. |
| ОК | Function: |

| Field Name | Definition |
|------------|---|
| | Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. |
| | Note the following: |
| | First, you must select the metadata or attribute you want, and then click OK. |
| | You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Enabling Parallel Approvals by Multiple Participants

This example demonstrates how to enable an AgileWork with multiple simultaneous, or parallel, approvals using the Dynamic Parallel Approval AgileShape. At runtime, the process does not move forward until all the identified reviewers have approved the activity, but the participants can approve in any order.

Instructional Goals

Demonstrate how to set up parallel approvals for an activity.

Example Process: Create or Update a Human Resources Policy



Problem Statement

Create or update a human resources (HR) policy within an organization.

Business Requirements

• The process is initiated when an HR employee submits an update to the company HR policies.

• The policy must be approved by multiple reviewers in parallel.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. On the **Premier Extension** stencil, drag the **Dynamic Parallel Approval** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the WorkToPerforms field, click the Ellipses button.

Instructions

Repeat the following steps until all required approvers are added to the list:

- 1. To add an approver, on the Participants and WorkToPerforms window, click Add.
- 2. Complete the following fields as required.

| Field Name | Value |
|----------------|---|
| Participant | Definition: Specifies the user to whom the task is assigned. Allowed Values: A text string that can contain spaces. A list of predetermined custom attributes. You can specify only one user name in the Participant field. You cannot specify multiple participants such as group of users, or a user role for the task at a time. However, you can add multiple instances of a Work to Perform, each with a different Participant assigned. Default Value: None Custom Attributes: Yes |
| WorkToPerforms | Opens the Following Window: Participants and WorkToPerforms Window Purpose of this Window: Assigns participants and Work to Perform values for a list of parallel tasks. |

Dynamic Sequential Approval

An AgileWork that represents a manual activity that must be completed sequentially by 1 or more participants. It is designed to be used as part of a loop in a process, so that the process flow will keep returning to this AgileShape until a sufficient number of participants have completed the activity, or until some other condition exits the loop.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. On the **Premier Extension** stencil, drag the **Dynamic Sequential Approval** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------------|--|
| UserDefinedProperties | Opens the Following Window: User Defined Properties Window Purpose of this Window: Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable- like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want. |
| Approvers | Definition: Specifies the custom attribute that contains the user names of the participants. The user names in the custom attribute must be separated by a semicolon. This property works as a part of the loop to specify the participants (who are the approvers) required to |
| Field Name | Definition |
|---------------|---|
| | complete the activity. The task is assigned to each |
| | During each iteration, the AgileShape assigns the task to the first user name specified by the Approvers property. Then, the custom attribute associated with this property is modified - the first user name is removed from the list, and the next user name is assigned to the task for the next iteration of the loop until all the approvers complete the task. |
| | Allowed Values: |
| | A custom attribute. |
| | Note: The value of this property must be the name of a custom attribute. The value of the custom attribute must be initialized elsewhere using an Update Custom Attributes AgileShape. |
| | If the value of the custom attribute is not updated in the loop, it ends up in an infinite loop. |
| | Default Value: |
| | \$Approvers |
| | Custom Attributes: |
| | Yes |
| LoopCondition | Definition: |
| | The custom attribute that specifies the status of the sequential loop as a Boolean value. |
| | The value of the custom attribute is updated each time the AgileShape exits an iteration of the loop to determine whether more participants are remaining to complete the task. |
| | The value of the specified custom attribute must be checked using a Single Condition AgileShape to determine when the process needs to exit from the loop to move to another activity. |
| | Allowed Values: |
| | A custom attribute. |
| | Note: The value of this property must be the name of a custom attribute. The value of the custom attribute must be initialized elsewhere using an Update Custom Attributes AgileShape. |

| Field Name | Definition |
|-----------------------|--|
| | <u>Default Value:</u> \$HasMoreApprover <u>Custom Attributes:</u> Yes |
| EnabledExchangeServer | Definition: Integrates the AgileShape with Microsoft Exchange Server. The AgileShape's associated tasks are visible in the Microsoft Outlook's task list to the assigned participants. Allowed Values: • False - The AgileShape in not integrated with Microsoft Exchange Server. • True - The AgileShape is integrated with Microsoft Exchange Server that enables the participants to view the assigned tasks in Microsoft Outlook. Default Value: False |
| ExchangeServer | Opens the Following Window: Exchange Server Configuration Window Purpose of this Window: Integrates an AgileShape with Microsoft Exchange Server. When this connection is properly configured, the AgileShape will then insert, update, and remove tasks for the assigned participants, so that the tasks can be viewed directly from Microsoft Outlook. |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

User Defined Properties Window

Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable-like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want.

| User Defined Properties | | | |
|-------------------------|-----------------------------------|---------|-------------|
| User Defined Prope | erties | | |
| Name | Z Value | Туре | Schema |
| ManagerApproval | \${/pd:myFields/pd:ManagerApprova | Boolean | |
| | | | Remove |
| | | | ✓ ОК Хапсеl |
| | | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Dynamic Parallel Approval
 - Dynamic Sequential Approval

- Process Adaptation
- Vote
- Web Form
- Workload Balance
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the UserDefinedProperties field, click the Ellipses button.

| Field Name | Definition |
|------------|--|
| Add | <u>Function:</u> Creates a row where you can specify a ClientData property. |
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want. |
| Name | Definition: Specifies the name for the ClientData. Image: The ClientData property is used to store data related to the AgileWork AgileShapes. This is like defining a variable to store specific values. Allowed Values: A text string with spaces. Default Value: None Custom Attributes: Yes |
| Value | <u>Definition:</u> The value for the ClientData variable. Allowed Values: |

| Field Name | Definition |
|------------|---|
| | A number or a text string that can contain spaces. |
| | You can dynamically set the value for the variable by using XML metadata. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Туре | Definition: |
| | Determines the data type for the ClientData variable. |
| | Allowed Values: |
| | • Integer |
| | • String |
| | • Float |
| | • Decimal |
| | DateTime |
| | Boolean |
| | Default Value: |
| | None |
| Remove | Function: |
| | Deletes the selected row from the user defined properties list. |
| Remove All | Function: |
| | Deletes all rows from the user defined properties list. |

- Data Binding
- Using Process Attributes

Exchange Server Configuration Window

Integrates an AgileShape with Microsoft Exchange Server. When this connection is properly configured, the AgileShape will then insert, update, and remove tasks for the assigned participants, so that the tasks can be viewed directly from Microsoft Outlook.

| Excl | nange Server Configuration | |
|--|---|------------------------|
| Server Url and | Authentication | |
| Exchange | 2003/2007 C Exchange 2010 | |
| Url: | https://agilepoint:8000 | |
| Domain: | agilepoint | |
| Username: | user@agilepoint.com | |
| Password: | **** | |
| Get help for | oint System User At Runtime configuring Microsoft Exchange Serve | Test |
| Task Propertie | es on Exchange Server subject, body and priority from the foll | lowing email template: |
| Import the : | | • |
| Import the : Acknowledg | ement | |
| Import the s Acknowledg Category: | lement | |
| Import the : Acknowledg Category: <default></default> | lement | |
| Import the : Acknowledg Category: <default></default> | lement | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Dynamic Parallel Approval
 - Dynamic Sequential Approval
 - Vote
 - Web Form
 - Workload Balance
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In the EnabledExchangeServer field, click True.

6. In the **ExchangeServer** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------------------------------|--|
| Exchange 2003/2007 or Exchange 2010 | Definition: Specifies the version of your Microsoft Exchange Server. |
| | Allowed Values: |
| | Exchange 2003/2007 - Enables to configure this AgileShape to access Exchange Server 2003/2007. |
| | • Exchange 2010 - Enables to configure this AgileShape to access Exchange Server 2010. |
| | Default Value: |
| | Exchange 2003/2007 |
| Url | Definition: |
| | Specifies the Exchange Server URL. |
| | Allowed Values: |
| | Exchange 2003/2007 - https://[machine name]: [port] |
| | Exchange 2010 - https://[machine name]:[port]/ EWS/Exchange.asmx |
| | Default Value: |
| | https://[MachineName]:[Port] |
| | Custom Attributes: |
| | No |
| | Example: |
| | Exchange 2003/2007 - https:// mydomain.com:2030 |
| | • Exchange 2010 - https://mydomain.com:2030/ EWS/Exchange.asmx |
| Domain | Definition: |
| | The authentication domain. |
| | Allowed Values: |
| | A valid domain. |
| | Default Value: |

| Field Name | Definition |
|---------------------------------------|--|
| | None |
| | Custom Attributes: |
| | None |
| Username | Definition: |
| | The user name for an Exchange Server administrator. |
| | Allowed Values: |
| | A valid user name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Password | Definition: |
| | The password for the authentication account. |
| | Allowed Values: |
| | A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Use AgilePoint System User at Runtime | Definition: |
| | Specifies whether to use the AgilePoint system user account (usually the same as the AgilePoint Service account) for the action when the process is running. |
| | Allowed Values: |
| | Selected - Uses the AgilePoint system user account for the action at runtime. |
| | Deselected - Uses the credentials specified on this window at runtime. |
| | Default Value: |
| | Deselected |
| | Custom Attributes: |
| | No |

| Field Name | Definition |
|--|---|
| Import the subject, body, and priority from the following email template | <u>Definition:</u> Specifies an email template to be used for sending emails from Microsoft Outlook. <u>Allowed Values:</u> A list of automatically populated email templates if designed for the process. None - Specifies that no email template is created within the process. <u>Default Value:</u> None |
| Category | Definition: Specifies an Outlook category to associate with the task. A category provides a way to group tasks that are created using the same AgileShape. For example, if different AgileShapes have been configured to use Exchange Server, then in this case, a category acts as a keyword which uniquely identifies the tasks created using one AgileShape. Allowed Values: A text string. Default Value: <default> No</default> |
| Remove Outlook Task if workflow Task is cancelled. | <u>Definition:</u> Determines whether to delete the task item from the participant's task list on Microsoft Outlook when the task is cancelled in the process. <u>Allowed Values:</u> <u>Selected</u> - Deletes the task item from Microsoft Outlook when the task is cancelled in the process. <u>Deselected</u> - The task item is not updated on Microsoft Outlook even if the task is cancelled in the process. |

| Field Name | Definition |
|------------|------------|
| | Selected |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes |
|------------------------------|
| Select XPath from Attributes |
| Schema Process Attributes |
| myFields empName (String) |
| XPath: |
| DataType: |
| 🥪 OK 🔀 Cancel |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.

- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the Ellipses button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|--|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. |
| | <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | Definition:Displays the process attributes associated with the process in a tree-view structure.Allowed Values: Read only. Click to select the process attribute you want to use. |
| ОК | Function: |

| Field Name | Definition | | |
|------------|---|--|--|
| | Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. | | |
| | Note the following: | | |
| | First, you must select the metadata or attribute you want, and then click OK. | | |
| | You can select only one metadata or attribute at a time. | | |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Enabling Sequential Approvals by Multiple Participants

This example demonstrates how to create a task with multiple approvals in an ordered sequence using the Dynamic Sequential Approval AgileShape. This example uses process attributes to loop through a specified list of approvers in sequential order. At runtime, the process does not move forward until all the identified reviewers have approved the activity in the prescribed order.

Instructional Goals

• Demonstrate how to set up sequential approvals for an activity.

Example Process: Create or Update a Human Resources Policy



Problem Statement

Create or update a human resources (HR) policy within an organization.

Business Requirements

- The process is initiated when an HR employee submits an update to the company HR policies.
- The policy must be approved by multiple reviewers in sequential order.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. On the **Premier Extension** stencil, drag the **Dynamic Sequential Approval** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. On the **Dynamic Sequential Approval** AgileShape, complete the following fields.

| Field Name | Value |
|-----------------|-------------------------------|
| Approvers | \$HRApprovers |
| LoopCondition | \$MoreHRApprovers |
| Work to Perform | Your ASP.NET or InfoPath form |

- 2. On the **Premier Extension** stencil, drag the **Update Custom Attributes** AgileShape, and drop it on the process template.
- 3. On the **Configuration** field, click the **Ellipses** button.
- 4. On the Create or Update Custom Attribute window, click Add.
- 5. In the AttributeName column, enter HRApprovers.

You can also click the **Schema** button to select the **HRApprovers** attribute from your InfoPath or ASP.NET XML schema.

6. In the **Expression** column, enter a C# expression that indicates the list of approvers for your Dynamic Sequential Approval task.

| Field Name | Value |
|------------|---|
| Expression | <u>Definition:</u> Specifies a value that is assigned to the custom attribute at runtime by a code snippet. <u>Allowed Values:</u> A C# code snippet. The following rules apply: You can specify simple expressions only. For example, assignment, call, increment, decrement, and new object expressions. The string value must be enclosed within the quotation marks. For example, "Name". You cannot leave the Expression field empty. |
| | Default Value: |

| Field Name | Value |
|------------|---|
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | • "True" |
| | • @"AP5\John; AP5\Bob; AP5\Lily; AP5\Fred"; |

- 7. On the Create or Update Custom Attribute window, click Add.
- 8. In the AttributeName column, enter MoreHRApprovers.
- 9. In the Expression column, enter "True".

Process Adaptation

An AgileWork that combines the functionality of the Dynamic Parallel, Dynamic Sequential, and Voting AgileWork. This AgileShape enables participants in a running process to dynamically adapt by adding new participants to complete a task in either a Parallel or Sequential fashion. Users can use the Process Viewer or AgilePoint Enterprise Manager to dynamically add participants at runtime.



Prerequisites

- 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.
- To enable the Open Process Adaptation link in the Process Viewer, you must add the following modification to the AgilePoint Web application's web.config file:

The value for the Process Adaptation is the URL of the process adaptation URL in AgilePoint Enterprise Manager.

For the Process Viewer in SharePoint using InfoPath, add the key entry into the SharePoint Web.config at C: \Inetpub\wwwroot\wss\VirtualDirectories\8000\web.config.

Navigation

1. In AgilePoint Envision, open a process template.

- 2. Navigate to the **Premier Extension** stencil.
- 3. On the **Premier Extension** stencil, drag the **Process Adaptation** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition | | |
|-----------------------|--|--|--|
| UserDefinedProperties | Opens the Following Window: User Defined Properties Window Purpose of this Window: | | |
| | Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable- like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want. | | |
| VotingConfiguration | Opens the Following Window: | | |
| | Purpose of this Window: | | |
| | Configures data binding to an XML schema to manage approvals as votes. | | |
| ApprovalType | Definition: | | |
| | Determines the manner (parallel or sequential), the task is delivered to the participants at runtime. | | |
| | The ApprovalType property is set at design time and can be changed at runtime using AgilePoint Enterprise Manager or the Process Viewer. | | |
| | Allowed Values: | | |
| | • Parallel - The task is delivered to all of the participants at the same time. This indicates that there is no particular order for assigning the task to the participants. | | |
| | • Sequential - The task is delivered to participants in a sequential order. This indicates that task is assigned to one participant at a time in a linear order. | | |
| | Default Value: | | |

| Field Name | Definition |
|-----------------------|---|
| | Parallel |
| UpdateCustomAttribute | Opens the Following Window: Create or Update Custom Attributes Window - Process Adaptation AgileShape Purpose of this Window: Updates a value for a custom attribute value based on a type of event. For information about the types of events that can be used, see the Event Type property. |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Voting Configuration Window

Configures data binding to an XML schema to manage approvals as votes.

To set up voting, you must map the approvals to the schema for your input form. XPath indicates a repeating XML node where the children are the user ID and voting status of an individual user, and whether the user is a mandatory approver.

| Voting Configura | tion 📃 | |
|---|--|--|
| Voti | ng Configuration | |
| Approvals | | |
| XPath | /pd:my/pd:Voters | |
| Enter the XM | ML tag names for below fields. | |
| User ID | /pd:my/pd:VoterID | |
| Status | /pd:my/pd:Approve | |
| Mandatory | (No Mandatory required if blank) | |
| Final Result | | |
| Final Result | XPath /pd:myFields/pd:VotingResult | |
| Set final res | sult as 'Approve' when 65 % of the users approved. | |
| SharePoint and InfoPath Integration are used. | | |
| | Second Cancel | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Process Adaptation
 - Vote
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **VotingConfiguration** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|-------------------------------------|
| Schema | Opens the Following Window: |
| | Select XPath from Attributes Window |

| Field Name | Definition | | |
|------------|---|--|--|
| | Purpose of this Window: | | |
| | Enables you to select a schema node from the XML schema for your process. | | |
| XPath | Definition: Specifies a group of approvers that are involved at an activity. | | |
| | Allowed Values: | | |
| | An XPath to a schema node that represents a group of approvers. This is a parent node where the children represent individual approvers within the group. | | |
| | Default Value: | | |
| | None | | |
| | Custom Attributes: | | |
| | No | | |
| | Example: | | |
| | /pd:my/pd:Managers | | |
| | The Managers node would have child nodes for individual managers. | | |
| User ID | Definition: | | |
| | Specifies the schema node for an individual approver. Usually this field is used to identify a mandatory approver. | | |
| | Allowed Values: | | |
| | An XPath to a schema node that represents an approver. This node must be a child node of the approvers identified in the XPath field. | | |
| | Default Value: | | |
| | None | | |
| | Custom Attributes: | | |
| | No | | |
| | Example: | | |
| | /pd:my/pd:ManagerID | | |
| | The ManagerID node contains the name of an individual manager. | | |
| Status | Definition: | | |

| Field Name | Definition | |
|--------------------|--|--|
| | Specifies whether the approver in the User ID field approves or rejects the activity. | |
| | Allowed Values: | |
| | An XPath to a schema node in Boolean format, such as True or False. <u>Default Value:</u> None <u>Custom Attributes:</u> | |
| | | |
| | | |
| | | |
| | No | |
| | Example: | |
| | /pd:my/pd:Status | |
| | The Status node contains the Boolean value to indicate whether the activity has been approved or rejected by an approver. | |
| Mandatory | Definition: | |
| | Specifies an XPath to a schema node that indicates whether the approver listed in the User ID field is mandatory. If the approver is mandatory, and he or she rejects the activity, the activity is considered rejected, regardless of the voting outcome. | |
| | Allowed Values: | |
| | An XPath to a schema node that represents a Boolean value indicating whether the approver is mandatory. | |
| | Default Value: | |
| | None | |
| | Custom Attributes: | |
| | No | |
| | Example: | |
| | /pd:my/pd:Mandatory | |
| | The Mandatory node contains the Boolean value to indicate whether the approval by an individual manager is essential. | |
| | For example, if you specify the following values in an XML schema: User ID: Kelly and Mandatory=True, then this indicates that Kelly's approval is mandatory. | |
| Final Result XPath | Definition: | |

| Field Name | Definition |
|---|--|
| | Specifies the final result whether an approval activity is approved or rejected. |
| | This is also an Boolean value. |
| | Allowed Values: |
| | An XPath to a schema node that represents the final result of the voting. |
| | The final result can be stored in a custom attribute. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | /pd:my/pd:VotingResult |
| | The VotingResult node stores the Boolean value to indicate whether the activity is finally approved or rejected. |
| Set final result as 'Approve' when _ % of the users | Definition: |
| approved. | Specifies the minimum percentage of approvers required to consider the item approved. |
| | Allowed Values: |
| | An integer. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | If you have enter 60, and you have 7 approvers, at least 5 of the approvers would need to vote Yes for the item to be approved because 4/7=57%, and 5/7=71%. |

- Data Binding
- Using Process Attributes

Create or Update Custom Attributes Window - Process Adaptation AgileShape

Updates a value for a custom attribute value based on a type of event. For information about the types of events that can be used, see the **Event Type** property.

| Creat | e or Update Custom Attributes | om Attributes | | |
|-------|-------------------------------|---------------|------------|------------|
| | ustom Attributes: | Malua | Event Turn | _ |
| | Attribute to be updated // | Value | Event Type | Schema |
| | 1obIDProvided | True | Enter | |
| | ReminderMail | True | Cancel | 🚽 Add |
| ľ | SentMail | True | Complete | |
| | WelcomeEmployeeMail | True | Leave | Remove |
| | | | | |
| | | | | Remove All |
| | | | | |
| | | | | 🕪 ок |
| | | | | |
| | | | | Cancel |
| | | | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. On the **Premier Extension** stencil, drag the **Process Adaptation** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **UpdateCustomAttribute** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|------------|
| Add | Function: |

| Field Name | Definition |
|-------------------------|---|
| | Creates a row to add a custom attribute, value, and event. |
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want. |
| Attribute to be updated | Definition: Specifies the name of the custom attribute you want to update on the basis of an event type. Allowed Values: The name of custom attribute to be updated. You can also use the XML metadata associated with the process. Default Value: None Custom Attributes: Yes Example: A custom attribute - EmployeeName An XPath to a schema element - /pd:myFields/ pd:empName |
| Value | Definition: Specifies a value that is assigned to the custom attribute when a specific runtime event occurs. Allowed Values: A number or a text string that can contain spaces. You can specify a custom attribute using the Schema button. Default Value: None Custom Attributes: Yes |

| Field Name | Definition |
|------------|---|
| Event Type | Definition: Indicates the runtime event that causes the custom attribute to be updated to the specified value. Allowed Values: • Enter - The process enters the AgileShape. • Assign - A task is assigned to a participant. • Cancel - A task is cancelled. • Complete - A task is completed. • Leave - The process exits the AgileShape. Default Value: None |
| Remove | <u>Function:</u> Deletes the selected row from the Custom Attributes list. |
| Remove All | <u>Function:</u> Deletes all rows from the Custom Attributes list. |

- Data Binding
- Using Process Attributes

User Defined Properties Window

Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable-like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want.

| User Defined Properties | operties | | | |
|-------------------------|----------|------------------------------|---------|------------|
| Name | Ζ. | Value | Туре | Schema |
| ManagerApproval | \${/pd | :myFields/pd:ManagerApproval | Boolean | Screma |
| | | | | Remove All |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Dynamic Parallel Approval
 - Dynamic Sequential Approval
 - Process Adaptation
 - Vote
 - Web Form
 - Workload Balance
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the UserDefinedProperties field, click the Ellipses button.

| Field Name | Definition |
|------------|---|
| Add | <u>Function:</u> Creates a row where you can specify a ClientData property. |

| Field Name | Definition |
|------------|--|
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want |
| Name | Definition: Specifies the name for the ClientData. Image: The ClientData property is used to store data related to the AgileWork AgileShapes. This is like defining a variable to store specific values. Allowed Values: A text string with spaces. Default Value: None Custom Attributes: Yes |
| Value | Definition: The value for the ClientData variable. Allowed Values: A number or a text string that can contain spaces. You can dynamically set the value for the variable by using XML metadata. Default Value: None Custom Attributes: Yes |
| Туре | Definition: Determines the data type for the ClientData variable. <u>Allowed Values:</u> Integer |

| Field Name | Definition |
|------------|---|
| | String |
| | • Float |
| | Decimal |
| | DateTime |
| | • Boolean |
| | Default Value: |
| | None |
| Remove | Function: |
| | Deletes the selected row from the user defined properties list. |
| Remove All | Function: |
| | Deletes all rows from the user defined properties list. |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes |
|------------------------------|
| Select XPath from Attributes |
| Schema Process Attributes |
| myFields mpName (String) |
| XPath: DataType: |
| 🥪 OK 🔀 Cancel |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the **Ellipses** button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Update Custom Attributes

An AgilePart that updates the values of process attributes.

Specify the names of one or more custom process attributes, and associate a snippet of C# code with each attribute name. When a process enters the AgileShape, each snippet is evaluated to determine the value for the custom attribute.

This AgilePart enables you to create and embed a simple custom AgilePart in your process, without having to create, name, compile, deploy, or register the AgilePart.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. On the **Premier Extension** stencil, drag the **Update Custom Attributes** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------|--|
| Configuration | Opens the Following Window: Create or Update Custom Attribute Window Purpose of this Window: Associates custom attributes with C# code snippets to update the custom attribute values. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Create or Update Custom Attribute Window

Associates custom attributes with C# code snippets to update the custom attribute values.



Note: The Create or Update Custom Attributes configuration dialog is not intended as a complete replacement for Visual Studio.NET. It is recommend that you create a C# project that you can use as a "scratch pad" so that you have full access to Intellisense and other built-in tools while constructing your snippets. This will help in avoiding simple syntax mistakes and other errors.

| eate or Update Custom Attributes | | |
|---|--|------------|
| Create or Update Custom Attribu | te | |
| Custom Attributes : | | |
| AttributeName / | Expression | |
| /pd:myFields/pd:Approvers | <pre>@"Demo3\Administrator;Demo3\CFO"</pre> | Schema |
| | | |
| | | |
| | | |
| | | Remove |
| | | Remove All |
| Massaga - | | |
| ricaauge i | | |
| using System; | | View Code |
| using System; using System.Collections; | | View Code |
| using System; using System.Collections; using Ascentn.Workflow.Base; public class CodeSpinnet 6FBAC1 | 2D6FD4483FB30B621CB612072F | View Code |
| using System; using System.Collections; using Ascentn.Workflow.Base; public class CodeSnippet_6FBAC1 { | 2D6FD448AFBA0B621CB612072F | View Code |
| using System; using System.Collections; using Ascentn.Workflow.Base; public class CodeSnippet_6FBAC1 { public void Invoke(WFProcessI | 2D6FD448AFBA0B621CB612072F | View Code |
| using System; using System.Collections; using Ascentn.Workflow.Base; public class CodeSnippet_6FBAC1 { public void Invoke(WFProcessI { | 2D6FD448AFBA0B621CB612072F | View Code |
| <pre>using System; using System.Collections; using Ascentn.Workflow.Base; public class CodeSnippet_6FBAC1 { public void Invoke(WFProcessI { WFCustomAttributes ds = pi WFCustomAttributes ds = pi WFCustomAttributes dsNew = pi</pre> | 2D6FD448AFBA0B621CB612072F nstance pi, WFAutomaticWorkItem w) .WFApi.GetCustomAttrs(pi.WorkObjectID, true); new WFCustomAttributes(): | View Code |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. On the **Premier Extension** stencil, drag the **Update Custom Attributes** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|---|
| Add | <u>Function:</u> Adds a new custom attribute. |
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: |

| Field Name | Definition |
|---------------|---|
| | Enables you to select a schema node from the XML schema for your process. |
| AttributeName | <u>Definition:</u> The name of the custom attribute that stores the return value of a code snippet at runtime. |
| | <u>Allowed Values:</u> The name of custom attribute to be updated. You can also use the XML metadata associated with the process. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |
| | Example: A custom attribute - EmployeeName An XPath to a schema element - /pd:myFields/ pd:empName |
| Expression | Definition: Specifies a value that is assigned to the custom attribute at runtime by a code snippet. Allowed Values: A C# code snippet. The following rules apply: You can specify simple expressions only. For example, assignment, call, increment, decrement, and new object expressions. The string value must be enclosed within the quotation marks. For example, "Name". You cannot leave the Expression field empty. Default Value: None Custom Attributes: Yes |
| | "True" @"AP5\John; AP5\Bob; AP5\Lily; AP5\Fred"; |

| Field Name | Definition |
|------------|--|
| Remove | <u>Function:</u> Deletes the selected row from the Custom Attributes list. |
| Remove All | <u>Function:</u> Deletes all rows from the Custom Attributes list. |
| View Code | <u>Function:</u> Displays a snippet of the C# code created for the custom attributes in the Message field. |
| Message | Definition: Displays a snippet of the C# code that is associated with custom attributes, or error messages during code compilation. <u>Allowed Values:</u> Read only. |
| Verify | Function: Compiles the code snippet to check the custom attributes and corresponding expression values and displays the error message if an error occurs. |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes |
|------------------------------|
| Select XPath from Attributes |
| Schema Process Attributes |
| myFields |
| XPath: |
| ✓ OK X Cancel |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the **Ellipses** button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Enabling Sequential Approvals by Multiple Participants

This example demonstrates how to create a task with multiple approvals in an ordered sequence using the Dynamic Sequential Approval AgileShape. This example uses process attributes to loop through a specified list of approvers in sequential order. At runtime, the process does not move forward until all the identified reviewers have approved the activity in the prescribed order.

Instructional Goals

• Demonstrate how to set up sequential approvals for an activity.

Example Process: Create or Update a Human Resources Policy



Problem Statement

Create or update a human resources (HR) policy within an organization.

Business Requirements

- The process is initiated when an HR employee submits an update to the company HR policies.
- The policy must be approved by multiple reviewers in sequential order.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. On the **Premier Extension** stencil, drag the **Dynamic Sequential Approval** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

216
Instructions

1. On the **Dynamic Sequential Approval** AgileShape, complete the following fields.

| Field Name | Value |
|-----------------|-------------------------------|
| Approvers | \$HRApprovers |
| LoopCondition | \$MoreHRApprovers |
| Work to Perform | Your ASP.NET or InfoPath form |

- 2. On the **Premier Extension** stencil, drag the **Update Custom Attributes** AgileShape, and drop it on the process template.
- 3. On the **Configuration** field, click the **Ellipses** button.
- 4. On the Create or Update Custom Attribute window, click Add.
- 5. In the AttributeName column, enter HRApprovers.

You can also click the **Schema** button to select the **HRApprovers** attribute from your InfoPath or ASP.NET XML schema.

6. In the **Expression** column, enter a C# expression that indicates the list of approvers for your Dynamic Sequential Approval task.

| Field Name | Value |
|------------|---|
| Expression | Definition: Specifies a value that is assigned to the custom attribute at runtime by a code snippet. |
| | Allowed Values: |
| | A C# code snippet. The following rules apply: |
| | You can specify simple expressions only. For example, assignment, call, increment, decrement, and new object expressions. |
| | The string value must be enclosed within the quotation marks. For example, "Name". |
| | • You cannot leave the Expression field empty. |
| | <u>Default Value:</u> |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | ● "True" |

| Field Name | Value |
|------------|---|
| | • @"AP5\John; AP5\Bob; AP5\Lily; AP5\Fred"; |

- 7. On the Create or Update Custom Attribute window, click Add.
- 8. In the AttributeName column, enter MoreHRApprovers.
- 9. In the Expression column, enter "True".

Update Parent Process

An AgilePart that can update the values of custom attributes in a parent process based on the value of the custom attribute in a subprocess.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. On the **Premier Extension** stencil, drag the **Update Parent Process** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|-----------------|--|
| Attributes | Opens the Following Window: Attributes of Parent Process Window |
| | Purpose of this Window: |
| | Associates a custom attribute in the parent process with a value in the schema of the child process. |
| ParentProcessID | Definition: |
| | Specifies the Process ID of a process which custom process attributes need to be updated. |
| | Allowed Values: |
| | The process ID of the parent process. |

| Field Name | Definition |
|------------|--------------------|
| | Default Value: |
| | \$ParentProcessID |
| | Custom Attributes: |
| | Yes |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Attributes of Parent Process Window

Associates a custom attribute in the parent process with a value in the schema of the child process. (The child process is the one where this window is configured.)

| Attributes of Parent Process | | × |
|------------------------------|--------------------------------------|----------|
| Attributes of Parent Proc | ess | |
| Name | Value | 📥 Add |
| JobID | <pre>\${/pd:myFields/pd:JobID}</pre> | - |
| | | Remove |
| | | Schema |
| | | 🖋 ок |
| | | 🔀 Cancel |
| | | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. On the **Premier Extension** stencil, drag the **Update Parent Process** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Attributes field, click the Ellipses button.

| Field Name | Definition |
|------------|---|
| Add | <u>Function:</u> Adds a custom attribute. |
| Schema | Opens the Following Window: Select XPath from Attributes Window |
| | Purpose of this Window: |
| | Enables you to select a schema node from the XML schema for your process. |

| Field Name | Definition |
|------------|--|
| | To activate the Schema button, select the row you want. |
| Name | Definition: |
| | Specifies the name of the custom attribute to update. |
| | For the AgileShape to be functional, you must ensure that on the Initial Attributes Configuration Window of the SubProcess AgileShape, the This sub process will share custom attributes with parent process option is deselected. |
| | Allowed Values: |
| | A parent process' custom attribute. |
| | You can also use the XML metadata associated with the process. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Value | Definition: |
| | The value in the child process to associate with the custom attribute in the parent process. |
| | Allowed Values: |
| | XML metadata defined for the sub process. |
| | Default Value: |
| | System.String - Indicates that AgilePoint system accepts the values as String data type only. In itself, this is not a valid value. |
| | Custom Attributes: |
| | Yes |
| Remove | <u>Function:</u> Deletes the selected row from the Attributes of |
| | Parent Process list. |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes | × |
|---|---|
| Select XPath from Attributes | |
| Schema Process Attributes | 1 |
| wyFields wy | |
| XPath: |] |
| DataType: | |
| 🥪 OK 🔀 Cancel | |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.

- Click the **Ellipses** button.
- Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use. |
| ОК | Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. |

| Field Name | Definition |
|------------|--|
| | You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Vote

An AgileWork that manages multiple approvals as votes. This AgileShape can be set to move forward when a certain percentage of the approvers approve, or to require some approvers as mandatory.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. On the **Premier Extension** stencil, drag the **Vote** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------------|--|
| UserDefinedProperties | Opens the Following Window: User Defined Properties Window Purpose of this Window: Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable- like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want. |

| Field Name | Definition |
|-----------------------|---|
| VotingConfiguration | Opens the Following Window: Voting Configuration Window Purpose of this Window: Configures data binding to an XML schema to manage approvals as votes. |
| EnabledExchangeServer | <u>Definition:</u> Integrates the AgileShape with Microsoft Exchange Server. The AgileShape's associated tasks are visible in the Microsoft Outlook's task list to the assigned participants. <u>Allowed Values:</u> False - The AgileShape in not integrated with Microsoft Exchange Server. True - The AgileShape is integrated with Microsoft Exchange Server that enables the participants to view the assigned tasks in Microsoft Outlook. <u>Default Value:</u> False |
| ExchangeServer | Opens the Following Window: Exchange Server Configuration Window Purpose of this Window: Integrates an AgileShape with Microsoft Exchange Server. When this connection is properly configured, the AgileShape will then insert, update, and remove tasks for the assigned participants, so that the tasks can be viewed directly from Microsoft Outlook. |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Voting Configuration Window

Configures data binding to an XML schema to manage approvals as votes.

To set up voting, you must map the approvals to the schema for your input form. XPath indicates a repeating XML node where the children are the user ID and voting status of an individual user, and whether the user is a mandatory approver.

| Voting Configura | tion 📃 | |
|---|--|--|
| Votin | ng Configuration | |
| Approvals | | |
| XPath | /pd:my/pd:Voters | |
| Enter the XM | ML tag names for below fields. | |
| User ID | /pd:my/pd:VoterID | |
| Status | /pd:my/pd:Approve | |
| Mandatory (No Mandatory required if blank) | | |
| Final Result | | |
| Final Result | XPath /pd:myFields/pd:VotingResult | |
| Set final res | sult as 'Approve' when 65 % of the users approved. | |
| SharePoint and InfoPath Integration are used. | | |
| | V OK Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Process Adaptation
 - Vote
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **VotingConfiguration** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|-------------------------------------|
| Schema | Opens the Following Window: |
| | Select XPath from Attributes Window |

| Field Name | Definition |
|------------|---|
| | Purpose of this Window: |
| | Enables you to select a schema node from the XML schema for your process. |
| XPath | Definition: |
| | Specifies a group of approvers that are involved at an activity. |
| | Allowed Values: |
| | An XPath to a schema node that represents a group of approvers. This is a parent node where the children represent individual approvers within the group. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | /pd:my/pd:Managers |
| | The Managers node would have child nodes for individual managers. |
| User ID | Definition: |
| | Specifies the schema node for an individual approver. Usually this field is used to identify a mandatory approver. |
| | Allowed Values: |
| | An XPath to a schema node that represents an approver. This node must be a child node of the approvers identified in the XPath field. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | /pd:my/pd:ManagerID |
| | The ManagerID node contains the name of an individual manager. |
| Status | Definition: |

| Field Name | Definition |
|--------------------|--|
| | Specifies whether the approver in the User ID field approves or rejects the activity. |
| | Allowed Values: |
| | An XPath to a schema node in Boolean format, such as True or False. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | /pd:my/pd:Status |
| | The Status node contains the Boolean value to indicate whether the activity has been approved or rejected by an approver. |
| Mandatory | Definition: |
| | Specifies an XPath to a schema node that indicates whether the approver listed in the User ID field is mandatory. If the approver is mandatory, and he or she rejects the activity, the activity is considered rejected, regardless of the voting outcome. |
| | Allowed Values: |
| | An XPath to a schema node that represents a Boolean value indicating whether the approver is mandatory. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | /pd:my/pd:Mandatory |
| | The Mandatory node contains the Boolean value to indicate whether the approval by an individual manager is essential. |
| | For example, if you specify the following values in an XML schema: User ID: Kelly and Mandatory=True, then this indicates that Kelly's approval is mandatory. |
| Final Result XPath | Definition: |

| Field Name | Definition |
|---|--|
| | Specifies the final result whether an approval activity is approved or rejected. |
| | This is also an Boolean value. |
| | Allowed Values: |
| | An XPath to a schema node that represents the final result of the voting. |
| | The final result can be stored in a custom attribute. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | /pd:my/pd:VotingResult |
| | The VotingResult node stores the Boolean value to indicate whether the activity is finally approved or rejected. |
| Set final result as 'Approve' when _ % of the users | Definition: |
| approved. | Specifies the minimum percentage of approvers required to consider the item approved. |
| | Allowed Values: |
| | An integer. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | If you have enter 60, and you have 7 approvers, at least 5 of the approvers would need to vote Yes for the item to be approved because 4/7=57%, and 5/7=71%. |

- Data Binding
- Using Process Attributes

User Defined Properties Window

Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable-like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want.

| User Defined Properties | | | × |
|-------------------------|------------------------------------|---------|-------------|
| User Defined Proper | ties | | |
| Name | / Value | Туре | Schema |
| ManagerApproval | \${/pd:myFields/pd:ManagerApproval | Boolean | |
| | | | Remove All |
| | | | ✓ ОК Халсеl |
| | | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Dynamic Parallel Approval
 - Dynamic Sequential Approval
 - Process Adaptation
 - Vote
 - Web Form
 - Workload Balance
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the UserDefinedProperties field, click the Ellipses button.

| Field Name | Definition |
|------------|--|
| Add | <u>Function:</u> Creates a row where you can specify a ClientData property. |
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want. |
| Name | Definition: Specifies the name for the ClientData. Image: Custom Attributes: Yes |
| Value | Definition: The value for the ClientData variable. Allowed Values: A number or a text string that can contain spaces. You can dynamically set the value for the variable by using XML metadata. Default Value: None Custom Attributes: |

| Field Name | Definition |
|------------|---|
| | Yes |
| Туре | Definition: Determines the data type for the ClientData variable. Allowed Values: Integer String Float Decimal Boolean Default Value: |
| | None |
| Remove | Function: Deletes the selected row from the user defined properties list. |
| Remove All | <u>Function:</u> Deletes all rows from the user defined properties list. |

- Data Binding
- Using Process Attributes

Exchange Server Configuration Window

Integrates an AgileShape with Microsoft Exchange Server. When this connection is properly configured, the AgileShape will then insert, update, and remove tasks for the assigned participants, so that the tasks can be viewed directly from Microsoft Outlook.

| Excl | nange Server Configuration | |
|--|---|------------------------|
| Server Url and | Authentication | |
| Exchange | 2003/2007 C Exchange 2010 | |
| Url: | https://agilepoint:8000 | |
| Domain: | agilepoint | |
| Username: | user@agilepoint.com | |
| Password: | **** | |
| Get help for | oint System User At Runtime configuring Microsoft Exchange Serve | Test |
| Task Propertie | es on Exchange Server subject, body and priority from the foll | lowing email template: |
| Import the : | | • |
| Import the : Acknowledg | ement | |
| Import the s Acknowledg Category: | lement | |
| Import the : Acknowledg Category: <default></default> | lement | |
| Import the : Acknowledg Category: <default></default> | lement | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Dynamic Parallel Approval
 - Dynamic Sequential Approval
 - Vote
 - Web Form
 - Workload Balance
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In the EnabledExchangeServer field, click True.

6. In the **ExchangeServer** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------------------------------|---|
| Exchange 2003/2007 or Exchange 2010 | Definition: Specifies the version of your Microsoft Exchange Server. Allowed Values: |
| | Exchange 2003/2007 - Enables to configure this AgileShape to access Exchange Server 2003/2007. Exchange 2010 - Enables to configure this |
| | AgileShape to access Exchange Server 2010. |
| | Default Value: |
| | Exchange 2003/2007 |
| Url | Definition: |
| | Specifies the Exchange Server URL. |
| | Allowed Values: |
| | Exchange 2003/2007 - https://[machine name]: [port] |
| | Exchange 2010 - https://[machine name]:[port]/ EWS/Exchange.asmx |
| | Default Value: |
| | https://[MachineName]:[Port] |
| | Custom Attributes: |
| | No |
| | Example: |
| | Exchange 2003/2007 - https:// mydomain.com:2030 |
| | Exchange 2010 - https://mydomain.com:2030/ EWS/Exchange.asmx |
| Domain | Definition: |
| | The authentication domain. |
| | Allowed Values: |
| | A valid domain. |
| | Default Value: |

| Field Name | Definition |
|---------------------------------------|--|
| | None |
| | Custom Attributes: |
| | None |
| Username | Definition: |
| | The user name for an Exchange Server administrator. |
| | Allowed Values: |
| | A valid user name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Password | Definition: |
| | The password for the authentication account. |
| | Allowed Values: |
| | A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Use AgilePoint System User at Runtime | Definition: |
| | Specifies whether to use the AgilePoint system user account (usually the same as the AgilePoint Service account) for the action when the process is running. |
| | Allowed Values: |
| | Selected - Uses the AgilePoint system user account for the action at runtime. |
| | • Deselected - Uses the credentials specified on this window at runtime. |
| | Default Value: |
| | Deselected |
| | Custom Attributes: |
| | No |

| Field Name | Definition |
|--|---|
| Import the subject, body, and priority from the following email template | <u>Definition:</u> Specifies an email template to be used for sending emails from Microsoft Outlook. <u>Allowed Values:</u> A list of automatically populated email templates if designed for the process. None - Specifies that no email template is created within the process. <u>Default Value:</u> None |
| Category | Definition: Specifies an Outlook category to associate with the task. A category provides a way to group tasks that are created using the same AgileShape. For example, if different AgileShapes have been configured to use Exchange Server, then in this case, a category acts as a keyword which uniquely identifies the tasks created using one AgileShape. Allowed Values: A text string. Default Value: <default> No</default> |
| Remove Outlook Task if workflow Task is cancelled. | <u>Definition:</u> Determines whether to delete the task item from the participant's task list on Microsoft Outlook when the task is cancelled in the process. <u>Allowed Values:</u> <u>Selected</u> - Deletes the task item from Microsoft Outlook when the task is cancelled in the process. <u>Deselected</u> - The task item is not updated on Microsoft Outlook even if the task is cancelled in the process. |

| Field Name | Definition |
|------------|------------|
| | Selected |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes |
|------------------------------|
| Select XPath from Attributes |
| Schema Process Attributes |
| myFields mpName (String) |
| XPath: |
| DataType: |
| 🥪 OK 🔀 Cancel |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.

- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the Ellipses button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|--|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. |
| | <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | Definition:Displays the process attributes associated with the process in a tree-view structure.Allowed Values: Read only. Click to select the process attribute you want to use. |
| ОК | Function: |

| Field Name | Definition |
|------------|---|
| | Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. |
| | Note the following: |
| | First, you must select the metadata or attribute you want, and then click OK. |
| | You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Approving an Activity by Vote

This example demonstrates how to set up a vote based approval using the Vote AgileShape. At runtime, the process moves forward after a specified percentage of voters approve or reject an activity.

Instructional Goals

• Demonstrate how to set up vote based approval for an activity.

Example Process: Create or Update a Human Resources Policy



Problem Statement

Create or update a human resources (HR) policy within an organization.

Business Requirements

• The process is initiated when an HR employee submits an update to the company HR policies.

- The policy must be approved by 60% of the approvers.
- Approval from a Legal department representative is required.

Prerequisites

• An XML based form with schema nodes representing approvers, status, and voting result. This example uses an InfoPath form.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Process Adaptation
 - Vote
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the VotingConfiguration field, click the Ellipses button.

Instructions

1. On the Voting Configuration Window, complete the following fields. This table provides sample values, but the actual values would depend upon the schema for your form.

For each field, click the **Schema** button to select the schema node for your form.

| Field Name | Value |
|------------|---|
| XPath | /pd:my/pd:HRPolicyApprovers |
| | This parent node would include the following individual approvers: |
| | Human Resources Vice President |
| | Employee union representative |
| | Chief Operating Officer |
| | Legal department representative |
| User ID | /pd:myFields/my:LegalRepUserID |
| | The legal department representative is identified as a mandatory reviewer. |
| Status | /pd:myFields/my:LegalRepResult |
| | A boolean value that represents the result of the legal representative's vote. |
| Mandatory | /pd:myFields/my:LegalRepIsMandatory |
| | A boolean value that specifies whether approval from the legal representative in the User ID field is mandatory for the HR policy to be approved. If this |

| Field Name | Value |
|---|--|
| | value is set to True, and the legal representative does not approve, then the policy is rejected regardless of the voting outcome. |
| Final Result XPath | /pd:myFields/my:VotingResult A boolean value that represents the final result of the voting, taking into account all the voting logic specified on this setup window. |
| Set final result as approved when _ % of the users approved. | 60 A minimum of 60 percent of the reviewers are required, which means 2 out of the 3 core reviewers, plus the legal representative. (The legal representative's approval is mandatory.) |
| SharePoint and InfoPath Integration are used. (Vote AgileShape) Enable Schema (Process Adaptation AgileShape) | Selected Indicates that this example uses an InfoPath form and SharePoint. |

Web Form

An AgileWork that uses a web page as the user interface for a manual activity.

The web page's URL is configurable and can include URL parameters. Therefore, one common use of this AgileShape is to associate several different activities with the same web page. Each AgileShape instance can pass different input to the web page via URL parameters in order to make the web page initialize appropriately for each individual activity.

As an alternative to URL parameters, you can also set up variables using user defined properties.



Prerequisites

• Generic process template.

Good to Know

 If a SharePoint list is customized using the Customize Form (InfoPath) option in the SharePoint ribbon, the WebForm AgileShape must be used instead of ListForm shape in the process. In addition, the URL in WebPageUrl property must be specified.

Navigation

1. In AgilePoint Envision, open a process template.

- 2. Navigate to the Premier Extension stencil.
- 3. On the **Premier Extension** stencil, drag the **WebForm** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------------|---|
| UserDefinedProperties | Opens the Following Window: User Defined Properties Window |
| | Purpose of this Window: |
| | with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable- like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want. |
| WebFormControls | Opens the Following Window: |
| | Web Form Controls Window |
| | Purpose of this Window: |
| | Sets up the display of custom web form. |
| WebPageUrl | Opens the Following Window: |
| | Web Form URL Window |
| | Purpose of this Window: |
| | Specifies the URL for the web form for the activity. |
| Work to Perform | Definition: |
| | Specifies the name of the task that appears in a participant's Task List. |
| | In most cases, for processes that use ASP.NET forms, this value also determines the file names for the .aspx form pages. |
| | For the Web Form AgileShape, this property does not determine the file names for the web form. Instead, use the Web Form URL Window. |
| | Allowed Values: |
| | The values for this property vary, depending on the type of process model you are using: |

| Field Name | Definition |
|-----------------------|--|
| | • Generic - Does the following: |
| | Specifies the name that appears in the participant's Task List for this activity. |
| | If you create an ASP.NET project for this process in AgilePoint Developer, a new .aspx page is created for each manual activity with the file name equivalent to the value of the Work to Perform property. |
| | SPList and SPDoc - Specifies the name that appears in the participant's Task List for this activity. |
| | • InfoPath - Does the following: |
| | Specifies the name that appears in the participant's Task List for this activity. |
| | Specifies the view from the InfoPath form that is associated with the process model. These values are loaded from the InfoPath form. |
| | It is possible to add a new work performer name. However, this is not recommended. A new name would indicate a different type of form, such as an ASP.NET form. This functionality is technically supported, but you would need to write code to implement it. |
| | AgileForms - Specifies the name that appears in the participant's Task List for this activity. |
| | The default value for this field is FormRender. It is recommended to change this value. |
| | Default Value: |
| | None, except for AgileForms process models. |
| | Property Group: |
| | Basic |
| EnabledExchangeServer | Definition: |
| | Integrates the AgileShape with Microsoft Exchange Server. The AgileShape's associated tasks are visible in the Microsoft Outlook's task list to the assigned participants. |
| | Allowed Values: |
| | • False - The AgileShape in not integrated with Microsoft Exchange Server. |
| | True - The AgileShape is integrated with Microsoft Exchange Server that enables the |

| Field Name | Definition |
|----------------|--|
| | participants to view the assigned tasks in Microsoft Outlook. |
| | Default Value: |
| | False |
| ExchangeServer | Opens the Following Window: Exchange Server Configuration Window Purpose of this Window: Integrates an AgileShape with Microsoft Exchange Server. When this connection is properly configured, the AgileShape will then insert, update, and remove tasks for the assigned participants, so that the tasks can be viewed directly from Microsoft Outlook. |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

User Defined Properties Window

Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable-like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want.

| User Defined Properties | erties | | × |
|-------------------------|------------------------------------|---------|------------|
| Name | Z Value | Туре | Crhama |
| ManagerApproval | \${/pd:myFields/pd:ManagerApproval | Boolean | Scheina |
| | | | Remove All |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Dynamic Parallel Approval
 - Dynamic Sequential Approval
 - Process Adaptation
 - Vote
 - Web Form
 - Workload Balance
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the UserDefinedProperties field, click the Ellipses button.

| Field Name | Definition |
|------------|---|
| Add | <u>Function:</u> Creates a row where you can specify a ClientData property. |

| Field Name | Definition |
|------------|--|
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want |
| Name | Definition: Specifies the name for the ClientData. Image: The ClientData property is used to store data related to the AgileWork AgileShapes. This is like defining a variable to store specific values. Allowed Values: A text string with spaces. Default Value: None Custom Attributes: Yes |
| Value | Definition: The value for the ClientData variable. Allowed Values: A number or a text string that can contain spaces. You can dynamically set the value for the variable by using XML metadata. Default Value: None Custom Attributes: Yes |
| Туре | Definition: Determines the data type for the ClientData variable. Allowed Values: Integer |

| Field Name | Definition |
|------------|---|
| | String |
| | • Float |
| | • Decimal |
| | DateTime |
| | • Boolean |
| | Default Value: |
| | None |
| Remove | Function: |
| | Deletes the selected row from the user defined properties list. |
| Remove All | Function: |
| | Deletes all rows from the user defined properties list. |

- Data Binding
- Using Process Attributes

Web Form Controls Window

Sets up the display of custom web form.

| We | b Form Controls | | × |
|------------|--------------------|-------------------------------------|--------|
| | Web Form Controls | | |
| | Web Control Name | Expected Format | |
| 1 | Web Form Control 1 | Enable | 📥 Add |
| | Web Form Control 2 | Disable | |
| | Web Form Control 3 | Invisible | Remove |
| Remove All | | | |
| | | ✓ OK Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. On the Premier Extension stencil, drag the WebForm AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **WebFormControls** field, click the **Ellipses** button.

| Field Name | Definition |
|------------------|---|
| Add | <u>Function:</u> Adds a row to specify a web form control name and how the control is displayed on the web form. |
| Web Control Name | Definition: Specifies the custom controls to be used in the web form. Allowed Values: A text string that specifies the name of a web form control. Default Value: None |
| | Custom Attributes: No |
| Expected Format | <u>Definition:</u> Determines the display and availability of custom controls on the web form, such as whether a web form control is visible and editable. <u>Allowed Values:</u> Enable - The control is visible and editable. Disable - The control is visible, but not editable. Invisible - The control is not visible. <u>Default Value:</u> None |
| Remove | Function: |

| Field Name | Definition |
|------------|--|
| | Deletes the selected row from the Web Form Controls list. |
| Remove All | Function: Deletes all rows from the Web Form Controls list. |

- Data Binding
- Using Process Attributes

Web Form URL Window

Specifies the URL for the web form for the activity.

This URL is displayed in the AgilePoint Task List Web Part. See the Manual AgileShape for more information about how URLs associated with manual activities are displayed in task lists.

| Web Form URL | x |
|--|---|
| Web Form URL | |
| URL | |
| <pre>www.gethired.com/new/\${/pd:myFields/pd:JobID}/ \${/pd:myFields/pd:JobSPSiteURL}</pre> | |
| Url can be either relative Url to an ASP.Net, or absolute Url with custom attributes, for example: /doc/review.aspx?a=1&b=2, or http://www.tusca.com/index.htm?a=1 &b=\${cb} | |
| Solution Cancel | |

Prerequisites

• If you are using a Web Form with SharePoint, you must ensure **OpenTasksInNewWindow** in the AgilePoint Configuration List is set properly, so that you can create the appropriate URL format for your form.

For more information, see Set the AgilePoint Configuration List.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. On the **Premier Extension** stencil, drag the **WebForm** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the WebPageUrl field, click the Ellipses button.

| Field Name | Definition |
|------------|---|
| URL | Definition: |
| | Specifies the URL of the web form that is associated with a task. |
| | In SharePoint, if you select the Customize Form (InfoPath) option in the SharePoint ribbon, this field can indicate the URL for the InfoPath task, and specify whether the task opens in a new window. |
| | Allowed Values: |
| | For ASP.NET pages, the following URL types are available: |
| | A Relative URL - An ASP.NET application- relative URL can be used by specifying a URL that starts with a slash. |
| | The location of the ASP.NET application is derived in the same way as described under the documentation of the Work To Perform property of the Manual AgileShape. |
| | An Absolute URL - An absolute URL which provides the full path to the Web page. |
| | For SharePoint, the use one of the following URL formats, depending upon your setting for OpenTaskInNewWindow in the AgilePoint Configuration List in SharePoint: |
| | • OpenTaskInNewWindow is set to True - |
| | http://[machine name]:[port]/sites/[site name]/ Lists/[list name]/Item/editifs.aspx?List=\${ListID} &ID=\${ListItemID}&Web=\${WebID}&Source= http://[machine name]:[port]/sites/[site name]/ _layouts/AP/CompleteWorkItem%2Easpx? WID=\${WorkItemID} |
| | OpenTaskInNewWindow is set to False - This redirects to the home page of the of the SharePoint, provided the HomePage attribute |

| Field Name | Definition |
|------------|---|
| | includes the URL of the SharePoint home page. Notice the phrase %26Source=\${HomePage} at the end, which is the only difference: http://[machine name]:[port]/sites/[site name]/ Lists/[list name]/Item/editifs.aspx?List=\${ListID} &ID=\${ListItemID}&Web=\${WebID}&Source= http://[machine name]:[port]/sites/[site name]/_layouts/AP/CompleteWorkItem %2Easpx?WID=\${WorkItemID}%26Source= |
| | |
| | <u>Derault value:</u> |
| | |
| | Custom Attributes: |
| | res |
| | Example: |
| | ASP.NET examples: |
| | Relative URL - /doc/roview.aspx2a=18b=2 |
| | • Absolute URL - |
| | http://www.tusca.com/MyPage.aspx?item=\$ \{itemid\}&quantity=\$\{qty\}&express=no |
| | The values of two of the parameters are initialized by custom process attributes (\$ \{itemid\} and \$\{qty\}) at runtime, and the third is initialized to a hard coded value. |
| | SharePoint examples: |
| | • OpenTaskInNewWindow is set to True - |
| | http://demo3:8010/Lists/TestList/Item/ editifs.aspx?List=\${ListID}&ID=\${ListItemID} &Web=\${WebID}&Source=http://demo3:8000/ _layouts/AP/CompleteWorkItem%2Easpx? WID=\${WorkItemID} |
| | • OpenTaskInNewWindow is set to False - |
| | http://demo3:8010/Lists/TestList/Item/ editifs.aspx?List=\${ListID}&ID=\${ListItemID} &Web=\${WebID}&Source=http://demo3:8000/ _layouts/AP/CompleteWorkItem%2Easpx? WID=\${WorkItemID}%26Source=\${HomePage} |
| Schema | Opens the Following Window: |
| | Select XPath from Attributes Window |
| | Purpose of this Window: |
| Field Name | Definition |
|------------|---|
| | Enables you to select a schema node from the XML schema for your process. |

- Data Binding
- Using Process Attributes

Exchange Server Configuration Window

Integrates an AgileShape with Microsoft Exchange Server. When this connection is properly configured, the AgileShape will then insert, update, and remove tasks for the assigned participants, so that the tasks can be viewed directly from Microsoft Outlook.

| | r Configuration | |
|---|--|-------------|
| Exc | hange Server Configuration | |
| Server Url an | d Authentication | |
| Exchange | 2003/2007 C Exchange 2010 | |
| Url: | https://agilepoint:8000 | |
| Domain: | agilepoint | |
| Username: | user@agilepoint.com | |
| Password: | **** | |
| Get help for | r configuring Microsoft Exchange Server. Mailbox a | ccess right |
| | | |
| Task Properti Import the | es on Exchange Server subject, body and priority from the following email | template: |
| Task Properti Import the Acknowledg | es on Exchange Server subject, body and priority from the following email gement | template: |
| Task Properti Import the Acknowled Category: | es on Exchange Server subject, body and priority from the following email gement | template: |
| Task Properti Import the Acknowledg Category: <default></default> | es on Exchange Server subject, body and priority from the following email gement | template: |
| Task Properti Import the Acknowledg Category: <default></default> | es on Exchange Server subject, body and priority from the following email gement | template: |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Dynamic Parallel Approval
 - Dynamic Sequential Approval
 - Vote
 - Web Form
 - Workload Balance
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In the EnabledExchangeServer field, click True.
- 6. In the ExchangeServer field, click the Ellipses button.

| Field Name | Definition |
|-------------------------------------|--|
| Exchange 2003/2007 or Exchange 2010 | Definition: |
| | Specifies the version of your Microsoft Exchange Server. |
| | Allowed Values: |
| | Exchange 2003/2007 - Enables to configure this AgileShape to access Exchange Server 2003/2007. |
| | • Exchange 2010 - Enables to configure this AgileShape to access Exchange Server 2010. |
| | Default Value: |
| | Exchange 2003/2007 |
| Url | Definition: |
| | Specifies the Exchange Server URL. |
| | Allowed Values: |
| | • Exchange 2003/2007 - https://[machine name]: [port] |
| | Exchange 2010 - https://[machine name]:[port]/ EWS/Exchange.asmx |
| | Default Value: |
| | https://[MachineName]:[Port] |

| Field Name | Definition |
|------------|--|
| | Custom Attributes: |
| | No |
| | Example: |
| | Exchange 2003/2007 - https:// mydomain.com:2030 |
| | Exchange 2010 - https://mydomain.com:2030/ EWS/Exchange.asmx |
| Domain | Definition: |
| | The authentication domain. |
| | Allowed Values: |
| | A valid domain. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | None |
| Username | Definition: |
| | The user name for an Exchange Server administrator. |
| | Allowed Values: |
| | A valid user name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Password | Definition: |
| | The password for the authentication account. |
| | Allowed Values: |
| | A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | |

| Field Name | Definition |
|--|---|
| Use AgilePoint System User at Runtime | Definition: Specifies whether to use the AgilePoint system user account (usually the same as the AgilePoint Service account) for the action when the process is running. Allowed Values: • Selected - Uses the AgilePoint system user account for the action at runtime. • Deselected - Uses the credentials specified on this window at runtime. • Default Value: Deselected No |
| Import the subject, body, and priority from the following email template | <u>Definition:</u> Specifies an email template to be used for sending emails from Microsoft Outlook. <u>Allowed Values:</u> A list of automatically populated email templates if designed for the process. None - Specifies that no email template is created within the process. <u>Default Value:</u> None |
| Category | Definition: Specifies an Outlook category to associate with the task. A category provides a way to group tasks that are created using the same AgileShape. For example, if different AgileShapes have been configured to use Exchange Server, then in this case, a category acts as a keyword which uniquely identifies the tasks created using one AgileShape. Allowed Values: A text string. Default Value: <default></default> |

| Field Name | Definition |
|--|---|
| | No |
| Remove Outlook Task if workflow Task is cancelled. | Definition: Determines whether to delete the task item from the participant's task list on Microsoft Outlook when the |
| | Allowed Values: • Selected - Deletes the task item from Microsoft |
| | Outlook when the task is cancelled in the process. |
| | • Deselected - The task item is not updated on Microsoft Outlook even if the task is cancelled in the process. |
| | Default Value: Selected |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes | × |
|------------------------------|---|
| Select XPath from Attributes | |
| Schema Process Attributes | |
| myFields | |
| XPath: | |
| ✓ OK Xancel | |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the **Ellipses** button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Workload Balance

An AgileWork that assigns the work for a manual activity to the participants with the smallest workloads.



Good to Know

- Workload is determined by the sum of assigned and overdue tasks.
- If all the participants in the group have the same work load, then the WorkLoad Balance AgileShape picks a participant at random.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. On the **Premier Extension** stencil, drag the **Workload Balance** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------------|--|
| UserDefinedProperties | Opens the Following Window: User Defined Properties Window Purpose of this Window: Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable- like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData |

| Field Name | Definition |
|-----------------------|---|
| | property of the WorkItem and use it however you want. |
| Claimable | <u>Definition:</u> <u>Determines whether the participant who has been assigned the work item can have the option to reject it. If the participant rejects the work item, the work item is placed back in the pool and assigned to a different participant.</u> <u>Allowed Values:</u> <u>True - The participant can reject the work item.</u> |
| | If rejected, the work item is placed back in the pool. False - The participant doesn't have the option to reject the work item. <u>Default Value:</u> True |
| EnabledExchangeServer | <u>Definition:</u> Integrates the AgileShape with Microsoft Exchange Server. The AgileShape's associated tasks are visible in the Microsoft Outlook's task list to the assigned participants. <u>Allowed Values:</u> False - The AgileShape in not integrated with Microsoft Exchange Server. True - The AgileShape is integrated with Microsoft Exchange Server that enables the participants to view the assigned tasks in Microsoft Outlook. <u>Default Value:</u> False |
| ExchangeServer | Opens the Following Window: Exchange Server Configuration Window Purpose of this Window: Integrates an AgileShape with Microsoft Exchange Server. When this connection is properly configured, the AgileShape will then insert, update, and remove tasks for the assigned participants, so that the tasks can be viewed directly from Microsoft Outlook. |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

User Defined Properties Window

Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable-like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want.

| User Defined Properties | operties | | | × |
|-------------------------|----------|-------------------------------|---------|------------|
| Name | 7 | Value | Туре | Schema |
| ManagerApproval | \${/pd | d:myFields/pd:ManagerApproval | Boolean | - Sciella |
| | | | | Remove All |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Dynamic Parallel Approval
 - Dynamic Sequential Approval
 - Process Adaptation
 - Vote
 - Web Form
 - Workload Balance
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the UserDefinedProperties field, click the Ellipses button.

| Field Name | Definition |
|------------|---|
| Add | <u>Function:</u> Creates a row where you can specify a ClientData property. |

| Field Name | Definition |
|------------|--|
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want |
| Name | Definition: Specifies the name for the ClientData. Image: The ClientData property is used to store data related to the AgileWork AgileShapes. This is like defining a variable to store specific values. Allowed Values: A text string with spaces. Default Value: None Custom Attributes: Yes |
| Value | Definition: The value for the ClientData variable. Allowed Values: A number or a text string that can contain spaces. You can dynamically set the value for the variable by using XML metadata. Default Value: None Custom Attributes: Yes |
| Туре | Definition: Determines the data type for the ClientData variable. <u>Allowed Values:</u> Integer |

| Field Name | Definition |
|------------|---|
| | String |
| | • Float |
| | Decimal |
| | • DateTime |
| | • Boolean |
| | Default Value: |
| | None |
| Remove | Function: |
| | Deletes the selected row from the user defined properties list. |
| Remove All | Function: |
| | Deletes all rows from the user defined properties list. |

- Data Binding
- Using Process Attributes

Exchange Server Configuration Window

Integrates an AgileShape with Microsoft Exchange Server. When this connection is properly configured, the AgileShape will then insert, update, and remove tasks for the assigned participants, so that the tasks can be viewed directly from Microsoft Outlook.

| | hange Server Configuration | |
|--|---|----------------------|
| Server Url and | d Authentication | |
| Exchange | 2003/2007 C Exchange 2010 | |
| Url: | https://agilepoint:8000 | |
| Domain: | agilepoint | |
| Username: | user@agilepoint.com | |
| Password: | **** | |
| | Point System User At Runtime | Test |
| Get help for | r configuring Microsoft Exchange Server | Mailbox access right |
| <u>Get help for</u> Task Propertie | configuring Microsoft Exchange Server es on Exchange Server subject, body and priority from the folk | Mailbox access right |
| Get help for Task Propertie Import the s | configuring Microsoft Exchange Server es on Exchange Server subject, body and priority from the folk gement | Mailbox access right |
| Get help for Task Propertie Import the s Acknowledg Category: | configuring Microsoft Exchange Server es on Exchange Server subject, body and priority from the follo gement | Mailbox access right |
| Get help for Task Propertie Import the : Acknowledg Category: <default></default> | r configuring Microsoft Exchange Server es on Exchange Server subject, body and priority from the follo gement | Mailbox access right |
| Get help for Task Propertie Import the s Acknowledg Category: <default></default> | r configuring Microsoft Exchange Server es on Exchange Server subject, body and priority from the follo gement | Mailbox access right |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Dynamic Parallel Approval
 - Dynamic Sequential Approval
 - Vote
 - Web Form
 - Workload Balance
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In the EnabledExchangeServer field, click True.

6. In the **ExchangeServer** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------------------------------|---|
| Exchange 2003/2007 or Exchange 2010 | Definition: Specifies the version of your Microsoft Exchange Server. Allowed Values: |
| | Exchange 2003/2007 - Enables to configure this AgileShape to access Exchange Server 2003/2007. Exchange 2010 - Enables to configure this |
| | AgileShape to access Exchange Server 2010. |
| | Default Value: |
| | Exchange 2003/2007 |
| Url | Definition: |
| | Specifies the Exchange Server URL. |
| | Allowed Values: |
| | Exchange 2003/2007 - https://[machine name]: [port] |
| | Exchange 2010 - https://[machine name]:[port]/ EWS/Exchange.asmx |
| | Default Value: |
| | https://[MachineName]:[Port] |
| | Custom Attributes: |
| | No |
| | Example: |
| | Exchange 2003/2007 - https:// mydomain.com:2030 |
| | Exchange 2010 - https://mydomain.com:2030/ EWS/Exchange.asmx |
| Domain | Definition: |
| | The authentication domain. |
| | Allowed Values: |
| | A valid domain. |
| | Default Value: |

| Field Name | Definition |
|---------------------------------------|--|
| | None |
| | Custom Attributes: |
| | None |
| Username | Definition: |
| | The user name for an Exchange Server administrator. |
| | Allowed Values: |
| | A valid user name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Password | Definition: |
| | The password for the authentication account. |
| | Allowed Values: |
| | A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Use AgilePoint System User at Runtime | Definition: |
| | Specifies whether to use the AgilePoint system user account (usually the same as the AgilePoint Service account) for the action when the process is running. |
| | Allowed Values: |
| | Selected - Uses the AgilePoint system user account for the action at runtime. |
| | • Deselected - Uses the credentials specified on this window at runtime. |
| | Default Value: |
| | Deselected |
| | Custom Attributes: |
| | No |

| Field Name | Definition |
|--|---|
| Import the subject, body, and priority from the following email template | <u>Definition:</u> Specifies an email template to be used for sending emails from Microsoft Outlook. <u>Allowed Values:</u> A list of automatically populated email templates if designed for the process. None - Specifies that no email template is created within the process. <u>Default Value:</u> None |
| Category | Definition: Specifies an Outlook category to associate with the task. A category provides a way to group tasks that are created using the same AgileShape. For example, if different AgileShapes have been configured to use Exchange Server, then in this case, a category acts as a keyword which uniquely identifies the tasks created using one AgileShape. Allowed Values: A text string. Default Value: <default> No</default> |
| Remove Outlook Task if workflow Task is cancelled. | Definition: Determines whether to delete the task item from the participant's task list on Microsoft Outlook when the task is cancelled in the process. Allowed Values: • Selected - Deletes the task item from Microsoft Outlook when the task is cancelled in the process. • Deselected - The task item is not updated on Microsoft Outlook even if the task is cancelled in the process. • Deselected - The task item is not updated on Microsoft Outlook even if the task is cancelled in the process. • Default Value: |

| Field Name | Definition |
|------------|------------|
| | Selected |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes |
|------------------------------|
| Select XPath from Attributes |
| Schema Process Attributes |
| myFields empName (String) |
| XPath: |
| DataType: |
| 🥪 OK 🔀 Cancel |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.

- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the Ellipses button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|--|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. |
| | Allowed Values: Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | Definition: Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| ОК | Function: |

| Field Name | Definition |
|------------|---|
| | Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. |
| | Note the following: |
| | First, you must select the metadata or attribute you want, and then click OK. |
| | You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Assigning Tasks Based On Workload

To assign a task based on the participant in a group with the lowest workload, do the following. When the process enters the Workload Balance AgileShape at runtime, it assigns the task to the individual participant with the smallest sum of assigned and overdue tasks.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. On the **Premier Extension** stencil, drag the **Workload Balance** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In the Participants field, click Add Participant.

Instructions

1. On the **Participant(s)** window, in the **Name** field, specify more than one participant - for example, a list of individuals, a group, or a role.

| Field Name | Definition |
|------------|--|
| Name | Definition: The Participants for an activity. |
| | Allowed Values: |
| | In the Name field, click the right arrow (>) to select the type of participant you want to add. |

| Field Name | Definition |
|------------|---|
| | Then follow the instructions to add the type of participant of your choice. |
| | AgilePoint User - For information, see Selecting an AgilePoint User Participant |
| | AgilePoint Role - For information, see Selecting an AgilePoint Role Participant |
| | AgilePoint Group - For information, see Selecting an AgilePoint Group Participant |
| | Active Directory Group - For information, see Selecting an Active Directory Group Participant |
| | SharePoint Group - For information, see Selecting a SharePoint Group Participant |
| | To specify multiple participants, separate the user names with a semicolon (;). |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

SharePoint / Microsoft SPS

This section describes the AgileShapes in the SharePoint and Microsoft SPS stencils. This stencil is to be used with the AgilePoint SharePoint Integration.



Note: The SharePoint stencil is compatible with AgilePoint Integration for SharePoint v2. The Microsoft SPS stencil is compatible with AgilePoint Integration for SharePoint v1. Some AgileShapes that are available on the SharePoint stencil may not be available on the Microsoft SPS stencil.

Add User to SP Group

An AgilePart that adds a user to a SharePoint Group.



Navigation

1. In AgilePoint Envision, open a process template.

- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Add User to SP Group** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------------------------|---|
| AddUserToGroup Configuration | Opens the Following Window: Add User To Group Configuration Window Purpose of this Window: Specifies user information to be created in SharePoint for the Add User to SP Group AgileShape. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Add User To Group Configuration Window

Specifies user information to be created in SharePoint for the Add User to SP Group AgileShape.

| Add User To Group Configuration | |
|--|--|
| Add User To Group On SharePoint Site. | |
| Site URL (e.g. http://Machine_Name:port/sites/SiteName): | |
| http://APDesktop:8000/sites/\${JobSite} | |
| Group Name: | |
| Customers | |
| User Name (e.g Domain\Username): | |
| APDesktop \John Smith | |
| Email: | |
| John Smith@tusca.com | |
| User Notes: | |
| Please provide authentication for the user. | |
| *You may enter Custom Attribute Name as \${} | |
| 🗖 Schema 🛛 💞 OK 🔀 Cancel | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Add User to SP Group** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the AddUserToGroup Configuration field, click the Ellipses button.

| Field Name | Definition |
|------------|--|
| Site URL | Definition: Specifies the URL for your SharePoint site. |
| | Allowed Values: A valid SharePoint site URL. |

| Field Name | Definition |
|---------------|--|
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://mysharepoint:8000/sites/\${mysite} |
| Group Name | Definition |
| | The name of the SharePoint group you want |
| | |
| | A valid SharePoint group name |
| | |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| User Name | Definition: |
| | Specifies the user name to be added to the SharePoint group. |
| | Allowed Values: |
| | A user name, including the domain name, in the following format: |
| | [domain]\[user name] |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | MyDomain\Administrator |
| Email Address | Definition: |
| | The user's email address. |
| | Allowed Values: |
| | A valid email address |
| | |

| Field Name | Definition |
|------------|--|
| | None |
| | Yes |
| User Notes | Definition: Provides information related to this activity. For example, you can specify group-related privileges to be assigned to the user. Allowed Values: A single line of text. Default Value: None Custom Attributes: |
| | Yes |
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: |
| | Enables you to select a schema node from the XML schema for your process. |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes |
|------------------------------|
| Select XPath from Attributes |
| Schema Process Attributes |
| myFields |
| XPath: |
| DataType: |
| 🥪 OK 🔀 Cancel |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the **Ellipses** button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Adding a User to a SharePoint Group

To add a user to a SharePoint group, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Add User to SP Group** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the AddUserToGroup Configuration field, click the Ellipses button.

Instructions

1. On the Add User from Group Configuration window, complete the following required fields:

| Field Name | Definition |
|------------|---|
| Site URL | Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/\${mysite} |
| Group Name | Definition: |

| Field Name | Definition |
|---------------|--|
| | The name of the SharePoint group you want. |
| | Allowed Values: |
| | A valid SharePoint group name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| User Name | Definition: |
| | Specifies the user name to be added to the SharePoint group. |
| | Allowed Values: |
| | A user name, including the domain name, in the following format: |
| | [domain]\[user name] |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | MyDomain\Administrator |
| Email Address | Definition: |
| | The user's email address. |
| | Allowed Values: |
| | A valid email address. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

2. Complete any additional configuration for this AgileShape according to your requirements:

- AgilePart Common Setup
- Add User To Group Configuration Window

Approve

An AgileWork that is identical to the Manual AgileShape, except that its Work To Perform property defaults to the value **Approve**, and it has a different visual appearance in the process template. This AgileShape is provided simply for the convenience of the process modeler.



Note: This AgileShape has been deprecated. Beginning with AgilePoint BPMS v5.0 SP4 this AgileShape is available only through the Traditional AgileShape stencils, and not through the current stencils.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Approve** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Approve Reject Content

An AgileWork that can be used to automatically approve or reject a document, or file.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Approve/Reject Content** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------|---|
| Approval Type | Definition: Determines whether the document is approved or rejected. |
| | Allowed Values: |
| | • Reject - The document is rejected. |
| | • Approve - The document is approved. |
| | <u>Default Value:</u> |
| | Reject |
| Document URL | <u>Definition:</u> The URL of your document or file — for example, the file you want to add, delete, or check out. <u>Allowed Values:</u> A valid URL. <u>Default Value:</u> None |
| | Custom Attributes: |

| Field Name | Definition |
|------------|------------|
| | Yes |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

CAML Query

An AgilePart that creates a SharePoint view based on available fields using a CAML query. Use the CAML Query Builder AgilePart to create your CAML query, and your view.



Prerequisites

Log on to SharePoint.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the CAML Query AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

284

Properties for This AgileShape

| Field Name | Definition |
|--------------------------|--|
| CAML Query Configuration | Opens the Following Window: CAML Query Builder Configuration Window - |
| | List and View Fields Tab - Creates a view from the available fields, or columns, in a SharePoint list. |
| | • CAML Query Builder Configuration Window - Where Clause Tab - Configures a Where clause to filter the results of a CAML query. |
| | CAML Query Builder Configuration Window Query Options Tab - Specifies how and where CAML query operations are performed in the SharePoint list - for example, how many SharePoint records need to be retrieved, the folder location where the query needs to be performed, and whether to include the mandatory columns in the CAML query result. |
| | CAML Query Builder Configuration Window - Grouping Tab - Groups SharePoint list data by a specified column name, either in ascending or descending order |
| | CAML Query Builder Configuration Window - Output Mapping Tab - Maps the SharePoint columns in a CAML query response to the nodes in an AgilePoint or InfoPath schema. |
| | CAML Query Builder Configuration Window - Test Query Tab - Verifies whether the specified CAML query is correct. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding

Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

CAML Query Builder Configuration Window - List and View Fields Tab

Creates a view from the available fields, or columns, in a SharePoint list.

| CAML Query Builder Configuration | | | | |
|--|------------------------------|--|--|--|
| Con | figure CAML query | | | |
| SharePoint Site Url | | | | |
| Site Url: http | ://APDestktop:8000/{JobSite} | | | |
| List and View Fields Where Clause Query Options Grouping Output Mapping Test Query Select List and View Fields List Name: TheJoineeList | | | | |
| Possible View Fields: Configured View Fields: Content Type[Computed] Name[File] Name[File] NewEmpAddress[Text] Property Bag[Lookup] Title[Text] Title[Text] Image: Configured View Fields: | | | | |
| <u>l</u> | ✓ OK Cancel | | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the CAML Query AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the CAML Query Configuration field, click the Ellipses button.

| Field Name | Definition |
|--------------------|--|
| Site URL | Definition: Specifies the URL for your SharePoint site. <u>Allowed Values:</u> A valid SharePoint site URL. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes <u>Example:</u> http://mysharepoint:8000/sites/\${mysite} |
| Connect | <u>Function:</u> Retrieves all the SharePoint lists and document libraries of the specified SharePoint site to the List Name list. |
| List Name | Definition: Determines the name of the SharePoint list you want to use. Allowed Values: The name of your SharePoint list. Default Value: None |
| | <u>Custom Attributes:</u> Yes |
| Show Hidden Fields | Definition: Determines whether you can use the SharePoint hidden columns to create the CAML query. Allowed Values: • Deselected - The SharePoint hidden columns are not available for creating the CAML query. |

| Field Name | Definition |
|------------------------|--|
| | Selected - The SharePoint hidden columns are displayed in the Possible View Fields box. Thus, you can use them to create the CAML query. |
| | Default Value: |
| | Deselected |
| Possible View Fields | Definition: |
| | Displays all the columns of the specified SharePoint list. |
| | Allowed Values: |
| | A SharePoint column selected from the list. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Left Arrow | Function: |
| | Moves the selected fields from the Possible View Fields box to the Configured View Fields box. |
| Right Arrow | Function: |
| | Moves the selected fields from the Configured View Fields box to the Possible View Fields box. |
| Configured View Fields | Definition: |
| | Specifies the SharePoint columns that are required to create the CAML query. |
| | Allowed Values: |
| | A list of columns moved from the Possible View Fields box using the Left Arrow button. |
| | To remove a particular column from the list, select the column, and then click the Right Arrow button. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
- Data Binding
- Using Process Attributes

CAML Query Builder Configuration Window - Where Clause Tab

Configures a Where clause to filter the results of a CAML query. Only the SharePoint records are retrieved that fulfill the criteria of the Where clause.

| CAML Query Builder Configuration | x |
|---|---|
| Configure CAML query | |
| SharePoint Site Url | |
| Site Url: http://APDestktop:8000/{JobSite} | |
| List and View Fields Where Clause Query Options Grouping Output Mapping Test Query | |
| Image: Where Image: Condition Image: Contains \${EmpName}) Image: Contains Image: Contains \${EmpName}) Image: Contains Image: Contains \${EmpName} Image: Contains | |
| <where> <and> <contains> <fieldref name="Title"></fieldref> <value type="Text">\${EmpName}</value> </contains></and></where> |] |
| V OK Cancel | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **CAML Query** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the CAML Query Configuration field, click the Ellipses button.

| Field Name | Definition |
|---------------------|--|
| Site URL | Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. |
| | <u>Default Value:</u> None |
| | Yes <u>Example:</u> http://mysharepoint:8000/sites/\${mysite} |
| Connect | <u>Function:</u> Retrieves all the SharePoint lists and document libraries of the specified SharePoint site to the List Name list. |
| Where Clause Box | Definition: Displays the tree-view structure of the Where clause set for the CAML query. The Where clause is specified using the conditions and logical operators. Allowed Values: Read only. |
| Select Nest Type | <u>Function:</u> Determines the use of logical AND and OR operators to nest conditions for the Where clause. And - Specifies the logical AND operator. Or - Specifies the logical OR operator. You must set the nest type first, before defining the condition for the where clause. |
| Configure Condition | Function: Sets the criteria that defines which SharePonit list data to be retrieved. Column - The name of the SharePoint column. |

| Field Name | Definition | | |
|-------------------------------|--|--|--|
| | Comparer - A list of comparison operators that are used with Where clause. | | |
| | Value - The value for the column. You can also specify a custom attribute using the Ellipses button. | | |
| Delete Condition | Function: | | |
| | Deletes the selected condition specified for the Where clause. | | |
| Save Query | Function: | | |
| | Saves the Where clause specified for the CAML query. | | |
| | Also, displays the code snippet generated for the Where clause, in the code snippet box where you can make changes. | | |
| | When you make changes in the code snippet box, the Edit and Save Query button appears to save the specified changes. Once you click the Edit and Save Query button, the changes are reflected in the Where Clause box. | | |
| Where Clause Code Snippet Box | Definition: | | |
| | Displays the code snippet which is generated for the Where clause when you click Save Query. The Where clause is specified using the conditions and logical operators. | | |
| | Allowed Values: | | |
| | A code snippet. | | |
| | You can edit the code in the code snippet box. When you make changes in the code snippet box, the Edit and Save Query button appears to save the specified changes. Once you click the Edit and Save Query button, the changes are reflected in the Where Clause box. | | |
| | Default Value: | | |
| | A code snippet generated for the Where clause. | | |

- Data Binding
- Using Process Attributes

CAML Query Builder Configuration Window - Query Options Tab

Specifies how and where CAML query operations are performed in the SharePoint list - for example, how many SharePoint records need to be retrieved, the folder location where the query needs to be performed, and whether to include the mandatory columns in the CAML query result.

| CAML Query Builder Configuration |
|---|
| Configure CAML query |
| SharePoint Site Url |
| Site Url: http://APDestktop:8000/{JobSite} |
| List and View Fields Where Clause Query Options Grouping Output Mapping Test Query |
| ✓ Row Limit \${RowLimit} ✓ Include Mandatory Columns ✓ Specify a folder |
| Look in all folders and sub folders |
| Specify a folder Url like http://machinename:port/sitename/doclib/folder |
| OK 🔀 Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the SharePoint stencil, drag the CAML Query AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the CAML Query Configuration field, click the Ellipses button.

| Field Name | Definition |
|---------------------------|---|
| Site URL | <u>Definition:</u> Specifies the URL for your SharePoint site. <u>Allowed Values:</u> A valid SharePoint site URL. |
| | Default Value: None Custom Attributes: |
| | Yes <u>Example:</u> http://mysharepoint:8000/sites/\${mysite} |
| Connect | <u>Function:</u> Retrieves all the SharePoint lists and document libraries of the specified SharePoint site to the List Name list. |
| Row Limit | Definition: Determines the maximum number of rows to be retrieved using the CAML query. By default, 10,000 records can be fetched from the CAML query. Allowed Values: • Deselected - Specifies that maximum 10,000 records can be fetched from the CAML query. • Selected - Retrieves the specified number of records. Default Value: Deselected |
| Include Mandatory Columns | <u>Definition:</u> Specifies that mandatory columns are included in the CAML query results. <u>Allowed Values:</u> <u>Selected</u> - The mandatory columns are included in the CAML query results. |

| Field Name | Definition | |
|------------------|---|--|
| | Deselected - The mandatory columns are not included in the CAML query results. | |
| | Default Value: | |
| | Selected | |
| Specify a folder | Definition: Specifies the location of a folder you want the | |
| | CAME query to be executed. | |
| | Allowed Values: | |
| | • Selected - The AgileShape executes the CAML query at the folder location. | |
| | Look in all folders and sub folders - The CAML query is executed in all the folders and their subfolders. | |
| | Specify a folder Url - The CAML query is executed only in the specified folder. | |
| | Deselected - The AgileShape executes the CAML query in the entire SharePoint database. | |
| | Default Value: | |
| | Deselected | |

- Data Binding
- Using Process Attributes

CAML Query Builder Configuration Window - Grouping Tab

Groups SharePoint list data by a specified column name, either in ascending or descending order

| CAML Query Builder Configuration | × |
|---|---------|
| Configure CAML query | |
| SharePoint Site Url | |
| Site Url: http://APDestktop:8000/{JobSite} | Connect |
| List and View Fields Where Clause Query Options Grouping Output Mapping Test Query | |
| Group By Columns Name Order By Columns Sort Order NewEmployeesName Ascending | |
| С. Ок | Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **CAML Query** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the CAML Query Configuration field, click the Ellipses button.

| Field Name | Definition |
|------------|---|
| Site URL | Definition: |
| | Specifies the URL for your SharePoint site. |
| | Allowed Values: |
| | A valid SharePoint site URL. |

| Field Name | Definition |
|-----------------------|---|
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://mysharepoint:8000/sites/\${mysite} |
| Connect | Function: |
| | Retrieves all the SharePoint lists and document libraries of the specified SharePoint site to the List Name list. |
| Group By - Columns | Definition: |
| | Specifies the name of the SharePoint column you want to group the SharePoint records to retrieve the required result set. |
| | Allowed Values: |
| | The name of your SharePoint list column. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Order By - Columns | Definition: |
| | Specifies the name of the SharePoint column you want the CAML query result set to be arranged. |
| | Allowed Values: |
| | The name of your SharePoint list column. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Order By - Sort Order | Definition: |
| | Determines the order the result set is to be arranged by the specified column. |
| | Allowed Values: |

| Field Name | Definition | |
|------------|---|--|
| | Ascending - The result set is arranged in an ascending order. | |
| | Descending - The result set is arranged in a descending order. | |
| | Default Value: | |
| | Ascending | |

- Data Binding
- Using Process Attributes

CAML Query Builder Configuration Window - Output Mapping Tab

Maps the SharePoint columns in a CAML query response to the nodes in an AgilePoint or InfoPath schema.

If the output type is an InfoPath form, the results from the CAML query operations are automatically updated in the InfoPath form. The following conditions apply:

- The InfoPath form must have a repeating table that can be mapped from the SharePoint column to the row node.
- The columns must be mapped to this repeating table.
- The ItemCount node contains the number of rows returned by the CAML query. This can also be mapped if required.

If these conditions are not met, then you must manually map the CAML query response to the InfoPath.

| CAML Query Builder | Configuration | | | | × |
|----------------------|------------------|-------------------|----------------------|------------|----------|
| Confi | gure CAML quer | | | | |
| SharePoint Site Url | | | | | |
| Site Url: http:/ | //APDesktop:800 | 0/\${JobSite} | | | Connect |
| List and View Fields | Where Clause | Query Options Gro | uping Output Mapping | Test Query | |
| Map CAML Q | uery Response to | AgilePoint Schema | | | |
| AgilePoi | int CAML Output | Mapping Done. | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | 🔶 ок | 🔀 Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **CAML Query** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the CAML Query Configuration field, click the Ellipses button.

| Field Name | Definition |
|------------|---|
| Site URL | Definition: |
| | Specifies the URL for your SharePoint site. |
| | Allowed Values: |
| | A valid SharePoint site URL. |

| Field Name | Definition |
|--|--|
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://mysharepoint:8000/sites/\${mysite} |
| Connect | Function: |
| | Retrieves all the SharePoint lists and document libraries of the specified SharePoint site to the List Name list. |
| Map CAML Query Response to AgilePoint Schema | Definition: |
| | Determines whether to map the nodes from the SharePoint columns returned from the CAML query to the AgilePoint schema. |
| | Allowed Values: |
| | Selected - The nodes from the SharePoint column are mapped to the AgilePoint schema. |
| | Deselected - Mapping is not performed. |
| | Default Value: |
| | Selected |
| CAML Output Mapping Box | Definition: |
| | Specifies whether the CAML Query response is mapped to the AgilePoint schema. |
| | Allowed Values: |
| | Read Only - message is populated when the mapping options are set on the Schema Mapper Window. |
| | Use the Ellipses button to map the schemas for the process and the CAML query response. |
| Ellipses | Opens the Following Window: |
| | Schema Mapper Window |
| | Purpose of this Window: |
| | Maps SharePoint fields, form fields, web methods, or other input sources to an XML schema. |

| Field Name | Definition |
|------------|---|
| | Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options: |
| | Reset All Mappings - Deletes all mappings that have been made in the Schema Mapper for this activity. |
| | Remove Invalid Mappings only - Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same. |
| | Cancel - Aborts opening the Schema Mapper window. |

- Data Binding
- Using Process Attributes

CAML Query Builder Configuration Window - Test Query Tab

Verifies whether the specified CAML query is correct.

AgileShapes

| CAML Query Builder Configuration | × |
|--|---------------|
| Configure CAML query | |
| SharePoint Site Url | Connect |
| List and View Fields Where Clause Query Options Grouping Output Mapping Test Query | × |
| | |
| | Execute Query |
| | - |
| | Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **CAML Query** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **CAML Query Configuration** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|--|
| Site URL | Definition: Specifies the URL for your SharePoint site. |
| | Allowed Values: A valid SharePoint site URL. |

| Field Name | Definition |
|---------------|---|
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://mysharepoint:8000/sites/\${mysite} |
| Connect | Function: |
| | Retrieves all the SharePoint lists and document libraries of the specified SharePoint site to the List Name list. |
| Execute Query | Function: |
| | Verifies the CAML query and displays the error message if an error occurs. |
| | If the CAML query is executed successfully, the result is displayed in the box. |

- Data Binding
- Using Process Attributes

Schema Mapper Window

Maps SharePoint fields, form fields, web methods, or other input sources to an XML schema.

| Schema Mapper | | x |
|---|---|---|
| deta row @ ows_Title @ ows_FileLeafRef @ itemCount | myFields ows_title ows_FileLeafRef | |
| Data Conversion No Data Conversion needed Default Data Conversion Custom Data Conversion | Auto Map Auto Map Auto Map Add Edit Delete Cancel Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - SharePoint
 - Web Services
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - CAML Query
 - WSE (Web Service Extension)
 - WCF (Windows Communication Foundation)
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In one of the following fields, click the **Ellipses** button. The fields that display vary, depending upon the AgsileShape you are using. For example, **Configure**.
- 6. On one of the following windows, under the **Output Mapping** or **Request/Response** tab, click the **Ellipses** button:
 - CAML Query Builder Configuration Window Output Mapping Tab
 - WebService Configuration Window Request Tab
 - WebService Configuration Window Response Tab
 - Configuration for WCF Service Window Request Tab

Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options:

- **Reset All Mappings** Deletes all mappings that have been made in the Schema Mapper for this activity.
- **Remove Invalid Mappings only** Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same.
- **Cancel** Aborts opening the Schema Mapper window.

| Field Name | Definition |
|---|--|
| Mapping Schemas for Request/Response and Process Model | Definition: Maps the schemas for a service's request or |
| | response and the AgilePoint schema: |
| | CAML query schema for a response and AgilePoint schema |
| | WSE service schema for a request/response and the AgilePoint schema |
| | WCF service schema for a request/response and the AgilePoint schema |
| | The source and the destination schemas are displayed in a tree-view structure in the left and right panes. |
| | Allowed Values: |
| | Read only - However, the drag and drop operations are supported to map the schemas. |
| | Drag a data node from the source schema pane to the destination schema pane: |
| | Green line - The data type of source and destination nodes matches. |
| | Blue line - The data type of source and destination nodes doesn't match. The data conversion is required to map the schemas. |
| | Red line - Specifies that the custom data conversion is required. |
| Automap | Function: |
| | Maps all fields in the data source and the process schema that have the same name. |
| No Data Conversion needed | Definition: |

| Field Name | Definition |
|-------------------------|--|
| | Determines whether the data conversion is not required between the source and the destination schema data fields. |
| | Allowed Values: |
| | Deselected - Data conversion is required between the schema data fields. |
| | • Selected - Data conversion is not required between the schema data fields. |
| | Default Value: |
| | None |
| | However, the No Data Conversion needed option is selected if the data type of the source and destination schema data fields matches. |
| Default Data Conversion | Definition: |
| | Determines whether the default data conversion is required between the source and the destination schema fields. |
| | Allowed Values: |
| | • Deselected - Default data conversion is not required between the schema data fields. |
| | • Selected - Default data conversion is required between the schema data fields. |
| | Default Value: |
| | None |
| | However, the Default Data Conversion option is selected if the data type of the source and destination schema fields doesn't match. |
| Custom Data Conversion | Definition: |
| | Determines whether the custom data conversion is required. You can create your own data conversion types by using the Add button. |
| | Allowed Values: |
| | Deselected - Custom data conversion is not required. |
| | • Selected - Custom data conversion is required. |
| | Default Value: |
| | Deselected |
| Add | Opens the Following Window: |

| Field Name | Definition |
|------------|--|
| | Custom Mapping Code Window <u>Purpose of this Window:</u> Specifies custom C# code that can be used to map fields to an XML schema. |
| Edit | Opens the Following Window: Custom Mapping Code Window Purpose of this Window: Specifies custom C# code that can be used to map fields to an XML schema. |
| Delete | Function: Deletes the selected custom data conversion from the list. |

- Data Binding
- Using Process Attributes

Custom Mapping Code Window

Specifies custom C# code that can be used to map fields to an XML schema.

| Custom Mapping Cod | le | | × |
|---|---|---------------|----|
| | Mapping Code | | |
| Input Type : | Int32 | _ | |
| Uutput Type : Method Name : | convertIntegerToString | | |
| Custom Mapping Meth public String co | od code: onvertIntegerToString (Int32 value) (| | |
| | | | |
| | | | |
| | | | |
| } | | | |
| Validate | • | 🥜 OK 🛛 🔀 Cano | el |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - SharePoint
 - Web Services
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - CAML Query
 - WSE (Web Service Extension)
 - WCF (Windows Communication Foundation)
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In one of the following fields, click the **Ellipses** button. The fields that display vary, depending upon the AgsileShape you are using. For example, **Configure**.
- 6. On one of the following windows, under the **Output Mapping** or **Request/Response** tab, click the **Ellipses** button:
 - CAML Query Builder Configuration Window Output Mapping Tab
 - WebService Configuration Window Request Tab
 - WebService Configuration Window Response Tab

- Configuration for WCF Service Window Request Tab
- Configuration for WCF Service Window Response Tab

Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options:

- **Reset All Mappings** Deletes all mappings that have been made in the Schema Mapper for this activity.
- **Remove Invalid Mappings only** Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same.
- **Cancel** Aborts opening the Schema Mapper window.
- 7. On the Schema Mapper Window, select the Custom Data Conversion option, and then click Add.

| Field Name | Definition |
|-------------|--|
| Input Type | Definition: |
| | Specifies the data type of a source schema data field. |
| | This indicates that the data type of the source schema field didn't match to the destination schema field on the Schema Mapper Window. |
| | Allowed Values: |
| | Read only. |
| Output Type | Definition: |
| | Specifies the data type of a destination schema data field. |
| | This indicates that the data type of the source schema field didn't match to the destination schema field on the Schema Mapper Window. |
| | Allowed Values: |
| | Read only. |
| Method Name | Definition: |
| | Specifies the name of a method you want to create for custom data conversion. |
| | Allowed Values: |
| | Any method name. |
| | Default Value: |

| Field Name | Definition |
|----------------------------|--|
| | Populated on the basis of the data type of the selected schema fields on the Schema Mapper Window. Custom Attributes: No |
| Custom Mapping Method Code | <u>Definition:</u> Specifies the code for the custom mapping data conversion. <u>Allowed Values:</u> A valid code. <u>Default Value:</u> None <u>Custom Attributes:</u> No |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Using a CAML Query to Retrieve Information from SharePoint

This example shows a process that uses a CAML query to retrieve information from a SharePoint list and display the information on a web page.

Instructional Goals

• Demonstrate how to retrieve data from SharePoint using the CAML Query AgileShape.

Example Process: Retrieve Expenses



Problem Statement

Display a custom, ad hoc report of employee expenses.

Business Requirements

- Display a report of employee expenses.
- Expenses are stored as items in a SharePoint list.

Prerequisites

• A SharePoint list, named **ExpenseList**, with the following columns set up to record employee expenses:

| SharePoint Column |
|-------------------|
| EmployeeID |
| Department |
| ExpenseDate |
| ExpenseType |
| Amount |

- An InfoPath form with the following 2 views:
 - Find Expenses Fields to enter the following search criteria:

| InfoPath Field |
|----------------|
| EmployeeID |
| Department |
| ExpenseDate |
| ExpenseType |
| Amount |

- View Expenses Display the expense information returned by the search in a repeating table.
- To access your SharePoint list, you must log on to SharePoint.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the CAML Query AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

310

5. On the CAML Query Configuration field, click the Ellipses button.

Instructions

On the **CAML Query Builder Configuration** window, do the following to set up a CAML query to retrieve employee expenses from the SharePoint list according to the options in the **Find Expenses** form. These instructions provide sample values based on the example process.

1. On the List and View Fields tab, complete the following fields:

| Field Name | Value |
|------------------------|---|
| Site Url | http://demo3:8000/ |
| List Name | ExpenseList |
| Configured View Fields | Use the right arrow button to move the following fields from the Possible View Fields list to the Configured View Fields list: |
| | • EmployeeID |
| | • ExpenseDate |
| | • ExpenseType |
| | • Department |
| | • Amount |

2. On the Where Clause tab, build your query using the dialog box, or simply copy and paste code that represents your query in the text area. This example uses the following clause:

```
<Where>
<And>
<Eq>
<FieldRef Name='EmployeeID'
                             />
<Value Type='Text' >${/my:ExpenseDetails/my:EmployeeID}</Value>
</Eq>
<And>
<Eq>
<FieldRef Name='Department'
                            />
<Value Type='Text' >${/my:ExpenseDetails/my:Department}</Value>
</Eq>
<And>
<Eq>
<FieldRef Name='ExpenseType'
                              />
<Value Type='Text' >${/my:ExpenseDetails/my:ExpenseType}</Value>
</Eq>
<And>
<Geq>
<FieldRef Name='ExpenseDate' IncludeTimeValue='TRUE' />
<Value Type='DateTime' IncludeTimeValue='TRUE'>${/my:ExpenseDetails/
my:FromDate}</Value>
</Geq>
<Leq>
<FieldRef Name='ExpenseDate' IncludeTimeValue='TRUE' />
<Value Type='DateTime' IncludeTimeValue='TRUE'>${/my:ExpenseDetails/my:To}</
Value>
</Leq>
```

| /Where> | | | |
|-----------|--------------------|------------------|----|
| OrderBy> | | | |
| FieldRef | Name='ExpenseDate' | Ascending='True' | /> |
| /OrderBy> | > | 2 | |
| - | | | |

3. On the Grouping tab, complete the following fields:

| Field Name | Value |
|-----------------------|-------------|
| Order By - Columns | ExpenseDate |
| Order By - Sort Order | Ascending |

- 4. On the Output Mapping tab, select Map CAML Query Response to AgilePoint Schema.
- 5. Click the **Ellipses** button.
- 6. On the Schema Mapper Window, map the columns in your SharePoint list to the schema elements on your InfoPath form.

| SharePoint Column | InfoPath Field |
|-------------------|----------------|
| EmployeeID | EmployeeID |
| Department | Department |
| ExpenseDate | ExpenseDate |
| ExpenseType | ExpenseType |
| Amount | Amount |

7. To test your query, on the Test Query tab, click **Execute Query**. Resolve any errors that occur, and continue testing until the query executes successfully.

Check In File

An AgilePart that checks a file in to SharePoint.



Navigation

1. In AgilePoint Envision, open a process template.

- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **Check In File** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|--------------|--|
| Checkin Type | Definition: Specifies how a file is checked in to a SharePoint document library. |
| | <u>Allowed Values:</u> <u>MinorCheckIn</u> - The file is in a draft status. <u>MajorCheckIn</u> - The file is ready to be published. <u>OverwriteCheckIn</u> - The check-in file overwrites the same file if it already exists. <u>Default Value:</u> MajorCheckIn |
| Comments | Definition: Specifies any information you want to associate with the check-in action. <u>Allowed Values:</u> Multiple lines of text. <u>Default Value:</u> None <u>Custom Attributes:</u> No |
| Document URL | Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. <u>Allowed Values:</u> A valid URL. <u>Default Value:</u> None <u>Custom Attributes:</u> |

| Field Name | Definition |
|------------|------------|
| | Yes |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Checking In a SharePoint File

To check a file in to SharePoint, do the following.

Prerequisites

A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Check In File** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Instructions

1. Complete the following required property for the **Check In File** AgileShape:

| Field Name | Definition |
|--------------|---|
| Document URL | Definition: |
| | The URL of your document or file — for example, the file you want to add, delete, or check out. |

| Field Name | Definition |
|------------|-----------------------|
| | Allowed Values: |
| | A valid URL. |
| | <u>Default Value:</u> |
| | None |
| | Custom Attributes: |
| | Yes |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Check In File

Check Out File

An AgilePart that checks a file out from SharePoint.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **Check Out File** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------|---|
| CheckoutToLocal | <u>Definition:</u> Determines whether a file can be checked out from a SharePoint document library to your computer. <u>Allowed Values:</u> False - A draft copy of the file is stored on the server. This indicates that you can access the SharePoint file over internet. |

| Field Name | Definition |
|--------------|---|
| | True - A copy of file is checked out on your computer's hard drive. Thus, you can work on the file on your computer. |
| | Default Value: |
| | False |
| Document URL | Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Checking Out a SharePoint File

To check a file out of SharePoint, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Check Out File AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Instructions

1. Complete the following required property for the **Check Out File** AgileShape:

| Field Name | Definition |
|--------------|---|
| Document URL | Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Check Out File

Common Dialog

An AgileWork that creates a dialog box form in SharePoint.



The most common use for this AgileShape is creating simple input or approval forms. Once you have created a Common Dialog and deployed your process, the dialog displays to a user when he or she clicks a task in SharePoint. The following image shows an approval form using a Common Dialog.

| ustomerName | John Doe | |
|-------------|--------------------|--|
| urpose | Laptop Repair | |
| mount | 1000 | |
| pproved | Approve Reject | |
| Comments | Approved | |
| pprovedDate | 02/18/2010 | |
| provedDate | 02/18/2010 | |

Good to Know

• For the Work to Perform property, Approve, Publish, or Submit are not valid values for this AgileWork. These are reserved values.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Common Dialog** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------|---|
| Configuration | <u>Opens the Following Window:</u> <u>Customize Common Dialog Interface Window - General Tab</u> - Sets up a dialog box to display in SharePoint. <u>Customize Common Dialog Interface Window - Data Configuration Tab</u> - Opens the Data |

| Field Name | Definition |
|------------|--|
| | Configuration tab, where you can define the fields for a common dialog form. |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Customize Common Dialog Interface Window - General Tab

Sets up a dialog box to display in SharePoint.

| Customize | Common Dialog Inter | face | X |
|-----------|----------------------|--------------------------------------|---------------|
| 8 | Configure Di | alog User Interface | |
| General | Data Configuration | | |
| П | tle and Description | | |
| | Dialog Title: | Approval Dialog | Icon Preview: |
| | Dialog Icon: | D:\Users\Administrator\Desktop\Share | |
| | Dialog Description: | Manager Approval Dialog | |
| В | utton Configuration | | |
| | Submit Button Label: | ОК | |
| | Cancel Button Label: | Cancel | |
| | | | V OK X Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Common Dialog** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

| Field Name | Definition |
|--------------|---|
| Dialog Title | Definition: |
| | Specifies the title to be displayed in the title bar of the dialog box. |

| Field Name | Definition |
|---------------------|--|
| | Allowed Values: |
| | A text string. |
| | Default Value: |
| | Approval Dialog |
| | Custom Attributes: |
| | No |
| Dialog Icon | Definition: |
| | Specifies an image to be displayed in the banner on the dialog box. |
| | Allowed Values: |
| | The name of an image file with the complete path. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Icon Preview | Definition: |
| | Displays the selected dialog icon for preview. |
| | Allowed Values: |
| | Read only. |
| Dialog Description | Definition: |
| | Specifies the text description of the dialog box. |
| | The description is displayed below the title bar, along with the image, on the dialog box. |
| | Allowed Values: |
| | A text string with spaces. |
| | Default Value: |
| | Manager Approval Dialog |
| | Custom Attributes: |
| | No |
| Submit Button Label | Definition: |
| | Specifies the text to be displayed on the Submit button. |

| Field Name | Definition |
|---------------------|--|
| | A Submit button on the dialog box is used to submit the form and close the dialog box. |
| | Allowed Values: |
| | A text string. |
| | <u>Default Value:</u> |
| | ОК |
| | Custom Attributes: |
| | No |
| Cancel Button Label | Definition: |
| | Specifies the text to be displayed on the Cancel button. |
| | A Cancel button is used to close the dialog box without submitting the form. |
| | Allowed Values: |
| | A text string. |
| | Default Value: |
| | Cancel |
| | Custom Attributes: |
| | No |

- Data Binding
- Using Process Attributes

Customize Common Dialog Interface Window - Data Configuration Tab

Opens the Data Configuration tab, where you can define the fields for a common dialog form.

| Customize Common Dialog | Interface | | | | | X |
|---|---------------|---------------|----------|---------------------|-------|----------------------------------|
| Configure | e Dialog User | Interface | | | | |
| General Data Configuration | 1 | | | | | |
| ⊡- MyTestSite_x002F_C | Name | Label | ReadOnly | Input Type | | 1 |
| Source_x0020_U | CompanyLoca | CompanyLocati | | Single Line of Text | -> | |
| | CompanyName | CompanyName | | Single Line of Text | • > | |
| CompanyName Title Edit_x0020_Menu CompanyLocation Sort_x0020_Type Template_x0020_ Item_x0020_Child Folder_x0020_Ch Is_x0020_Check# Source_x0020_V Document_x0020_ Check_x0020_ln | | | | | | ▲ ▲ |
| | | | | 🕪 ОК | 🔀 Car | icel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Common Dialog** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|---|
| Schema | Definition: |
| | Displays the schema for the current process in the left pane. |

| Field Name | Definition |
|------------|---|
| | Note: You must drag and drop schema fields to the right pane to add them to the dialog box. |
| | Allowed Values: |
| | Read only. |
| Name | <u>Definition:</u> Specifies the name of the field as it appears in the schema. <u>Allowed Values:</u> Read only. However, using the > (Data Binding) button, you can modify the data binding for the field. |
| Label | <u>Definition:</u> Specifies the name to be displayed for the schema field in the dialog box. <u>Allowed Values:</u> A text string. |
| | Note: By default, the Label is the same as the schema field name, however you can change the value for the Label. |
| | Default Value: Populated when you drag and drop the schema field to the right pane. Custom Attributes: No |
| ReadOnly | <u>Definition:</u> Specifies whether the field accepts user input at runtime. <u>Allowed Values:</u> <u>Deselected</u> - A user can enter a value for the field. <u>Selected</u> - A user cannot enter a value for the field. The field is displayed as read-only in the dialog box. <u>Default Value:</u> |
| | Deselected |
| Field Name | Definition |
|------------------|---|
| Input Type | <u>Definition:</u> Specifies the type of input field to be displayed on the dialog box. <u>Allowed Values:</u> Static Text Single Line of Text |
| | Multiple Lines of Text Check Box Radio Buttons Radio Button Pair List Box Combo Box Date Picker |
| | Populated when you drag and drop the schema field to the right pane. |
| > (Data Binding) | Opens the Following Window: Item Properties Window Purpose of this Window: Allows you to modify the data binding for the field. For more information, see Data Binding. |
| Up Arrow | <u>Function:</u> Moves the selected field one row up in the list. |
| Down Arrow | <u>Function:</u> Moves the selected field one row down in the list. |
| X | Function: Deletes the selected field from the list. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Item Properties Window

Allows you to modify the data binding for the field.

| Item Properties |
|---|
| Binding |
| Budget_x0020_Request_x0020_SharePoint_x00 |

| Pick Schema Field |
|---|
| Budget_x0020_Request_x0020_SharePoint_x0020_L |
| CFOApproval |
| ManagerApproval |
| Status |
| Department |
| CapitalExpense |
| ReferenceNo |
| DateNeeded |
| BusinessJustification |
| AmountRequested |
| Requester |
| |
| |
| |
| |
| |
| |
| |
| |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Common Dialog AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.
- 6. To modify the data binding for the field, on the Customize Common Dialog Interface Window Data Configuration Tab, select the row you want, and then click > (Data Binding).

Field Definitions

| Field Name | Definition | |
|------------|---|---------|
| Binding | Definition: Specifies the data binding for the field. Allowed Values: A valid data binding for the field. Use the Ellipses button to select another schema field to modify the data binding for the field. Default Value: Populated depending upon the field you selected. Custom Attributes: No Example: Budget x0020, Request x0020, SharePoint x0020 | istForm |
| | \CFOApproval | |
| Ellipses | Function: Opens the Pick Schema Field list that allows you to select a schema field. | |

Copy Document Set

An AgilePart that copies a document set from one SharePoint document folder or library to another SharePoint document folder or library.



Prerequisites

• An environment using SharePoint 2013 and the CSOM AgileConnector.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.

- 3. On the SharePoint stencil, drag the Copy Document Set AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------|---|
| Configuration | Opens the Following Window: Copy Document Set Configuration Window Purpose of this Window: Specifies the details for copying a document set from one document library to another. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Copy Document Set Configuration Window

Specifies the details for copying a document set from one document library to another.

| Copy Document Set Configuration | × |
|--|---|
| Copy Document Set Configuration | |
| Copy Document Set Configuration | |
| Source Site URL (e.g. http://Machine_Name:port/sites/SiteName): | |
| http://demo3:8000 | |
| Source Document Library Name: | |
| Marketing | |
| Document Set: | |
| User Registration | |
| Destination Site URL (e.g. http://Machine_Name:port/sites/SiteName): | |
| http://demo3:8000 | |
| Destination Document Library Name: | |
| AgilePoint Document | |
| Destination Folder Name | |
| Marketing | |
| Filter: | |
| | |
| ✓ OverWriteFile | |
| V OK Cancel | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Copy Document Set** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **CopyDocSetConfiguration** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|-----------------|---|
| Source Site URL | Definition: Specifies the URL for your SharePoint site. The source site contains the SharePoint document library and document set you want — for example, the document set you want to copy or move to the destination document library. <u>Allowed Values:</u> |

| Field Name | Definition |
|------------------------------|--|
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://APDesktop:8000 |
| Source Document Library Name | Definition: Specifies the name of the SharePoint document |
| | document set you want to copy or move to the destination document library. |
| | Allowed Values: |
| | The name of your SharePoint library. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Document Set | Definition: |
| | Specifies the name of the document set. |
| | Allowed Values: |
| | The name of your document set. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Destination Site URL | Definition: |
| | Specifies the URL for your SharePoint site. The destination site contains the document library where you want to copy or move the document set from the source document library. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |

| Field Name | Definition |
|-----------------------------------|--|
| | Custom Attributes: |
| | Yes |
| Destination Document Library Name | Definition: Specifies the name of the destination SharePoint document library where you want to copy or move the document set. Allowed Values: The name of your SharePoint document library. Default Value: None Custom Attributes: Yes |
| Destination Folder Name | Definition: Specifies the name of the SharePoint folder where you want to copy or move the document set from the source location. Allowed Values: The name of your SharePoint folder If the folder does not exist within the specified SharePoint list, the AgilePoint system creates it. Default Value: None Custom Attributes: |
| | Yes |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Copying a Document Set

To copy a document set from one SharePoint location to another, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **Copy Document Set** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the CopyDocSetConfiguration field, click the Ellipses button.

Instructions

1. On the **Copy Document Set Configuration** window, complete the following fields as required:

| Field Name | Definition |
|------------------------------|--|
| Source Site URL | Definition: |
| | Specifies the URL for your SharePoint site. The source site contains the SharePoint document library and document set you want — for example, the document set you want to copy or move to the destination document library. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://APDesktop:8000 |
| Source Document Library Name | Definition: |
| | Specifies the name of the SharePoint document library. The source document library contains the document set you want to copy or move to the destination document library. |
| | Allowed Values: |
| | The name of your SharePoint library. |
| | Default Value: |
| | None |

| Field Name | Definition |
|-----------------------------------|--|
| | Custom Attributes: |
| | Yes |
| Document Set | Definition: |
| | Specifies the name of the document set. |
| | Allowed Values: |
| | The name of your document set. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Destination Site URL | Definition: Specifies the URL for your SharePoint site. The |
| | where you want to copy or move the document set from the source document library. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Destination Document Library Name | Definition: |
| | Specifies the name of the destination SharePoint document library where you want to copy or move the document set. |
| | Allowed Values: |
| | The name of your SharePoint document library. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

2. Complete any additional configuration for this AgileShape according to your requirements:

• AgilePart - Common Setup

• Copy Document Set

Copy Files

An AgilePart that copies one or more files from one SharePoint folder or library to another SharePoint folder or library.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Copy Files** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|---|
| Filter | <u>Definition:</u> Specifies the file name or a set of files expressed using the filter expression you want to search within the specified source location. For example, files to be downloaded by the Download Files AgilePart, to be uploaded by the Upload Files AgilePart, or to be converted to PDF by the PDF Converter AgilePart. <u>Allowed Values:</u> A file name. A filter string that uses asterisks (*) as |
| | Wildcards. <u>Default Value:</u> \${DocName} <u>Custom Attributes:</u> Yes <u>Example:</u> Following are some examples of filter expressions: |

| Field Name | Definition |
|-----------------|---|
| | *.* - All files are searched. |
| | *.xml - The files that have the .xml file extension are searched. |
| | *.doc - The files that have the .doc file extension are searched. |
| | MyFile.xml - Only the specific file MyFile.xml is searched. |
| | The filter action is performed at the source location, that vary depending upon the AgileShape. |
| OverWriteFile | Definition: |
| | Specifies whether the AgileShape overwrites the files if they already exist at the specified destination location. |
| | Allowed Values: |
| | • False - The AgileShape does not overwrite any existing file. |
| | • True - The AgileShape overwrites the file if it exists with the same name at the destination location. |
| | Default Value: |
| | False |
| Recursive | Definition: |
| | Determines whether the AgileShape's specified action - such as copying, uploading, or deleting - is recursive. In other words, it determines whether the action is repeated in subfolders of the target folder or document library. |
| | Allowed Values: |
| | • False - The AgileShape performs the action only on the files located at the specified source folder. Files within subfolders aren't affected. |
| | • True - The AgileShape performs the action on the files located at the specified source folder, as well as the files that are located within the subfolders. |
| | Default Value: |
| | False |
| SourceFolderUrl | Definition: |

| Field Name | Definition |
|-----------------|---|
| | Specifies the URL for the SharePoint document library or subfolder which contains the files to be copied to the destination location. |
| | Allowed Values: |
| | A valid SharePoint document library or folder URL. |
| | Default Value: |
| | \${SPServer}/\${SitePath}/\${DocLibPath} |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://[machine name]:[port]/sites/[site name]/ [document library name] |
| | http://[machine name]:[port]/sites/[site name]/ [document library name]/[folder name] |
| TargetFolderUrl | Definition: |
| | Specifies the URL for the SharePoint document library or subfolder where you want the files to be copied from the source location. |
| | Allowed Values: |
| | A valid SharePoint document library or folder URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://[machine name]:[port]/sites/[site name]/ [document library name] |
| | http://[machine name]:[port]/sites/[site name]/ [document library name]/[folder name] |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Copying SharePoint Files

To copy files from one SharePoint location to another, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Copy Files** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following required properties for the **Copy Files** AgileShape:

| Field Name | Definition |
|-----------------|--|
| SourceFolderUrl | Definition: Specifies the URL for the SharePoint document library or subfolder which contains the files to be copied to the destination location. Allowed Values: A valid SharePoint document library or folder URL. Default Value: \${SPServer}/\${SitePath}/\${DocLibPath} Custom Attributes: Yes Example: |

| Field Name | Definition |
|-----------------|---|
| | http://[machine name]:[port]/sites/[site name]/ [document library name] |
| | http://[machine name]:[port]/sites/[site name]/ [document library name]/[folder name] |
| TargetFolderUrl | Definition: |
| | library or subfolder where you want the files to be copied from the source location. |
| | Allowed Values: |
| | A valid SharePoint document library or folder URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://[machine name]:[port]/sites/[site name]/ [document library name] |
| | http://[machine name]:[port]/sites/[site name]/ [document library name]/[folder name] |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Copy Files

Copy List Item

An AgilePart that copies specified list items from one list to another.



Prerequisites

Log on to SharePoint.

Good to Know

• If errors occur during the execution, a message will be written into the SharePoint Integration log file.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **Copy List Item** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|----------------------------|--|
| CopyListItemsConfiguration | Opens the Following Window: Configuration for Copy ListItems AgilePart Purpose of this Window: Specifies how to copy SharePoint list items. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Copy ListItems AgilePart

Specifies how to copy SharePoint list items.

| Configuration for Co | py ListItems AgilePart |
|---------------------------------|--------------------------------------|
| Source Site Configuration | |
| Source Site URL (e.g. http://M | achine_Name:port/sites/SiteName): |
| http://APDesktop:8000 | • |
| Source List Name: | Source Folder Name (Optional) |
| JoineeList | • |
| ListItem Field Name (Optiona | I): ListItem Field Value (Optional): |
| Status | ▼ New |
| Tamat Cita Configuration | |
| Target Site URL (e.g. http://Ma | achine_Name:port/sites/SiteName): |
| http://APDesktop:8000 | • |
| Target List Name: | Target Folder Name (Optional): |
| Employees | • • |
| | |
| ou may enter Custom Attrib | ute Name as \${} |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Copy List Item** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **CopyListItemsConfiguration** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|-----------------|--|
| Source Site URL | Definition: Specifies the URL for your SharePoint site. The |
| | source site contains the SharePoint list and list |

| Field Name | Definition |
|---------------------|--|
| | items you want — for example, the list items you want to copy or move to the destination list. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://APDesktop:8000 |
| Source List Name | Definition: |
| | Specifies the name of the SharePoint list. The source list contains the list items you want to copy or move to the destination list. |
| | Allowed Values: |
| | The name of your SharePoint list. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Source Folder Name | <u>Definition:</u> Specifies the name of a SharePoint folder. The source folder contains the list items you want to copy or move to the destination folder. |
| | Allowed Values: |
| | The name of your SharePoint folder. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| ListItem Field Name | Definition: |
| | Specifies the name of a SharePoint list column. |
| | Allowed Values: |

| Field Name | Definition |
|----------------------|--|
| | The name of your SharePoint list column. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| ListItem Field Value | Definition: |
| | Specifies the SharePoint list column's value. |
| | This value can be used as a filter to limit the scope of the action. |
| | Allowed Values: |
| | The list column's value. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Target Site URL | Definition: |
| | Specifies the URL for your SharePoint site. The target site contains the SharePoint list where you want to copy or move list items from the source list. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Target List Name | Definition: |
| | Specifies the name of the destination SharePoint list where you want to copy or move the list items. |
| | Allowed Values: |
| | The name of your SharePoint list. |
| | Default Value: |
| | None |
| | Custom Attributes: |

| Field Name | Definition |
|--------------------|--|
| | Yes |
| Target Folder Name | Definition: Specifies the name of the SharePoint folder where you want to copy or move the list items from the source location. Allowed Values: The name of your SharePoint folder If the folder does not exist within the specified SharePoint list, the AgilePoint system creates it. Default Value: None Custom Attributes: Yes |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Copying a SharePoint List Item

To copy a SharePoint list item from one folder or list to another, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Copy List Item** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the CopyListItemsConfiguration field, click the Ellipses button.

Instructions

1. On the Configuration for Copy ListItems AgilePart, complete the fields as required to specify the source (copy from) and target (copy to).

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup

Create Document Set

An AgilePart that creates a new document set.



Prerequisites

• An environment using SharePoint 2013 and the CSOM AgileConnector.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Create Document Set** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------|--|
| Configuration | Opens the Following Window: Create Document Set Configuration Window Purpose of this Window: Specifies the details for creating a document set. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Create Document Set Configuration Window

Specifies the details for creating a document set.

| Create Document Set Configuration | X |
|--|---|
| Create Document Set Configuration | |
| Site URL (e.g. http://Machine_Name:port/sites/SiteName): | |
| http://demo3:8000 | - |
| Document Library Name: | |
| Marketing | - |
| Folder Name (Optional): | |
| Advertisements | • |
| Document Set Content Type (optional): | |
| Sales Force | |
| Document Set Name: | |
| User Registration | |
| 🖌 OK 🔀 Cancel | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Create Document Set** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the CreateDocSetConfiguration field, click the Ellipses button.

Field Definitions

| Field Name | Definition |
|-----------------------|---|
| Site URL | <u>Definition:</u> Specifies the URL for your SharePoint site. <u>Allowed Values:</u> A valid SharePoint site URL. |
| | <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |
| | Example: http://mysharepoint:8000/sites/\${mysite} |
| Document Library Name | Definition: Specifies the name of the SharePoint document library. Allowed Values: A valid SharePoint document library name. Default Value: None Custom Attributes: Yes |
| Folder Name | Definition: Specifies the name of a SharePoint folder. Allowed Values: The name of your SharePoint folder If the folder does not exist within the specified SharePoint list, the AgilePoint system creates it. Default Value: None Custom Attributes: Yes |

| Field Name | Definition |
|---------------------------|--|
| Document Set Content Type | Definition: Specifies the content type for your document set. Allowed Values: A single line of text. Default Value: None (document set) If this field is blank, SharePoint applies the default name for the document set content type. Custom Attributes: No |
| Document Set Name | Definition: Specifies the name for the document set. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a Document Set

To create a new document set, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.

- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Create Document Set** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the CreateDocSetConfiguration field, click the Ellipses button.

Instructions

1. On the **Create Document Set Configuration** window, complete the following fields as required:

| Field Name | Definition |
|-----------------------|---|
| Site URL | <u>Definition:</u> Specifies the URL for your SharePoint site. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | <u>Default Value:</u> None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://mysharepoint:8000/sites/\${mysite} |
| Document Library Name | Definition: |
| | Specifies the name of the SharePoint document library. |
| | Allowed Values: |
| | A valid SharePoint document library name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Document Set Name | Definition: |
| | Specifies the name for the document set. |
| | Allowed Values: |
| | A single line of text. |
| | Default Value: |

| Field Name | Definition |
|------------|--------------------|
| | None |
| | Custom Attributes: |
| | Yes |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Create Document Set

Create SharePoint List

An AgilePart that creates a SharePoint list.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Create SharePoint List** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------|--|
| Configuration | Opens the Following Window: Configuration for New List Window Purpose of this Window: Specifies the settings for a new SharePoint list. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for New List Window

Specifies the settings for a new SharePoint list.

| | e List | | | | × |
|------|--|--|--------------------------------|----------|---|
| | Configurat | ion for New List | | | |
| Set | tings | | | | |
| Sit | e Url (e.g. http://m | /site.com:8000/site | es/MySite): | | |
| ht | tp://APDesktop:800 | 0/sites/NewHire | | | |
| Lis | t Name: | | List Type: | | |
| Jo | ineeDetails | | Custom List | | • |
| De | scription: | | | | |
| Co | ontains informations | about new joinees. | | | |
| Co | Display On QuickL lumns: (Columns ar | aunch e applicable only fo | or Custom List) | | |
| | Name | Туре | Description | Required | * |
| | JoineeID | Number | - | V | |
| | JoineeName | Text | - | | |
| | OfferletterID | Number | - | | |
| | JoineeAddress | Text | • | | |
| | | | | | - |
| | JoiningDate | DateTime | • | | _ |
| | JoiningDate Qualification | DateTime Text | - - | | _ |
| | JoiningDate Qualification Department | DateTime Text Text | • • • | | _ |
| | JoiningDate Qualification Department OfficeLocation | DateTime Text Text Text | • • • | | |
| | JoiningDate Qualification Department OfficeLocation | DateTime Text Text Text | • • • | | |
| * Yc | JoiningDate Qualification Department OfficeLocation | DateTime Text Text Text Text | ▼ ▼ ▼ ■ me as \${} | | - |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Create SharePoint List** AgileShape, and drop it on the process template.
- 4. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|------------|--|
| Site URL | Definition: Specifies the URL for your SharePoint site. <u>Allowed Values:</u> A valid SharePoint site URL. |
| | Default Value: None <u>Custom Attributes:</u> Yes |
| | Example: http://mysharepoint:8000/sites/\${mysite} |
| List Name | Definition: Specifies the name of the SharePoint list you want to create. Allowed Values: A text string. Default Value: None Custom Attributes: |
| List Type | Yes Definition: Specifies the type of SharePoint list you want. Allowed Values: Announcements Contacts Contacts Custom List Custom List in Datasheet View DataSources Discussion Board Document Library Events |

| Field Name | Definition |
|------------------------|---|
| | • Form Library |
| | • Issues |
| | • Links |
| | Picture Library |
| | • Survey |
| | • Tasks |
| | Default Value: |
| | Custom List |
| Description | Definition: |
| | A free text description of your SharePoint list. |
| | Allowed Values: |
| | A single line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Display on QuickLaunch | Definition: |
| | Specifies whether to include the SharePoint list in the Quick Launch menu. |
| | Allowed Values: |
| | Deselected - The list is not included in the Quick Launch menu. |
| | Selected - The list is included in the Quick Launch menu. |
| | <u>Default Value:</u> |
| | Deselected |
| Column Name | Definition: |
| | Specifies the name of a custom SharePoint list column. |
| | Note: This option is available only when you select the Custom List option in the List Type field. Custom List is a built-in SharePoint list template. |
| | Allowed Values: |

| Field Name | Definition |
|--------------------|---|
| | A text string. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Column Type | Definition: |
| | Specifies the column type for a custom SharePoint list column. |
| | Note: This option is available only when you select the Custom List option in the List Type field. Custom List is a built-in SharePoint list template. |
| | Allowed Values: |
| | • Text |
| | Calculated |
| | Choice |
| | • Currency |
| | • DateTime |
| | Lookup |
| | |
| | |
| | Default Value: |
| | None |
| Column Description | Definition: |
| | The free text description of a custom SharePoint list column. |
| | Note: This option is available only when you select the Custom List option in the List Type field. Custom List is a built-in SharePoint list template. |
| | Allowed Values: |
| | A single line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |

| Field Name | Definition |
|-----------------|---|
| | Yes |
| Column Required | <u>Definition:</u> Specifies whether the custom SharePoint column is required. Note: This option is available only when you select the Custom List option in the List Type field. Custom List is a built-in SharePoint list template. <u>Allowed Values:</u> Deselected - The custom SharePoint column is not required. <u>Selected</u> - The custom SharePoint column is mandatory. <u>Default Value:</u> Deselected |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a SharePoint List

To create a new SharePoint list, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Create SharePoint List** AgileShape, and drop it on the process template.
- 4. On the **Configuration** field, click the **Ellipses** button.

Instructions

1. On the Configuration for New List Window, complete the following fields as required:

| Field Name | Definition |
|------------|---|
| Site URL | Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. |
| | Default Value: None Custom Attributes: |
| | Example: http://mysharepoint:8000/sites/\${mysite} |
| List Name | Definition: Specifies the name of the SharePoint list you want to create. Allowed Values: A text string. Default Value: None Custom Attributes: |
| List Type | Yes Definition: Specifies the type of SharePoint list you want. Allowed Values: Announcements Contacts Custom List Custom List Custom List in Datasheet View DataSources Discussion Board Document Library Events Form Library |

| Field Name | Definition |
|------------|-----------------|
| | • Links |
| | Picture Library |
| | • Survey |
| | • Tasks |
| | Default Value: |
| | Custom List |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Configuration for New List Window

Create List Item

An AgilePart that This AgileShape can be used to create a list item.



Prerequisites

Log on to SharePoint.

Good to Know

• If errors occur during the execution, a message will be written into the SharePoint Integration log file.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Create List Item** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|---|
| ItemValues | Opens the Following Window: |
| | Configuration for Creating List Item Window |

| Field Name | Definition |
|------------|---|
| | Purpose of this Window: |
| | Specifies how to create a SharePoint list item. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Creating List Item Window

Specifies how to create a SharePoint list item.

| List Configuration List URL (e.g. http://Machine_Name:port/sites/SiteName/Lists/ListName): | | | | | | |
|--|------------|-------------------------|-------|---------|--|--|
| Content Type (Optional): | | Folder Name (Optional): | | Connect | | |
| | • | | ,· | • | | |
| ialdDisplayName | Field Inte | rnalName | Value | | | |
| Title | Title | mainame | Text | | | |
| NewEmployeesName | NewEmpl | NewEmployeesName | | | | |
| NewEmpAddress | NewEmp/ | Address | Text | | | |
| Country | Country | Country | | | | |
| Phone Number | Phone_x0 | Phone_x0020_Number | | | | |
| Mobile | Mobile | Mobile | | | | |
| Qualification | Qualificat | tion | Text | | | |
| Comment | Comment | : | Note | Ĭ | | |
| JoiningDate | JoiningDa | JoiningDate | | | | |
| Attachments | Attachme | Attachments | | | | |
| | | | | | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **Create List Item** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **ItemValues** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition | | |
|--------------|--|--|--|
| List URL | Definition: Specifies the SharePoint list URL you want. <u>Allowed Values:</u> A valid SharePoint list URL. Note: If you use a library URL, such as a document library URL or form library URL, | | |
| | instead of a list URL, an error occurs during execution. <u>Default Value:</u> \${DocUrl} | | |
| | <u>Custom Attributes:</u> Yes | | |
| | Example: http://[machine name]:[port]/sites/[site name] \$\{DocUrl\} | | |
| Connect | <u>Function:</u> Connects to the specified SharePoint list. This button populates the fields with the correct values for the specified SharePoint list. | | |
| Content Type | Definition: Specifies the content type for the list item. Allowed Values: The name of your content type. Default Value: None Image: None Image: Note: Image: Note: Specifies a content type for the list item, the SharePoint system applies a default content type, named "Item." Custom Attributes: No | | |
| Folder Name Definition: Specifies the name of a SharePoint folder. Allowed Values: The name of your SharePoint folder If the folder does not exist within the specified SharePoint list, the AgilePoint system creates it. Default Value: None Custom Attributes: Yes Field DisplayName Definition: Specifies the SharePoint column names for the specified list or library. Allowed Values: An editable SharePoint column name. Default Value: None Custom Attributes: Yes Field InternalName Definition: Specifies the internal names of the SharePoint columns for the specified list or library. Allowed Values: An editable SharePoint column name. Default Value: None Queed Values: An editable internal names of the SharePoint columns for the specified list or library. Allowed Values: An editable internal SharePoint column name. Default Value: None Custom Attributes: Yes Value Definition: The value for the SharePoint column. Allowed Values: Yes | Field Name | Definition |
|--|--------------------|---|
| Allowed Values: The name of your SharePoint folder If the folder does not exist within the specified SharePoint list, the AgilePoint system creates it. Default Value: None Custom Attributes: Yes Field DisplayName Definition: Specifies the SharePoint column names for the specified list or library. Allowed Values: An editable SharePoint column name. Default Value: None Custom Attributes: Yes Field InternalName Definition: Specifies the internal names of the SharePoint column name. Default Value: None Custom Attributes: Yes Field InternalName Definition: Specifies the internal names of the SharePoint column name. Default Value: None Custom Attributes: Yes Value Default Value: None Custom Attributes: Yes Value Definition: The value for the SharePoint colu | Folder Name | Definition: Specifies the name of a SharePoint folder. |
| SharePoint list, the AgliePoint system creates it. Default Value: None Custom Attributes: Yes Field DisplayName Definition: Specifies the SharePoint column names for the specified list or library. Allowed Values: An editable SharePoint column name. Default Value: None Custom Attributes: Yes Field InternalName Definition: Specifies the internal names of the SharePoint column name. Definition: Specifies the internal names of the SharePoint column name. Definition: Specifies the internal names of the SharePoint column name. Default Value: None Custom Attributes: Yes Value Default Value: None Custom Attributes: Yes Value Definition: The value for the SharePoint column. Allowed Values: Yes | | Allowed Values: The name of your SharePoint folder If the folder does not exist within the specified |
| Custom Attributes: Yes Field DisplayName Definition: Specifies the SharePoint column names for the specified list or library. Allowed Values: An editable SharePoint column name. Default Value: None Custom Attributes: Yes Field InternalName Definition: Specifies the internal names of the SharePoint columns for the specified list or library. Allowed Values: An editable internal names of the SharePoint columns for the specified list or library. Allowed Values: An editable internal sharePoint column name. Default Value: None Custom Attributes: Yes Value Definition: Yes Value Definition: The value for the SharePoint column. Allowed Values: The value for the SharePoint column. | | SharePoint list, the AgilePoint system creates it. Default Value: None |
| Field DisplayName Definition: Specifies the SharePoint column names for the specified list or library. Allowed Values: An editable SharePoint column name. Default Value: None Custom Attributes: Yes Yes Field InternalName Definition: Specifies the internal names of the SharePoint columns for the specified list or library. Allowed Values: An editable internal SharePoint column name. Definition: Specifies the internal names of the SharePoint columns for the specified list or library. Allowed Values: An editable internal SharePoint column name. Default Value: None Value Definition: The value for the SharePoint column. Allowed Values: | | <u>Custom Attributes:</u> Yes |
| Allowed Values: An editable SharePoint column name. Default Value: None Custom Attributes: Yes Field InternalName Definition: Specifies the internal names of the SharePoint columns for the specified list or library. Allowed Values: An editable internal SharePoint column name. Default Value: None Custom Attributes: Yes Value Default Value: None Custom Attributes: Yes Value Definition: The value for the SharePoint column. Allowed Values: | Field DisplayName | Definition: Specifies the SharePoint column names for the specified list or library. |
| Default Value: None Custom Attributes: Yes Field InternalName Definition: Specifies the internal names of the SharePoint columns for the specified list or library. Allowed Values: An editable internal SharePoint column name. Default Value: None Custom Attributes: Yes Value Definition: The value for the SharePoint column. Allowed Values: | | <u>Allowed Values:</u> An editable SharePoint column name. |
| Custom Attributes: Yes Field InternalName Definition: Specifies the internal names of the SharePoint columns for the specified list or library. Allowed Values: An editable internal SharePoint column name. Default Value: None Custom Attributes: Yes Value Definition: The value for the SharePoint column. Allowed Values: | | <u>Default Value:</u> None |
| Field InternalName Definition: Specifies the internal names of the SharePoint columns for the specified list or library. Allowed Values: An editable internal SharePoint column name. Default Value: None Custom Attributes: Yes Value Definition: The value for the SharePoint column. Allowed Values: | | <u>Custom Attributes:</u> Yes |
| Value Default Value: None Value Definition: The value for the SharePoint column. Allowed Values: | Field InternalName | Definition: Specifies the internal names of the SharePoint columns for the specified list or library. <u>Allowed Values:</u> |
| Custom Attributes: Yes Value Definition: The value for the SharePoint column. Allowed Values: | | <u>Default Value:</u> None |
| Value Definition: The value for the SharePoint column. Allowed Values: | | <u>Custom Attributes:</u> Yes |
| | Value | Definition: The value for the SharePoint column. Allowed Values: |

| Field Name | Definition |
|------------|---|
| | A null value. |
| | • A custom attribute. |
| | • An XPath to a schema element. |
| | To add XML metadata associated with the process model, click the button in the Value field. |
| | • An attachment. |
| | You can attach a file using: |
| | Local file path - c:\[path]\[file name] |
| | URL - http://[URL]/[file name] |
| | Default Value: |
| | The data type of the SharePoint column. |
| | Note: By default, the Value field displays the column's data type. Set the actual value. |
| | Custom Attributes: |
| | Yes |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a SharePoint List Item

To create a new SharePoint list item, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Create List Item AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **ItemValues** field, click the **Ellipses** button.

Instructions

- 1. On the **Item Values** window, enter the URL for the SharePoint site that contains the list item you want to delete.
- 2. Click Connect.
- 3. Complete any additional configuration for this AgileShape according to your requirements:
 - Configuration for Creating List Item Window
 - AgilePart Common Setup

Create SP Group

An AgilePart that adds a user to a SharePoint Group.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Create SP Group AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------------|--|
| Group Configuration | Opens the Following Window: Create Group Configuration Window Purpose of this Window: Specifies the details for creating a SharePoint group. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Create Group Configuration Window

Specifies the details for creating a SharePoint group.

| Create Group Configuration |
|--|
| Create a Group on SharePoint Site. |
| Site URL (e.g. http://Machine_Name:port/sites/SiteName): |
| http://APDesktop:8000 |
| Group Name: |
| Employees |
| Group Owner (e.g Domain\Username): |
| Demo3\Administrator |
| Group Description: |
| Group of new joinees. |
| *You may enter Custom Attribute Name as \${} |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Create SP Group** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Group Configuration field, click the Ellipses button.

| Field Name | Definition |
|-------------|--|
| Site URL | Definition: Specifies the URL for your SharePoint site. |
| | <u>Allowed Values:</u> A valid SharePoint site URL. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |
| | Example: http://mysharepoint:8000/sites/\${mysite} |
| Group Name | Definition: The name of the SharePoint group you want. <u>Allowed Values:</u> A valid SharePoint group name. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |
| Group Owner | <u>Definition:</u> Specifies the name of the SharePoint user you want to be the owner of the group. <u>Allowed Values:</u> A user name, including the domain name, in the following format: |

| Field Name | Definition |
|-------------------|---|
| | [domain]\[user name] |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | MyDomain\Administrator |
| Group Description | Definition: |
| | A free text description of the group. |
| | Allowed Values: |
| | Multiple lines of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Schema | Opens the Following Window: |
| | Select XPath from Attributes Window |
| | Purpose of this Window: |
| | Enables you to select a schema node from the XML schema for your process. |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes | × |
|------------------------------|---|
| Select XPath from Attributes | |
| Schema Process Attributes | |
| myFields | |
| XPath: |] |
| DataType: | |
| 🥪 OK 🔀 Cancel | |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the **Ellipses** button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a SharePoint Group

To create a new SharePoint group, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Create SP Group** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Group Configuration field, click the Ellipses button.

Instructions

1. On the Create Group Configuration window, complete the following required fields:

| Field Name | Definition |
|------------|---|
| Site URL | Definition: |
| | Specifies the URL for your SharePoint site. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://mysharepoint:8000/sites/\${mysite} |
| Group Name | Definition: |
| | The name of the SharePoint group you want. |

| Field Name | Definition |
|-------------|--|
| | Allowed Values: |
| | A valid SharePoint group name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Group Owner | Definition: |
| | Specifies the name of the SharePoint user you want to be the owner of the group. |
| | Allowed Values: |
| | A user name, including the domain name, in the following format: |
| | [domain]\[user name] |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | MyDomain\Administrator |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Create Group Configuration Window

Delete Document Set

An AgilePart that removes a specified document set from the SharePoint document library.



Prerequisites

• An environment using SharePoint 2013 and the CSOM AgileConnector.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Delete Document Set AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|---------------|---|
| Configuration | Opens the Following Window: Delete Document Set Configuration Window |
| | Purpose of this Window: |
| | Specifies the document set you want to delete. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Delete Document Set Configuration Window

Specifies the document set you want to delete.

| Delete Document Set Configuration | × |
|--|---|
| Delete Document Set Configuration | |
| Delete Document Set Configuration | |
| Site URL (e.g. http://Machine_Name:port/sites/SiteName): | |
| http://demo3:8000 | |
| Document Library Name: | |
| Marketing | |
| Document Set: | |
| User Registration | |
| V OK K Cancel | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Delete Document Set AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **DeleteDocSetConfiguration** field, click the **Ellipses** button.

| Field Name | Definition |
|-----------------------|--|
| Site URL | Definition: Specifies the URL for your SharePoint site. <u>Allowed Values:</u> A valid SharePoint site URL. <u>Default Value:</u> None <u>Custom Attributes:</u> |
| | Example: http://mysharepoint:8000/sites/\${mysite} |
| Document Library Name | Definition: Specifies the name of the SharePoint document library. |

| Field Name | Definition |
|--------------|---|
| | Allowed Values: |
| | A valid SharePoint document library name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Document Set | Definition: |
| | Specifies the name of the document set. |
| | Allowed Values: |
| | The name of your document set. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Deleting a Document Set

To delete a document set from the document library, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Delete Document Set AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **DeleteDocSetConfiguration** field, click the **Ellipses** button.

Instructions

1. On the **Delete Document Set Configuration** window, complete the following fields as required:

| Field Name | Definition |
|-----------------------|--|
| Site URL | Definition: Specifies the URL for your SharePoint site. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://mysharepoint:8000/sites/\${mysite} |
| Document Library Name | Definition: |
| | Specifies the name of the SharePoint document library. |
| | Allowed Values: |
| | A valid SharePoint document library name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Document Set | Definition: |
| | Specifies the name of the document set. |
| | Allowed Values: |
| | The name of your document set. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

2. Complete any additional configuration for this AgileShape according to your requirements:

- AgilePart Common Setup
- Delete Document Set

Delete Files

An AgilePart that deletes files from SharePoint.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Delete Files** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------------|---|
| DocumentLibrary Url | Definition: The URL for the SharePoint document library or folder which contains the files to be deleted. <u>Allowed Values:</u> A valid SharePoint document library or folder URL. <u>Default Value:</u> None <u>Custom Attributes:</u> No |
| Filter | Definition: Specifies the file name or a set of files expressed using the filter expression you want to search within the specified source location. For example, files to be downloaded by the Download Files AgilePart, to be uploaded by the Upload Files AgilePart, or to be converted to PDF by the PDF Converter AgilePart. |

| Field Name | Definition |
|------------|---|
| | Allowed Values: |
| | • A file name. |
| | A filter string that uses asterisks (*) as wildcards. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | Following are some examples of filter expressions: |
| | *.* - All files are searched. |
| | *.xml - The files that have the .xml file extension are searched. |
| | *.doc - The files that have the .doc file extension are searched. |
| | MyFile.xml - Only the specific file MyFile.xml is searched. |
| | The filter action is performed at the source location, that vary depending upon the AgileShape. |
| Recursive | Definition: |
| | Determines whether the AgileShape's specified action - such as copying, uploading, or deleting - is recursive. In other words, it determines whether the action is repeated in subfolders of the target folder or document library. |
| | Allowed Values: |
| | • False - The AgileShape performs the action only on the files located at the specified source folder. Files within subfolders aren't affected. |
| | • True - The AgileShape performs the action on the files located at the specified source folder, as well as the files that are located within the subfolders. |
| | Default Value: |
| | False |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Deleting Files from SharePoint

To delete files from a SharePoint list or folder, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Delete Files** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. On the **Delete Files** AgileShape, complete the following required properties:

| Field Name | Definition |
|---------------------|--|
| DocumentLibrary Url | Definition: The URL for the SharePoint document library or folder which contains the files to be deleted. Allowed Values: A valid SharePoint document library or folder URL. Default Value: None |
| 1 | Custom Attributes: |

| 378 | ; |
|-----|---|
|-----|---|

| Field Name | Definition |
|------------|------------|
| | No |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Delete Files

Delete SharePoint List

An AgilePart that deletes a SharePoint list.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **Delete SharePoint List** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------|--|
| Configuration | Opens the Following Window: Configuration for Deleting List Window |
| | Purpose of this Window: Specifies the SharePoint list you want to delete. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Deleting List Window

Specifies the SharePoint list you want to delete.

| Delete List |
|--|
| Configuration for Deleting List |
| Settings |
| Site Url (e.g. http://mysite.com:8000/sites/MySite): |
| http://APDesktop:8000 |
| List Name: List Type: |
| CompaniesDetails |
| |
| 5 |
| |
| 🥪 OK 🔀 Cancel |
| |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Delete SharePoint List** AgileShape, and drop it on the process template.
- 4. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|------------|--|
| Site URL | <u>Definition:</u> Specifies the URL for your SharePoint site. <u>Allowed Values:</u> A valid SharePoint site URL. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |
| | Example: http://mysharepoint:8000/sites/\${mysite} |
| GO | <u>Function:</u> Populates the fields with the correct values - the SharePoint lists and their list types - for the specified SharePoint site. |
| List Name | Definition: Specifies the name of the SharePoint list you want. <u>Allowed Values:</u> The name of your SharePoint list. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |
| List Type | <u>Definition:</u> Displays the list type of the specified SharePoint list. <u>Allowed Values:</u> Read only |

Common Configuration Tasks

• Data Binding

• Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Deleting a SharePoint List

To delete a SharePoint list, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Delete SharePoint List** AgileShape, and drop it on the process template.
- 4. On the **Configuration** field, click the **Ellipses** button.

Instructions

- 1. On the **Configuration for Deleting List** window, in the **Site URL** field, enter the URL of the SharePoint site that contains the list you want to delete.
- 2. Click Go.
- 3. In the List Name field, select the list you want to delete.
- 4. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup

Delete List Item

An AgilePart that deletes SharePoint list items.



Prerequisites

Log on to SharePoint.

Good to Know

• If errors occur during the execution, a message will be written into the SharePoint Integration log file.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **Delete List Item** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------------------------|--|
| DeleteListItemsConfiguration | Opens the Following Window: Configuration for Deleting List Items Window Purpose of this Window: Specifies the SharePoint list items you want to delete. You can delete all list items within a SharePoint list or a folder, or you can identify a field name and value pair to delete a limited set of list items. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Deleting List Items Window

Specifies the SharePoint list items you want to delete. You can delete all list items within a SharePoint list or a folder, or you can identify a field name and value pair to delete a limited set of list items.

| Configuration for Deleting List Items | | |
|--|--|--|
| Configuration for Deleting List Items | | |
| Source Site Configuration Site URL (e.g. http://Machine_Name:port/sites/SiteName): http://ap6/MyTestSite/Lists/TheJoineeList/AllItems.aspx | | |
| List Name: The JoineeList - | Folder Name (Optional): | |
| ListItem Field Name (Optional): Title | ListItem Field Value (Optional): \${ListItemID} | |
| * You may enter Custom Attribu | te Name as \${} | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Delete List Item** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **DeleteListItemsConfiguration** field, click the **Ellipses** button.

| Site URL Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. | Field Name | Definition |
|---|------------|---|
| Default Value: | Site URL | Definition: Specifies the URL for your SharePoint site. <u>Allowed Values:</u> A valid SharePoint site URL. <u>Default Value:</u> |
| \${DocUrl} | | \${DocUrl} |

| Field Name | Definition |
|---------------------|--|
| | Yes |
| | Example: |
| | http://mysharepoint:8000/sites/\${mysite} |
| List Name | Definition: |
| | Specifies the name of the SharePoint list you want. |
| | Allowed Values: |
| | The name of your SharePoint list. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Folder Name | Definition: |
| | Specifies the name of a SharePoint folder. |
| | Allowed Values: |
| | The name of your SharePoint folder |
| | If the folder does not exist within the specified SharePoint list, the AgilePoint system creates it. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| ListItem Field Name | Definition: |
| | Specifies the name of a SharePoint list column or field. Along with the field value, the field name specifies a particular group of list items to delete. |
| | To identify a list item group, you must provide a filed name and value. If you do not specify a field name and value, all list items are deleted from the list or folder you specify. |
| | Allowed Values: |
| | The name of your SharePoint list column. |
| | Default Value: |
| | "ID", the list column that specifies the unique list item ID. |

| Field Name | Definition |
|----------------------|---|
| | Custom Attributes: |
| | Yes |
| | Example: |
| | If ListItem Field Name is set to ID, and ListItem Field Value is set to 5, only the list item with the ID equal to 5 is deleted. |
| | If ListItem Field Name is set to Created By, and ListItem Field Value is set to Mary Jones, all list items created by Mary Jones are deleted. |
| ListItem Field Value | Definition: |
| | Specifies the value of the field defined in ListItem Field Name. |
| | To identify a list item group, you must provide a filed name and value. If you do not specify a field name and value, all list items are deleted from the list or folder you specify |
| | Allowed Values: |
| | The value of the list column specified in the ListItem Field Name. |
| | Default Value: |
| | \${ListItemID} |
| | A custom attribute representing a SharePoint List Item ID. This value corresponds to ID, the default value of ListItem Field Name. |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | If ListItem Field Name is set to ID, and ListItem Field Value is set to 5, only the list item with the ID equal to 5 is deleted. |
| | If ListItem Field Name is set to Created By, and ListItem Field Value is set to Mary Jones, all list items created by Mary Jones are deleted. |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Deleting a SharePoint List Item

To delete a SharePoint list item, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Delete List Item AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **DeleteListItemsConfiguration** field, click the **Ellipses** button.

Instructions

1. On the **Delete List Item** AgileShape, complete the following required properties:

| Field Name | Definition |
|------------|--|
| Site URL | Definition: Specifies the URL for your SharePoint site. <u>Allowed Values:</u> A valid SharePoint site URL. <u>Default Value:</u> \${DocUrl} <u>Custom Attributes:</u> |
| | Yes <u>Example:</u> http://mysharepoint:8000/sites/\${mysite} |
| List Name | <u>Definition:</u> Specifies the name of the SharePoint list you want. <u>Allowed Values:</u> The name of your SharePoint list. |

| Field Name | Definition |
|------------|--------------------|
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - Delete List Item
 - AgilePart Common Setup

Delete Particular FileVersion

An AgilePart that deletes a major or minor version of a file from a SharePoint list.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Delete Particular FileVersion** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|-----------------------------------|--|
| Delete File Version Configuration | Opens the Following Window: Delete a Particular Version of a File Window Purpose of this Window: Specifies a list item file version you want to delete. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Delete a Particular Version of a File Window

Specifies a list item file version you want to delete.

| Delete a particular version of a file | | |
|--|--|--|
| Delete a particular version of a file | | |
| Document URL (e.g. http://Machine_Name:port/sites/SiteName/doclib/document name): http://APDesktop:8000/NewHire/JoineeInfo/OfferLetter-Rajesh-003 | | |
| Version number of file to be deleted(Major/Minor) | | |
| 1.0 | | |
| Schema You may enter Custom Attribute Name as \${} | | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Delete Particular FileVersion** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Delete File Version Configuration field, click the Ellipses button.

| Field Name | Definition |
|--------------------------------------|--|
| Document URL | Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. |
| | <u>Allowed Values:</u> A valid URL. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |
| Version number of file to be deleted | Definition: |
| | Specifies the major or minor file version you want to delete or restore. |
| | 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: |
| | Yes |
| | 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. |
| Schema | Opens the Following Window: |
| | Purpose of this Window: |
| | |

| Field Name | Definition |
|------------|---|
| | Enables you to select a schema node from the XML schema for your process. Note: If the process template has an associated schema, the Schema button appears. |

- Data Binding
- Using Process Attributes

Schema Mapper Window

Maps SharePoint fields, form fields, web methods, or other input sources to an XML schema.

| Schema Mapper | | |
|--|----------|-----------------------|
| data row ows_Tite data ows_TiteLeafRef temCount | | myFields ows_title |
| | Auto Map | |
| Data Conversion needed | | |
| C Default Data Conversion | | |
| C Custom Data Conversion | | |
| | Ad | dd Edit Delete |
| | | ✓ OK Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - SharePoint

- Web Services
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - CAML Query
 - WSE (Web Service Extension)
 - WCF (Windows Communication Foundation)
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. In one of the following fields, click the **Ellipses** button. The fields that display vary, depending upon the AgsileShape you are using. For example, **Configure**.
- 6. On one of the following windows, under the **Output Mapping** or **Request/Response** tab, click the **Ellipses** button:
 - CAML Query Builder Configuration Window Output Mapping Tab
 - WebService Configuration Window Request Tab
 - WebService Configuration Window Response Tab
 - Configuration for WCF Service Window Request Tab
 - Configuration for WCF Service Window Response Tab



Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options:

- **Reset All Mappings** Deletes all mappings that have been made in the Schema Mapper for this activity.
- **Remove Invalid Mappings only** Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same.
- **Cancel** Aborts opening the Schema Mapper window.

| Mapping Schemas for Request/Response and Process Model Definition: Maps the schemas for a service's request or response and the AgilePoint schema: | Field Name | Definition |
|--|---|--|
| CAML query schema for a response and AgilePoint schema WSE service schema for a request/response and the AgilePoint schema WCF service schema for a request/response and the AgilePoint schema The source and the destination schemas are displayed in a tree-view structure in the left and rip panes. | Mapping Schemas for Request/Response and Process Model | <u>Definition:</u> Maps the schemas for a service's request or response and the AgilePoint schema: CAML query schema for a response and AgilePoint schema WSE service schema for a request/response and the AgilePoint schema WCF service schema for a request/response and the AgilePoint schema WCF service schema for a request/response and the AgilePoint schema The source and the destination schemas are displayed in a tree-view structure in the left and right panes. |

| Field Name | Definition | | |
|---------------------------|--|--|--|
| | Read only - However, the drag and drop operations are supported to map the schemas. | | |
| | Drag a data node from the source schema pane to the destination schema pane: | | |
| | Green line - The data type of source and destination nodes matches. | | |
| | Blue line - The data type of source and destination nodes doesn't match. The data conversion is required to map the schemas. | | |
| | Red line - Specifies that the custom data conversion is required. | | |
| Automap | Function: | | |
| | Maps all fields in the data source and the process schema that have the same name. | | |
| No Data Conversion needed | Definition: | | |
| | Determines whether the data conversion is not required between the source and the destination schema data fields. | | |
| | Allowed Values: | | |
| | Deselected - Data conversion is required between the schema data fields. | | |
| | Selected - Data conversion is not required between the schema data fields. | | |
| | Default Value: | | |
| | None | | |
| | However, the No Data Conversion needed option is selected if the data type of the source and destination schema data fields matches. | | |
| Default Data Conversion | Definition: | | |
| | Determines whether the default data conversion is required between the source and the destination schema fields. | | |
| | Allowed Values: | | |
| | Deselected - Default data conversion is not required between the schema data fields. | | |
| | • Selected - Default data conversion is required between the schema data fields. | | |
| | Default Value: | | |
| | None | | |

| Field Name | Definition |
|------------------------|--|
| | However, the Default Data Conversion option is selected if the data type of the source and destination schema fields doesn't match. |
| Custom Data Conversion | <u>Definition:</u> Determines whether the custom data conversion is required. You can create your own data conversion types by using the Add button. <u>Allowed Values:</u> <u>Deselected</u> - Custom data conversion is not required. <u>Selected</u> - Custom data conversion is required. <u>Default Value:</u> Deselected |
| Add | Opens the Following Window: Custom Mapping Code Window Purpose of this Window: Specifies custom C# code that can be used to map fields to an XML schema. |
| Edit | Opens the Following Window: Custom Mapping Code Window Purpose of this Window: Specifies custom C# code that can be used to map fields to an XML schema. |
| Delete | Function: Deletes the selected custom data conversion from the list. |

- Data Binding
- Using Process Attributes

Custom Mapping Code Window

Specifies custom C# code that can be used to map fields to an XML schema.

| Custom Mapping Co | de | | | × |
|--|--|----|----|----------|
| Custom | Mapping Code | | | |
| Input Type : | Int32 | | | |
| Output Type : | String | | | |
| Method Name : | convertIntegerToString | _ | | |
| Custom Mapping Meth public String c | nod code: onvertIntegerToString (Int32 value) { | (| | |
|) | | ~2 | or | Concel 1 |
| validate | | ~ | UK | × Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - SharePoint
 - Web Services
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - CAML Query
 - WSE (Web Service Extension)
 - WCF (Windows Communication Foundation)
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In one of the following fields, click the **Ellipses** button. The fields that display vary, depending upon the AgsileShape you are using. For example, **Configure**.
- 6. On one of the following windows, under the **Output Mapping** or **Request/Response** tab, click the **Ellipses** button:
 - CAML Query Builder Configuration Window Output Mapping Tab
 - WebService Configuration Window Request Tab
 - WebService Configuration Window Response Tab

- Configuration for WCF Service Window Request Tab
- Configuration for WCF Service Window Response Tab

Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options:

- **Reset All Mappings** Deletes all mappings that have been made in the Schema Mapper for this activity.
- **Remove Invalid Mappings only** Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same.
- **Cancel** Aborts opening the Schema Mapper window.
- 7. On the Schema Mapper Window, select the Custom Data Conversion option, and then click Add.

| Field Name | Definition |
|-------------|--|
| Input Type | Definition: |
| | Specifies the data type of a source schema data field. |
| | This indicates that the data type of the source schema field didn't match to the destination schema field on the Schema Mapper Window. |
| | Allowed Values: |
| | Read only. |
| Output Type | Definition: |
| | Specifies the data type of a destination schema data field. |
| | This indicates that the data type of the source schema field didn't match to the destination schema field on the Schema Mapper Window. |
| | Allowed Values: |
| | Read only. |
| Method Name | Definition: |
| | Specifies the name of a method you want to create for custom data conversion. |
| | Allowed Values: |
| | Any method name. |
| | Default Value: |

| Field Name | Definition |
|----------------------------|--|
| | Populated on the basis of the data type of the selected schema fields on the Schema Mapper Window. Custom Attributes: No |
| Custom Mapping Method Code | Definition: Specifies the code for the custom mapping data conversion. Allowed Values: A valid code. Default Value: None Custom Attributes: No |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Deleting a Version of a SharePoint File

To delete a particular version of a SharePoint file, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Delete Particular FileVersion** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Delete File Version Configuration field, click the Ellipses button.
Instructions

1. On the **Delete a Particular Version of a File** window, enter the URL of the file whose version you want to delete:

| Field Name | Definition |
|--------------|---|
| Document URL | Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes |

2. Enter the file version you want to delete.

If your process has an XML schema, you can click the **Schema** button to select the file version from the schema.

| Field Name | Definition |
|--------------------------------------|--|
| Version number of file to be deleted | Definition: Specifies the major or minor file version you want to delete or restore. |
| | 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. |
| | <u>Default Value:</u> |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |

| Field Name | Definition |
|------------|--|
| | 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. |
| Schema | Opens the Following Window: Select XPath from Attributes Window |
| | Purpose of this Window: |
| | Enables you to select a schema node from the XML schema for your process. |
| | Note: If the process template has an associated schema, the Schema button appears. |

- 3. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup

Download Documents from Document Set

An AgilePart that downloads one or more documents from a SharePoint document to the local file system of the AgilePoint Server machine.



Prerequisites

• An environment using SharePoint 2013 and the CSOM AgileConnector.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Download Documents from Document Set** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|---------------|--|
| Configuration | Opens the Following Window: Download Document Set Configuration Window Purpose of this Window: Specifies the documents to download from a SharePoint document set. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Download Document Set Configuration Window

Specifies the documents to download from a SharePoint document set.

| Download Document Set Configuration | × |
|--|---|
| Download Documents from Document Set | |
| Download Document Set Configuration | 7 |
| Site URL (e.g. http://Machine_Name:port/sites/SiteName): | |
| http://demo3:8000 | |
| Document Library Name: | |
| Marketing | |
| Document Set: | |
| User Registration | |
| LocalPath: | |
| C:\Marketing | |
| Filter: | |
| *.docx | |
| ✓ OverWriteFile ✓ Recursive ✓ OK X Cancel | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Download Documents from Document Set** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **DownloadDocSetConfiguration** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|--|
| Site URL | Definition: Specifies the URL for your SharePoint site. |
| | <u>Allowed Values:</u> A valid SharePoint site URL. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |
| | Example: |

| Field Name | Definition |
|-----------------------|--|
| | http://mysharepoint:8000/sites/\${mysite} |
| Document Library Name | Definition: Specifies the name of the SharePoint document library. |
| | <u>Allowed Values:</u> A valid SharePoint document library name. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |
| Document Set | Definition: Specifies the name of the document set. |
| | Allowed Values: |
| | The name of your document set. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Local Path | Definition: |
| | Specifies the location of the file system folder on the local computer where the AgileShape performs the certain action such as uploading or downloading files. |
| | This property defines the source location for the files to be uploaded and the destination location for the files to be downloaded. |
| | Allowed Values: |
| | An absolute path on the AgilePoint Server machine. |
| | A file path relative to the AgilePoint Server application's root directory. |
| | <u>Default Value:</u> |
| | None |
| | Custom Attributes: |
| | No |

| Field Name | Definition |
|------------|--|
| | Example: |
| | If AgilePoint Server is installed at: |
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | And, the file once downloaded is to be located at: |
| | c:\Inetpub\wwwroot\AgilePointServer\files \MyFile.txt |
| | Then, the LocalPath property can be set to one of the following values: |
| | • Relative path - files |
| | Absolute path - c:\Inetpub\wwwroot \AgilePointServer\files |
| | If AgilePoint Server is installed at: |
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | And, the file once downloaded is to be located at: |
| | c:\Inetpub\wwwroot\AgilePointServer\files\temp \MyFile.txt |
| | Then, the LocalPath property must be set to one of the following values: |
| | • Relative path - files\temp |
| | Absolute path - c:\Inetpub\wwwroot \AgilePointServer\files\temp\ |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Downloading Documents from a Document Set

To download documents from a document set to the local file system of the AgilePoint Server machine, do the following.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.

- 3. On the **SharePoint** stencil, drag the **Download Documents from Document Set** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **DownloadDocSetConfiguration** field, click the **Ellipses** button.

Instructions

1. On the **Download Document Set Configuration** Window, complete the following fields as required:

| Field Name | Definition |
|-----------------------|--|
| Site URL | Definition: |
| | Specifies the URL for your SharePoint site. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://mysharepoint:8000/sites/\${mysite} |
| Document Library Name | Definition: |
| | Specifies the name of the SharePoint document library. |
| | Allowed Values: |
| | A valid SharePoint document library name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Document Set | Definition: |
| | Specifies the name of the document set. |
| | Allowed Values: |
| | The name of your document set. |
| | Default Value: |
| | None |

| Field Name | Definition |
|------------|--|
| | Custom Attributes: |
| | Yes |
| LocalPath | Definition: |
| | Specifies the location of the file system folder on the local computer where the AgileShape performs the certain action such as uploading or downloading files. |
| | This property defines the source location for the files to be uploaded and the destination location for the files to be downloaded. |
| | Allowed Values: |
| | A file path relative to the AgilePoint Server application's root directory. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | If AgilePoint Server is installed at: |
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | And, the file once downloaded is to be located at: |
| | c:\Inetpub\wwwroot\AgilePointServer\files \MyFile.txt |
| | Then, the LocalPath property must be set to the following value: |
| | files |
| | If AgilePoint Server is installed at: |
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | And, the file once downloaded is to be located at: |
| | c:\Inetpub\wwwroot\AgilePointServer\files \temp\MyFile.txt |
| | Then, the LocalPath property must be set to the following value: |
| | files\temp |

2. Complete any additional configuration for this AgileShape according to your requirements:

- Download Documents from Document Set
- AgilePart Common Setup

Download Files

An AgilePart that downloads one or more files from a SharePoint library to the local file system of the AgilePoint Server machine.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **Download Files** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-------------|--|
| AbsoluteURL | Definition: Specifies the absolute URL for the source folder on SharePoint server. <u>Allowed Values:</u> A valid SharePoint absolute URL. <u>Default Value:</u> None <u>Custom Attributes:</u> |
| | No <u>Example:</u> http://[machine name]:[port]/sites/[site name]/ [document library name]/[folder name] |
| Filter | Definition: Specifies the file name or a set of files expressed using the filter expression you want to search within |

| Field Name | Definition |
|------------|--|
| | the specified source location. For example, files to be downloaded by the Download Files AgilePart, to be uploaded by the Upload Files AgilePart, or to be converted to PDF by the PDF Converter AgilePart. |
| | Allowed Values: |
| | • A file name. |
| | A filter string that uses asterisks (*) as wildcards. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | Following are some examples of filter expressions: |
| | *.* - All files are searched. |
| | *.xml - The files that have the .xml file extension are searched. |
| | *.doc - The files that have the .doc file extension are searched. |
| | MyFile.xml - Only the specific file MyFile.xml is searched. |
| | The filter action is performed at the source location, that vary depending upon the AgileShape. |
| LocalPath | Definition: |
| | Specifies the location of the file system folder on the local computer where the AgileShape performs the certain action such as uploading or downloading files. |
| | This property defines the source location for the files to be uploaded and the destination location for the files to be downloaded. |
| | Allowed Values: |
| | A file path relative to the AgilePoint Server application's root directory. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |

| Field Name | Definition |
|---------------|---|
| | Example: |
| | If AgilePoint Server is installed at: |
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | And, the file once downloaded is to be located at: |
| | c:\Inetpub\wwwroot\AgilePointServer\files \MyFile.txt |
| | Then, the LocalPath property must be set to the following value: |
| | files |
| | If AgilePoint Server is installed at: |
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | And, the file once downloaded is to be located at: |
| | c:\Inetpub\wwwroot\AgilePointServer\files\temp \MyFile.txt |
| | Then, the LocalPath property must be set to the following value: |
| | files\temp |
| OverWriteFile | Definition: |
| | Specifies whether the AgileShape overwrites the files if they already exist at the specified destination location. |
| | Allowed Values: |
| | False - The AgileShape does not overwrite any existing file. |
| | • True - The AgileShape overwrites the file if it exists with the same name at the destination location. |
| | Default Value: |
| | False |
| Recursive | Definition: Determines whether the AgileShape's specified action - such as copying, uploading, or deleting - is recursive. In other words, it determines whether the action is repeated in subfolders of the target |
| | folder or document library. |
| | Allowed Values: |

| Field Name | Definition |
|------------|---|
| | False - The AgileShape performs the action only on the files located at the specified source folder. Files within subfolders aren't affected. |
| | • True - The AgileShape performs the action on the files located at the specified source folder, as well as the files that are located within the subfolders. |
| | Default Value: |
| | False |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Downloading SharePoint Files

To download files from a SharePoint library or folder to the file system on the AgilePoint Server machine, do the following.

Prerequisites

A process model that uses a SharePoint compatible process template.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Download Files** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following required properties for the **Download Files** AgileShape:

| Field Name | Definition |
|-------------|--|
| AbsoluteURL | Definition: Specifies the absolute URL for the source folder on SharePoint server. |
| | Allowed Values: |
| | A valid SharePoint absolute URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | http://[machine name]:[port]/sites/[site name]/ [document library name]/[folder name] |
| LocalPath | Definition: |
| | Specifies the location of the file system folder on the local computer where the AgileShape performs the certain action such as uploading or downloading files. |
| | This property defines the source location for the files to be uploaded and the destination location for the files to be downloaded. |
| | Allowed Values: |
| | A file path relative to the AgilePoint Server application's root directory. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | If AgilePoint Server is installed at: |
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | at: |

| Field Name | Definition |
|------------|--|
| | c:\Inetpub\wwwroot\AgilePointServer\files \MyFile.txt |
| | Then, the LocalPath property must be set to the following value: |
| | files |
| | If AgilePoint Server is installed at: |
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | And, the file once downloaded is to be located at: |
| | c:\Inetpub\wwwroot\AgilePointServer\files \temp\MyFile.txt |
| | Then, the LocalPath property must be set to the following value: |
| | files\temp |
| | |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - Download Files
 - AgilePart Common Setup

Excel Calculate

An AgilePart that allows both writing (temporarily or permanently) and reading from an Excel document in the same step.

Good to Know

• The write operation happens first, and then the read operation occurs.



Note: Write is carried out first and then Read in executed.



- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Excel Calculate** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------|--|
| Configuration | Opens the Following Window: Excel Services Configuration Window |
| | Purpose of this Window: Sets up an Excel operation. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Excel Services Configuration Window

Sets up an Excel operation.

AgileShapes

| xcel Services | Configuratio | on s Configuration | | × |
|---|--|---|--|---|
| General Excel Se Run-time Design-ti Save To | rvices URL Template ime Template | http://AP6/_vti_bin/e http://AP6/ExcelRunt D:\Users\Administrato C:\\${/my:myFields/my | xcelservice.asmx imeTemplates/ExcelServices.xlsx r\Desktop\SharePoint\Excel\ExcelServices.xlsx :SaveCalculate).xlsx | Browse Overwrite if exists |
| Write | Read ExcelField ExcelField2 | | ProcessValue (XPATH)/my.myFields/myfield1 (XPATH)/my.myFields/myfield2 | Non- Refresh ExcelField1 ExcelField2 ExcelField3 ExcelField4 ExcelField6Range ExcelField6Range ExcelField6Range ExcelField6Range ExcelField6Range ExcelField6Range ExcelField6Range ExcelField6Range ExcelField6Range ExcelField6Range ExcelField6Range ExcelField6Range ResultTest1 ResultTest3 ResultTest3 ResultTest4 MK X |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **Excel Calculate** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

| Field Name | Definition |
|--------------------|---|
| Excel Services URL | Definition: |
| | Specifies the URL of the SharePoint Excel Services. |

| Field Name | Definition |
|-------------------|--|
| | |
| | • A velid ShareDeint Event Services UD |
| | A quetom attributo |
| | A custom attribute. |
| | The add XML metadata uses the Ellipsee butter |
| | To add XML metadata, use the Ellipses button. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | • LIPI http://ind.01:00000/ |
| | ExcelService.asmx |
| | A custom attribute - \$\{SharePointURL\}\$ |
| | \{ExcelService\} |
| Run-time Template | Definition: |
| | Specifies the name of an Excel template file to be |
| | used at runtime. The Excel file can be either .xlsx |
| | or .xltx. |
| | Allowed Values: |
| | A valid Excel template file name with the full path. |
| | • A custom attributes. For example, \$ |
| | <pre>\}\$\{ExcelFilename\}</pre> |
| | XML metadata |
| | To add XML metadata, use the Ellipses button. |
| | Note the following: |
| | • The Run-time Template file and the Design- |
| | time Template file must have the same named fields. This indicates that both the files must |
| | have same content. |
| | • This Excel template file must be located either |
| | in a SharePoint document library or in a shared folder. Either way, the file must be added to |
| | the Trusted file locations of the Excel Services |
| | which is configured in SharePoint Central Administration - Shared Services |
| | |
| | |
| | INONE |

| Field Name | Definition |
|----------------------|---|
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://ind-01:8888/ExcelServicesDemo/ ExcelServices.xlsx |
| Design-time Template | Definition: |
| | Specifies the name of an Excel template file that is used at design time. |
| | Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. |
| | The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. |
| | Allowed Values: |
| | A valid Excel template file name with the full path. |
| | Note the following: |
| | The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. |
| | Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | C:\Excel\ExcelSheet\ExcelServices.xlsx |
| Save To | Definition: |
| | Specifies the location where you want to save the resulting Excel document. |
| | Allowed Values: |
| | • A valid URI. |
| | The URI can be the URL for a SharePoint document library, or a directory path. |

| Field Name | Definition |
|---------------------|--|
| | A custom attributes. For example, \$ <pre>\{SharePointURL\}\$\{ExcelDocLibrary\}\$ <pre>\{ExcelFilename\}.</pre> </pre> XML metadata To add XML metadata, use the Ellipses button. |
| | Default Value: |
| | None |
| | Custom Attributes: Yes |
| | Example: |
| | http://ind-01:8888/ExcelServicesDemo/\${/ my:myFields/my:SaveWrite}.xlsx |
| Overwrite if exists | Definition: |
| | Overwrites an existing file specified using the Save To field. |
| | Allowed Values: |
| | • Deselected - The AgileShape doesn't overwrite the existing file. |
| | • Selected - The AgileShape overwrites the file if it already exists. |
| | Default Value: |
| | Deselected |
| Named Fields Box | Definition: |
| | Specifies the named fields populated from the Excel sheet once you specify the Design-time Template file. |
| | This field is used for the mapping purpose. You must map the Excel named fields to the process values to: |
| | • Write to an Excel document. |
| | Read from an Excel document. |
| | A named field in Microsoft Excel is the name of a cell or range that is used instead of the cell's reference name. For example, empName, a named field, is easier to use instead of its cell's reference name, C21. |
| | Allowed Values: |
| | A named field selected from the list. |

| Field Name | Definition |
|-------------|--|
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Refresh | Function: |
| | Reloads the named fields from the Excel sheet to the Named Fields box. |
| | Note: You must click the Refresh button if the file specified in the Design-time Template changes. |
| Left Arrow | Function: |
| | Populates the selected named field from the Named Fields Box box to the ExcelField column. |
| | You can add only one named field at a time. |
| Right Arrow | Function: |
| | Deletes the selected row. |
| Write | Opens the Following Window: |
| | Excel Services Configuration Window - Write Tab |
| | Purpose of this Window: |
| | Sets up an operation to create an Excel file. |
| Read | Opens the Following Window: |
| | Excel Services Configuration Window - Read Tab |
| | Purpose of this Window: |
| | Specifies an operation to read and store data from an Excel file. |

- Data Binding
- Using Process Attributes

Excel Services Configuration Window - Write Tab

Sets up an operation to create an Excel file.

AgileShapes

| Run-time Template http://AP6/ExcelRuntimeTemplates/ExcelServices.xlsx Design-time Template D:\Users\Administrator\Desktop\SharePoint\Excel\ExcelServices.xlsx Image: Browse Save To http://AP6/ExcelRuntimeTemplates/ Image: I | Run-time 1 | Terrelate | | | | |
|--|------------|-------------|----------------|---|---|----------------------------|
| Design-time Template D:\Users\Administrator\Desktop\SharePoint\Excel\ExcelServices.xlsx Image: Browse Save To http://AP6/ExcelRuntimeTemplates/ Image: | | remplate | http://AP6/Exc | elRuntimeTemplates/ExcelServices.xlsx | | |
| Save To http://AP6/ExcelRuntimeTemplates/ Appings Write ExcelField ExcelFi | Design-tim | ne Template | D:\Users\Admi | $nistrator \ Excel \ Share Point \ Excel \ Services \ xdsx$ | | C Browse |
| Mappings Second Field ProcessValue ExcelField 1 ExcelField 1 ExcelField 1 ExcelField 2 ExcelField 2 ExcelField 3 ExcelField 6 Exc | Save To | | http://AP6/Exc | elRuntimeTemplates/ | | Voverwrite if exis |
| ExcelField6Range (XPATH/my:my:Fields/my:RepeatingGroup/my:field2 ExcelField6Range ExcelField6Range ExcelField6Range (XPATH/my:my:Fields/my:RepeatingGroup/my:field5 ExcelField6Range ExcelField6Range * ExcelField6RangeType2 my:my:Fields/my:RepeatingGroup/my:field5 ExcelField6Range ExcelField6Range * ExcelField6RangeType2 my:my:Fields/my:RepeatingGroup/my:field5 ExcelField6Range ExcelField6Range | | ExcelField1 | | (XPATH)/my.myFields/my.field1 | | ExcelField3 ExcelField4 |
| ExcelField2 (XPATH)/my:myFields/my:field2 ExcelField6Range ExcelField6Range ExcelField6Range (XPATH)/my:myFields/my:RepeatingGroup/my:field6 Image: State | | ExcelField1 | | (XPATH)/my.myFields/my.field1 | | ExcelField2 ExcelField3 |
| ExcelField6Range (XPATH)/my:myFields/my:RepeatingGroup/my:field6 ExcelField6RangeType2 my:myFields/my:RepeatingGroup/my:field5 * ExcelField6RangeType2 | | ExcelField2 | | (XPATH)/my:myFields/my:field2 | < | ExcelField6Range |
| ExcelField6RangeType2 my:myRelds/my:RepeatingGroup/myfield5 Result Test2 Result Test3 Result Test4 | | ExcelField6 | Range | (XPATH)/my:myFields/my:RepeatingGroup/myfield6 | | ResultTest1 |
| * Result Test 4 | • | ExcelField6 | RangeType2 | my:myFields/my:RepeatingGroup/my.field5 | > | ResultTest2 ResultTest3 |
| | * | | | | | ResultTest4 |
| | | | | | | |
| | | | | | | |
| | - | | | | | Piedult real.4 |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Excel Write
 - Excel Calculate
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

| Field Name | Definition |
|--------------------|-------------|
| Excel Services URL | Definition: |

| Field Name | Definition | | |
|-------------------|---|--|--|
| | Specifies the URL of the SharePoint Excel Services. | | |
| | Allowed Values: | | |
| | A valid SharePoint Excel Services URL. | | |
| | • A custom attribute. | | |
| | XML metadata | | |
| | To add XML metadata, use the Ellipses button. | | |
| | Default Value: | | |
| | None | | |
| | Custom Attributes: | | |
| | Vas | | |
| | | | |
| | Example: | | |
| | URL - http://ind-01:8888/_vti_bin/ ExcelService.asmx | | |
| | A custom attribute - \$\{SharePointURL\}\$ \{ExcelService\} | | |
| Run-time Template | Definition: | | |
| | Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. | | |
| | Allowed Values: | | |
| | A valid Excel template file name with the full path. | | |
| | A custom attributes. For example, \$ <pre>\{SharePointURL\}\$\{RuntimeTemplateLibrary <pre>\}\$\{ExcelFilename\}</pre></pre> | | |
| | • XML metadata | | |
| | To add XML metadata, use the Ellipses button. | | |
| | Note the following: | | |
| | • The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. | | |
| | • This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. | | |
| | Default Value: | | |

| Field Name | Definition |
|----------------------|---|
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://ind-01:8888/ExcelServicesDemo/ ExcelServices.xlsx |
| Design-time Template | Definition: |
| | Specifies the name of an Excel template file that is used at design time. |
| | Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. |
| | The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. |
| | Allowed Values: |
| | A valid Excel template file name with the full path. |
| | Note the following: |
| | The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. |
| | Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | C:\Excel\ExcelSheet\ExcelServices.xlsx |
| Save To | Definition: |
| | Specifies the location where you want to save the resulting Excel document. |
| | Allowed Values: |
| | • A valid URI. |

| Field Name | Definition |
|------------------|---|
| | The URI can be the URL for a SharePoint document library, or a directory path. • A custom attributes. For example, \$ \{SharePointURL\}\$\{ExcelDocLibrary\}\$ \{ExcelFilename\}. • XML metadata To add XML metadata, use the Ellipses button. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes <u>Example:</u> http://ind-01:8888/ExcelServicesDemo/\${/ |
| | my:myFields/my:SaveWrite}.xlsx |
| Named Fields Box | Definition: Specifies the named fields populated from the Excel sheet once you specify the Design-time Template file. This field is used for the mapping purpose. You must map the Excel named fields to the process values to: • Write to an Excel document. • Read from an Excel document. • Read from an Excel document. A named field in Microsoft Excel is the name of a cell or range that is used instead of the cell's reference name. For example, empName, a named field, is easier to use instead of its cell's reference name, C21. Allowed Values: A named field selected from the list. Default Value: None |
| | Custom Attributes: |
| Refresh | <u>Function:</u> Reloads the named fields from the Excel sheet to the Named Fields box. |

| Field Name | Definition |
|---------------------|--|
| | Note: You must click the Refresh button if the file specified in the Design-time Template changes. |
| Left Arrow | <u>Function:</u> Populates the selected named field from the Named Fields Box box to the ExcelField column. You can add only one named field at a time. |
| Right Arrow | <u>Function:</u> Deletes the selected row. |
| Overwrite if exists | <u>Definition:</u> Overwrites an existing file specified using the Save To field. <u>Allowed Values:</u> <u>Deselected</u> - The AgileShape doesn't overwrite the existing file. <u>Selected</u> - The AgileShape overwrites the file if it already exists. |
| | Default Value: Deselected |
| ExcelField | Definition: Specifies the Excel named field to be mapped to the process value. The mapping is performed to update the named fields in the Excel sheet. Allowed Values: A named field. Use the Left Arrow button to move the named field from the Named Fields box to the ExcelField column. Image: The value of the named field in the ExcelField column can be evaluated from a string containing a custom attribute. For example, \$\{MyExcelField\} or field\$\{year\}\$ \{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! Default Value: |
| | None <u>Custom Attributes:</u> |

| Field Name | Definition | | |
|--------------|---|--|--|
| | Yes | | |
| ProcessValue | Definition: Specifies the process value. The value is mapped to the named field to update the named fields in the Excel sheet. | | |
| | Allowed Values: | | |
| | A number or a text string that can contain spaces. | | |
| | This must be in accordance with the data type of the Excel named field. | | |
| | • A custom attribute. | | |
| | Note the following: | | |
| | Once a named field is in the ExcelField column, map a named field to the process value. First, select the row, and then click the Ellipses button to select from the Select XPath from Attributes Window. | | |
| | You can type a custom attribute directly in the ProcessValue column. | | |
| | Note: The name of the custom attribute in the ProcessValue column can be derived from a string containing another custom attribute. For example, \$ \{MyCustomAttribute\} or customattribute \$\{year\}\$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! | | |
| | Note: You can also use advance XPath expressions such as filtering. For example, (XPATH)/my:myFields/my:field2[.>32] returns all items that match the filter (field2 > 32). In addition, you can combine XPath expressions and custom attributes such as: (XPATH)/my:myFields/my:field2[.>\$ \{myCustomAttribute\}] | | |
| | • Note: If you have an XPath expression that returns more than one value, there is a feature for mapping them with a named field that is defined as a one-dimensional range in the Excel document. The AgilePart fills the range with returned values from the XPath expression, but if the range does not contain enough cells for the number of values, the AgilePart doesn't fill past the range of cells in order to protect rest of the | | |

| Field Name | Definition |
|------------|--|
| | worksheet and the remaining values are simply discarded. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

- Data Binding
- Using Process Attributes

Excel Services Configuration Window - Read Tab

Specifies an operation to read and store data from an Excel file.

AgileShapes

| el Services (| Configuratio | n s Configuration | | | X |
|--|--------------------------------------|---|---|---------------------|--|
| General Excel Ser Run-time Design-tir | vices URL Template ne Template | http://AP6/_vti_bin/excelservice.asmx http://AP6/ExcelRuntimeTemplates/\${my: D:\Users\Administrator\Desktop\SharePoi | myFields/my:SaveWrite).xdax int\Excel\ExcelServices.xdax | | ··· ··· Browse |
| Mappings Read * | ExcelField Result Test 1 | ProcessValue (XPATH)/my.myFields/my:ResultRea | Formatted d | | Refresh ExcelField1 ExcelField2 ExcelField4 ExcelField6Range ExcelField6Range Type2 ResultTest1 ResultTest2 ResultTest3 ResultTest4 |
| | | | | v (| DK Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Excel Read
 - Excel Calculate
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

| Field Name | Definition |
|--------------------|-------------|
| Excel Services URL | Definition: |

| Field Name | Definition | | |
|-------------------|---|--|--|
| | Specifies the URL of the SharePoint Excel Services. | | |
| | Allowed Values: | | |
| | A valid SharePoint Excel Services URL. | | |
| | • A custom attribute. | | |
| | XML metadata | | |
| | To add XML metadata, use the Ellipses button. | | |
| | Default Value: | | |
| | None | | |
| | Custom Attributes: | | |
| | Vas | | |
| | | | |
| | Example: | | |
| | URL - http://ind-01:8888/_vti_bin/ ExcelService.asmx | | |
| | A custom attribute - \$\{SharePointURL\}\$ \{ExcelService\} | | |
| Run-time Template | Definition: | | |
| | Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. | | |
| | Allowed Values: | | |
| | A valid Excel template file name with the full path. | | |
| | A custom attributes. For example, \$ <pre>\{SharePointURL\}\$\{RuntimeTemplateLibrary <pre>\}\$\{ExcelFilename\}</pre></pre> | | |
| | • XML metadata | | |
| | To add XML metadata, use the Ellipses button. | | |
| | Note the following: | | |
| | • The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. | | |
| | • This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. | | |
| | Default Value: | | |

| Field Name | Definition |
|----------------------|---|
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://ind-01:8888/ExcelServicesDemo/ ExcelServices.xlsx |
| Design-time Template | Definition: |
| | Specifies the name of an Excel template file that is used at design time. |
| | Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. |
| | The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. |
| | Allowed Values: |
| | A valid Excel template file name with the full path. |
| | Note the following: |
| | The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. |
| | Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | C:\Excel\ExcelSheet\ExcelServices.xlsx |
| Named Fields Box | Definition: |
| | Specifies the named fields populated from the Excel sheet once you specify the Design-time Template file. |
| | This field is used for the mapping purpose. You must map the Excel named fields to the process values to: |

| Field Name | Definition |
|-------------|---|
| | Write to an Excel document. |
| | Read from an Excel document. |
| | A named field in Microsoft Excel is the name of a cell or range that is used instead of the cell's reference name. For example, empName, a named field, is easier to use instead of its cell's reference name, C21. |
| | Allowed Values: |
| | A named field selected from the list. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Refresh | Function: Reloads the named fields from the Excel sheet to the Named Fields box. Note: You must click the Refresh button |
| | if the file specified in the Design-time Template changes. |
| Left Arrow | Function: |
| | Populates the selected named field from the Named Fields Box box to the ExcelField column. |
| | You can add only one named field at a time. |
| Right Arrow | Function: |
| | Deletes the selected row. |
| ExcelField | Definition: |
| | Specifies the Excel named field to be mapped to the |
| | process value. The mapping is performed to read the value in the named field in the Excel sheet into a process attribute. |
| | Allowed Values: |
| | A named field. |
| | Use the Left Arrow button to move the named field from the Named Fields box to the ExcelField column. |

| Field Name | Definition |
|--------------|---|
| | Note: In the Read AgileShape, the named field cannot be a range in the Excel document but only a cell. |
| | Note: The value of the named field in the ExcelField column can be evaluated from a string containing a custom attribute. For example, \$\{MyExcelField\} or field\$\{year\}\$ \{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| ProcessValue | Definition: |
| | Specifies the name of the process attribute. The process attribute is mapped to the named field to read the value in the named field in the Excel sheet. |
| | Allowed Values: |
| | A custom attribute. |
| | Note: The name of the custom attribute in the ProcessValue column can be derived from a string containing another custom attribute. For example, \$ \{MyCustomAttribute\} or customattribute \$\{year\}\$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! |
| | Default Value: |
| | None |
| | However, when you add a row for a named field using the Left Arrow button, the ProcessValue column is populated with the Excel named field's name. |
| | Custom Attributes: |
| | Yes |
| Formatted | Function: |
| | Determines whether the formatted value of the Excel cell is read instead of the actual value. |
| | The formatted values are useful to denote numbers or dates such as in emails. |

| Field Name | Definition |
|------------|--|
| | Allowed Values: |
| | Deselected - The actual value of the cell is read. For example, 1023 |
| | Selected - The formatted value of the cell is read. For example, €1,023.34 |
| | Default Value: |
| | Deselected |
| | However, when you add a row for a named field using the Left Arrow button, by default, the Formatted check box is selected. |
| | Example: |
| | When the Formatted check box is selected: |
| | A Percentage type cell returns 15% instead of 15, where 15 is the actual value and % is the formatting code. |
| | A Currency type cell returns €1,023.34 instead of 1023.34, where 1023.34 is the actual value and € is the formatting code. |
| | This indicates that the formatting code of the Excel cell is also read along with the cell value. |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes | × |
|------------------------------|---|
| Select XPath from Attributes | |
| Schema Process Attributes | |
| myFields | |
| XPath: DataType: | |
| 🥪 OK 🔀 Cancel | |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the **Ellipses** button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Excel Read

An AgilePart that reads data from an Excel file, and then stores the values in custom attributes that can be used in the process.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Excel Read** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------|--|
| Configuration | Opens the Following Window: Excel Services Configuration Window - Read Tab Purpose of this Window: Specifies an operation to read and store data from an Excel file. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.
Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Excel Services Configuration Window - Read Tab

Specifies an operation to read and store data from an Excel file.

| Excel Service: | xcel Services Configuration | | | | |
|----------------|------------------------------|---|---------------------------------|------------|---|
| 8 | Excel Services Configuration | | | | |
| General | General | | | | |
| Excel Se | ervices URL | http://AP6/_vti_bin/excelservice.asmx | | | |
| Run-time | e Template | http://AP6/ExcelRuntimeTemplates/\${my:myFields/my:SaveWrite}xdsx | | | |
| Design-t | ime Template | D:\Users\Administrator\Desktop\Shar | ePoint\Excel\ExcelServices.xlsx | | C Browse |
| Read * | ExcelField ResultTest1 | ProcessValue I (XPATH)/my.myRelds/my:Result | Formatted Read | ب ۲ | Pefresh ExcelField1 ExcelField2 ExcelField3 ExcelField6Range ExcelField6Range ExcelField6RangeType2 ResulTest1 ResulTest2 ResulTest3 ResulTest4 |
| | | | | √ 0 | K Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Excel Read
 - Excel Calculate
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

| Field Name | Definition |
|--------------------|--|
| Excel Services URL | Definition: Specifies the URL of the SharePoint Excel Services. |
| | <u>Allowed Values:</u> A valid SharePoint Excel Services URL. A custom attribute. XML metadata To add XML metadata, use the Ellipses button. <u>Default Value:</u> |
| | None |
| | <u>Custom Attributes:</u> Yes |
| | Example: • URL - http://ind-01:8888/_vti_bin/ ExcelService.asmx • A custom attribute - \$\{SharePointURL\}\$ \{ExcelService\} |
| Run-time Template | <u>Definition:</u> Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. <u>Allowed Values:</u> A valid Excel template file name with the full path. |

| Field Name | Definition |
|----------------------------------|--|
| | A custom attributes. For example, \$ \{SharePointURL\}\$\{RuntimeTemplateLibrary \}\$\{ExcelFilename\} |
| | • XML metadata |
| | To add XML metadata, use the Ellipses button. |
| | Note the following: |
| | • The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. |
| | This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://ind-01:8888/ExcelServicesDemo/ ExcelServices.xlsx |
| Design-time Template Definition: | |
| | Specifies the name of an Excel template file that is used at design time. |
| | Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. |
| | The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. |
| | Allowed Values: |
| | A valid Excel template file name with the full path. |
| | Note the following: |
| | The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. |

| Field Name | Definition |
|------------------|---|
| | Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | C:\Excel\ExcelSheet\ExcelServices.xlsx |
| Named Fields Box | Definition: |
| | Specifies the named fields populated from the Excel sheet once you specify the Design-time Template file. |
| | This field is used for the mapping purpose. You must map the Excel named fields to the process values to: |
| | • Write to an Excel document. |
| | Read from an Excel document. |
| | A named field in Microsoft Excel is the name of a cell or range that is used instead of the cell's reference name. For example, empName, a named field, is easier to use instead of its cell's reference name, C21. |
| | Allowed Values: |
| | A named field selected from the list. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Refresh | Function: |
| | Reloads the named fields from the Excel sheet to the Named Fields box. |
| | Note: You must click the Refresh button if the file specified in the Design-time Template changes. |
| Left Arrow | Function: |

| Field Name | Definition | |
|--------------|--|--|
| | Populates the selected named field from the Named Fields Box box to the ExcelField column. | |
| | You can add only one named field at a time. | |
| Right Arrow | Function: | |
| | Deletes the selected row. | |
| ExcelField | Definition: | |
| | Specifies the Excel named field to be mapped to the process value. The mapping is performed to read the value in the named field in the Excel sheet into a process attribute. | |
| | Allowed Values: | |
| | A named field. | |
| | Use the Left Arrow button to move the named field from the Named Fields box to the ExcelField column. | |
| | Note: In the Read AgileShape, the named field cannot be a range in the Excel document but only a cell. | |
| | Note: The value of the named field in the ExcelField column can be evaluated from a string containing a custom attribute. For example, \$\{MyExcelField\} or field\$\{year\}\$ \{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! | |
| | Default Value: | |
| | None | |
| | Custom Attributes: | |
| | Yes | |
| ProcessValue | Definition: Specifies the name of the process attribute. The process attribute is mapped to the named field to read the value in the named field in the Excel sheet. | |
| | Allowed Values: | |
| | A custom attribute. | |
| | Note: The name of the custom attribute in the ProcessValue column can be derived from a string containing another custom attribute. For example, \$ | |

| Field Name | Definition |
|------------|---|
| | \{MyCustomAttribute\} or customattribute \$\{year\}\$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! |
| | Default Value: |
| | None |
| | However, when you add a row for a named field using the Left Arrow button, the ProcessValue column is populated with the Excel named field's name. |
| | Custom Attributes: |
| | Yes |
| Formatted | Function: |
| | Determines whether the formatted value of the Excel cell is read instead of the actual value. |
| | The formatted values are useful to denote numbers or dates such as in emails. |
| | Allowed Values: |
| | • Deselected - The actual value of the cell is read. For example, 1023 |
| | • Selected - The formatted value of the cell is read. For example, €1,023.34 |
| | Default Value: |
| | Deselected |
| | However, when you add a row for a named field using the Left Arrow button, by default, the Formatted check box is selected. |
| | Example: |
| | When the Formatted check box is selected: |
| | • A Percentage type cell returns 15% instead of 15, where 15 is the actual value and % is the formatting code. |
| | • A Currency type cell returns €1,023.34 instead of 1023.34, where 1023.34 is the actual value and € is the formatting code. |
| | This indicates that the formatting code of the Excel cell is also read along with the cell value. |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Reading Data from an Excel File

This example demonstrates how to read data from a Microsoft Excel file for display in a form using the Excel Read AgileShape.

Instructional Goals

• Demonstrate how to read data from a Microsoft Excel file from an AgilePoint process.

Example Process: Expense Reporting Application: View Existing Expense Report



Problem Statement

View the data from an existing expense report stored in a Microsoft Excel file.

This functionality is a subset of the expense reporting application.

Business Requirements

- View expense report data stored in a Microsoft Excel file.
- Integrate with an expense report management application.

Prerequisites

An SPDoc or SPList process model with the following schema values:

| Process Value | |
|---------------|--|
| field1 | |

| Process Value | |
|---------------|--|
| eld2 | |
| eld3 | |
| eld4 | |
| eld6 | |

• An InfoPath form with the following fields:

| InfoPath | Schema | Node |
|----------|--------|------|
|----------|--------|------|

(XPATH)/my:myFields/my:field1

(XPATH)/my:myFields/my:field2

(XPATH)/my:myFields/my:field3

(XPATH)/my:myFields/my:field4

(XPATH)/my:myFields/my:RepeatingGroup/my:field6

(XPATH)/my:myFields/my:RepeatingGroup[my:field5='Type 2']/my:field6

(XPATH)/my:myFields/my:ResultRepeatingAll

(XPATH)/my:myFields/my:ResultRepeatingType2

• A Microsoft Excel template file named **ExcelServices.xlsx** that includes the following fields:

| Excel Field |
|-----------------------|
| ExcelField1 |
| ExcelField2 |
| ExcelField3 |
| ExcelField4 |
| ExcelField6Range |
| ExcelField6RangeType2 |
| ResultTest3 |
| ResultTest4 |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Excel Read** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

Instructions

Repeat the following steps until all required approvers are added to the list:

1. On the Excel Services Configuration window, complete the following fields as required for your environment.

| Field Name | Value |
|--------------------|---|
| Excel Services URL | Definition: Specifies the URL of the SharePoint Excel Services. |
| | <u>Allowed Values:</u> A valid SharePoint Excel Services URL. A custom attribute. XML metadata To add XML metadata, use the Ellipses button. |
| | Default Value: None <u>Custom Attributes:</u> Yes <u>Example:</u> URL - http://ind-01:8888/_vti_bin/ ExcelService.asmx |
| | A custom attribute - \$\{SharePointURL\}\$ \{ExcelService\} |
| Run-time Template | Definition: Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. <u>Allowed Values:</u> |
| | A valid Excel template file name with the full path. |

| | Malua |
|----------------------|--|
| | |
| | A custom attributes. For example, \$ \{SharePointURL\}\$\{RuntimeTemplateLibrary \}\$\{ExcelFilename\} |
| | XML metadata |
| | To add XML metadata, use the Ellipses button. |
| | Note the following: |
| | • The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. |
| | This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://ind-01:8888/ExcelServicesDemo/ ExcelServices.xlsx |
| Design-time Template | Definition [.] |
| | Specifies the name of an Excel template file that is used at design time. |
| | Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. |
| | The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. |
| | Allowed Values: |
| | A valid Excel template file name with the full path. |
| | Note the following: |
| | • The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. |

| Field Name | Value |
|------------|---|
| | Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: C:\Excel\ExcelSheet\ExcelServices.xlsx |

2. On the **Read** tab, use the arrow buttons to map the following Excel fields and process values.

| ExcelField | ProcessValue |
|------------------|--------------|
| ExcelField1 | field1 |
| ExcelField2 | field2 |
| ExcelField3 | field3 |
| ExcelField4 | field4 |
| ExcelField6Range | field6 |

- 3. For each of the mapped values, select **Formatted**.
- 4. When you have finished mapping the values, click **OK**.
- 5. On the **SharePoint** stencil, drag the **Update InfoPath** AgileShape, and drop it on the process template.
- 6. On the XMLMappings field, click the Ellipses button.
- 7. On the XML Schema Mappings Window, use the map the following Excel fields and InfoPath schema nodes.

| InfoPath XPath | Value |
|---|----------------------|
| (XPATH)/my:myFields/my:field1 | \${ExcelField1} |
| (XPATH)/my:myFields/my:field2 | \${ExcelField2} |
| (XPATH)/my:myFields/my:field3 | \${ExcelField3} |
| (XPATH)/my:myFields/my:field4 | \${ExcelField4} |
| (XPATH)/my:myFields/my:RepeatingGroup/ my:field6 | \${ExcelField6Range} |

| InfoPath XPath | Value |
|---|---------------------------|
| (XPATH)/my:myFields/ my:RepeatingGroup[my:field5='Type 2']/my:field6 | \${ExcelField6RangeType2} |
| (XPATH)/my:myFields/my:ResultRepeatingAll | \${ResultTest3} |
| (XPATH)/my:myFields/my:ResultRepeatingType2 | \${ResultTest4} |

Excel Write

An AgilePart that creates, and then modifies, an Excel file based on an Excel template. The output file can be saved either to a SharePoint document library or to a file path to a local or shared folder on the AgilePoint Server.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Excel Write AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------|--|
| Configuration | Opens the Following Window: Excel Services Configuration Window - Write Tab Purpose of this Window: Sets up an operation to create an Excel file. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Excel Services Configuration Window - Write Tab

Sets up an operation to create an Excel file.

AgileShapes

| -un-time | Excel Services URL http://AP6/_vti_bin/excelservice.asmx | | | | |
|-----------|--|---------------------|--|---|--|
| | Run-time Template http://AP6/ExcelHuntime Templates/ExcelServices.xtsx | | | | |
| Jesign-ti | me l'emplate | D:\Users\Admi | Inistrator/Desktop/SharePoint/Excel/Excel/Services.xlsx | | C browse |
| Save To | | http://AP6/Exc | celRuntimeTemplates/ | | V Overwrite if exis |
| | ExcelField1 | | (XPATH)/my.myFields/my:field1 | | ExcelField2 ExcelField3 |
| | ExcelField | | ProcessValue | | ExcelField2 |
| | ExcelField? | | (VPATH)/mymyEields/myfield2 | | ExcelField4 |
| | ExcelField6 | Rance | (XPATH)/my.myFields/my:RepeatingGroup/myfield6 | < | ExcelField6RangeType2 |
| • | ExcelField6 | RangeType2 | ny:myFields/my:RepeatingGroup/my.field5 | | Result Test 2 |
| * | | | | | ResultTest3 ResultTest4 |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| ► * | ExcelField6 ExcelField6 | Range RangeType2 | (XPATH)/my:myFields/my:RepeatingGroup/myfield6 my:myFields/my:RepeatingGroup/myfield5 | > | Result Test 1 Result Test 2 Result Test 3 Result Test 4 |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Excel Write
 - Excel Calculate
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

| Field Name | Definition |
|--------------------|-------------|
| Excel Services URL | Definition: |

| Field Name | Definition |
|-------------------|---|
| | Specifies the URL of the SharePoint Excel Services. |
| | Allowed Values: |
| | A valid SharePoint Excel Services URL |
| | A custom attribute. |
| | XML metadata |
| | To add XML metadata, use the Ellipses button. |
| | Default Value |
| | None |
| | |
| | Custom Attributes: |
| | res |
| | Example: |
| | URL - http://ind-01:8888/_vti_bin/ ExcelService.asmx |
| | A custom attribute - \$\{SharePointURL\}\$ \{ExcelService\} |
| Run-time Template | Definition: |
| | Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. |
| | Allowed Values: |
| | A valid Excel template file name with the full path. |
| | A custom attributes. For example, \$ <pre>\{SharePointURL\}\$\{RuntimeTemplateLibrary <pre>\}\$\{ExcelFilename\}</pre></pre> |
| | • XML metadata |
| | To add XML metadata, use the Ellipses button. |
| | Note the following: |
| | • The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. |
| | • This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. |
| | Default Value: |

| Field Name | Definition |
|----------------------|---|
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://ind-01:8888/ExcelServicesDemo/ ExcelServices.xlsx |
| Design-time Template | Definition: |
| | Specifies the name of an Excel template file that is used at design time. |
| | Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. |
| | The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. |
| | Allowed Values: |
| | A valid Excel template file name with the full path. |
| | Note the following: |
| | The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. |
| | Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | C:\Excel\ExcelSheet\ExcelServices.xlsx |
| Save To | Definition: |
| | Specifies the location where you want to save the resulting Excel document. |
| | Allowed Values: |
| | • A valid URI. |

| Field Name | Definition |
|------------------|--|
| | The URI can be the URL for a SharePoint document library, or a directory path. A custom attributes. For example, \$ \{SharePointURL\}\$\{ExcelDocLibrary\}\$ \{ExcelFilename\}. XML metadata To add XML metadata, use the Ellipses button. Default Value: None Custom Attributes: Yes Example: http://ind-01:8888/ExcelServicesDemo/\${/ mv:mvEields/mv:SaveWrite} vlsv |
| Named Fields Box | Definition: Specifies the named fields populated from the Excel sheet once you specify the Design-time Template file. This field is used for the mapping purpose. You must map the Excel named fields to the process values to: • Write to an Excel document. • Read from an Excel document. A named field in Microsoft Excel is the name of a cell or range that is used instead of the cell's reference name. For example, empName, a named field, is easier to use instead of its cell's reference name, C21. |
| | Allowed Values: A named field selected from the list. Default Value: None Custom Attributes: No |
| Refresh | <u>Function:</u> Reloads the named fields from the Excel sheet to the Named Fields box. |

| Field Name | Definition |
|---------------------|--|
| | Note: You must click the Refresh button if the file specified in the Design-time Template changes. |
| Left Arrow | <u>Function:</u> Populates the selected named field from the Named Fields Box box to the ExcelField column. You can add only one named field at a time. |
| Right Arrow | <u>Function:</u> Deletes the selected row. |
| Overwrite if exists | <u>Definition:</u> Overwrites an existing file specified using the Save To field. <u>Allowed Values:</u> <u>Deselected</u> - The AgileShape doesn't overwrite the existing file. <u>Selected</u> - The AgileShape overwrites the file if it already exists. |
| | Default Value: Deselected |
| ExcelField | Definition: Specifies the Excel named field to be mapped to the process value. The mapping is performed to update the named fields in the Excel sheet. Allowed Values: A named field. Use the Left Arrow button to move the named field from the Named Fields box to the ExcelField column. Image: The value of the named field in the ExcelField column can be evaluated from a string containing a custom attribute. For example, \$\{MyExcelField\} or field\$\{year\}\$ \{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! Default Value: |
| | None <u>Custom Attributes:</u> |

| Field Name | Definition |
|--------------|---|
| | Yes |
| ProcessValue | Definition: Specifies the process value. The value is mapped to the named field to update the named fields in the Excel sheet. |
| | Allowed Values: |
| | A number or a text string that can contain spaces. |
| | This must be in accordance with the data type of the Excel named field. |
| | • A custom attribute. |
| | Note the following: |
| | Once a named field is in the ExcelField column, map a named field to the process value. First, select the row, and then click the Ellipses button to select from the Select XPath from Attributes Window. |
| | You can type a custom attribute directly in the ProcessValue column. |
| | Note: The name of the custom attribute in the ProcessValue column can be derived from a string containing another custom attribute. For example, \$ \{MyCustomAttribute\} or customattribute \$\{year\}\$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! |
| | Note: You can also use advance XPath expressions such as filtering. For example, (XPATH)/my:myFields/my:field2[.>32] returns all items that match the filter (field2 > 32). In addition, you can combine XPath expressions and custom attributes such as: (XPATH)/my:myFields/my:field2[.>\$ \{myCustomAttribute\}] |
| | Note: If you have an XPath expression that returns more than one value, there is a feature for mapping them with a named field that is defined as a one-dimensional range in the Excel document. The AgilePart fills the range with returned values from the XPath expression, but if the range does not contain enough cells for the number of values, the AgilePart doesn't fill past the range of cells in order to protect rest of the |

| Field Name | Definition |
|------------|--|
| | worksheet and the remaining values are simply discarded. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes | (|
|------------------------------|---|
| Select XPath from Attributes | |
| Schema Process Attributes | |
| myFields | |
| XPath: DataType: | |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the Ellipses button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|--|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | Definition: Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | Definition: |

| Field Name | Definition |
|------------|---|
| | Displays the process attributes associated with the process in a tree-view structure. |
| | Allowed Values: |
| | Read only. |
| | Click to select the process attribute you want to use. |
| ОК | Function: |
| | Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. |
| | Note the following: |
| | First, you must select the metadata or attribute you want, and then click OK. |
| | You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating an Excel File

This example demonstrates how to create a Microsoft Excel file using the Excel Write AgileShape.

Instructional Goals

• Demonstrate how to create a Microsoft Excel file from an AgilePoint process.

Example Process: Expense Reporting Application: Create New Expense Report



Problem Statement

Create an employee expense report as an Excel file.

This functionality is a subset of the expense reporting application.

Business Requirements

- Create an expense report in Microsoft Excel.
- Integrate with an expense report management application.
- Store the Excel file in SharePoint.

Prerequisites

• An SPDoc or SPList process model with the following schema values:

| Process Value |
|---------------|
| ield1 |
| ield2 |
| ield3 |
| ield4 |
| ield6 |

• An InfoPath form with the following fields:

| InfoPath Schema Node |
|---|
| (XPATH)/my:myFields/my:field1 |
| (XPATH)/my:myFields/my:field2 |
| (XPATH)/my:myFields/my:field3 |
| (XPATH)/my:myFields/my:field4 |
| (XPATH)/my:myFields/my:RepeatingGroup/my:field6 |
| (XPATH)/my:myFields/my:RepeatingGroup[my:field5='Type 2']/my:field6 |
| (XPATH)/my:myFields/my:ResultRepeatingAll |
| (XPATH)/my:myFields/my:ResultRepeatingType2 |

• A Microsoft Excel template file named **ExcelServices.xlsx** that includes the following fields:

| Excel Field |
|-------------|
| ExcelField1 |
| ExcelField2 |

• The following process attribute to indicate the file name for a new Excel file:

\${/my:myFields/my:SaveWrite}

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Excel Write** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

Instructions

Repeat the following steps until all required approvers are added to the list:

1. On the Excel Services Configuration window, complete the following fields as required for your environment.

| Field Name | Value |
|--------------------|---|
| Excel Services URL | Definition: Specifies the URL of the SharePoint Excel Services. Allowed Values: A valid SharePoint Excel Services URL. A custom attribute. XML metadata To add XML metadata, use the Ellipses button. Default Value: None |
| | Custom Attributes: |

| Field Name | Value |
|----------------------|--|
| | Yes |
| | Example: • URL - http://ind-01:8888/_vti_bin/ ExcelService.asmx |
| | A custom attribute - \$\{SharePointURL\}\$ \{ExcelService\} |
| Run-time Template | Definition: |
| | Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. |
| | Allowed Values: |
| | • A valid Excel template file name with the full path. |
| | A custom attributes. For example, \$ <pre>\{SharePointURL\}\$\{RuntimeTemplateLibrary \}\$\{ExcelFilename\}</pre> |
| | XML metadata |
| | To add XML metadata, use the Ellipses button. |
| | Note the following: |
| | • The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. |
| | • This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://ind-01:8888/ExcelServicesDemo/ ExcelServices.xlsx |
| Design-time Template | Definition: |

| Field Name | Value |
|------------|---|
| | Specifies the name of an Excel template file that is used at design time. |
| | Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. |
| | The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. |
| | Allowed Values: |
| | A valid Excel template file name with the full path. |
| | Note the following: |
| | • The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. |
| | • Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | C:\Excel\ExcelSheet\ExcelServices.xlsx |
| Save To | Definition: |
| | Specifies the location where you want to save the resulting Excel document. |
| | Allowed Values: |
| | • A valid URI. |
| | The URI can be the URL for a SharePoint document library, or a directory path. |
| | A custom attributes. For example, \$ <pre>\{SharePointURL\}\$\{ExcelDocLibrary\}\$ <pre>\{ExcelFilename\}.</pre></pre> |
| | XML metadata |
| | To add XML metadata, use the Ellipses button. |
| | Default Value: |

| Field Name | Value |
|------------|---|
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://ind-01:8888/ExcelServicesDemo/\${/ my:myFields/my:SaveWrite}.xlsx |

2. On the Write tab, use the arrow buttons to map the following Excel fields and InfoPath fields.

| ExcelField | ProcessValue |
|-----------------------|---|
| ExcelField1 | (XPATH)/my:myFields/my:field1 |
| ExcelField2 | (XPATH)/my:myFields/my:field2 |
| ExcelField3 | (XPATH)/my:myFields/my:field3 |
| ExcelField4 | (XPATH)/my:myFields/my:field4 |
| ExcelField6Range | (XPATH)/my:myFields/my:RepeatingGroup/ my:field6 |
| ExcelField6RangeType2 | (XPATH)/my:myFields/ my:RepeatingGroup[my:field5='Type 2']/my:field6 |
| ResultTest3 | (XPATH)/my:myFields/my:ResultRepeatingAll |
| ResultTest4 | (XPATH)/my:myFields/my:ResultRepeatingType2 |

InfoPath SubProcess

An AgilePart that associates different InfoPath forms for each sub-process within a parent process.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.

- 3. On the **SharePoint** stencil, drag the **InfoPath SubProcess** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|--------------|---|
| FormLibUrl | Definition: Specifies the URL for the InfoPath form located in a SharePoint form library or folder. |
| | Allowed Values: |
| | A valid URL to a SharePoint form library. |
| | Note the following: |
| | The InfoPath form must be located in a SharePoint form library or folder. |
| | • The value must be an absolute URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | http://demo3:8000/InfoPathChangeRequest/Forms/ AllItems.aspx |
| NamingFormat | Definition: |
| | Specifies the format to name the sub process. |
| | Allowed Values: |
| | A valid format. |
| | Default Value: |
| | yyyy-MM-dd hh-mm-ss-ffffff - The DateTime format that is used to name the sub process. |
| | Custom Attributes: |
| | Yes |
| Prefix | Definition: Specifies the prefix that is associated with the sub process name. Allowed Values: |

| Field Name | Definition |
|-------------------|--|
| | A text string. |
| | Default Value: |
| | Prefix- |
| | Custom Attributes: |
| | No |
| | Example: |
| | CR- |
| | This prefix could be used to indicate a change request for a software development process. |
| SubProcess | Definition: |
| | Specifies the name of the InfoPath process to be initiated as a sub process. |
| | Allowed Values: |
| | The name of the existing process to be initiated as a sub process. |
| | You can use the Ellipses button to select the InfoPath process name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Wait For Complete | Definition: |
| | Determines whether the parent process waits for the sub process to complete before moving forward. |
| | Allowed Values: |
| | • False - The AgileShape exits immediately once the sub process is initiated. |
| | True - The AgileShape waits for sub process to complete. |
| | Default Value: |
| | True |
| | Custom Attributes: |
| | No |
| XMLMappings | Opens the Following Window: |

| Field Name | Definition |
|------------|--|
| | XML Schema Mappings Window <u>Purpose of this Window:</u> Maps schema nodes from a parent process to a sub-process. |
| XsnFileUrl | Definition: The URL of the InfoPath form template file to be associated with the sub process. Allowed Values: A valid URL of the InfoPath form template file. Default Value: /forms/template.xsn Custom Attributes: Yes Example: /forms/QAReview.xsn |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

XML Schema Mappings Window

Maps schema nodes from a parent process to a sub-process.

| Xml Schema Mappings Xml Schema Mappings | | |
|---|--|--------|
| Child OfferLetter | Parent \${/pd:myFields/pd:FileName} | Concel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **InfoPath SubProcess** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **XMLMappings** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|---|
| Add | Function: Adds a row to create a new parent/child pair you can map using the schema mapper. Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. |
| Child | Definition: |

| Field Name | Definition |
|------------|--|
| | Specifies the XML schema node for a child process. |
| | Allowed Values: |
| | XML metadata defined for the child process. |
| | You can use custom attributes also. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Parent | Definition: |
| | Specifies the XML schema node for a parent process. |
| | Allowed Values: |
| | XML metadata defined for the parent process. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Schema | Function: |
| | Opens the schema associated with the selected sub process or parent process. |
| | Opens the Following Window: |
| | Select XPath from Attributes Window |
| | Purpose of this Window: |
| | Enables you to select a schema node from the XML schema for your process. |
| Remove | Function: |
| | Deletes the selected new parent/child schema node pair. |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes | x |
|------------------------------|---|
| Select XPath from Attributes | |
| Schema Process Attributes | |
| ➡ ∰ empName (String) | |
| XPath: |] |
| DataType: | |
| 🥪 OK 🔀 Cancel | |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the Ellipses button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Using an InfoPath Sub Process

This example shows how a sub process can be activated from a parent process using the InfoPath SubProcess AgileShape. By using a sub process, departments can manage their parts of a process independently, and sub processes can grow and change without affecting the parent process.

Instructional Goals

• Demonstrate how to call a sub process from a parent process using the InfoPath SubProcess AgileShape.

Example Parent Process: Execute a Software Change Request



Example Sub Process: QA Test the Change Request



Problem Statement

Fulfill a change request (CR) for a software product.

Business Requirements

- The process is initiated when someone submits a CR.
- Engineering implements the CR.
- Once the CR is implemented in the code, the Quality Assurance (QA) department tests it. The QA department has the following unique requirements:

- QA for this product requires complex preparation, where test cases must be written and real-world system configurations and data must be set up prior to testing to ensure proper implementation of fixes and enhancements. This requirement carries a unique set of needs for resources and logistics.
- The QA department is managed separately from Engineering, and follows its own internal processes. They want to maintain autonomous control over their processes.
- There is an initiative in the company to improve the QA process in order to improve efficiency and product quality. Therefore, the QA review process is likely to change more frequently than the overall Change Request process.

To meet the QA department's requirements, the company uses a sub process to define and manage the QA review process.

• The form technology is InfoPath

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **InfoPath SubProcess** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Set up the following properties for InfoPath SubProcess AgileShape:

| Field | Configuration |
|------------|---|
| FormLibUrl | Definition: Specifies the URL for the InfoPath form located in a SharePoint form library or folder. |
| | A valid URL to a SharePoint form library. |
| | Note the following: |
| | The InfoPath form must be located in a SharePoint form library or folder. |
| | • The value must be an absolute URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | http://demo3:8000/InfoPathChangeRequest/ Forms/AllItems.aspx |
| Field | Configuration |
|--------------|--|
| NamingFormat | Definition: Specifies the format to name the sub process. Allowed Values: A valid format. Default Value: yyyy-MM-dd hh-mm-ss-ffffff - The DateTime format that is used to name the sub process. Custom Attributes: Yes |
| Prefix | Definition: Specifies the prefix that is associated with the sub process name. Allowed Values: A text string. Default Value: Prefix- Custom Attributes: No Example: CR- This prefix could be used to indicate a change request for a software development process. |
| SubProcess | Definition: Specifies the name of the InfoPath process to be initiated as a sub process. Allowed Values: The name of the existing process to be initiated as a sub process. You can use the Ellipses button to select the InfoPath process name. Default Value: None Custom Attributes: |

| Field | Configuration |
|-------------------|---|
| | No |
| Wait For Complete | <u>Definition:</u> <u>Determines whether the parent process waits</u> for the sub process to complete before moving forward. <u>Allowed Values:</u> False - The AgileShape exits immediately once the sub process is initiated. <u>True</u> - The AgileShape waits for sub process to complete. <u>Default Value:</u> True <u>Custom Attributes:</u> No |
| XMLMappings | Opens the Following Window: XML Schema Mappings Window Purpose of this Window: Maps schema nodes from a parent process to a sub-process. |
| XsnFileUrl | Definition: The URL of the InfoPath form template file to be associated with the sub process. Allowed Values: A valid URL of the InfoPath form template file. Default Value: /forms/template.xsn Custom Attributes: Yes Example: /forms/QAReview.xsn |

Downloads

NTLoginTest.zip.

ListForm

An AgileWork that uses a SharePoint List to create form UI for manual tasks. This feature provides an easy way of building forms with different views based on a SharePoint List.



Navigation

- 1. In AgilePoint Envision, open a Microsoft SPList process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the SharePoint stencil, drag the ListForm AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------------|--|
| UserDefinedProperties | Opens the Following Window: User Defined Properties Window Purpose of this Window: Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable- like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want. |
| ListFormControls | Opens the Following Window: Customize List Form User Interface Window Purpose of this Window: Specifies whether the fields on a SharePoint List Form are Editable , Read Only , or Hidden when the process participant accesses the form at runtime. |

| Field Name | Definition |
|--------------------------|---|
| Field Name SubmitStep | Definition Definition: Determines whether the form based on a SharePoint list is used as the Submit step. Note: If you have set a custom field as required in a SharePoint list, it must be editable on the Submit step, otherwise SharePoint throws an exception. Note: If you have set a field to be of type Multiple lines of text, the field cannot be set as Read Only. Allowed Values: True - The form cannot be used as the Submit step. This property must be set to True if you are monthered by its feature of the form the f |
| | Default Value: |
| | False |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

User Defined Properties Window

Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable-like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want.

| User Defined Properties | | | | × |
|-------------------------|---------|------------------------------------|---------|------------|
| User Defined Pro | opertie | 5 | | |
| Name | Z | Value | Туре | Schema |
| ManagerApproval | | \${/pd:myFields/pd:ManagerApproval | Boolean | |
| | | | | Add Remove |
| | | | | Remove All |
| | | | | Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Dynamic Parallel Approval
 - Dynamic Sequential Approval
 - Process Adaptation
 - Vote
 - Web Form
 - Workload Balance
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the UserDefinedProperties field, click the Ellipses button.

Field Definitions

| Field Name | Definition |
|------------|--|
| Add | <u>Function:</u> Creates a row where you can specify a ClientData property. |
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want. |
| Name | Definition: Specifies the name for the ClientData. Image: Custom Attributes: Yes |
| Value | Definition: The value for the ClientData variable. Allowed Values: A number or a text string that can contain spaces. You can dynamically set the value for the variable by using XML metadata. Default Value: None Custom Attributes: |

| Field Name | Definition |
|------------|---|
| | Yes |
| Туре | Definition: Determines the data type for the ClientData variable. Allowed Values: Integer String Float Decimal Boolean Default Value: |
| | None |
| Remove | Function: Deletes the selected row from the user defined properties list. |
| Remove All | <u>Function:</u> Deletes all rows from the user defined properties list. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Customize List Form User Interface Window

Specifies whether the fields on a SharePoint List Form are **Editable**, **Read Only**, or **Hidden** when the process participant accesses the form at runtime.

| Customize List Form User Interfa | nce m User Interface | | | |
|----------------------------------|-------------------------|---|--------------|----------|
| 📢 All Edita | ble 💦 🔍 All Rea | d Only | 😭 All H | idden |
| Field Name | Field Type | Editable | Read Only | Hidden |
| Comment | String | \checkmark | | |
| Country | String | \checkmark | | |
| JoiningDate | DateTime | \checkmark | | |
| Mobile | String | Image: A set of the set of the | | |
| NewEmpAddress | String | | | |
| NewEmployeesName | String | | I | |
| Phone Number | String | \checkmark | | |
| Qualification | String | \checkmark | | |
| Title | String | | \checkmark | |
| | | | | |
| | | ∳ ОК | | 🔇 Cancel |

Navigation

- 1. In AgilePoint Envision, open a Microsoft SPList process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **ListForm** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the ListFormControls field, click the Ellipses button.

Field Definitions

| Field Name | Definition |
|--------------|---|
| All Editable | Function: |
| | Selects all the check boxes of the Editable column for all SharePoint list form fields at the same time. |

| Field Name | Definition |
|---------------|---|
| | Note: By default, all the Editable check boxes are selected for all SharePoint list form fields. |
| All Read Only | <u>Function:</u> Selects all the check boxes of the Read Only column for all SharePoint list form fields at the same time. |
| All Hidden | <u>Function:</u> Selects all the check boxes of the Hidden column for All SharePoint list form fields at the same time. |
| Field Name | Definition: Specifies the names of the SharePoint list form fields. Image: Note: You can click the triangle button to change the order of the display. Allowed Values: Read only. |
| Field Type | <u>Definition:</u> Specifies the data types of the SharePoint list form fields. <u>Allowed Values:</u> Read only. |
| Editable | <u>Function:</u> Specifies that the selected SharePoint list form field is editable. Also, you can make all the fields editable at the same time by using All Editable button. |
| Read Only | <u>Function:</u> Specifies that the selected SharePoint list form field is read-only. Also, you can make all the fields read-only at the same time by using the All Read Only button. |
| Hidden | <u>Function:</u> Specifies that the selected SharePoint list form field is hidden. |

| Field Name | Definition |
|------------|---|
| | Also, you can make all the fields hidden at the same time by using the All Hidden button. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes |
|------------------------------|
| Select XPath from Attributes |
| Schema Process Attributes |
| myFields mpName (String) |
| XPath: |
| DataType: |
| 🥪 OK 🔀 Cancel |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.

478

- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the Ellipses button.
 - Click the **Schema** button.

Field Definitions

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use. |

| Field Name | Definition |
|------------|---|
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Completing an Activity Using SharePoint List Forms

This example shows a process that is completed using SharePoint list forms.

Instructional Goals

• Demonstrate how to route a process based on a logical rule with multiple conditions using the SharePoint ListForm AgileShape.

Example Process: Budget Request and Fulfillment



Problem Statement

Submit and approve a budget request.

Business Requirements

- The process is initiated when an employee submits a budget request form.
- The process uses SharePoint list forms.

Prerequisites

- A SharePoint list with columns set up to represent the fields you want to use on your ListForm.
- To access your SharePoint list, you must log on to SharePoint.

Navigation

- 1. In AgilePoint Envision, open a Microsoft SPList process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **ListForm** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the ListFormControls field, click the Ellipses button.

Instructions

1. On the Customize List Form User Interface Window, specify how you want the columns on your form to display on your form - editable, read-only, or hidden.

In this example, the following rules are applied.

| Field Name | Value |
|-----------------------|--|
| Submit form | Manager Approval field - Hidden CFO Approval field - Hidden |
| Manager Approval form | Manager Approval field - Editable CFO Approval field - Hidden |
| CFO Approval form | Manager Approval field - Hidden CFO Approval field - Editable |

Downloads

NTLoginTest.zip.

Move Document Set

An AgilePart that moves a document set from one SharePoint document library or folder to another document library or folder.



Prerequisites

• An environment using SharePoint 2013 and the CSOM AgileConnector.

Good to Know

• If you move a document set from one library to another and then back to its original location, the columns on both libraries must be the same.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Move Document Set** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------|--|
| Configuration | Opens the Following Window: Move Document Set Configuration Window Purpose of this Window: Specifies the source and destination for moving a document set from one document library or folder to another. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Move Document Set Configuration Window

Specifies the source and destination for moving a document set from one document library or folder to another.

| Move Document Set Configuration | × |
|--|---|
| Move Document Set Configuration | |
| Move Document Set Configuration | 7 |
| Source Site URL (e.g. http://Machine_Name:port/sites/SiteName): | |
| http://demo3:8000 | |
| Source Document Library Name: | |
| Marketing | |
| Document Set: | |
| User Registration | |
| Destination Site URL (e.g. http://Machine_Name:port/sites/SiteName): | |
| http://demo3:8000 | |
| Destination Document Library Name: | |
| AgilePoint Document | |
| Destination Folder Name: | |
| Marketing | |
| Filter: | |
| ••• • | |
| VerWriteFile | |
| V OK K Cancel | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Move Document Set AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **MoveDocSetConfiguration** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|------------------------------|---|
| Source Site URL | Definition: Specifies the URL for your SharePoint site. The source site contains the SharePoint document library and document set you want — for example, the document set you want to copy or move to the destination document library. Allowed Values: A valid SharePoint site URL. Default Value: None |
| | <u>Custom Attributes:</u> Yes <u>Example:</u> http://APDesktop:8000 |
| Source Document Library Name | Definition: Specifies the name of the SharePoint document library. The source document library contains the document set you want to copy or move to the destination document library. Allowed Values: The name of your SharePoint library. Default Value: None Custom Attributes: Yes |

| Field Name | Definition |
|-----------------------------------|--|
| Source Folder Name | Definition: Specifies the name of a SharePoint folder. The source folder contains the document set you want to copy or move to the destination folder. Allowed Values: The name of your SharePoint folder. Default Value: None Custom Attributes: Yes |
| Destination Site URL | Definition: Specifies the URL for your SharePoint site. The destination site contains the document library where you want to copy or move the document set from the source document library. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes |
| Destination Document Library Name | Definition: Specifies the name of the destination SharePoint document library where you want to copy or move the document set. Allowed Values: The name of your SharePoint document library. Default Value: None Custom Attributes: Yes |
| Destination Folder Name | Definition: |

| Field Name | Definition |
|------------|---|
| | Specifies the name of the SharePoint folder where you want to copy or move the document set from the source location. |
| | Allowed Values: |
| | The name of your SharePoint folder |
| | If the folder does not exist within the specified SharePoint list, the AgilePoint system creates it. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Moving a Document Set From One SharePoint Location To Another

To move a document set from one SharePoint library or folder to another, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Move Document Set AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the MoveDocSetConfiguration field, click the Ellipses button.

Instructions

1. On the Move Document Set Configuration window, complete the following fields as required:

| Field Name | Definition |
|-----------------|-------------|
| Source Site URL | Definition: |

| Field Name | Definition |
|------------------------------|--|
| | Specifies the URL for your SharePoint site. The source site contains the SharePoint document library and document set you want — for example, the document set you want to copy or move to the destination document library. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://APDesktop:8000 |
| Source Document Library Name | Definition: |
| | Specifies the name of the SharePoint document library. The source document library contains the document set you want to copy or move to the destination document library. |
| | Allowed Values: |
| | The name of your SharePoint library. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Source Folder Name | Definition: Specifies the name of a SharePoint folder. The source folder contains the document set you want to copy or move to the destination folder. |
| | Allowed Values: |
| | The name of your SharePoint folder. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

| Field Name | Definition |
|-----------------------------------|--|
| Destination Site URL | Definition: Specifies the URL for your SharePoint site. The destination site contains the document library where you want to copy or move the document set from the source document library. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes |
| Destination Document Library Name | Definition: Specifies the name of the destination SharePoint document library where you want to copy or move the document set. Allowed Values: The name of your SharePoint document library. Default Value: None Custom Attributes: Yes |

2. Complete any additional configuration for this AgileShape according to your requirements:

- Move Document Set
- AgilePart Common Setup

Move Files

An AgilePart that moves a file from one SharePoint library or folder to another SharePoint library or folder.



Good to Know

• If you move a file from one library to another and then back to its original location, the columns on both libraries must be the same.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **Move Files** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------|--|
| DocumentUrl | Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: \$DocUrl Custom Attributes: Yes |
| OverWriteFile | <u>Definition:</u> Specifies whether the AgileShape overwrites the files if they already exist at the specified destination location. <u>Allowed Values:</u> False - The AgileShape does not overwrite any existing file. True - The AgileShape overwrites the file if it exists with the same name at the destination location. <u>Default Value:</u> False |
| TargetFolder | Definition: Specifies the name of the SharePoint folder where you want to move the files from the source location. |

| Field Name | Definition |
|------------|---|
| | Allowed Values: |
| | The name of your SharePoint folder |
| | If the folder does not exist, the AgilePoint system automatically creates the folder. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Νο |
| | Example: |
| | FolderName/SubFolderName |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Moving Files From One SharePoint Location To Another

To move files from one SharePoint library or folder to another, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Move Files** AgileShape, and drop it on the process template.

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following required properties for the **Copy Files** AgileShape:

| Field Name | Definition |
|--------------|--|
| DocumentUrl | Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. |
| | Allowed Values: A valid URL. |
| | Default Value: \$DocUrl |
| | <u>Custom Attributes:</u> Yes |
| TargetFolder | <u>Definition:</u> Specifies the name of the SharePoint folder where you want to move the files from the source location. <u>Allowed Values:</u> The name of your SharePoint folder |
| | In the folder does not exist, the AgliePoint system automatically creates the folder. Default Value: None Custom Attributes: |
| | NO Example: FolderName/SubFolderName |

2. Complete any additional configuration for this AgileShape according to your requirements:

- Move Files
- AgilePart Common Setup

Move List Item

An AgilePart that moves a specified list item from one SharePoint list to another.



Prerequisites

• Log on to SharePoint.

Good to Know

• If errors occur during the execution, a message will be written into the SharePoint Integration log file.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Move List Item** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|----------------------------|--|
| MoveListItemsConfiguration | Opens the Following Window: Configuration for Move ListItems AgilePart Window Purpose of this Window: Sets up the details for moving list items from one SharePoint list to another. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding

Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Move ListItems AgilePart Window

Sets up the details for moving list items from one SharePoint list to another.

| Configuration for Move ListItems AgilePart | | |
|---|---|--|
| Source Site Configuration | | |
| Source Site URL (e.g. http://Machi | Source Site URL (e.g. http://Machine_Name:port/sites/SiteName): | |
| http://APDesktop:8000/NewHire - | | |
| Source List Name: | Source Folder Name (Optional): | |
| JoineeDetails 👻 | - | |
| ListItem Field Name (Optional): | ListItem Field Value (Optional): | |
| ID v | 1000 | |
| Target Site Configuration Target Site URL (e.g. http://Machin http://APDesktop:8000/Newl Target List Name: EmployeeDetail | Target Site Configuration Target Site URL (e.g. http://Machine_Name:port/sites/SiteName): http://APDesktop:8000/NewHire Target List Name: Target Folder Name (Optional): EmployeeDetail | |
| *You may enter Custom Attribut | *You may enter Custom Attribute Name as \${} | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the SharePoint stencil, drag the Move List Item AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

5. On the **MoveListItemsConfiguration** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|--------------------|--|
| Source Site URL | Definition: Specifies the URL for your SharePoint site. The source site contains the SharePoint list and list items you want — for example, the list items you want to copy or move to the destination list. |
| | Allowed Values: A valid SharePoint site URL. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |
| | Example: http://APDesktop:8000 |
| Source List Name | Definition: Specifies the name of the SharePoint list. The source list contains the list items you want to copy or move to the destination list. |
| | Allowed Values: |
| | The name of your SharePoint list. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Source Folder Name | Definition: Specifies the name of a SharePoint folder. The source folder contains the list items you want to copy or move to the destination folder. |
| | Allowed Values: |
| | The name of your SharePoint folder. |
| | Default Value: |
| | None |

| Field Name | Definition |
|----------------------|--|
| | Custom Attributes: |
| | Yes |
| ListItem Field Name | Definition: |
| | Specifies the name of a SharePoint list column. |
| | Allowed Values: |
| | The name of your SharePoint list column. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| ListItem Field Value | Definition: |
| | Specifies the SharePoint list column's value. |
| | This value can be used as a filter to limit the scope of the action. |
| | Allowed Values: |
| | The list column's value. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Target Site URL | Definition: |
| | Specifies the URL for your SharePoint site. The target site contains the SharePoint list where you want to copy or move list items from the source list. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Target List Name | Definition: |
| | Specifies the name of the destination SharePoint list where you want to copy or move the list items. |

| Field Name | Definition |
|--------------------|---|
| | Allowed Values: |
| | The name of your SharePoint list. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Target Folder Name | Definition: |
| | Specifies the name of the SharePoint folder where you want to copy or move the list items from the source location. |
| | Allowed Values: |
| | The name of your SharePoint folder |
| | If the folder does not exist within the specified SharePoint list, the AgilePoint system creates it. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Moving a SharePoint List Item

To move a SharePoint list item from one folder or list to another, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Move List Item** AgileShape, and drop it on the process template.

- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **MoveListItemsConfiguration** field, click the **Ellipses** button.

Instructions

1. On the **Configuration for Move ListItems** window, complete the following required fields:

| Field Name | Definition |
|------------------|---|
| Source Site URL | Definition: Specifies the URL for your SharePoint site. The source site contains the SharePoint list and list items you want — for example, the list items you want to copy or move to the destination list. |
| | Allowed Values: |
| | A valid SharePoint site URL. Default Value: |
| | <u>Custom Attributes:</u> Yes |
| | Example: http://APDesktop:8000 |
| Source List Name | Definition: Specifies the name of the SharePoint list. The source list contains the list items you want to copy or move to the destination list. <u>Allowed Values:</u> The name of your SharePoint list. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |
| Target Site URL | Definition: Specifies the URL for your SharePoint site. The target site contains the SharePoint list where you want to copy or move list items from the source list. <u>Allowed Values:</u> A valid SharePoint site URL |

| Field Name | Definition |
|------------------|--|
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Target List Name | Definition: |
| | Specifies the name of the destination SharePoint list where you want to copy or move the list items. |
| | Allowed Values: |
| | The name of your SharePoint list. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| DocumentUrl | Definition: |
| | The URL of your document or file — for example, the file you want to add, delete, or check out. |
| | Allowed Values: |
| | A valid URL. |
| | Default Value: |
| | \$DocUrl |
| | Custom Attributes: |
| | Yes |
| TargetFolder | Definition: |
| | Specifies the name of the SharePoint folder where you want to move the files from the source location. |
| | Allowed Values: |
| | The name of your SharePoint folder |
| | If the folder does not exist, the AgilePoint system automatically creates the folder. |
| | Default Value: |
| | None |
| | Custom Attributes: |

| Field Name | Definition |
|------------|--------------------------|
| | No |
| | Example: |
| | FolderName/SubFolderName |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - Configuration for Move ListItems AgilePart Window
 - AgilePart Common Setup

New Folder

An AgilePart that creates a folder under an existing SharePoint document library.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the New Folder AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-------------|--|
| AbsoluteURL | Definition: |
| | Specifies the absolute URL for the source folder on SharePoint server. |
| | Allowed Values: |
| | A valid SharePoint absolute URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |

| Field Name | Definition |
|------------|---|
| | http://[machine name]:[port]/sites/[site name]/ [document library name]/[folder name] |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a SharePoint Folder

To create a new folder in SharePoint, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the New Folder AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following required property for the New Folder AgileShape:

| Field Name | Definition |
|-------------|---|
| AbsoluteURL | Definition: |
| | Specifies the absolute URL for the source folder on SharePoint server. |

| Field Name | Definition |
|------------|---|
| | Allowed Values: |
| | A valid SharePoint absolute URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | http://[machine name]:[port]/sites/[site name]/ [document library name]/[folder name] |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup

New Form Library

An AgilePart that creates a new form library under an existing SharePoint site.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the New Form Library AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|--------------------------|--|
| Enable ContentManagement | Definition: Determines whether the content management is enabled for the SharePoint form or document library. This adds content type to the library. Allowed Values: |

| Field Name | Definition |
|--------------------------|--|
| | False - The content management feature is disabled. True - The content management feature is enabled. Default Value: False |
| Enable Versioning | Definition: Determines whether you can use the versioning feature to manage your SharePoint form library or document library. Versioning feature allows you to keep track of different version of your files. You can view, restore, and delete a particular version of file. Allowed Values: • False - The file versioning feature is disabled. • True - The file versioning feature is enabled. Default Value: False |
| FormLibraryName | Definition: Specifies the name for the new form library. Allowed Values: A text string. Default Value: None Custom Attributes: No |
| FormTemplateRelativePath | Definition: Specifies the location of the InfoPath form template file to be associated with the new form library. Allowed Values: An InfoPath file path relative to the AgilePoint Server application's root directory. Default Value: None Custom Attributes: |

| Field Name | Definition |
|------------------|---|
| | No |
| | Example: |
| | If AgilePoint Server is installed at: |
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | And, the InfoPath form template file is located at: |
| | c:\Inetpub\wwwroot\AgilePointServer\files \MyTemplate.xsn |
| | Then, this property must be set to the following value: |
| | files\MyTemplate.xsn |
| OverWriteFormLib | Definition: |
| | Determines whether the AgileShape overwrites the form or document library that already exists at the location where the new library is to be created. |
| | Allowed Values: |
| | • False - The AgileShape does not overwrite an existing SharePoint form or document library. |
| | Note: If you specify False when a form or document library already exists, then SharePoint is not modified. The AgileShape exits and updates the appropriate custom process attributes specified by the SaveErrorMessageTo and SaveStatusTo properties. |
| | True - The AgileShape overwrites an existing SharePoint form or document library. |
| | Default Value: |
| | False |
| Site URL | Definition: |
| | Specifies the URL for your SharePoint site. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

| Field Name | Definition |
|------------|---|
| | Example: |
| | http://mysharepoint:8000/sites/\${mysite} |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a SharePoint Form Library

To create a new SharePoint form library, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the New Form Library AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Instructions

1. Complete the following required property for the **New Library** AgileShape:

| Field Name | Definition |
|-----------------|--|
| FormLibraryName | Definition: |
| | Specifies the name for the new form library. |
| Field Name | Definition |
|--------------------------|---|
| | Allowed Values: |
| | A text string. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| FormTemplateRelativePath | Definition: |
| | Specifies the location of the InfoPath form template file to be associated with the new form library. |
| | Allowed Values: |
| | An InfoPath file path relative to the AgilePoint Server application's root directory. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | If AgilePoint Server is installed at: |
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | And, the InfoPath form template file is located at: |
| | c:\Inetpub\wwwroot\AgilePointServer\files \MyTemplate.xsn |
| | Then, this property must be set to the following value: |
| | files\MyTemplate.xsn |
| Site URL | Definition: |
| | Specifies the URL for your SharePoint site. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |

| Field Name | Definition |
|------------|---|
| | Yes |
| | Example: |
| | http://mysharepoint:8000/sites/\${mysite} |

New Library

An AgilePart that creates a new document library under an existing SharePoint site.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **New Library** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------------|--|
| DocumentLibraryName | Definition: Specifies the name for the new document library. Allowed Values: A text string. Default Value: None Custom Attributes: No |
| DocumentTemplate | Definition: Specifies the SharePoint document template to be associated with the new document library. Allowed Values: |

| Field Name | Definition |
|--------------------------|---|
| | The name of a SharePoint document template. |
| | The valid values for this property are the same as the values listed in the New Document Library page, such as: |
| | Microsoft Office FrontPage Web page |
| | Microsoft Office Excel spreadsheet |
| | Microsoft Office PowerPoint presentation |
| | Basic page |
| | Web Part Page |
| | The New Document Library page is displayed when you manually create a new document library in SharePoint. |
| | Default Value: |
| | Microsoft Office Word document - A new document library is created for Microsoft Word documents. |
| | Custom Attributes: |
| | No |
| Enable ContentManagement | Definition: Determines whether the content management |
| | is enabled for the SharePoint form or document library. This adds content type to the library. |
| | Allowed Values: |
| | False - The content management feature is disabled. |
| | • True - The content management feature is enabled. |
| | <u>Default Value:</u> |
| | False |
| Enable Versioning | Definition: |
| | Determines whether you can use the versioning feature to manage your SharePoint form library or document library. |
| | Versioning feature allows you to keep track of different version of your files. You can view, restore, and delete a particular version of file. |
| | Allowed Values: |
| | • False - The file versioning feature is disabled. |
| | • True - The file versioning feature is enabled. |

| Field Name | Definition |
|-----------------|---|
| | Default Value: |
| | False |
| ListTemplate | Definition: Specifies the name of the SharePoint list template to be used to create the new document library. |
| | Allowed Values: |
| | The name of the SharePoint list template. |
| | Default Value: |
| | Document Library |
| | Custom Attributes: |
| | No |
| | Example: |
| | Following are some SharePoint list templates: |
| | • Document Library - The SharePoint default. |
| | Control Document Library - Included with SharePoint Integration for AgilePoint. |
| OverWriteDocLib | Definition: |
| | Determines whether the AgileShape overwrites the form or document library that already exists at the location where the new library is to be created. |
| | Allowed Values: |
| | • False - The AgileShape does not overwrite an existing SharePoint form or document library. |
| | Note: If you specify False when a form or document library already exists, then SharePoint is not modified. The AgileShape exits and updates the appropriate custom process attributes specified by the SaveErrorMessageTo and SaveStatusTo properties. |
| | True - The AgileShape overwrites an existing SharePoint form or document library. |
| | Default Value: |
| | False |
| Site URL | Definition: Specifies the URL for your SharePoint site. |

| Field Name | Definition |
|------------|---|
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://mysharepoint:8000/sites/\${mysite} |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a SharePoint Library

To create a new SharePoint library, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **New Library** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following required properties for the **New Library** AgileShape:

| Field Name | Definition |
|---------------------|---|
| DocumentLibraryName | Definition: Specifies the name for the new document library. <u>Allowed Values:</u> A text string. |
| | None Custom Attributes: No |
| ListTemplate | Definition: Specifies the name of the SharePoint list template to be used to create the new document library. Allowed Values: The name of the SharePoint list template. Default Value: Document Library Custom Attributes: No Example: Following are some SharePoint list templates: Document Library - The SharePoint default. Control Document Library - Included with SharePoint Integration for AgilePoint. |
| Site URL | Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: |

| Field Name | Definition |
|------------|---|
| | Yes |
| | Example: |
| | http://mysharepoint:8000/sites/\${mysite} |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - New Library
 - AgilePart Common Setup

New Site

An AgilePart that creates a new SharePoint site.



Prerequisites

• When creating a site or site collection, a top-level site must already exist, if one does not exist, declare a blank site and enable the web site using the SharePoint Configuration Manager.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **New Site** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|----------------|---|
| ConvertIfThere | <u>Definition:</u> Determines whether the AgileShape converts an existing site of the same name to a new SharePoint site. <u>Allowed Values:</u> False - The AgileShape does not overwrite an existing SharePoint site. |

| Field Namo | Definition |
|---------------|--|
| | Deminition |
| | Note: If you specify False when a site or site collection already exists, then SharePoint is not modified. The AgileShape exits and updates the appropriate custom process attributes specified by the SaveErrorMessageTo and SaveStatusTo properties. True - The AgileShape overwrites an existing |
| | SharePoint site. |
| | Default Value: |
| | False |
| | |
| Locale | Definition: |
| | Specifies the locale code for the new SharePoint site or site collection. |
| | A locale code identifies the language used in a particular region or country. |
| | Allowed Values: |
| | A valid locale code. |
| | Default Value: |
| | 1033 |
| | Custom Attributes: |
| | No |
| | Example: |
| | The locale code 1033 represents English language - United States. |
| OverWriteSite | Definition: |
| | Specifies whether the AgileShape overwrites the site or site collection if it already exists at the location where the new site collection is to be created. |
| | Allowed Values: |
| | • False - The AgileShape does not overwrite an existing SharePoint site or site collection. |
| | Note: If you specify False when a site or site collection already exists, then SharePoint is not modified. The AgileShape exits and updates the appropriate custom process attributes |

| Field Name | Definition |
|----------------------|---|
| | specified by the SaveErrorMessageTo and SaveStatusTo properties. |
| | • True - The AgileShape overwrites an existing SharePoint site or site collection. |
| | Default Value: |
| | False |
| SiteTitle | Definition: |
| | Specifies the title for the new SharePoint site or site collection. |
| | Allowed Values: |
| | A text string. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Site URL | Definition: |
| | Specifies the URL for a new SharePoint site where you want to add or remove the associated item such as a SharePoint site, document library, site collection, user, and group. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://[machine name]:[port]/sites/[site name] |
| | • Note: You must include the /sites in the Site URL for the site to be created successfully. |
| | • \$\{DocUrl\} |
| UseUniquePermissions | Definition: |
| | Specifies whether the sub site can inherit permissions from the parent site. |

| Field Name | Definition |
|-------------|--|
| | Allowed Values: False - The site inherits permissions from the parent site. True - The site uses unique permissions. Default Value: False |
| WebTemplate | Definition: Specifies the name of the SharePoint site template that is used to create the new SharePoint site or site collection. Allowed Values: The name of a SharePoint site template. Default Value: Team Site Custom Attributes: No |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a SharePoint Site

To create a new SharePoint site, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **New Site** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following required properties for the **New Site** AgileShape:

| Field Name | Definition |
|------------|--|
| SiteTitle | Definition: Specifies the title for the new SharePoint site or site collection. |
| | Allowed Values: |
| | A text string. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Site URL | Definition: Specifies the URL for a new SharePoint site where you want to add or remove the associated item such as a SharePoint site, document library, site collection, user, and group. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes |
| | http://[machine name]:[port]/sites/[site name] |

| Field Name | Definition |
|------------|--|
| | Note: You must include the /sites in the Site URL for the site to be created successfully. |
| | • \$\{DocUrl\} |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - New Site

New Site Collection

An AgilePart that creates a new SharePoint site collection.



Prerequisites

• When creating a site or site collection, a top-level site must already exist, if one does not exist, declare a blank site and enable the web site using the SharePoint Configuration Manager.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the New Site Collection AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------|---|
| CentralAdminUrl | Definition:Specifies the URL of the SharePoint central administration site. Using this site, you can control and manage all SharePoint sites and related activities.Allowed Values: A valid SharePoint central administration site URL. |

| Field Name | Definition |
|---------------|--|
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | |
| | Definition: |
| | site or site collection. |
| | A locale code identifies the language used in a particular region or country. |
| | Allowed Values: |
| | A valid locale code. |
| | <u>Default Value:</u> |
| | 1033 |
| | Custom Attributes: |
| | No |
| | Example: |
| | The locale code 1033 represents English language - United States. |
| OverWriteSite | Definition: |
| | Specifies whether the AgileShape overwrites the site or site collection if it already exists at the location where the new site collection is to be created. |
| | Allowed Values: |
| | • False - The AgileShape does not overwrite an existing SharePoint site or site collection. |
| | Note: If you specify False when a site or site collection already exists, then SharePoint is not modified. The AgileShape exits and updates the appropriate custom process attributes specified by the SaveErrorMessageTo and SaveStatusTo properties. |
| | True - The AgileShape overwrites an existing SharePoint site or site collection. |
| | Default Value: |
| | False |

| Field Name | Definition |
|----------------|---|
| OwnerEmail | Definition: Specifies the email address of the owner of the new SharePoint site collection. <u>Allowed Values:</u> A valid email address. <u>Default Value:</u> None <u>Custom Attributes:</u> No |
| OwnerLoginName | Definition: Specifies the user name of the owner of the new SharePoint site collection. 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 |
| OwnerName | Definition: Specifies the display name of the owner of the new SharePoint site collection. Allowed Values: A text string. Default Value: None Custom Attributes: No |
| SiteTitle | Definition: |

| Field Name | Definition |
|-------------|---|
| | Specifies the title for the new SharePoint site or site collection. |
| | Allowed Values: |
| | A text string. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Site URL | Definition: |
| | Specifies the URL for a new SharePoint site where you want to add or remove the associated item such as a SharePoint site, document library, site collection, user, and group. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://[machine name]:[port]/sites/[site name] |
| | • Note: You must include the /sites in the Site URL for the site to be created successfully. |
| | • \$\{DocUrl\} |
| WebTemplate | Definition: |
| | Specifies the name of the SharePoint site template that is used to create the new SharePoint site or site collection. |
| | Allowed Values: |
| | The name of a SharePoint site template. |
| | Default Value: |
| | Team Site |
| | Custom Attributes: |

| Field Name | Definition |
|------------|------------|
| | No |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a SharePoint Site Collection

To create a new SharePoint site collection, do the following.

Prerequisites

A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the New Site Collection AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Instructions

1. Complete the following required properties for the New Site Collection AgileShape:

| Field Name | Definition |
|-----------------|--|
| CentralAdminUrl | Definition: |
| | Specifies the URL of the SharePoint central administration site. Using this site, you can control |

| Field Name | Definition |
|----------------|---|
| | and manage all SharePoint sites and related activities. |
| | Allowed Values: |
| | A valid SharePoint central administration site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| OwnerEmail | Definition: |
| | Specifies the email address of the owner of the new SharePoint site collection. |
| | Allowed Values: |
| | A valid email address. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| OwnerLoginName | Definition: |
| | Specifies the user name of the owner of the new SharePoint site collection. |
| | 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 |
| OwnerName | Definition: |
| | Specifies the display name of the owner of the new SharePoint site collection. |

| Field Name | Definition |
|------------|---|
| | Allowed Values: |
| | A text string. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| SiteTitle | Definition: |
| | Specifies the title for the new SharePoint site or site collection. |
| | Allowed Values: |
| | A text string. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Site URL | Definition: |
| | Specifies the URL for a new SharePoint site where you want to add or remove the associated item such as a SharePoint site, document library, site collection, user, and group. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://[machine name]:[port]/sites/[site name] |
| | Note: You must include the /sites in the Site URL for the site to be created successfully. |
| | • \$\{DocUrl\} |

2. Complete any additional configuration for this AgileShape according to your requirements:

- AgilePart Common Setup
- New Site Collection

Portal Listing

An AgilePart that adds a link to a SharePoint link library. This AgileShape is typically used with the SharePoint Portal site template.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **Portal Listing** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------------|---|
| Link LibraryName | Definition: Specifies the name of the SharePoint library where you want to add a new link. Allowed Values: A valid SharePoint library name. Default Value: Links - Specifies the name of a SharePoint list template. You can add a list of web pages to the link library created using this template. Custom Attributes: No |
| LinkURL | Definition: Specifies the URL of the link you want to add to the SharePoint link library. |

| Field Name | Definition |
|---------------------|--|
| | Allowed Values: |
| | A valid URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | http://www.agilepoint.com |
| | http://www.yahoo.com |
| Notes | Definition: |
| | The information about the new portal link you want to provide. |
| | Allowed Values: |
| | A text string. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Overwrite | Definition: |
| | Determines whether the AgileShape overwrites an existing link URL instead of creating a new one. |
| | Allowed Values: |
| | True - The AgileShape overwrites an existing link. |
| | If you specify True and a link already exists, the AgileShape replaces an existing Link URL with the new link. This indicates that AgileShape updates the non-URL properties of the existing link. |
| | False - The AgileShape creates a new link instead of overwriting an existing link. |
| | Default Value: |
| | True |
| SharePointPortalURL | Definition: |
| | Specifies the URL for your SharePoint site. |

| Field Name | Definition |
|------------|--|
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | \$SPServer |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://[machine name]:[port] |
| Title | Definition: |
| | Specifies the title for the new portal link. |
| | Allowed Values: |
| | A text string. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Adding a Link to a SharePoint Link Library

To add a new link to a SharePoint link library, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Portal Listing** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following required properties for the **Portal Listing** AgileShape:

| Field Name | Definition |
|------------------|--|
| Link LibraryName | Definition: Specifies the name of the SharePoint library where you want to add a new link. Allowed Values: A valid SharePoint library name. Default Value: Links - Specifies the name of a SharePoint list template. You can add a list of web pages to the link library created using this template. Custom Attributes: |
| | No |
| LinkURL | Definition: Specifies the URL of the link you want to add to the SharePoint link library. Allowed Values: A valid URL. Default Value: None Custom Attributes: No |

| Field Name | Definition |
|---------------------|--|
| | Example: http://www.agilepoint.com http://www.yahoo.com |
| SharePointPortalURL | Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: \$SPServer Custom Attributes: Yes Example: http://[machine name]:[port] |
| Title | Definition: Specifies the title for the new portal link. <u>Allowed Values:</u> A text string. <u>Default Value:</u> None <u>Custom Attributes:</u> No |

2. Complete any additional configuration for this AgileShape according to your requirements:

- AgilePart Common Setup
- Portal Listing

Publish

An AgileWork that is identical to the Manual AgileShape, except that its **Work To Perform** property defaults to the value **Publish**, and it has a different visual appearance in the process template. This AgileShape is provided for your convenience.



Note: This AgileShape has been deprecated. Beginning with AgilePoint BPMS v5.0 SP4 this AgileShape is available only through the Traditional AgileShape stencils, and not through the current stencils.



- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the SharePoint stencil, drag the Publish AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Publish Content

An AgilePart that changes the status of a SharePoint file from Draft to Published.



- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Publish Content AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|--------------|---|
| Document URL | Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Remove SP Group

An AgilePart that deletes a SharePoint group.



- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Remove SP Group** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------------|---|
| Group Configuration | Opens the Following Window: Remove Group Configuration Window Purpose of this Window: |
| | Specifies a SharePoint group to delete. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Remove Group Configuration Window

Specifies a SharePoint group to delete.

| Remove Group Configuration | |
|--|--|
| Remove a Group from SharePoint Site. | |
| Site URL (e.g. http://Machine_Name:port/sites/SiteName): | |
| http://APDesktop:8000/NewHire | |
| Group Name: | |
| NewJoinees | |
| *You may enter Custom Attribute Name as \${} | |
| 🗇 Schema 🥪 OK 🔀 Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Remove SP Group** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Group Configuration** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|------------|---|
| Site URL | <u>Definition:</u> Specifies the URL for your SharePoint site. <u>Allowed Values:</u> A valid SharePoint site URL. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |
| | Example: http://mysharepoint:8000/sites/\${mysite} |

| Field Name | Definition |
|------------|---|
| Group Name | Definition: The name of the SharePoint group you want. Allowed Values: A valid SharePoint group name. Default Value: None Custom Attributes: Yes |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Removing a SharePoint Group

To remove a group from SharePoint, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **Remove SP Group** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the Group Configuration field, click the Ellipses button.

Instructions

1. On the **Remove Group Configuration** window, complete the following required fields:

| Field Name | Definition |
|------------|---|
| Site URL | Definition: |
| | Specifies the URL for your SharePoint site. |

| Field Name | Definition |
|------------|--|
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://mysharepoint:8000/sites/\${mysite} |
| Group Name | Definition: |
| | The name of the SharePoint group you want. |
| | Allowed Values: |
| | A valid SharePoint group name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Remove SP Group

Remove User from SP Group

An AgilePart that removes a user from a SharePoint group.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Remove User from SP Group** AgileShape, and drop it on the process template.

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|----------------------------------|---|
| RemoveUserFromGroupConfiguration | Opens the Following Window: Remove User From Group Configuration Window Purpose of this Window: Specifies a user to remove from a SharePoint group. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Remove User From Group Configuration Window

Specifies a user to remove from a SharePoint group.

| Remove User From Group Configuration |
|--|
| Remove User From Group on SharePoint Site. |
| Site URL (e.g. http://Machine_Name:port/sites/SiteName): |
| http://APDesktop:8000/NewHire |
| Group Name: |
| JoineeDetails |
| User Name: |
| APDesktopd\CFO |
| *You may enter Custom Attribute Name as \${} |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **Remove User from SP Group** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the RemoveUserFromGroupConfiguration field, click the Ellipses button.

Field Definitions

| Field Name | Definition |
|------------|---|
| Site URL | Definition: |
| | Specifies the URL for your SharePoint site. |
| | Allowed Values: |
| | A valid SharePoint site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

| Field Name | Definition |
|------------|---|
| | Example: |
| | http://mysharepoint:8000/sites/\${mysite} |
| Group Name | Definition: |
| | The name of the SharePoint group you want. |
| | Allowed Values: |
| | A valid SharePoint group name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| User Name | Definition: |
| | Specifies the user name to be removed from the SharePoint group. |
| | Allowed Values: |
| | A user name, including the domain name, in the following format: |
| | [domain]\[user name] |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | MyDomain\Administrator |
| Schema | Opens the Following Window: |
| | Select XPath from Attributes Window |
| | Purpose of this Window: |
| | Enables you to select a schema node from the XML schema for your process. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes | × |
|------------------------------|---|
| Select XPath from Attributes | |
| Schema Process Attributes | 1 |
| empName (String) | |
| XPath: | |
| ✓ OK X Cancel | |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the Ellipses button.
 - Click the **Schema** button.

Field Definitions

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Removing a User from a SharePoint Group

To remove a user from a SharePoint group, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Remove User from SP Group** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **RemoveUserFromGroupConfiguration** field, click the **Ellipses** button.

Instructions

1. On the **Remove User from Group Configuration** window, complete the following required fields:

| Field Name | Definition |
|------------|---|
| Site URL | Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/\${mysite} |
| Group Name | Definition: |

| Field Name | Definition |
|------------|--|
| | The name of the SharePoint group you want. |
| | Allowed Values: |
| | A valid SharePoint group name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| User Name | Definition: |
| | Specifies the user name to be removed from the SharePoint group. |
| | Allowed Values: |
| | A user name, including the domain name, in the following format: |
| | [domain]\[user name] |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | MyDomain\Administrator |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Remove User From Group Configuration Window

Restore File Version

An AgilePart that restores a SharePoint file to a previous major or minor version number.


Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Restore File Version AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------------------------|--|
| RestoreFileVersionConfiguration | Opens the Following Window: Restore File Version Window |
| | Purpose of this Window: Specifies a version to restore for a SharePoint file. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Restore File Version Window

Specifies a version to restore for a SharePoint file.

| Restore File Version | | |
|---|--|--|
| Restore File Version | | |
| Document URL (e.g. http://mysite.com:8000/sites/MySite/doclib/document name): | | |
| http://APDesktop:8000/NewHire/JoineeInfo/OfferLetter | | |
| Version number of file to be restored (e.g 1 or 1.3) | | |
| 3.1 | | |
| Schema | | |
| *You may enter Custom Attribute Name as \${} | | |
| ✓ OK Cancel | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Restore File Version** AgileShape, and drop it on the process template.
- 4. On the **Configuration** field, click the **Ellipses** button.

| Field Name | Definition |
|---------------------------------------|---|
| Document URL | Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes |
| Version number of file to be restored | Definition: |

| Field Name | Definition |
|------------|--|
| | Specifies the major or minor file version you want to delete or restore. |
| | 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: |
| | Yes |
| | 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. |
| Schema | Opens the Following Window: |
| | Select XPath from Attributes Window |
| | Purpose of this Window: |
| | Enables you to select a schema node from the XML schema for your process. |
| | Note: If the process template has an associated schema, the Schema button appears. |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes |
|------------------------------|
| Select XPath from Attributes |
| Schema Process Attributes |
| myFields |
| XPath: |
| DataType: |
| 🥪 OK 🔀 Cancel |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the **Ellipses** button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Restoring a Deleted Version of a SharePoint File

To restore, or undelete, a deleted a version of a SharePoint file, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Restore File Version AgileShape, and drop it on the process template.
- 4. On the **Configuration** field, click the **Ellipses** button.

Instructions

1. On the **Restore File Version** window, enter the URL of the file whose version you want to restore:

| Field Name | Definition |
|--------------|---|
| Document URL | Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes |

2. Enter the version number you want to restore.

If your process has an XML schema, you can click the **Schema** button to select the file version from the schema.

| Field Name | Definition |
|---------------------------------------|---|
| Version number of file to be restored | Definition: Specifies the major or minor file version you want to delete or restore. 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: Yes 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 |
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. Image: Im |

3. Complete any additional configuration for this AgileShape according to your requirements:

• AgilePart - Common Setup

Retrieve List Item

An AgilePart that retrieves list item field values to be updated in custom attributes, schema metadata, or SharePoint metadata.



Prerequisites

Log on to SharePoint.

Good to Know

• If errors occur during the execution, a message will be written into the SharePoint Integration log file.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **Retrieve List Item** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|--|
| ItemValues | Opens the Following Window: Configuration for Retrieving ListItem Fields Window Purpose of this Window: Determines how to retrieve list item field values to undate custom attributes, schema metadata, or |
| | SharePoint metadata. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration for Retrieving ListItem Fields Window

Determines how to retrieve list item field values to update custom attributes, schema metadata, or SharePoint metadata.

| nfiguration for Retrieving L | istItem Fields | | |
|------------------------------|-----------------------------|------------------------|----------|
| Configuration for | Retrieving List Item Fields | | |
| Source Site Configuration | | | |
| List URL (e.g. http://Mach | ine_Name:port/sites/SiteNam | e/ListName): | |
| http://APDesktop:8000/h | VewHire/JoineeDetails | | - |
| ListItem Field Name : | | ListItem Field Value : | |
| ID | | \${ListItemID} | |
| Qualification1 | Qualification | Qualification | |
| | | | 🚽 Add |
| | | | Remove |
| | | | 🔶 ок |
| | | | 🔀 Cancel |

After the Source Site is configured, the configuration window will look similar to below.

| http://hz-dev12:96/sites/ho | wardteam/Lists/List_1 | | - |
|-----------------------------|------------------------|------------------------|-----------------------------|
| ListItem Field Name : | | ListItem Field Value : | |
| 10 | | \${Ustitemit/} | |
| | | | |
| etaData Name | Field DisplayName | Field InternalName | |
| /pd:myFields/pd:WorkTyp | City | WorkCity | Add |
| Company1 | Company | Company | |
| | | | Remove |
| Sciece an our in Unit | XML Schema | | × |
| City (S | ype (String) tring) | | <u>QK</u> <u>C</u> ancel |

The MetaData Name column is used to specify a custom attribute, schema metadata, or SharePoint metadata where the value from the list field that is retrieved will be updated to.



Note: In order to update the XML metadata with the retrieved field values, the AgilePoint Envision process template type must be either Microsoft InfoPath or Generic.

The MetaData Name can be configured as follows:

- 1. Use the Add button to select a SharePoint metadata item.
- 2. Input a custom attribute name (e.g. Company1).
- 3. Click the button at the right side of the field to select a schema metadata.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Retrieve List Item** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **ItemValues** field, click the **Ellipses** button.

| Field Name | Definition |
|----------------------|---|
| List URL | Definition: Specifies the SharePoint list URL you want. Allowed Values: A valid SharePoint list URL. Image: Definition of the state of th |
| | Default Value: \${DocUrl} <u>Custom Attributes:</u> Yes <u>Example:</u> • http://[machine name]:[port]/sites/[site name] • \$\{DocUrl\} |
| ListItem Field Name | Definition: Specifies the name of a SharePoint list column. <u>Allowed Values:</u> Read only. "ID", the list column that specifies the unique list item ID. |
| ListItem Field Value | <u>Definition:</u> Specifies the SharePoint list column's value. This value can be used as a filter to limit the scope of the action. |

| Field Name | Definition |
|---------------|---|
| | Allowed Values: |
| | The list column's value. |
| | Default Value: |
| | \${ListItemID} |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | \$\{ListItemID\} or \$\{SubListItemID\} |
| | • A list item ID such as 9 |
| Add | Opens the Following Window: |
| | Select SharePoint Library Column Window |
| | Purpose of this Window: |
| | Specifies a SharePoint library column |
| | |
| MetaData Name | Definition: |
| | The name of the process variable you want to store the retrieved list item field values. The retrieved metadata values can be updated to a custom attribute, an XML schema element, or SharePoint metadata. |
| | Allowed Values: |
| | A custom attribute |
| | An XPath to a schema element |
| | To add XML metadata associated with the process model, click the button in the MetaData Name field. |
| | Note: In order to update the XML metadata with the retrieved field values, the AgilePoint Envision process template type must be either Microsoft InfoPath or Generic. |
| | A SharePoint metadata |
| | Default Value: |
| | None |
| | However, when you add a field using the Add button, the MetaData Name is populated with the internal name of the SharePoint column. |

| Field Name | Definition |
|--------------------|--|
| | For example, Author1, where Author is the internal name of the SharePonit column named Author. |
| | Custom Attributes: |
| | Yes |
| Field DisplayName | Definition: |
| | Specifies the SharePoint column names for the specified list or library. |
| | Allowed Values: |
| | Read only. |
| | The values are populated when you click Add, and then select a list item on the Select SharePoint Library Column Window. |
| Field InternalName | Definition: |
| | Specifies the internal names of the SharePoint columns for the specified list or library. |
| | Allowed Values: |
| | Read only. |
| | The values are populated when you click Add, and then select a list item on the Select SharePoint Library Column Window. |
| Remove | Function: |
| | Deletes the selected row from the list. |

- Data Binding
- Using Process Attributes

Select SharePoint Library Column Window

Specifies a SharePoint library column.

| Select SharePoint Lib | rary Column harePoint Library Co | olumn | | | | | × |
|--|-------------------------------------|--------|----------|-----------------|---|-------------|--------|
| http://APDesktop:80 | 000/NewHire/JoineeD | etails | | | - | | |
| The searce of th | | | | | _ | | |
| DisplayName / | InternalName | Туре | ReadOnly | PropertyName | | | |
| Attachments | Attachments | String | | Attachments | | | |
| Client Id | SyncClientId | String | V | SyncClientId | | | |
| Comment | Comment | String | | Comment | | | |
| Content Type | ContentType | String | | ContentType | | | |
| Content Type ID | ContentTypeId | String | V | ContentTypeId | | | |
| Copy Source | _CopySource | String | V | _CopySource | | ~ | ОК |
| Country | Country | String | | Country | | <u> </u> | |
| Created By | Author | String | v | Author | | | |
| Edit Menu Table | _EditMenuTableE | String | V | _EditMenuTableE | - | \varkappa | Cancel |
| Show All | | | | | | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Retrieve List Item** or **Update Meta Data** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In one the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
 - ItemValues
 - MetadataNameAndValues
- 6. On one of the following windows, click **Add**. The specific windows that display vary, depending upon the fields of AgileShape you are using:
 - Configuration for Retrieving ListItem Fields Window
 - Name and Value Window

| Field Name | Definition |
|--------------|--|
| Library URL | Definition: Specifies the URL for the SharePoint library that contains the metadata attributes you want to update. <u>Allowed Values:</u> Read only. |
| DisplayName | Definition: Specifies the name of the SharePoint library column. <u>Allowed Values:</u> Read only. |
| InternalName | <u>Definition:</u> Specifies the column's internal name. <u>Allowed Values:</u> Read only. |
| Туре | <u>Definition:</u> Specifies the column's data type. <u>Allowed Values:</u> Read only. |
| Read Only | <u>Definition:</u> Indicates whether the column's value can be changed when the process is running: <u>Selected</u> - The column's value cannot be changed. <u>Deselected</u> - The column's value is editable. <u>Allowed Values:</u> Read only. You cannot select or deselect the Read Only check box. |
| PropertyName | Definition: |

| Field Name | Definition |
|------------|---|
| | Specifies the name of the property associated with the SharePoint library column. |
| | Allowed Values: |
| | Read only. |
| ОК | Function: |
| | Completes the task, and opens the window where this Select SharePoint Library Column window was invoked to specify the metadata field: |
| | Configuration for Retrieving ListItem Fields Window |
| | Name and Value Window |
| | Note the following: |
| | • To specify the metadata field, select the field, and then click OK. |
| | • You can select only one field at a time. |

- Data Binding
- Using Process Attributes

Single Condition

An AgilePart that specifies a process decision branch where the process follows one of two paths based on a single Boolean (true/false, yes/no) input value. This AgileShape is specifically for SharePoint processes.



Note: This AgileShape has been deprecated. Beginning with AgilePoint BPMS v5.0 SP4 this AgileShape is available only through the Traditional AgileShape stencils, and not through the current stencils.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Single Condition** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------------|---|
| Property Binding | Opens the Following Window: New Condition Activity Window - Single Condition SharePoint AgileShape Purpose of this Window: Associates a Boolean condition with a data field, such as a custom attribute or schema element, for the purpose of routing a process based on the field value. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

New Condition Activity Window - Single Condition SharePoint AgileShape

Associates a Boolean condition with a data field, such as a custom attribute or schema element, for the purpose of routing a process based on the field value.

| New Condition Activit | y 📃 💌 |
|-----------------------|---|
| New Cond | lition Activity |
| Name: | Offer Accepted |
| Data Binding: \$ | /pd:Data/pd:Offer_Decision_SubForm/pd:Offer_Decision/pd:Offe |
| Description | Conditional check whether the offer has been accepted or not. |
| Туре | Boolean |
| | 🥪 OK 🔀 Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Single Condition** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Property Binding** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|---|
| Name | <u>Definition:</u> The display name for the AgileShape. |
| | Allowed Values: A single line of text. Default Value: None Custom Attributes: No |

| Field Name | Definition |
|--------------|---|
| Data Binding | Definition: Specifies a data field (such as a schema element or custom attribute) used to evaluate the condition. For more information, see Data Binding. Image: The second structure is not available for Generic process models. Allowed Values: A valid data binding expression. This could be a custom attribute name or an xpath to a schema element. Default Value: None Custom Attributes: |
| Description | Yes Definition: A free text description of the condition. Allowed Values: Multiple lines of text. Default Value: None Custom Attributes: No |
| Туре | <u>Definition:</u> The data type for the data binding expression. <u>Allowed Values:</u> Boolean <u>Default Value:</u> Boolean |

- Data Binding
- Using Process Attributes

Submit

An AgileWork that is essentially identical to the Manual AgileShape, except that its **Work To Perform** property defaults to the value **Submit**, and it has a different visual appearance in the process template.



Note: This AgileShape has been deprecated. Beginning with AgilePoint BPMS v5.0 SP4 this AgileShape is available only through the Traditional AgileShape stencils, and not through the current stencils.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Submit** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Submit File to Record Center

An AgilePart that stores a specified file in a SharePoint Record Center.



Prerequisites

Log on to SharePoint.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the **SharePoint** stencil, drag the **Submit File to Record Center** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------------------|--|
| Record Center Configuration | Opens the Following Window: Submit File To Record Center Configuration Window |
| | Purpose of this Window: Specifies how a file is submitted to a SharePoint Record Center. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Submit File To Record Center Configuration Window

Specifies how a file is submitted to a SharePoint Record Center.

| Submit File To Record Center Configuration | X |
|--|-----------|
| Submit File To Record Center Configuration | |
| Record Center Site URL (e.g. http://Machine_Name:port/sites/SiteName): | |
| http://APDesktop:8000/NewHireRecordCenter | i Connect |
| Routing Name: | (|
| New Joinee Details | 📄 Schema |
| Document URL (e.g. http://Machine_Name:port/sites/SiteName/document name): | |
| http://APDesktop:8000/NewHire/JoineeInfo/OfferLetter | 🕪 ок |
| User Name (e.g Domain\Username): | |
| APDesktop\Administrator | 🔀 Cancel |
| *You may enter Custom Attribute Name as \${} | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Submit File to Record Center** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Record Center Configuration field, click the Ellipses button.

| Field Name | Definition |
|------------------------|--|
| Record Center Site URL | Definition: |
| | Specifies the URL of the SharePoint Record Center site where you want to store the files. |

| Field Name | Definition |
|--------------|--|
| | Allowed Values: |
| | A valid SharePoint Record Center site URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Connect | Function. |
| | Retrieves the list of routing names for the specified |
| | SharePoint Record Center site. |
| Routing Name | Definition: |
| | Specifies the routing name to be used to submit the file to the SharePoint Record Center. |
| | A routing name is a record routing rule that is set up on the SharePoint Record Center to facilitate records management. Each routing rule maps the records to the destination location on the Record Center site based on content type. |
| | Allowed Values: |
| | A routing name. |
| | <u>Default Value:</u> |
| | None |
| | Custom Attributes: |
| | Yes |
| Document URL | Definition: |
| | The URL of your document or file — for example, the file you want to add, delete, or check out. |
| | Allowed Values: |
| | A valid URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| User Name | Definition: |

| Field Name | Definition | |
|------------|--|--|
| | The user name you want to associate with the action. If the current user does not have access to the Record Center site, then the Login window opens. This user impersonation feature switches users at runtime to access the Record Center. | |
| | | |
| | Note: The user must be a member of the Records Center Web Service Submitters group in SharePoint. | |
| | Allowed Values: | |
| | A user name, including the domain name, in the following format: | |
| | [domain]\[user name] | |
| | Default Value: | |
| | None | |
| | Custom Attributes: | |
| | Yes | |
| | Example: | |
| | MyDomain\Administrator | |
| Schema | Opens the Following Window: | |
| | Select XPath from Attributes Window | |
| | Purpose of this Window: | |
| | Enables you to select a schema node from the XML schema for your process. | |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes | × |
|------------------------------|---|
| Select XPath from Attributes | |
| Schema Process Attributes | |
| myFields | |
| XPath: |] |
| DataType: | |
| 🥪 OK 🔀 Cancel | |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the **Ellipses** button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Submitting a File to a SharePoint Record Center

To submit a file to a SharePoint Record Center, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Submit File to Record Center** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Record Center Configuration field, click the Ellipses button.

Instructions

- 1. On the **Submit File To Record Center Configuration** window, enter the URL for your SharePoint record center.
- 2. Click **Connect**.
- 3. Complete the following fields as required for your file submission:

| Field Name | Definition |
|--------------|--|
| Routing Name | Definition: |
| | Specifies the routing name to be used to submit the file to the SharePoint Record Center. |
| | A routing name is a record routing rule that is set up on the SharePoint Record Center to facilitate records management. Each routing rule maps the records to the destination location on the Record Center site based on content type. |
| | Allowed Values: |
| | A routing name. |
| | Default Value: |

| Field Name | Definition |
|--------------|--|
| | None |
| | Custom Attributes: |
| | Yes |
| Document URL | Definition: |
| | The URL of your document or file — for example, the file you want to add, delete, or check out. |
| | Allowed Values: |
| | A valid URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| User Name | Definition: |
| | The user name you want to associate with the action. |
| | If the current user does not have access to the Record Center site, then the Login window opens. This user impersonation feature switches users at runtime to access the Record Center. |
| | Note: The user must be a member of the Records Center Web Service Submitters group in SharePoint. |
| | Allowed Values: |
| | A user name, including the domain name, in the following format: |
| | [domain]\[user name] |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | MyDomain\Administrator |

4. Complete any additional configuration for this AgileShape according to your requirements:

• AgilePart - Common Setup

Undo Check Out File

An AgilePart that reverses a document check out from SharePoint.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Undo Check Out File** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|--------------|---|
| Document URL | Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Canceling a SharePoint File Checkout

To cancel, or undo, a SharePoint file checkout, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Undo Check Out File** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. In the properties for the Undo File Checkout AgileShape, enter the file URL:

| Field Name | Definition |
|--------------|---|
| Document URL | Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes |
| | Yes |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup

Update InfoPath

An AgilePart that updates the XML data in an InfoPath form.



Prerequisites

• This AgileShape can only be used when working with a Microsoft InfoPath process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Update InfoPath** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------|---|
| InfoPathFileURL | Definition: Specifies the URL of the InfoPath form in Microsoft SharePoint. Allowed Values: A valid InfoPath form URL. Default Value: \$DocUrl Custom Attributes: Yes |
| XPathAndValues | Opens the Following Window: XPath and Value Window Purpose of this Window: Specifies values for one or more of the data elements in the XML of the InfoPath form. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

XPath and Value Window

Specifies values for one or more of the data elements in the XML of the InfoPath form.

| XPath and Value | | × |
|-----------------|-------------------|---|
| XPath and Value | | |
| InfoPath XPath | Value | |
| CompanyName | "AgilePoint Inc." | |
| | | Add Remove |
| | | ✓ ОКҲҲҲҲҲСапсе! |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.

572

- 3. On the SharePoint stencil, drag the Update InfoPath AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **XPathAndValues** field, click the **Ellipses** button.

| Field Name | Definition |
|----------------|--|
| Add | Function: Opens the schema of the associated InfoPath form to select the XML data element. Then, adds a row to specify a new value for the selected data element of the InfoPath form. Opens the Following Window: Select XDath from Attributes Window: |
| | Purpose of this Window: Enables you to select a schema node from the XML schema for your process. |
| InfoPath XPath | Definition: Specifies the XML data element of the InfoPath form you want to set a new value. Allowed Values: A valid data element in the XML. Default Value: None Custom Attributes: Yes |
| Value | Definition: The new value for the XML data element of the InfoPath form. Allowed Values: A valid column value. Default Value: None However, when you add a row by using the Add button, the Value field is populated with the data type of the selected data element, such as {Decimal} or {String}. Set the actual value. |

| Field Name | Definition |
|------------|---|
| | Custom Attributes: |
| | No |
| Remove | <u>Function:</u> Deletes the selected row from the list. |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes | × |
|--------------------------------------|---|
| Select XPath from Attributes | |
| Schema Process Attributes | |
| ➡ 🦢 myFields ■ 🔄 empName (String) | |
| XPath: DataType: | |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the Ellipses button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|--|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | <u>Definition:</u> Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | Definition: |

| Field Name | Definition |
|------------|---|
| | Displays the process attributes associated with the process in a tree-view structure. |
| | Allowed Values: |
| | Read only. |
| | Click to select the process attribute you want to use. |
| ОК | Function: |
| | Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. |
| | Note the following: |
| | First, you must select the metadata or attribute you want, and then click OK. |
| | • You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Update Meta Data

An AgilePart that updates metadata in SharePoint.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Update Meta Data** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
Properties for This AgileShape

| Field Name | Definition |
|-----------------------|--|
| MetadataNameAndValues | Opens the Following Window: Name and Value Window Purpose of this Window: Specifies a value for a field you want to update in a SharePoint library and folder. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Name and Value Window

Specifies a value for a field you want to update in a SharePoint library and folder.

| Name | e and Value | | | × |
|------|--------------------------------|-------------------------|-------------------------|----------|
| | Name and Value | | | |
| S | ource Site Configuration | | | |
| | Library URL (e.g. http://Machi | ne_Name:port/sites/Site | Name/LibraryName): | |
| | http://APDesktop:8000/New | lire/JoineeDetails | | • |
| | Folder Name (Optional): | | | |
| | | | | - |
| | Field Name (Optional): | | Field Value (Optional): | |
| | ID | - | 123 | |
| | | | | |
| Fie | eldDisplayName | Field InternalName | Value | |
| | CompanyLocation | CompanyLocation | String | |
| * | CompanyName | CompanyName | String | |
| | | | | 🕂 Add |
| | | | | Remove |
| | | | | 🔶 ок |
| | | | | X Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Update Meta Data** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the MetadataNameAndValues field, click the Ellipses button.

| Field Name | Definition |
|-------------|-------------|
| Library URL | Definition: |

| Field Name | Definition |
|-------------|--|
| | Specifies the URL for the SharePoint library that contains the metadata attributes you want to update. Enter a valid SharePoint URL, and then expand the Library URL list to select the list or library URL you want. This action populates the fields with the correct values for the specified SharePoint library. |
| | Allowed Values: |
| | A valid SharePoint library URL. |
| | You must enter an actual URL if you want to retrieve the metadata associated with the library URL at design-time to update the values. |
| | You can also use a custom attribute to specify the URL at runtime. |
| | Default Value: |
| | \${DocUrl} |
| | Custom Attributes: |
| | Yes |
| Folder Name | <u>Definition:</u> Specifies the name of a SharePoint folder. The folder contains the metadata attributes you want to update. |
| | Allowed Values: |
| | The name of your SharePoint folder. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Field Name | Definition: Specifies the name of the SharePoint column you want to restrict the metadata update. |
| | The name of your SharePoint list column |
| | Default Value |
| | "ID", the list column that specifies the unique list item ID. |
| | Custom Attributes: |

| Field Name | Definition |
|--------------------|--|
| | No |
| Field Value | Definition: Specifies the SharePoint column's value. This indicates that you can restrict the metadata update by the value specified. |
| | <u>Allowed Values:</u> The list column's value. Note the following: If you want to clear a value, specify NULL. And, if you leave the Field Value property empty, the AgileShape updates all records in the SharePoint library. <u>Default Value:</u> \${ListItemID} <u>Custom Attributes:</u> Yes |
| Add | Opens the Following Window: Select SharePoint Library Column Window Purpose of this Window: Specifies a SharePoint library column. |
| Remove | <u>Function:</u> Deletes the selected row from the list. |
| Field DisplayName | Definition: Specifies the SharePoint column names for the specified list or library. Allowed Values: Read only. The values are populated when you click Add, and then select a list item on the Select SharePoint Library Column Window. |
| Field InternalName | Definition: Specifies the internal names of the SharePoint columns for the specified list or library. Allowed Values: |

| Field Name | Definition |
|------------|---|
| | Read only. |
| | The values are populated when you click Add, and then select a list item on the Select SharePoint Library Column Window. |
| Value | Definition: |
| | Specifies the value to be updated for the SharePoint column. |
| | Allowed Values: |
| | • A valid column value. |
| | • An XPath to a schema element. |
| | To add XML metadata associated with the process model, click the button in the Value field. |
| | Default Value: |
| | None. |
| | However, when you add a SharePoint column in the list by using the Add button, the Value field is populated with the column's data type. Set the actual value. |
| | Custom Attributes: |
| | Yes |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select SharePoint Library Column Window

Specifies a SharePoint library column.

| Select SharePoint Lib | rary Column harePoint Library Co | olumn | | | | | | X |
|-----------------------|-------------------------------------|--------|----------|-----------------|---|----------|--------|---|
| Library Url : | | | | | | | | |
| http://APDesktop:80 | 000/NewHire/JoineeD | etails | | | | | | |
| DisplayName / | InternalName | Туре | ReadOnly | PropertyName | - | | | |
| Attachments | Attachments | String | | Attachments | | | | |
| Client Id | SyncClientId | String | V | SyncClientId | | | | |
| Comment | Comment | String | | Comment | | | | |
| Content Type | ContentType | String | | ContentType | | | | |
| Content Type ID | ContentTypeId | String | V | ContentTypeId | | | | |
| Copy Source | _CopySource | String | V | _CopySource | | ~ | ОК | |
| Country | Country | String | | Country | | <u> </u> | | |
| Created By | Author | String | V | Author | | | | |
| Edit Menu Table | _EditMenuTableE | String | V | _EditMenuTableE | - | × | Cancel | |
| Show All | | | | | | | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Retrieve List Item** or **Update Meta Data** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In one the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
 - ItemValues
 - MetadataNameAndValues
- 6. On one of the following windows, click **Add**. The specific windows that display vary, depending upon the fields of AgileShape you are using:
 - Configuration for Retrieving ListItem Fields Window
 - Name and Value Window

| Field Name | Definition |
|--------------|--|
| Library URL | <u>Definition:</u> Specifies the URL for the SharePoint library that contains the metadata attributes you want to update. <u>Allowed Values:</u> Read only. |
| DisplayName | <u>Definition:</u> Specifies the name of the SharePoint library column. <u>Allowed Values:</u> Read only. |
| InternalName | <u>Definition:</u> Specifies the column's internal name. <u>Allowed Values:</u> Read only. |
| Туре | <u>Definition:</u> Specifies the column's data type. <u>Allowed Values:</u> Read only. |
| Read Only | <u>Definition:</u> Indicates whether the column's value can be changed when the process is running: <u>Selected</u> - The column's value cannot be changed. <u>Deselected</u> - The column's value is editable. <u>Allowed Values:</u> Read only. You cannot select or deselect the Read Only check box. |
| PropertyName | Definition: |

| Field Name | Definition |
|------------|---|
| | Specifies the name of the property associated with the SharePoint library column. |
| | Allowed Values: |
| | Read only. |
| ок | Function: |
| | Completes the task, and opens the window where this Select SharePoint Library Column window was invoked to specify the metadata field: |
| | Configuration for Retrieving ListItem Fields Window |
| | Name and Value Window |
| | Note the following: |
| | To specify the metadata field, select the field, and then click OK. |
| | • You can select only one field at a time. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Modifying Fields in a SharePoint Library or List

To modify fields in a SharePoint library or list, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Update Meta Data** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the MetadataNameAndValues field, click the Ellipses button.

Instructions

1. On the **Name and Value** window, select the URL for your SharePoint library:

| Field Name | Definition |
|---------------------------|---|
| Field Name Library URL | Definition Definition: Specifies the URL for the SharePoint library that contains the metadata attributes you want to update. Enter a valid SharePoint URL, and then expand the Library URL list to select the list or library URL you want. This action populates the fields with the point library that the point library libra |
| | correct values for the specified SharePoint library. <u>Allowed Values:</u> A valid SharePoint library URL. You must enter an actual URL if you want to retrieve the metadata associated with the library URL at design-time to update the values. You can also use a custom attribute to specify |
| | the URL at runtime. <u>Default Value:</u> \${DocUrl} <u>Custom Attributes:</u> Yes |

2. Complete the following fields as required for your update:

| Field Name | Definition |
|-------------|--|
| Folder Name | Definition: Specifies the name of a SharePoint folder. The folder contains the metadata attributes you want to update. Allowed Values: The name of your SharePoint folder. Default Value: None Custom Attributes: No |
| Field Name | Definition: Specifies the name of the SharePoint column you want to restrict the metadata update. |

| Field Name | Definition |
|-------------|---|
| | Allowed Values: |
| | The name of your SharePoint list column. |
| | Default Value: |
| | "ID", the list column that specifies the unique list item ID. |
| | Custom Attributes: |
| | No |
| Field Value | Definition: |
| | Specifies the SharePoint column's value. |
| | This indicates that you can restrict the metadata update by the value specified. |
| | Allowed Values: |
| | The list column's value. |
| | Note the following: |
| | • If you want to clear a value, specify NULL . |
| | And, if you leave the Field Value property empty, the AgileShape updates all records in the SharePoint library. |
| | <u>Default Value:</u> |
| | \${ListItemID} |
| | Custom Attributes: |
| | Yes |

- 3. If you want to add a column from the existing SharePoint columns, do the following:
 - a. Click Add.
 - b. Select the column you want.
 - c. Click OK.
- 4. If you want to remove a column from the list of SharePoint columns, do the following:
 - a. Select the column you want.
 - b. Click Remove.
- 5. On the Name and Value window, complete the following fields to modify your columns:

| Field Name | Definition |
|-------------------|-------------|
| Field DisplayName | Definition: |

| Field Name | Definition |
|--------------------|---|
| | Specifies the SharePoint column names for the specified list or library. |
| | Allowed Values: |
| | Read only. |
| | The values are populated when you click Add, and then select a list item on the Select SharePoint Library Column Window. |
| Field InternalName | Definition: |
| | Specifies the internal names of the SharePoint columns for the specified list or library. |
| | Allowed Values: |
| | Read only. |
| | The values are populated when you click Add, and then select a list item on the Select SharePoint Library Column Window. |
| Value | Definition: |
| | Specifies the value to be updated for the SharePoint column. |
| | Allowed Values: |
| | A valid column value. |
| | • An XPath to a schema element. |
| | To add XML metadata associated with the process model, click the button in the Value field. |
| | Default Value: |
| | None. |
| | However, when you add a SharePoint column in the list by using the Add button, the Value field is populated with the column's data type. Set the actual value. |
| | Custom Attributes: |
| | Yes |

6. Complete any additional configuration for this AgileShape according to your requirements:

• AgilePart - Common Setup

Update SP Group

An AgilePart that updates the settings for a SharePoint Group.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Update SP Group AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------------|---|
| Group Configuration | Opens the Following Window: Update Group Configuration Window Purpose of this Window: Specifies the information to update for a SharePoint group. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Update Group Configuration Window

Specifies the information to update for a SharePoint group.

| Update Group Configuration | | |
|--|--|--|
| Update Group Information on SharePoint Site. | | |
| Site URL (e.g. http://Machine_Name:port/sites/SiteName): | | |
| http://APDesktop:8000/NewHire/JoineeDetails | | |
| Existing Group Name: | | |
| NewJoinees | | |
| New Group Name: | | |
| Employees | | |
| New Group Description: | | |
| The group contains details about Employees joined as NewJoinees. | | |
| New Group Owner (e.g Domain\Username): | | |
| Demo3\Administrator | | |
| *You may enter Custom Attribute Name as \${} | | |
| 🗇 Schema 🧼 OK 🔀 Cancel | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **SharePoint** stencil.
- 3. On the SharePoint stencil, drag the Update SP Group AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Group Configuration field, click the Ellipses button.

| Field Name | Definition |
|---------------------|--|
| Site URL | <u>Definition:</u> Specifies the URL for your SharePoint site. <u>Allowed Values:</u> A valid SharePoint site URL. |
| | <u>Default Value:</u> None |
| | Yes |
| | Example: http://mysharepoint:8000/sites/\${mysite} |
| Existing Group Name | Definition: Specifies the name of the SharePoint group you want to update. Allowed Values: The name of an existing SharePoint group. Default Value: None Custom Attributes: Yes |
| New Group Name | Definition: Specifies the target name for the SharePoint group - in other words, the name to which you want to change the group. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes |

| Field Name | Definition |
|-----------------------|--|
| New Group Description | Definition: Specifies a new description to overwrite the existing group description. |
| | <u>Allowed Values:</u> Multiple line of text. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |
| New Group Owner | Definition: Specifies the name of the SharePoint user you want to be the new owner of your group. Allowed Values: A user name, including the domain name, in the following format: [domain]\[user name] Default Value: None Custom Attributes: Yes Example: MyDomain\Administrator |
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes | × |
|------------------------------|---|
| Select XPath from Attributes | |
| Schema Process Attributes | |
| myFields mpName (String) | |
| XPath: DataType: | |
| 🥪 OK 🔀 Cancel | |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the **Ellipses** button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Modifying a SharePoint Group

To modify, or update, an existing SharePoint group, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Update SP Group AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Group Configuration field, click the Ellipses button.

Instructions

- 1. On the Update Group Configuration Window, modify the field values according to your requirements. All fields are optional.
- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup

Upload Documents to Document Set

An AgilePart that uploads one or more documents from local machine to specified document set of a SharePoint document library.



Prerequisites

An environment using SharePoint 2013 and the CSOM AgileConnector.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Upload Documents to Document Set** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------|---|
| Configuration | Opens the Following Window: Upload Document Set Configuration Window Purpose of this Window: Specifies the details for uploading one or more documents to the document set. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Upload Document Set Configuration Window

Specifies the details for uploading one or more documents to the document set.

| Upload Document Set Configuration | × |
|---|---|
| Upload Documents To Document Set | |
| Upload Document Set Configuration Site URL (e.g. http://Machine_Name:port/sites/SiteName): | |
| http://demo3:8000 | |
| Document Library Name: | |
| Marketing | |
| Document Set: | |
| User Registration | |
| Filter: | |
| ** | |
| LocalPath: | |
| C:\Marketing | |
| ✓ OverWriteFile ✓ Recursive ✓ OK ✓ Cancel | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Upload Documents to Document Set** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the UploadDocSetConfiguration field, click the Ellipses button.

| Field Name | Definition |
|------------|--|
| Site URL | Definition: Specifies the URL for your SharePoint site. |
| | Allowed Values: A valid SharePoint site URL. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |
| | Example: |

| Field Name | Definition |
|-----------------------|---|
| | http://mysharepoint:8000/sites/\${mysite} |
| Document Library Name | Definition: Specifies the name of the SharePoint document library. Allowed Values: A valid SharePoint document library name. Default Value: None Custom Attributes: |
| Document Set | Definition: Specifies the name of the document set. Allowed Values: The name of your document set. Default Value: None Custom Attributes: Yes |
| Filter | Definition: Specifies the file name or a set of files expressed using the filter expression you want to search within the specified source location. For example, files to be downloaded by the Download Files AgilePart, to be uploaded by the Upload Files AgilePart, or to be converted to PDF by the PDF Converter AgilePart. Allowed Values: A file name. A filter string that uses asterisks (*) as wildcards. Default Value: None Custom Attributes: No Example: |

| Field Name | Definition |
|------------|--|
| | Following are some examples of filter expressions: |
| | *.* - All files are searched. |
| | *.xml - The files that have the .xml file extension are searched. |
| | *.doc - The files that have the .doc file extension are searched. |
| | MyFile.xml - Only the specific file MyFile.xml is searched. |
| | The filter action is performed at the source location, that vary depending upon the AgileShape. |
| LocalPath | Definition: |
| | Specifies the location of the file system folder on the local computer where the AgileShape performs the certain action such as uploading or downloading files. |
| | This property defines the source location for the files to be uploaded and the destination location for the files to be downloaded. |
| | Allowed Values: |
| | A file path relative to the AgilePoint Server application's root directory. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | If AgilePoint Server is installed at: |
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | And, the file once downloaded is to be located at: |
| | c:\Inetpub\wwwroot\AgilePointServer\files \MyFile.txt |
| | Then, the LocalPath property must be set to the following value: |
| | files |
| | If AgilePoint Server is installed at: |
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | And, the file once downloaded is to be located at: |

| Field Name | Definition |
|---------------|--|
| | c:\Inetpub\wwwroot\AgilePointServer\files\temp \MyFile.txt Then, the LocalPath property must be set to the following value: files\temp |
| OverWriteFile | Definition: Specifies whether the AgileShape overwrites the files that exist in the specified destination. Allowed Values: • Deselected - The AgileShape does not overwrite existing files. • Selected - The AgileShape overwrites files i with the same name in the destination. Default Value: Deselected |
| Recursive | Definition: Determines whether the AgileShape's specified action — such as copying, uploading, or deleting — is recursive. In other words, it determines whether the action is repeated in subfolders of the target folder or document library. Allowed Values: Deselected - The AgileShape performs the action only on the files located at the specified source folder. Files within subfolders aren't affected. Selected - The AgileShape performs the action on the files located at the specified source folder. Files within subfolders aren't affected. |
| | Default Value: Deselected |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Uploading Documents to Document Set

To upload documents from the AgilePoint Server machine to a document set, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Upload Documents to Document Set** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **UploadDocSetConfiguration** field, click the **Ellipses** button.

Instructions

1. On the **Upload Document Set Configuration** window, complete the following fields as required:

| Field Name | Definition |
|-----------------------|--|
| Site URL | Definition: Specifies the URL for your SharePoint site. |
| | Allowed Values: A valid SharePoint site URL. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |
| | Example: http://mysharepoint:8000/sites/\${mysite} |
| Document Library Name | Definition: Specifies the name of the SharePoint document library. |
| | Allowed Values: A valid SharePoint document library name. |

| Field Name | Definition |
|--------------|--|
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Document Set | Definition: |
| | Specifies the name of the document set. |
| | Allowed Values: |
| | The name of your document set. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Vac |
| | 165 |
| LocalPath | Definition: |
| | Specifies the location of the file system folder on the local computer where the AgileShape performs the certain action such as uploading or downloading files. |
| | This property defines the source location for the files to be uploaded and the destination location for the files to be downloaded. |
| | Allowed Values: |
| | A file path relative to the AgilePoint Server application's root directory. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | If AgilePoint Server is installed at: |
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | And, the file once downloaded is to be located at: |
| | c:\Inetpub\wwwroot\AgilePointServer\files \MyFile.txt |

| Field Name | Definition |
|------------|--|
| | Then, the LocalPath property must be set to the following value: |
| | files |
| | If AgilePoint Server is installed at: |
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | And, the file once downloaded is to be located at: |
| | c:\Inetpub\wwwroot\AgilePointServer\files \temp\MyFile.txt |
| | Then, the LocalPath property must be set to the following value: |
| | files\temp |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - Upload Documents to Document Set
 - AgilePart Common Setup

Upload Files

An AgilePart that uploads files from the local file system on the AgilePoint Server machine to SharePoint.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the **SharePoint** stencil, drag the **Upload Files** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|-----------------------|---|
| DeleteFileAfterUpload | Definition: |
| | Specifies whether to delete the files from the source directory after upload. |

| Field Name | Definition |
|----------------|--|
| | Allowed Values: |
| | True - The AgileShape deletes the files from the source folder and sub folders after uploading to SharePoint. |
| | False - The AgileShape does not delete the files from the source folder and sub folders after uploading to SharePoint. |
| | Default Value: |
| | False |
| | Custom Attributes: |
| | Yes |
| DestinationURL | Definition: |
| | Specifies the destination URL for the SharePoint document library or sub folder where the files are uploaded. |
| | Allowed Values: |
| | A valid SharePoint document library or folder URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | http://[machine name]:[port]/sites/[site name]/ [document library name] |
| | http://[machine name]:[port]/sites/[site name]/ [document library name]/[folder name] |
| Filter | Definition: |
| | Specifies the file name or a set of files expressed using the filter expression you want to search within the specified source location. For example, files to be downloaded by the Download Files AgilePart, to be uploaded by the Upload Files AgilePart, or to be converted to PDF by the PDF Converter AgilePart. |
| | Allowed Values: |
| | • A file name. |
| | A filter string that uses asterisks (*) as wildcards. |
| | Default Value: |

| Field Name | Definition |
|------------|--|
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | Following are some examples of filter expressions: |
| | *.* - All files are searched. |
| | *.xml - The files that have the .xml file extension are searched. |
| | *.doc - The files that have the .doc file extension are searched. |
| | MyFile.xml - Only the specific file MyFile.xml is searched. |
| | The filter action is performed at the source location, that vary depending upon the AgileShape. |
| LocalPath | Definition: |
| | Specifies the location of the file system folder on the local computer where the AgileShape performs the certain action such as uploading or downloading files. |
| | This property defines the source location for the files to be uploaded and the destination location for the files to be downloaded. |
| | Allowed Values: |
| | A file path relative to the AgilePoint Server application's root directory. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | If AgilePoint Server is installed at: |
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | And, the file once downloaded is to be located at: |
| | c:\Inetpub\wwwroot\AgilePointServer\files \MyFile.txt |
| | Then, the LocalPath property must be set to the following value: |

| Field Name | Definition |
|---------------|---|
| | files |
| OverWriteFile | <u>Definition:</u> Specifies whether the AgileShape overwrites the files if they already exist at the specified destination location. <u>Allowed Values:</u> False - The AgileShape does not overwrite any existing file. True - The AgileShape overwrites the file if it exists with the same name at the destination location. <u>Default Value:</u> False |
| Recursive | Definition: Determines whether the AgileShape's specified action - such as copying, uploading, or deleting - is recursive. In other words, it determines whether the action is repeated in subfolders of the target folder or document library. Allowed Values: False - The AgileShape performs the action only on the files located at the specified source folder. Files within subfolders aren't affected. True - The AgileShape performs the action on the files located at the specified source folder, as well as the files that are located within the subfolders. Default Value: False |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Uploading Files to SharePoint

To upload files from the AgilePoint Server machine to a SharePoint library or folder, do the following.

Prerequisites

• A process model that uses a SharePoint compatible process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. On the SharePoint stencil, drag the Download Files AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following required properties for the **Upload Files** AgileShape:

| Field Name | Definition |
|----------------|--|
| DestinationURL | Definition: Specifies the destination URL for the SharePoint document library or sub folder where the files are uploaded. <u>Allowed Values:</u> |

| Field Name | Definition |
|------------|--|
| | A valid SharePoint document library or folder URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | http://[machine name]:[port]/sites/[site name]/ [document library name] |
| | http://[machine name]:[port]/sites/[site name]/ [document library name]/[folder name] |
| LocalPath | Definition: |
| | Specifies the location of the file system folder on the local computer where the AgileShape performs the certain action such as uploading or downloading files. |
| | This property defines the source location for the files to be uploaded and the destination location for the files to be downloaded. |
| | Allowed Values: |
| | A file path relative to the AgilePoint Server application's root directory. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | If AgilePoint Server is installed at: |
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | And, the file once downloaded is to be located at: |
| | c:\Inetpub\wwwroot\AgilePointServer\files \MyFile.txt |
| | Then, the LocalPath property must be set to the following value: |
| | files |
| | If AgilePoint Server is installed at: |

| Field Name | Definition |
|------------|--|
| | c:\Inetpub\wwwroot\AgilePointServer\ |
| | And, the file once downloaded is to be located at: |
| | c:\Inetpub\wwwroot\AgilePointServer\files \temp\MyFile.txt |
| | Then, the LocalPath property must be set to the following value: |
| | files\temp |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - Upload Files
 - AgilePart Common Setup

Advanced Extension

This section describes the AgileShapes in the Advanced Extension stencil.

C#

An AgilePart that adds managed custom code using the C# programming language.



Good to Know

• You can use custom classes with this AgileShape. For more information, see Setting Up Custom Classes in C# and Visual Basic

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Advanced Extension stencil.
- 3. On the Advanced Extension stencil, drag the Managed Code C# AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|-------------|--|
| CodeSnippet | Opens the Following Window: Managed Code CSharp Snippet Window |
| | Purpose of this Window: Builds and compiles the managed code snippet. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Managed Code CSharp Snippet Window

Builds and compiles the managed code snippet.

| Managed Code CSharp Snippet 📃 🗆 🗙 |
|---|
| Managed Code CSharp Snippet |
| AnagedCode.CSharpCodeSnippet |
| <pre>1 = using System; 2 using System.Collections; 3 using System.Data; 4 using System.Mat; 5 using System.Xml; 5 using System.Net; 6 using System.IO; 7 using System.Text; 8 using System.Linq; 9 using Ascentn.Workflow.Base; 10 11 namespace ManagedCode 12 = { 13 public class CSharpCodeSnippet 14 = { 15 // Invoke method is this class's entry point *</pre> |
| Line Col Message |
| Compile VK XCancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Advanced Extension stencil.
- 3. On the Advanced Extension stencil, drag the Managed Code C# AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **CodeSnippet** field, click the **Ellipses** button.

| Field Name | Definition |
|-----------------|-------------|
| Class Name List | Definition: |

| Field Name | Definition |
|----------------------|--|
| | Specifies the list of classes in the managed C# code window. |
| | Allowed Values: |
| | Read only. |
| Method Name List | Definition: |
| | Displays the list of methods in the selected class. |
| | Allowed Values: |
| | Read only. |
| Managed Code Snippet | Definition: |
| | Specifies your C# code in the editor. |
| | Allowed Values: |
| | A valid C# code snippet. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Errors | Definition: |
| | Displays the list of errors identified during code complication. |
| | Allowed Values: |
| | Read only. |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Setting Up Custom Classes in C# and Visual Basic

The Managed Code C# and Managed Code VB AgileParts allow developers to add custom classes to their code snippets. To set up support for custom classes, do the following.

Instructions

- 1. Create a custom assembly as a class library using managed code C# or managed code VB.
- 2. Deploy the custom assembly to the GAC on all AgilePoint Server and Envision machines.
- 3. In a text editor, create a new file.

4. In the text file, paste the following:

- 5. Replace the information in the **<Assembly>** element with the correct information for your assembly. You can add as many Assembly nodes as required.
- 6. Save the file with the name **CustomAssembly.xml**.
- 7. Place a copy of the file in all of the following locations:
 - The root installation folder for AgilePoint Server.
 - The GAC of the AgilePoint Server machine.

This information refers to the assembly **Infragistics2.WebUI.Misc.v8.1.dll**, and not to the CustomAssembly.xml file.

- The root installation folder for each AgilePoint Envision instance where the custom classes will be used.
- The GAC of each AgilePoint Envision machine.

This information refers to the assembly Infragistics2.WebUI.Misc.v8.1.dll, and not to the CustomAssembly.xml file.

External Command

An AgilePart that specifies a command line action, such as a DOS or UNIX command, that is initiated from a process.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Advanced Extension stencil.
- 3. On the **Advanced Extension** stencil, drag the **External Command** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
Properties for This AgileShape

| Field Name | Definition |
|------------|---|
| Configure | Opens the Following Window: Configuration for Calling External Command Window Purpose of this Window: Specifies the details for calling an external command. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Calling External Command Window

Specifies the details for calling an external command.

| nfiguration for Calling External Command | × |
|---|----------|
| Configuration for Calling External Command | |
| Environment Variable : (For example : path = C:\ , one line for each variable) | |
| | |
| | 🧕 Search |
| Command: | |
| | |
| Arguments: | 1 |
| | |
| | 🖌 ок |
| Return Value: \${ } (Get console output value. Optional) | |
| Timeout: 10 🛨 Second(s) | 🔀 Cancel |
| | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Advanced Extension stencil.
- 3. On the **Advanced Extension** stencil, drag the **External Command** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|----------------------|---|
| Environment Variable | <u>Definition:</u> Specifies set of dynamic named values that affects the way running processes will behave on a computer. <u>Allowed Values:</u> A valid existing or defined environment variable in the system. |

| Field Name | Definition |
|--------------|--|
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | Path |
| Command | Definition: Specifies command or executable to run. |
| | Allowed Values: |
| | A valid command or executable name. |
| | <u>Default Value:</u> |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | CMD |
| Arguments | Definition: |
| | Specifies the parameters required to complete the command. |
| | Allowed Values: |
| | A valid argument for the specified command. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | DIR |
| Return Value | Definition: |
| | Stores output in specified custom attribute. |
| | Allowed Values: |
| | A valid custom attribute name. |
| | Default Value: |

| Field Name | Definition |
|------------|---|
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | OutputCustAttr |
| Timeout | Definition: Specifies the time to complete execution of the specified command. Allowed Values: Numeric number in seconds. Default Value: 10 Custom Attributes: No |

Java

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This AgileShape can be used to run a Java application.

Note: This AgileShape has been deprecated. Beginning with AgilePoint BPMS v5.0 SP4 this AgileShape is available only through the Traditional AgileShape stencils, and not through the current stencils.

Note: The Java AgilePart can only integrate with Java startup classes.

Note: The Java runtime environment must be installed on the process participant's machine.

Properties for This AgilePart

| Field Name | Definition |
|------------|---|
| Configure | Opens the Configuration for Invoking Java Program Window dialog box, where you can configure the details for invoking the Java program. |

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Configuration for Invoking Java Program Window

This window allows the process modeler to configure the details for invoking the Java program.

| Configuration for Invoking Java Program | × |
|---|--------------------|
| Configuration for Invoking Java Program | |
| Please install java development kit and deploy "java_home", "path=%java_home%\bin;", " automatically add the folder where startup class locate so as to ensure normally start. | "classpath". It |
| Class Libraries Path : | 🚑 Add Class Folder |
| | Jar Add JAR File |
| Startup Class : | |
| | 🧕 Search |
| Return Value : \${ Get console output value. Optional) Timeout : 10 Second(s) | ✓ OK X Cancel |

- 1. Click the **Search** button to add a class that contains the main method for the startup class. It automatically adds the folder where the startup class is located to ensure normal startup as shown above.
- 2. Add all the libraries and/or class folders that the startup class requires by clicking either the Add Class Folder or Add External JAR button.
- 3. Enter a custom parameter name for the output value in the "**Return Value**" text box. This is an optional step and only returns the console output value.
- 4. To limit the run time, input the number of seconds before timeout.
- 5. Click **OK** when finished with the configuration.

Pass Milestone

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

Example

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

Parent Process



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Advanced Extension stencil.
- 3. On the **Advanced Extension** stencil, drag the **PassMilestone** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|-------------|
| Name | Definition: |

| Field Name | Definition |
|------------|--|
| | A name that identifies the Pass Milestone for use with the Wait for Milestone AgilePart. |
| | Allowed Values: |
| | A valid name for the Pass Milestone shape |
| | Default Value: |
| | PassMilestone.1 |
| | Custom Attributes: |
| | No |

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Sequential Workflow

This AgileShape can be used to expose your Microsoft Windows Workflow Foundation assets at the AgilePoint process layer.



Note: This AgileShape has been deprecated. Beginning with AgilePoint BPMS v5.0 SP4 this AgileShape is available only through the Traditional AgileShape stencils, and not through the current stencils.

Properties for This AgilePart

| Field Name | Definition |
|------------|---|
| Configure | Opens the Workflow Foundation Assembly dialog box, where you can configure the details for invoking Windows Workflow Foundation activities. |
| Timeout | Default value: 600 |

| Field Name | Definition |
|------------|--|
| | Specifies the maximum amount of time (in seconds) that should be allowed for the completion of the web service call for this AgileShape. |

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Workflow Foundation Assembly Window

This window allows the process modeler to configure the details for invoking Windows Workflow Foundation activities.

1. Click the **Ellipses** button to open the Workflow Foundation Assembly window.

| rkflow Foundation Assembly | | |
|---|--|--|
| Workflow Foundation Assembly | | |
| Assembly Name: | | |
| 1 | Co Browse | |
| Class Name: | | |
| Toput Parameters: | | |
| Wierceaft Norkflow | àgileDoint | |
| Output Parameters: | | |
| Nicrosoft Workflow | AgilePoint | |
| | ✓ ок | |
| Sequential Workflow requires AgileConnector fo Get help for setting up AgileConnector for Micros | or Workflow Foundation Runtime on AgilePoint Server. | |



Note: The Sequential Workflow should be built and its assembly needs to be generated before this AgilePart can be configured.

- 2. Click Browse, the following two choices are available:
 - Workflow Assembly in a folder
 - Workflow Assembly in GAC

The Sequential Workflow assembly can be either in the GAC or in a folder. If it is in a folder, it will be added into the GAC automatically when the Sequential Workflow AgilePart is configured.

- 3. Choose a workflow assembly.
- 4. Configure the "Input Parameters" and "Output Parameters".
- 5. Click OK.

VB

An AgilePart that adds managed custom code using the Visual Basic coding language.



Good to Know

• You can use custom classes with this AgileShape. For more information, see Setting Up Custom Classes in C# and Visual Basic

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Advanced Extension stencil.
- 3. On the Advanced Extension stencil, drag the Managed Code VB AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|-------------|---|
| CodeSnippet | Opens the Following Window: Managed Code VB Snippet Window |
| | Purpose of this Window: |

| Field Name | Definition |
|------------|---|
| | Sets up and compiles the Visual Basic managed code snippet. |

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Managed Code VB Snippet Window

Sets up and compiles the Visual Basic managed code snippet.

| Managed Code VB Snippet | |
|--|--|
| Managed Code VB Snippet | |
| A ManagedCode.VBCodeSnippet | Invoke(WFProcessInstance, WFAutomaticWorkItem, IWFAPI, 1 🖃 |
| 1 Imports System 2 Imports System.Collections 3 Imports System.Data 4 Imports System.Nata 4 Imports System.Xml 5 Imports System.Net 6 Imports System.IO 7 Imports System.Text 8 Imports System.Linq 9 Imports Ascentn.Workflow.Base 10 11 11 Namespace ManagedCode 12 Public Class VBCodeSnippet 13 'Invoke method is this class 14 Public Sub Invoke(| 's entry point |
| Line Col Message | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Advanced Extension stencil.
- 3. On the Advanced Extension stencil, drag the Managed Code VB AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **CodeSnippet** field, click the **Ellipses** button.

| Field Name | Definition |
|-----------------|--|
| Class Name List | Definition: |
| | Displays the list of Visual Basic classes. |

| Field Name | Definition |
|----------------------|--|
| | Allowed Values: |
| | Read only. |
| Method Name List | Definition: |
| | |
| | Allowed Values: |
| | Read only. |
| Managed Code Snippet | <u>Definition:</u> Allows you to write Visual Basic code in the editor. |
| | Allowed Values: |
| | Valid Visual Basic software code. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Errors | Definition: Displays the list of errors identified during code complication. |
| | Allowed Values: |
| | Read only. |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Setting Up Custom Classes in C# and Visual Basic

The Managed Code C# and Managed Code VB AgileParts allow developers to add custom classes to their code snippets. To set up support for custom classes, do the following.

Instructions

- 1. Create a custom assembly as a class library using managed code C# or managed code VB.
- 2. Deploy the custom assembly to the GAC on all AgilePoint Server and Envision machines.
- 3. In a text editor, create a new file.
- 4. In the text file, paste the following:

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
<assemblies>
```

- 5. Replace the information in the **<Assembly>** element with the correct information for your assembly. You can add as many Assembly nodes as required.
- 6. Save the file with the name **CustomAssembly.xml**.
- 7. Place a copy of the file in all of the following locations:
 - The root installation folder for AgilePoint Server.
 - The GAC of the AgilePoint Server machine.

This information refers to the assembly **Infragistics2.WebUI.Misc.v8.1.dll**, and not to the CustomAssembly.xml file.

- The root installation folder for each AgilePoint Envision instance where the custom classes will be used.
- The GAC of each AgilePoint Envision machine.

This information refers to the assembly **Infragistics2.WebUI.Misc.v8.1.dll**, and not to the CustomAssembly.xml file.

Wait For Milestone

An AgilePart that, when used in conjunction with the Pass Milestone AgileSha[e, can enable a process to wait for an event that is not within the direct process flow, and then continue once the event is complete.

For example, if an activity cannot start within a process until an approval occurs in a subprocess, there is now a way to regulate the process flow based on that event. The Pass Milestone and Wait for Milestone AgileParts work together in a caller/listener model to support this functionality.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Advanced Extension stencil.
- 3. On the **Advanced Extension** stencil, drag the **WaitForMilestone** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|---------------|---|
| Configuration | Opens the Following Window: Wait For Milestone Configuration Window Purpose of this Window: Specifies the event for which you want the process to wait. |
| Number | Definition: Specifies the number of Milestones to be passed in order to complete the Wait Milestone activity. Allowed Values: Any integer. Default Value: 1 Custom Attributes: No |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Wait For Milestone Configuration Window

Specifies the event for which you want the process to wait.

| Wait For Milestone Configuration | × |
|--|--|
| Configure Milestone activity to wait | for |
| Process Templates on AgilePoint Server: Drawing2 | Milestone activities in the process template: WaitForMilestone.2 (WaitForMilestone.2) |
| | 🥪 OK 🔀 Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Advanced Extension stencil.
- 3. On the **Advanced Extension** stencil, drag the **WaitForMilestone** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

| Field Name | Definition |
|--|--|
| Process Templates on AgilePoint Server | <u>Definition:</u> Specifies the process template with the Pass Milestone shape for which you want the current shape to wait. |

| Field Name | Definition |
|--|--|
| | Allowed Values: |
| | A valid process model name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Milestone activities in the process template | Definition: |
| | Specifies the Pass Milestone shape for which you want to wait. |
| | Allowed Values: |
| | A Pass Milestone name in the list. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |

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Note: This AgileShape has been deprecated. Beginning with AgilePoint BPMS v5.0 SP4 this AgileShape is available only through the Traditional AgileShape stencils, and not through the current stencils.

Web Services

This section describes the AgileShapes in the Web Services stencil.

Web Service

An AgilePart that calls a web service method from an AgilePoint process. You can select and configure the method call by connecting to a web service URI.

Good to Know

• You cannot use overloaded methods or circular type refs.



Prerequisites

• A valid Web Service — for example a live, valid WSDL file.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. On the **Web Services** stencil, drag the **Web Service** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|---|
| Configure | Opens the Following Window: Web Service Configuration Window Purpose of this Window: Specifies the web service method to call at runtime. |
| Credential | Opens the Following Window: Login Window Purpose of this Window: Specifies the authentication credentials to run a web service method at runtime. |
| Proxy | Opens the Following Window: Configure Proxy Server Window Purpose of this Window: Specifies a proxy server used to connect to the web service. This bypasses the permission constraints on the local machine at runtime. |
| Timeout | Definition: Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape. |

| Field Name | Definition |
|-------------------------|---|
| | Allowed Values: |
| | Any positive integer. |
| | Default Value: |
| | 600 |
| | Custom Attributes: |
| | No |
| XmlSerializeReturnValue | <u>Definition:</u> Determines whether to serialize as XML the data returned by the web service method called by the AgileShape. <u>Allowed Values:</u> False - The return value is stored into the service seturned by the |
| | custom attribute exactly as returned by the web service. |
| | • True - The return value is serialized into an XML string before being stored into the custom attribute exactly as returned by the web service. |
| | Default Value: |
| | False |

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Web Service Configuration Window

Specifies the web service method to call at runtime.

| Web Service Configuration | × |
|---|----------|
| Web Service Configuration | |
| URL: Enter a web service URL or select from this list | 📑 uddi 🔬 |
| Method: | |
| Parameters Return Output | |
| | - |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| Server URL Key or Custom Attribute Name \$ or \${} | |
| Enter a Server Key stored in AgilePoint Web Configuration file or custom attribute na | |
| 🥪 OK 🔀 Cancel | |

Prerequisites

• A valid Web Service — for example a live, valid WSDL file.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. On the **Web Services** stencil, drag the **Web Service** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|--|
| uddi | Opens the Following Window: Web Service Explorer Window Purpose of this Window: Finds and selects a web service using the Universal Description Discovery and Integration (UDDI) standard. |
| URL | Definition: Specifies the URL of the web service to which you want to connect at design time. This web service is used to populate the Method list. This may be the production URL for your web service, or it may be a URL in a development environment. Allowed Values: A valid web service URL. Default Value: None Custom Attributes: No |
| Connect | <u>Function:</u> Retrieves the list of methods for the specified web service. |
| Method | Definition: Specifies the name of the method you want to call. Allowed Values: Any method name. Default Value: None Custom Attributes: No |
| Parameters | Definition: |

| Field Name | Definition |
|---------------|--|
| | Specifies the values for the parameters. |
| | Allowed Values: |
| | A parameter value or variable. |
| | Note the following: |
| | You can change the value by double-clicking the parameter name. You may need pause briefly between clicks for the field to enter edit mode. |
| | You can use an XPath to a schema element as a parameter value if the process has the associated schema. |
| | Default Value: |
| | A custom attribute based on the parameter name. |
| | Custom Attributes: |
| | Yes |
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. Image: Instant the process template has an associated schema, the Schema button appears. |
| Return Output | Definition: |
| | Specifies the expected return data. |
| | Allowed Values: |
| | A parameter value or variable. |
| | You can change the value by double-clicking the parameter name. |
| | Note: You may need pause briefly between clicks for the field to enter edit mode. |
| | Default Value: |
| | A custom attribute based on the parameter name. |
| | Custom Attributes: |
| | res |

| Field Name | Definition |
|---|--|
| Serialize Return as XML String | Definition: Determines whether to serialize as XML the data returned by the web service method called by the AgileShape. Allowed Values: False - The return value is stored into the custom attribute exactly as returned by the web service. True - The return value is serialized into an XML string before being stored into the custom attribute exactly as returned by the web service. Default Value: Ealse |
| Server URL Key or Custom Attribute Name | Definition: Specifies the location of the web service to which you want to connect at runtime. This is the location of the web service in your production environment. Allowed Values: A web service URL - The URL of your production web service. A custom attribute - A custom attribute that stores the web service URL. A shared custom attribute - A shared custom attribute that stores the web service URL. Default Value: None Custom Attributes: Yes |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Configure Proxy Server Window

Specifies a proxy server used to connect to the web service. This bypasses the permission constraints on the local machine at runtime.

| Configure Proxy Server | × |
|------------------------|------------------------|
| Configure P | roxy Server |
| Proxy Server | |
| Host : | CSC-NINE |
| Port : | 13487 |
| Bypass on local : | |
| Credential | |
| Following accord | unt : |
| Domain : | |
| Username : | |
| Password : | |
| O Use AgilePoint | system user at runtime |
| 🔘 Use Default Cre | dential |
| | Reset OK Xancel |

Prerequisites

• A valid Web Service — for example a live, valid WSDL file.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. On the **Web Services** stencil, drag the **Web Service** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Proxy** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|----------------------------------|
| Host | Definition: |
| | Specifies the proxy server name. |

| Field Name | Definition |
|-------------------|--|
| | Allowed Values: |
| | A valid proxy server name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Port | Definition: |
| | Specifies the port number of the proxy server. |
| | Allowed Values: |
| | A valid port number. |
| | Default Value: |
| | 80 |
| | Custom Attributes: |
| | No |
| Bypass on local | Definition: |
| | Specifies whether to bypass the proxy server when the web service exists on the local network. If you select this option, the proxy server is bypassed for the local address, and the client machine connects directly to the web service. |
| | Allowed Values: |
| | • Deselected - The proxy server is not bypassed. |
| | • Selected - The proxy server is bypassed. |
| | Default Value: |
| | Deselected |
| Following account | Definition: |
| | Authenticates using the credentials you specify. |
| | Allowed Values: |
| | Selected - The domain, username and password fields are enabled to fetch the input from an user. |
| | Deselected - Specifies that the logon as current user (AD2008R2\Administrator) option is enabled. |
| | Default Value: |

| Field Name | Definition |
|---------------------------------------|--|
| | Deselected |
| Domain | Definition: The authentication domain for the web service. Allowed Values: A valid domain. Default Value: None |
| | Custom Attributes: No |
| User Name | Definition: Specifies the user name for the web service. Allowed Values: A valid user name. Default Value: None Custom Attributes: No |
| Password | Definition: The password for the authentication account. <u>Allowed Values:</u> A valid password. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |
| Use AgilePoint System User at Runtime | Definition: Specifies whether to use the AgilePoint system user account (usually the same as the AgilePoint Service account) for the action when the process is running. Allowed Values: • Selected - Uses the AgilePoint system user account for the action at runtime. |

| Field Name | Definition |
|------------------------|--|
| | Deselected - Uses the credentials specified on this window at runtime. |
| | Default Value: |
| | Deselected |
| | Custom Attributes: |
| | No |
| Use Default Credential | Definition: |
| | Authenticates using the local machine's Windows user account. |
| | This option can be used with Windows authentication only. |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Calling a Web Service Method from a Process

To associate a method call with the Web Service AgileShape, do the following.

Prerequisites

• A valid Web Service — for example a live, valid WSDL file.

Good to Know

• In some cases, the **type** of the object instance returned by a web method may need to implement the IConvertible interface in order for the web method to be used with the Web Service AgileShape.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. On the Web Services stencil, drag the Web Service AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

Instructions

- 1. On the Web Service Configuration Window, in the URL field enter the URL of the web service to which you want to connect, and click the **Connect** button.
- 2. If you want to connect to a different web service at runtime, in the **Server URL Key or Custom Attribute Name** field, enter the URL, or a custom attribute that represents this value.
- 3. In the Method list, select your web method.

- 4. Complete any additional configuration for this AgileShape according to your requirements:
 - Web Service Configuration Window
 - Web Service
 - AgilePart Common Setup

Web Service Extension (WSE)

An AgilePart that accesses a web service and its methods that are registered in AgilePoint Envision. The Web Service Extension uses SOAP calls over HTTP and allows for schema mapping between the AgilePoint application schema and the web method's request schema.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. On the **Web Services** stencil, drag the **WSE (Web Service Extension)** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|--|
| Configure | Opens the Following Window: WebService Configuration Window - Request Tab - Configures the request settings for a web service method call using the WSE AgileShape. |
| | WebService Configuration Window - Response Tab - Configures the response settings for a web service method call using the WSE AgileShape. |
| | WebService Configuration Window - Security Tab - Configures the security settings for a web service method call using the WSE AgileShape. |
| Credential | Opens the Following Window: Login Window |
| | Purpose of this Window: |

| Field Name | Definition |
|--------------|---|
| | Specifies the authentication credentials to run a web service method at runtime. |
| NeedCallback | Definition: Determines whether the AgileShape exits |
| | immediately after invoking the web service method, or waits until the activity's status is explicitly updated to Complete. |
| | Allowed Values: |
| | • False - The AgileShape invokes its associated .NET method synchronously. The AgileShape exits immediately after invoking the web service method. |
| | True - The AgileShape invokes its associated .NET method asynchronously. The AgileShape exits only after the activity's status is explicitly updated at runtime. This explicit update can be performed manually using AgilePoint Enterprise Manager or automatically by an external system — for example, through a separate application that uses the AgilePoint API to programmatically update the activity's status. |
| | Default Value: |
| | False |
| | Custom Attributes: |
| | No |
| Proxy | Definition: |
| | Specifies a proxy server used to connect to the web service. This bypasses the permission constraints on the local machine at runtime. |
| | Allowed Values: |
| | A valid proxy server. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | http://agilepoint/InternalProxy |
| Timeout | Definition: |

| Field Name | Definition |
|------------|--|
| | Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape. |
| | Allowed Values: |
| | Any positive integer. |
| | Default Value: |
| | 600 |
| | Custom Attributes: |
| | No |

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

WebService Configuration Window - Request Tab

Configures the request settings for a web service method call using the WSE AgileShape.

| bService Configuration | |
|------------------------------------|---------------|
| WebService Configuration | |
| Webservice | |
| Select the URL of the Webservice : | vi 💌 vidi a 💟 |
| C Select the WSDL file : | |
| | |
| WebMethod : | • |
| Endpoint Url : | |
| | |
| Request Response Security | |
| Request Mapping : | |
| Custom Headers : | |
| Add Other Soap Headers | |
| | |
| | |
| | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. On the **Web Services** stencil, drag the **WSE (Web Service Extension)** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|-----------------------------------|--|
| Select the URL of the web service | Definition: |
| | Specifies the URL of your web service. |

| Field Name | Definition |
|----------------------|--|
| | Allowed Values: |
| | A valid web service URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| uddi | Opens the Following Window: Web Service Explorer Window |
| | Burness of this Windows |
| | Finds and selects a web service using the Universal Description Discovery and Integration (UDDI) standard. |
| Select the WSDL file | Definition: Determines whether to use a WSDL file to access the web service method. |
| | Allowed Values: |
| | • Deselected - Specifies to use the URL of your web service. |
| | Selected - Specifies to use the WSDL file to access your web service method. |
| | Use the Ellipses button to browse the WSDL file. Once you select the WSDL file, the correct values are populated in the fields, such as web service method names. |
| | Default Value: |
| | Deselected |
| Connect | <u>Function:</u> Retrieves the list of methods and the endpoint URL for the specified web service. |
| WebMethod | Definition: |
| | Specifies the name of the method you want to call. |
| | Allowed Values: |
| | A valid web method name defined in the specified WCF or web service. |
| | Default Value: |

| Field Name | Definition |
|-----------------|--|
| | None |
| | Example: |
| | StartProcInst |
| Endpoint Url | Definition: Specifies the URL of the endpoint of the web service or WCF service you want to connect. <u>Allowed Values:</u> A valid endpoint URL. <u>Default Value:</u> None However, once a web service is connected, the endpoint URL is populated, if it is defined in the WSDL file |
| | <u>Custom Attributes:</u> No |
| Request Mapping | Definition: Maps the web service request to the AgilePoint process schema. This is required only if the request is passing values to the web method as parameters as data that comes from the process model schema. Allowed Values: Click the Ellipses button to open the Schema Mapper Window. Use this window to map the request to your process schema. Default Value: None |
| Custom Headers | Definition: Specifies the custom headers required for the web service. Custom headers contain application-specific information in the SOAP header. Custom headers are mostly used to provide security information, such as authentication credentials. Allowed Values: |

| Field Name | Definition |
|------------------------|---|
| | Read only - A message is displayed if the custom headers are set for the web service. |
| | Use the Ellipses button to display the custom headers set for the web service. |
| | Example: |
| | Custom Header Value |
| | WSClietInfo.AppName AgilePoint Envision |
| | WSClietInfo.UserName Ap13\Administrator |
| | WSClietInfo.Locale en-us |
| | |
| Add Other Soap Headers | Definition: Determines whether other SOAP headers are to be added. |
| | Allowed Values: |
| | Deselected - Other SOAP headers are not added. |
| | • Selected - Other SOAP headers are added. |
| | When you select the option, the text box becomes available allowing you to specify the required SOAP headers. |
| | Default Value: |
| | Selected |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

WebService Configuration Window - Response Tab

Configures the response settings for a web service method call using the WSE AgileShape.

| bService Configuration | |
|--|----------|
| | |
| Webservice | |
| Select the URL of the Webservice : | |
| C select the WSDL file : | |
| | |
| WebMethod : | |
| | <u> </u> |
| Endpoint Url : | |
| enuect Response Security | |
| atom I have I | |
| Map Response to AgliePoint Schema | |
| | |
| C Store the response in Custom Attribute | |
| 1 | |
| | |
| | |
| | Carrow V |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. On the **Web Services** stencil, drag the **WSE (Web Service Extension)** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|-----------------------------|
| uddi | Opens the Following Window: |
| | Web Service Explorer Window |

| Field Name | Definition |
|-----------------------------------|--|
| | Purpose of this Window: |
| | Finds and selects a web service using the Universal Description Discovery and Integration (UDDI) standard. |
| Select the URL of the web service | Definition: Specifies the URL of your web service. |
| | Allowed Values: |
| | A valid web service URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Select the WSDL file | Definition: Determines whether to use a WSDL file to access |
| | the web service method. |
| | Allowed Values: |
| | Deselected - Specifies to use the URL of your web service. |
| | • Selected - Specifies to use the WSDL file to access your web service method. |
| | Use the Ellipses button to browse the WSDL file. Once you select the WSDL file, the correct values are populated in the fields, such as web service method names. |
| | Default Value: |
| | Deselected |
| Connect | Function: |
| | Retrieves the list of methods and the endpoint URL for the specified web service. |
| WebMethod | Definition: |
| | Specifies the name of the method you want to call. |
| | Allowed Values: |
| | A valid web method name defined in the specified WCF or web service. |
| | Default Value: |

| Field Name | Definition |
|--|---|
| | None |
| | Example: |
| | StartProcInst |
| Endpoint Url | Definition: Specifies the URL of the endpoint of the web service or WCF service you want to connect. |
| | Allowed Values: A valid endpoint URL. |
| | <u>Default Value:</u> None |
| | However, once a web service is connected, the endpoint URL is populated, if it is defined in the WSDL file. |
| | Custom Attributes: |
| | No |
| Map Response to AgilePoint Schema | Definition: |
| | Determines whether the web service response is mapped to the AgilePoint schema. |
| | Allowed Values: |
| | Click the Ellipses button to open the Schema Mapper Window. |
| | Use this window to map the response to your process schema. |
| | Default Value: |
| | None |
| Store the response in Custom Attribute | Definition: Specifies the name of the custom attribute that is used to store the response to a method call. |
| | The call may be to a web service, Web Service Extension, WCF service, or web application, depending upon the context. |
| | Allowed Values: |
| | A custom attribute. |
| | Default Value: |
| | None |
| Field Name | Definition |
|------------|--------------------|
| | Custom Attributes: |
| | Yes |
| | Example: |
| | \${GroupMembers} |

- Data Binding
- Using Process Attributes

WebService Configuration Window - Security Tab

Configures the security settings for a web service method call using the WSE AgileShape.

| WebService Configuration | × |
|------------------------------------|------------|
| WebService Configuration | |
| Webservice | |
| Select the URL of the Webservice : | 💽 uddi 🔿 💟 |
| | |
| C Select the WSDL hile : | |
| WebMethod : | |
| | |
| Endpoint Url : | |
| | |
| Permert Permone Seturity | |
| Request Responde second | 1 |
| ✓ Log SSL Authentication Failures | |
| Client Certificates | |
| | |
| 1 | |
| | |
| | |
| | |
| ≪ ok. | 💥 Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. On the **Web Services** stencil, drag the **WSE (Web Service Extension)** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition | |
|-----------------------------------|--|--|
| uddi | Opens the Following Window: Web Service Explorer Window Purpose of this Window: Finds and selects a web service using the Universal Description Discovery and Integration (UDDI) standard. | |
| Select the URL of the web service | Definition: Specifies the URL of your web service. <u>Allowed Values:</u> A valid web service URL. <u>Default Value:</u> None <u>Custom Attributes:</u> No | |
| Select the WSDL file | <u>Definition:</u> <u>Determines whether to use a WSDL file to access the web service method.</u> <u>Allowed Values:</u> <u>Deselected - Specifies to use the URL of your web service.</u> <u>Selected - Specifies to use the WSDL file to access your web service method.</u> <u>Use the Ellipses button to browse the WSDL file. Once you select the WSDL file, the correct values are populated in the fields, such as web service method names.</u> | |

| Field Name | Definition | |
|---------------------------------|--|--|
| | Default Value: | |
| | Deselected | |
| Connect | Function: | |
| | Retrieves the list of methods and the endpoint URL for the specified web service. | |
| WebMethod | Definition: | |
| | Specifies the name of the method you want to call. | |
| | Allowed Values: | |
| | A valid web method name defined in the specified WCF or web service. | |
| | Default Value: | |
| | None | |
| | Example: | |
| | StartProcInst | |
| Endpoint Url | Definition: | |
| | Specifies the URL of the endpoint of the web service or WCF service you want to connect. | |
| | Allowed Values: | |
| | A valid endpoint URL. | |
| | Default Value: | |
| | None | |
| | However, once a web service is connected, the endpoint URL is populated, if it is defined in the WSDL file. | |
| | Custom Attributes: | |
| | No | |
| Log SSL Authentication Failures | Definition: | |
| | Determines whether to log SSL Client authentication failure. | |
| | Allowed Values: | |
| | • Selected - Errors occurring due to the SSL authentication failure are recorded in an AgilePoint server log. | |
| | For more information, see Where Are the AgilePoint Logs? in the Documentation Library. | |

| Field Name | Definition | |
|---------------------|---|--|
| | Deselected - Errors occurring due to the SSL authentication failure are not logged. Default Value: Selected | |
| Client Certificates | Opens the Following Window: Client Certificates Window Purpose of this Window: Manages client certificates for web service | |

- Data Binding
- Using Process Attributes

Client Certificates Window

Manages client certificates for web service authentication.

| Client Certificates | × |
|----------------------------|----------------|
| Client Certificates | |
| IssuedBy IssuedTo Verified | |
| | Add from file |
| | Add from store |
| | Remove |
| | View |
| 🥪 OK 🔀 Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. On the **Web Services** stencil, drag the **WSE (Web Service Extension)** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. Under the WebService Configuration Window Security Tab, click the Client Certificates Ellipses button.

| Field Name | Definition |
|----------------|---|
| Add from file | Function: Adds a certificate file from your computer. Browse the required file. |
| Add from store | Opens the Following Window: Select Client Certificates Window Purpose of this Window: Selects a client certificate on your machine's local client certificates store. |
| IssuedBy | Definition: Specifies the name of the issuer of the certificate - the certificate issuing authority. Allowed Values: Read only. The values are populated when you add a client certificate. |
| IssuedTo | Definition: Specifies the domain name the certificate has been issued. Allowed Values: Read only. The values are populated when you add a client certificate. |
| Verified | Definition: |

| Field Name | Definition | | |
|------------|--|--|--|
| | Indicates whether the client certificate is verified: | | |
| | • Selected - The client certificate is verified. | | |
| | Deselected - The client certificate is not verified. | | |
| | Allowed Values: | | |
| | Read only. | | |
| | The values are populated when you add a client certificate. | | |
| | You cannot select or deselect the Verified check box. | | |
| Remove | Function: | | |
| | Deletes the selected row from the Client Certificates list. | | |
| View | Function: | | |
| | Displays the detailed information about the SSL certificate, such as the domain name, the validity period, and the issuer. | | |

- Data Binding
- Using Process Attributes

Select Client Certificates Window

Selects a client certificate on your machine's local client certificates store.

| Select Client | Certificates | | | | × |
|---|--------------|----------|----------|-----------|-------------|
| Select a certificate from the following list to add to the Webservice Request | | | | | |
| | | | | | |
| Issued to | Issued by | Intende | Friendly | Expiratio | Location |
| 🔙 WMSv | WMSvc | Server A | None | 2/10/2022 | Not avail |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| 1 | | | | | |
| | r | | | | |
| | | ОК | Cancel | View | Certificate |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. On the **Web Services** stencil, drag the **WSE (Web Service Extension)** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. Under the WebService Configuration Window Security Tab, click the **Client Certificates** Ellipses button.
- 7. On the Client Certificates Window, click Add from store.

| Field Name | Definition |
|------------|---|
| Issued to | Definition: Specifies the domain name the certificate has been issued. <u>Allowed Values:</u> Read only. |
| Issued by | Definition: Specifies the name of the issuer of the certificate - the certificate issuing authority. Allowed Values: |

| Field Name | Definition |
|-------------------|--|
| | Read only. |
| Intended Purposes | Definition: Specifies the purpose of the certificate, such as Server authentication. <u>Allowed Values:</u> Read only. |
| Friendly Name | <u>Definition:</u> Specifies the friendly name for the certificate. <u>Allowed Values:</u> Read only. |
| Expiration Date | <u>Definition:</u> Specifies the date when the certificate validity is terminated. <u>Allowed Values:</u> Read only. |
| Location | Definition: Specifies the information about the geographical location your organization is registered. <u>Allowed Values:</u> Read only. |
| View Certificate | Function: Displays the detailed information about the SSL certificate, such as the domain name, the validity period, and the issuer. |

- Data Binding
- Using Process Attributes

Schema Mapper Window

Maps SharePoint fields, form fields, web methods, or other input sources to an XML schema.

| chema Mapper | | 2 |
|--|----------|------------------|
| data row file fileLeafRef temCount | | myFields |
| | Auto Map | |
| Data Conversion | | |
| C Default Data Conversion | | |
| C Custom Data Conversion | | |
| | Add | i Edit. 💶 Delete |
| L | | V OK X Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - SharePoint
 - Web Services
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - CAML Query
 - WSE (Web Service Extension)
 - WCF (Windows Communication Foundation)
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In one of the following fields, click the **Ellipses** button. The fields that display vary, depending upon the AgsileShape you are using. For example, **Configure**.
- 6. On one of the following windows, under the **Output Mapping** or **Request/Response** tab, click the **Ellipses** button:
 - CAML Query Builder Configuration Window Output Mapping Tab
 - WebService Configuration Window Request Tab
 - WebService Configuration Window Response Tab
 - Configuration for WCF Service Window Request Tab

Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options:

- **Reset All Mappings** Deletes all mappings that have been made in the Schema Mapper for this activity.
- **Remove Invalid Mappings only** Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same.
- **Cancel** Aborts opening the Schema Mapper window.

| Field Name | Definition |
|--|---|
| Mapping Schemas for Request/Response and Process Model | Definition: Maps the schemas for a service's request or response and the AgilePoint schema: CAML query schema for a response and AgilePoint schema WSE service schema for a request/response and the AgilePoint schema WCF service schema for a request/response and the AgilePoint schema WCF service schema for a request/response and the AgilePoint schema The source and the destination schemas are displayed in a tree-view structure in the left and right panes. Allowed Values: Read only - However, the drag and drop operations are supported to map the schemas. Drag a data node from the source schema pane to the destination schema pane: Green line - The data type of source and destination nodes matches. Blue line - The data type of source and destination nodes doesn't match. The data conversion is required to map the schemas. Red line - Specifies that the custom data conversion is required. |
| Automap | <u>Function:</u> Maps all fields in the data source and the process schema that have the same name. |
| No Data Conversion needed | Definition: |

| Field Name | Definition |
|-------------------------|--|
| | Determines whether the data conversion is not required between the source and the destination schema data fields. |
| | Allowed Values: |
| | Deselected - Data conversion is required between the schema data fields. |
| | Selected - Data conversion is not required between the schema data fields. |
| | Default Value: |
| | None |
| | However, the No Data Conversion needed option is selected if the data type of the source and destination schema data fields matches. |
| Default Data Conversion | Definition: |
| | Determines whether the default data conversion is required between the source and the destination schema fields. |
| | Allowed Values: |
| | Deselected - Default data conversion is not required between the schema data fields. |
| | • Selected - Default data conversion is required between the schema data fields. |
| | Default Value: |
| | None |
| | However, the Default Data Conversion option is selected if the data type of the source and destination schema fields doesn't match. |
| Custom Data Conversion | Definition: |
| | Determines whether the custom data conversion is required. You can create your own data conversion types by using the Add button. |
| | Allowed Values: |
| | Deselected - Custom data conversion is not required. |
| | • Selected - Custom data conversion is required. |
| | Default Value: |
| | Deselected |
| Add | Opens the Following Window: |

| Field Name | Definition |
|------------|--|
| | Custom Mapping Code Window <u>Purpose of this Window:</u> Specifies custom C# code that can be used to map fields to an XML schema. |
| Edit | Opens the Following Window: Custom Mapping Code Window Purpose of this Window: Specifies custom C# code that can be used to map fields to an XML schema. |
| Delete | Function: Deletes the selected custom data conversion from the list. |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Calling a Method from a Web Service Extension

To call a method from a Web Service Extension (WSE), do the following.

Prerequisites

• A valid Web Service — for example a live, valid WSDL file.

Good to Know

• In some cases, the **type** of the object instance returned by a web method may need to implement the IConvertible interface in order for the web method to be used with the Web Service AgileShape.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. On the **Web Services** stencil, drag the **WSE (Web Service Extension)** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

Instructions

- 1. To select your web service, do one of the following.
 - To use a web service url:
 - 1. On the WebService Configuration Window, click Select the URL of the Webservice.
 - 2. In **Select the URL of the Webservice** field, enter the URL for your web service, and click the connect button.
 - To use a WSDL file:
 - 1. Click Select the WSDL file.
 - 2. On Select the WSDL file field, click the Ellipses button.
 - 3. Select your WSDL file.
 - 4. Click the connect button.
- 2. In the **WebMethod** list, select your web method.
- 3. If you want to map the outbound data for the web service call to your process schema, on the **Request** tab, complete the following field.

| Request Mapping Def M P rd P rd P rd P rd D f M L U P Def N | efinition: Maps the web service request to the AgilePoint process schema. This is required only if the request is passing values to the web method as parameters as data that comes from the process model schema. Ilowed Values: Click the Ellipses button to open the Schema Mapper Window. Use this window to map the request to your process schema. efault Value: None |
|--|---|

- 4. If you want to map inbound data retrieved from the web service call to your process, click the **Response** tab, and then do one of the following:
 - To map the response to your AgilePoint schema, complete the following field.

| Field Name | Definition |
|-----------------------------------|---|
| Map Response to AgilePoint Schema | Definition: |
| | Determines whether the web service response is mapped to the AgilePoint schema. |

| Field Name | Definition |
|------------|--|
| | Allowed Values: |
| | Click the Ellipses button to open the Schema Mapper Window. |
| | Use this window to map the response to your process schema. |
| | Default Value: |
| | None |

• To map the response to a custom attribute, complete the following field.

| Field Name | Definition |
|---|--|
| Field Name Store the response in Custom Attribute | Definition Definition: Specifies the name of the custom attribute that is used to store the response to a method call. The call may be to a web service, Web Service Extension, WCF service, or web application, depending upon the context. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes Example: |
| | \${GroupMembers} |

- 5. Complete any additional configuration for this AgileShape according to your requirements:
 - Web Service Extension (WSE)
 - WebService Configuration Window Request Tab
 - WebService Configuration Window Response Tab
 - WebService Configuration Window Security Tab
 - AgilePart Common Setup

Windows Communication Foundation (WCF)

An AgilePart that calls services that use Windows Communication Foundation (WCF).



- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. On the **Web Services** stencil, drag the **WCF (Windows Communication Foundation)** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|--------------|--|
| Configure | Opens the Following Window: Configuration for WCF Service Window - Request Tab - Sets up communication with a WCF service. Configuration for WCF Service Window - Response Tab - This dialog box enables you to configure communication with a WCF service. |
| Credential | Opens the Following Window: Login Window Purpose of this Window: Specifies the authentication credentials to run a web service method at runtime. |
| NeedCallback | <u>Definition:</u> Determines whether the AgileShape exits immediately after invoking the web service method, or waits until the activity's status is explicitly updated to Complete. <u>Allowed Values:</u> False - The AgileShape invokes its associated .NET method synchronously. The AgileShape exits immediately after invoking the web service method. True - The AgileShape invokes its associated .NET method asynchronously. The AgileShape exits only after the activity's status |

| Field Name | Definition |
|------------|--|
| | is explicitly updated at runtime. This explicit update can be performed manually using AgilePoint Enterprise Manager or automatically by an external system — for example, through a separate application that uses the AgilePoint API to programmatically update the activity's status. |
| | Default Value: |
| | False |
| | Custom Attributes: |
| | No |
| Timeout | Definition: Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape. |
| | Allowed Values: |
| | Any positive integer. |
| | Default Value: |
| | 600 |
| | Custom Attributes: |
| | No |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for WCF Service Window - Request Tab

Sets up communication with a WCF service.

| Service Config | juration | | | |
|----------------|------------------|-----------|----------|----------|
| \Lambda wc | F Service Config | uration | | |
| WCF Service | | | | |
| | Generate Message | Contracts | | |
| Service URL | | | 🗾 🔁 uddi | o 🗙 💿 |
| Bindings | | | - | |
| EndPoints | | | - | |
| WebMethod | | | • | |
| Endpoint Url | | | | |
| | | | | |
| Request Respo | onse | | | |
| | | | | |
| Request Map | pping | | | |
| | | | | |
| | | | 1. | |
| | | | ≪ ok | K Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. On the **Web Services** stencil, drag the **WCF (Windows Communication Foundation)** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|----------------------------|--|
| Generate Message Contracts | Definition: Determines whether to generate a message contract for the method you are calling. Allowed Values: • Deselected - Message contracts are not generated. • Selected - Message contracts are generated. |
| | Default Value: Deselected |
| uddi | Opens the Following Window: WCF Service Explorer Window Purpose of this Window: Finds and selects a WCF service using the Universal Description Discovery and Integration (UDDI) standard. |
| Service URL | Definition: Specifies the URL of your WCF service. Allowed Values: A valid WCF service URL. Default Value: None Custom Attributes: No Example: • http://demo3:80/agilepointserver/admin.sbc? wsdl In this example, SBC is the extension name for the WCF services, and ?WSDL is the query string that contains all the information such as method names of the specific WCF service. However, you can leave the extension name in the URL, as follows: http://demo2:20/agilepointserver/admin2wcdl |

| Field Name | Definition |
|------------|---|
| Connect | <u>Function:</u> Retrieves the list of methods, data bindings, and service endpoints for the specified WCF service. |
| Bindings | Definition: Specifies the data binding you want to use. The binding defines the communication details required to connect to the WCF endpoint. Allowed Values: WSHttpBinding NetTcpBinding BasicHttpBinding Default Value: None |
| Endpoints | Definition: Specifies the WCF service endpoint you want to connect. Endpoints provide access to the WCF service data. Allowed Values: A list of Endpoints populated from the WSDL file of the WCF service. Default Value: None Example: NetTcpBinding_IWCFWorkflowService |
| WebMethod | Definition: Specifies the name of the method you want to call. Allowed Values: A valid web method name defined in the specified WCF or web service. Default Value: None Example: StartProcInst |

| Field Name | Definition |
|-----------------|---|
| Endpoint Url | Definition: Specifies the URL of the endpoint of the web service or WCF service you want to connect. |
| | Allowed Values: A valid WCF service URL or custom attribute. |
| | Default Value: None |
| | Custom Attributes: No |
| | Example: http://CSC-NINE:7002/AgilePointServer/Workflow |
| Request Mapping | Definition: Specifies whether the request is mapped to the WCF service schema. This is required only if the request is passing values to the web method via parameters as data that comes from the process model schema. |
| | Allowed Values: Click the Ellipses button to open the Schema Mapper Window. |
| | Use this window to map the request to your process schema. |
| | <u>Default Value:</u> None |

- Data Binding
- Using Process Attributes

Configuration for WCF Service Window - Response Tab

This dialog box enables you to configure communication with a WCF service.

| e wa | CF Service Configuration | |
|---------------|---|--------------|
| /CF Service | | |
| Service URL | http://ap28:7000/AgilePointServer/Workflow?wsdl | v 📑 uddi o 🗙 |
| Bindings | NetTopBinding | |
| EndPoints | NetTcpBinding_IWCFWorkflowService | × |
| WebMethod | StartProcInst | × |
| Endpoint Url | http://AP28:7000/AgilePointServer/Workflow | |
| equest Resp | onse | |
| Map Response | onse to AgliePoint Schema | |
| F | (Response Mapped to AglePoint Schema) | |
| C Store the r | response in Custom Attribute | |
| | | 100-1 |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. On the **Web Services** stencil, drag the **WCF (Windows Communication Foundation)** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|----------------------------|---|
| Generate Message Contracts | Definition: Determines whether to generate a message contract for the method you are calling. Allowed Values: • Deselected - Message contracts are not generated. • Selected - Message contracts are generated. |

| Field Name | Definition |
|-------------|---|
| | Default Value: |
| | Deselected |
| uddi | Opens the Following Window: |
| | WCF Service Explorer Window |
| | Purpose of this Window: |
| | Finds and selects a WCF service using the Universal Description Discovery and Integration (UDDI) standard. |
| Service URL | Definition: |
| | Specifies the URL of your WCF service. |
| | Allowed Values: |
| | A valid WCF service URL. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | http://demo3:80/agilepointserver/admin.sbc? wsdl |
| | In this example, SBC is the extension name for the WCF services, and ?WSDL is the query string that contains all the information such as method names of the specific WCF service. |
| | However, you can leave the extension name in the URL, as follows: |
| | http://demo3:80/agilepointserver/admin?wsdl |
| Connect | Function: |
| | Retrieves the list of methods, data bindings, and service endpoints for the specified WCF service. |
| Bindings | Definition: |
| | Specifies the data binding you want to use. |
| | The binding defines the communication details required to connect to the WCF endpoint. |
| | Allowed Values: |
| | WSHttpBinding |

| Field Name | Definition |
|--------------|--|
| | NetTcpBinding |
| | BasicHttpBinding |
| | Default Value: |
| | None |
| Endpoints | Definition: |
| | Specifies the WCF service endpoint you want to connect. |
| | Endpoints provide access to the WCF service data. |
| | Allowed Values: |
| | A list of Endpoints populated from the WSDL file of the WCF service. |
| | <u>Default Value:</u> None |
| | Example: |
| | NetTcpBinding IWCFWorkflowService |
| | |
| WebMethod | Definition: |
| | Specifies the name of the method you want to call. |
| | Allowed Values: |
| | A valid web method name defined in the specified WCF or web service. |
| | Default Value: |
| | None |
| | Example: |
| | StartProcInst |
| Endpoint Url | Definition: |
| | Specifies the URL of the endpoint of the web service or WCF service you want to connect. |
| | Allowed Values: |
| | A valid WCF service URL or custom attribute. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |

| Field Name | Definition |
|--|---|
| | Example: |
| | http://CSC-NINE:7002/AgilePointServer/Workflow |
| Map Response to AgilePoint Schema | Definition: |
| | Maps the data returned from a WCF service call to your process schema. |
| | Allowed Values: |
| | Click the Ellipses button to open the Schema Mapper Window. |
| | Use this window to map the response to your process schema. |
| | Default Value: |
| | None |
| Store the response in Custom Attribute | Definition: |
| | Specifies the name of the custom attribute that is used to store the response to a method call. The call may be to a web service, Web Service Extension, WCF service, or web application, depending upon the context. |
| | Allowed Values: |
| | A custom attribute. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | \${GroupMembers} |

- Data Binding
- Using Process Attributes

WCF Service Explorer Window

Finds and selects a WCF service using the Universal Description Discovery and Integration (UDDI) standard.

| WCF Service Explorer | | × |
|--|--|---|
| WCF Service Explorer | | |
| Authentication | UDDI Server URL http://uddi.microsoft.com/inquire.asmx | |
| Windows Authentication | http://uddi.microsoft.com/inquire.asmx | |
| C None | Searching for wild card character is '%' (%Sample%) | |
| | % | |
| | | |
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| | | |
| | | |
| | | |
| 🧕 Search | OK 🛛 💥 Cance | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. On the **Web Services** stencil, drag the **WCF (Windows Communication Foundation)** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the configuration window, click uddi:

| Field Name | Definition |
|------------------------|--|
| Windows Authentication | Definition: Specifies whether to use the Windows system user credentials to access the UDDI Server. Allowed Values: |

| Field Name | Definition |
|-----------------|---|
| | Windows Authentication - Windows authentication is used. |
| | None - User authentication is not required to access the UDDI Server. |
| | Default Value: |
| | Windows |
| UDDI Server URL | Definition: |
| | Specifies the UDDI server URL where your web service or WCF service is registered. |
| | Allowed Values: |
| | A valid UDDI server URL. |
| | Default Value: |
| | http://uddi.microsoft.com/inquire.asmx |
| | Custom Attributes: |
| | No |
| Searching for | Definition: |
| | Specifies the web service or WCF service you want to search on the UDDI server using the filter expression. |
| | Allowed Values: |
| | A text string used to filter the results. You can use % as a wildcard. |
| | Default Value: |
| | % |
| | Custom Attributes: |
| | No |
| Search | Function: |
| | Locates the specified web service or WCF service on the UDDI server. |

- Data Binding
- Using Process Attributes

Schema Mapper Window

Maps SharePoint fields, form fields, web methods, or other input sources to an XML schema.

| chema Mapper | | |
|--|----------|----------------|
| data row ows_Tite ows_FileLeafRef temCount | | myFields |
| Data Conversion C No Data Conversion needed Default Data Conversion C Custom Data Conversion | Auto Map | dd Edit Delete |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - SharePoint
 - Web Services
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - CAML Query
 - WSE (Web Service Extension)
 - WCF (Windows Communication Foundation)
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. In one of the following fields, click the **Ellipses** button. The fields that display vary, depending upon the AgsileShape you are using. For example, **Configure**.
- 6. On one of the following windows, under the **Output Mapping** or **Request/Response** tab, click the **Ellipses** button:
 - CAML Query Builder Configuration Window Output Mapping Tab

- WebService Configuration Window Request Tab
- WebService Configuration Window Response Tab
- Configuration for WCF Service Window Request Tab
- Configuration for WCF Service Window Response Tab



Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options:

- **Reset All Mappings** Deletes all mappings that have been made in the Schema Mapper for this activity.
- **Remove Invalid Mappings only** Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same.
- **Cancel** Aborts opening the Schema Mapper window.

| Field Name | Definition |
|---|---|
| Field Name Mapping Schemas for Request/Response and Process Model | Definition Definition: Maps the schemas for a service's request or response and the AgilePoint schema: CAML query schema for a response and AgilePoint schema WSE service schema for a request/response and the AgilePoint schema |
| | WCF service schema for a request/response and the AgilePoint schema |
| | displayed in a tree-view structure in the left and right panes. |
| | Allowed Values: |
| | Read only - However, the drag and drop operations are supported to map the schemas. |
| | Drag a data node from the source schema pane to the destination schema pane: |
| | Green line - The data type of source and destination nodes matches. |
| | Blue line - The data type of source and destination nodes doesn't match. The data conversion is required to map the schemas. |
| | Red line - Specifies that the custom data conversion is required. |
| Automap | Function: |

| Field Name | Definition |
|---------------------------|--|
| | Maps all fields in the data source and the process schema that have the same name. |
| No Data Conversion needed | Definition: Determines whether the data conversion is not |
| | schema data fields. |
| | Allowed Values: |
| | Deselected - Data conversion is required between the schema data fields. |
| | Selected - Data conversion is not required between the schema data fields. |
| | Default Value: |
| | None |
| | However, the No Data Conversion needed option is selected if the data type of the source and destination schema data fields matches. |
| Default Data Conversion | Definition: |
| | Determines whether the default data conversion is required between the source and the destination schema fields. |
| | Allowed Values: |
| | • Deselected - Default data conversion is not required between the schema data fields. |
| | • Selected - Default data conversion is required between the schema data fields. |
| | Default Value: |
| | None |
| | However, the Default Data Conversion option is selected if the data type of the source and destination schema fields doesn't match. |
| Custom Data Conversion | Definition: |
| | Determines whether the custom data conversion is required. You can create your own data conversion types by using the Add button. |
| | Allowed Values: |
| | • Deselected - Custom data conversion is not required. |
| | • Selected - Custom data conversion is required. |

| Field Name | Definition |
|------------|---|
| | Default Value: |
| | Deselected |
| Add | Opens the Following Window: |
| | Custom Mapping Code Window |
| | Purpose of this Window: |
| | Specifies custom C# code that can be used to map fields to an XML schema. |
| Edit | Opens the Following Window: |
| | Custom Mapping Code Window |
| | Purpose of this Window: |
| | Specifies custom C# code that can be used to map fields to an XML schema. |
| Delete | Function: |
| | Deletes the selected custom data conversion from the list. |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Calling a Method from a WCF Service

To call a method from a Windows Communication Foundation (WCF) service, do the following.

Prerequisites

• A valid WCF Service.

Good to Know

• In some cases, the **type** of the object instance returned by a web method may need to implement the IConvertible interface in order for the web method to be used with the Web Service AgileShape.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.

- 3. On the **Web Services** stencil, drag the **WCF (Windows Communication Foundation)** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

Instructions

- 1. On the WCF Service Configuration Window, in the Service URL field, enter the URL of your WCF Service, and click the connect button.
- 2. Complete the following fields to set up your web method call:

| Field Name | Definition |
|------------|---|
| Bindings | Definition: Specifies the data binding you want to use. The binding defines the communication details required to connect to the WCF endpoint. |
| | Allowed Values: • WSHttpBinding • NetTcpBinding • BasicHttpBinding <u>Default Value:</u> None |
| Endpoints | Definition: Specifies the WCF service endpoint you want to connect. Endpoints provide access to the WCF service data. Allowed Values: A list of Endpoints populated from the WSDL file of the WCF service. Default Value: None Example: NetTcpBinding_IWCFWorkflowService |
| WebMethod | Definition: Specifies the name of the method you want to call. Allowed Values: |

| Field Name | Definition |
|--------------|--|
| | A valid web method name defined in the specified WCF or web service. |
| | Default Value: |
| | None |
| | Example: |
| | StartProcInst |
| Endpoint Url | Definition: Specifies the URL of the endpoint of the web service or WCF service you want to connect. <u>Allowed Values:</u> A valid WCF service URL or custom attribute. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | http://CSC-NINE:7002/AgilePointServer/Workflow |

3. If you want to map the outbound data for the WCF service call to your process schema, on the **Request** tab, complete the following field.

| Field Name | Definition |
|-----------------|---|
| Request Mapping | Definition: Specifies whether the request is mapped to the WCF service schema. This is required only if the request is passing values to the web method via parameters as data that comes from the process model schema. Allowed Values: Click the Ellipses button to open the Schema Mapper Window. Use this window to map the request to your process schema. Default Value: None |

- 4. If you want to map inbound data retrieved from the WCF service call to your process, click the **Response** tab, and then do one of the following:
 - To map the response to your AgilePoint schema, complete the following field.

| Field Name | Definition |
|-----------------------------------|--|
| Map Response to AgilePoint Schema | Definition: |
| | Maps the data returned from a WCF service call to your process schema. |
| | Allowed Values: |
| | Click the Ellipses button to open the Schema Mapper Window. |
| | Use this window to map the response to your process schema. |
| | Default Value: |
| | None |

• To map the response to a custom attribute, complete the following field.

| Field Name | Definition |
|--|--|
| Store the response in Custom Attribute | Definition: Specifies the name of the custom attribute that is used to store the response to a method call. The call may be to a web service, Web Service Extension, WCF service, or web application, depending upon the context. |
| | Allowed Values: A custom attribute. Default Value: None |
| | <u>Custom Attributes:</u> Yes <u>Example:</u> |
| | \${GroupMembers} |

- 5. Complete any additional configuration for this AgileShape according to your requirements:
 - Windows Communication Foundation (WCF)
 - Configuration for WCF Service Window Request Tab
 - Configuration for WCF Service Window Response Tab
 - AgilePart Common Setup

Exchange Server

This section describes the AgileShapes in the Exchange Server stencil.

Create Appointment

An AgilePart that creates an appointment on a user's Microsoft Outlook calendar.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Exchange Server stencil.
- 3. On the **Exchange Server** stencil, drag the **Create Appointment** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|----------------|--|
| Authentication | <u>Definition:</u> Configure an authentication mode. <u>Allowed Values:</u> <u>SystemUser</u> - Performs authentication using configured system user account. <u>SpecifiedUserAccount</u> - Specifies particular user credential to authenticate. <u>Default Value:</u> |
| | SpecifiedUserAccount |
| Configure | Opens the Following Window: • Appointment Schedule for Exchange Server Window - Authentication Tab - Specifies the configuration for the Create Appointment AgileShape. |

| Field Name | Definition |
|------------|--|
| | Appointment Schedule for Exchange Server Window - Appointment Tab - Specifies the configuration for the Create Appointment AgileShape. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Appointment Schedule for Exchange Server Window - Authentication Tab

Specifies the configuration for the Create Appointment AgileShape.

| Appointment Schedule for Exchange Server | × |
|--|---|
| Appointment Schedule for Exchange Server | |
| Authentication Appointment | |
| User Authentication | |
| Exchange 2003/2007 C Exchange 2010 | |
| | |
| URL: [https://[MachineName]:[Port] | |
| Domain: | |
| Username: | |
| Password: | |
| Use AgilePoint System User | |
| Get help for configuring Microsoft Exchange Server. Mailbox access right | |
| Sector Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Exchange Server stencil.
- 3. On the **Exchange Server** stencil, drag the **Create Appointment** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------------------------------|---|
| Exchange 2003/2007 or Exchange 2010 | <u>Definition:</u> Specifies the version of your Microsoft Exchange Server. |
| Field Name | Definition |
|------------|--|
| | Allowed Values: |
| | Exchange 2003/2007 - Enables to configure this AgileShape to access Exchange Server 2003/2007. |
| | Exchange 2010 - Enables to configure this AgileShape to access Exchange Server 2010. |
| | Default Value: |
| | Exchange 2003/2007 |
| URL | Definition: |
| | Specifies the Exchange Server URL. |
| | Allowed Values: |
| | Exchange 2003/2007 - https://[machine name]: [port] |
| | Exchange 2010 - https://[machine name]:[port]/ EWS/Exchange.asmx |
| | Default Value: |
| | https://[MachineName]:[Port] |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | Exchange 2003/2007 - https:// mydomain.com:2030 |
| | Exchange 2010 - https://mydomain.com:2030/ EWS/Exchange.asmx |
| Domain | Definition: |
| | Determines that a specified account to use to access the Exchange Server. |
| | Allowed Values: |
| | A valid domain name for user to be specified. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Username | Definition: |

| Field Name | Definition |
|----------------------------|---|
| | The user name for an Exchange Server administrator. |
| | Allowed Values: |
| | A valid user name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Password | Definition: |
| | The password for the authentication account. |
| | Allowed Values: |
| | A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Use AgilePoint System User | Definition: |
| | Specifies to use the AgilePoint System User credentials to access the Exchange Server. |
| | The credentials and URL can be verified by clicking the Test button. The Test button is disabled if Use AgilePoint System User is checked. In both cases, make sure that the user has proper access rights to the Exchange Server. |
| | Allowed Values: |
| | Deselected - Specifies particular user credential to authenticate. |
| | Selected - Performs authentication using configured system user account. |
| | Default Value: |
| | Deselected |

Appointment Schedule for Exchange Server Window - Appointment Tab

Specifies the configuration for the Create Appointment AgileShape.

| Appointment Sch | nedule for Exchange Server | × |
|----------------------------|--|---|
| Authentication Subject: | Appointment | |
| Location: Start Time: | 07/08/2012 10:47 PM Recurrence | |
| Time Zone: | Coordinated Universal Time (UTC) | |
| | | |
| Type ''\${'' to g | get the workflow related macros or schema. | |
| | < OK 🔀 Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Exchange Server stencil.
- 3. On the **Exchange Server** stencil, drag the **Create Appointment** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|---|
| Subject | Definition: |
| | The details about the appointment or meeting. |

| Field Name | Definition |
|------------|---|
| | Allowed Values: |
| | A single line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | [Example] |
| Location | Definition: |
| | Specifies location for the appointment. |
| | Allowed Values: |
| | A single line of text. |
| | <u>Default Value:</u> |
| | None |
| | Custom Attributes: |
| | Yes |
| Start Time | Definition: |
| | Specifies starting date and time of the appointment or event. |
| | Allowed Values: |
| | A valid date and time. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | 6/12/2013 7:18:11 AM |
| End Time | Definition: |
| | Specifies ending date and time of the appointment or event. |
| | Allowed Values: |
| | A valid date and time. |

| Field Name | Definition |
|------------|--|
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Time Zone | Definition: |
| | Select time zone for the appointment. |
| | Allowed Values: |
| | A valid time zone. |
| | Default Value: |
| | Coordinated Universal Time (UTC) |
| | Custom Attributes: |
| | No |
| Body | Definition: |
| | The body of the email. Accepts custom attributes and schema by typing \${. |
| | Allowed Values: |
| | Multi-line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | [Example] |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating an Appointment in Microsoft Exchange Server

To create an appointment in Microsoft Exchange Server, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Exchange Server stencil.

- 3. On the **Exchange Server** stencil, drag the **Create Appointment** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

Instructions

- 1. On the Appointment Schedule for Exchange Server window, click the Authentication tab.
- 2. On the Authentication tab, complete the fields as required to set up your Exchange Server authentication.
- 3. Click the Appointment tab.
- 4. On the Appointment tab, complete the fields as required to set up your Exchange Server appointment.
- 5. Complete any additional configuration for this AgileShape according to your requirements:
 - Appointment Schedule for Exchange Server Window Authentication Tab
 - Appointment Schedule for Exchange Server Window Appointment Tab
 - Create Appointment
 - AgilePart Common Setup

Create Meeting

An AgilePart that creates a meeting on a user's Microsoft Outlook calendar



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Exchange Server stencil.
- 3. On the Exchange Server stencil, drag the Create Meeting AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|----------------|--|
| Authentication | Definition: Configure an authentication mode. |
| | Allowed Values: |

| Field Name | Definition |
|------------|---|
| | SystemUser - Performs authentication using configured system user account. |
| | SpecifiedUserAccount - Specifies particular user credential to authenticate. |
| | Default Value: |
| | SpecifiedUserAccount |
| Configure | Opens the Following Window: Meeting Schedule for Exchange Server Window - Authentication Tab - Specifies the authentication mode to be used to access the |
| | and the appointment details. |
| | Meeting Schedule for Exchange Server Window Meeting Tab - Specifies the authentication mode to be used to access the Exchange Server and schedule the appointment and the appointment details. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Meeting Schedule for Exchange Server Window - Authentication Tab

Specifies the authentication mode to be used to access the Exchange Server and schedule the appointment and the appointment details.

| Meeting Schedule for Exchange Server |
|---|
| Meeting Schedule for Exchange Server |
| Authentication Meeting |
| User Authentication |
| ● Exchange 2003/2007 ● Exchange 2010 |
| URL: https://[MachineName]:[Port] |
| Domain: |
| Username: |
| Password: |
| Use AgilePoint System User |
| Get help for configuring Microsoft Exchange Server Mailbox access right |
| |
| V OK K Close |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Exchange Server stencil.
- 3. On the **Exchange Server** stencil, drag the **Create Meeting** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------------------------------|--|
| Exchange 2003/2007 or Exchange 2010 | Definition: Specifies the version of your Microsoft Exchange Server. |

| Field Name | Definition |
|------------|--|
| | Allowed Values: |
| | Exchange 2003/2007 - Enables to configure this AgileShape to access Exchange Server 2003/2007. |
| | • Exchange 2010 - Enables to configure this AgileShape to access Exchange Server 2010. |
| | <u>Default Value:</u> |
| | Exchange 2003/2007 |
| URL | Definition: |
| | Specifies the Exchange Server URL. |
| | Allowed Values: |
| | Exchange 2003/2007 - https://[machine name]: [port] |
| | Exchange 2010 - https://[machine name]:[port]/ EWS/Exchange.asmx |
| | Default Value: |
| | https://[MachineName]:[Port] |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | Exchange 2003/2007 - https:// mydomain.com:2030 |
| | Exchange 2010 - https://mydomain.com:2030/ EWS/Exchange.asmx |
| Domain | Definition: |
| | Determines that a specified account to use to access the Exchange Server. |
| | Allowed Values: |
| | A valid domain name for user to be specified. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Username | Definition: |

| Field Name | Definition |
|----------------------------|---|
| | The user name for an Exchange Server administrator. |
| | Allowed Values: |
| | A valid user name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Password | Definition: |
| | The password for the authentication account. |
| | Allowed Values: |
| | A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Use AgilePoint System User | Definition: |
| | Specifies to use the AgilePoint System User credentials to access the Exchange Server. |
| | The credentials and URL can be verified by clicking the Test button. The Test button is disabled if Use AgilePoint System User is checked. In both cases, make sure that the user has proper access rights to the Exchange Server. |
| | Allowed Values: |
| | Deselected - Specifies particular user credential to authenticate. |
| | Selected - Performs authentication using configured system user account. |
| | Default Value: |
| | Deselected |

Meeting Schedule for Exchange Server Window - Meeting Tab

Specifies the authentication mode to be used to access the Exchange Server and schedule the appointment and the appointment details.

| Meeting Schedule | e for Exchange Server | | × |
|------------------|---|---------------------|--------------------|
| Meetir | ng Schedule for Exchange Server | | |
| Authentication | Meeting | | |
| To: | | | |
| Subject: | | | |
| Location: | | | |
| Start Time: | | 08/08/2012 12:26 AM | <u>R</u> ecurrence |
| End Time: | | 08/08/2012 12:26 AM | · |
| Time Zone: | Coordinated Universal Time (UTC) | • | |
| | | | _ |
| | | | |
| | | | |
| | | | |
| Type "\${" to g | et the workflow related macros or schema. | | |
| | | 쓪 ОК | 🔀 Close |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Exchange Server stencil.
- 3. On the **Exchange Server** stencil, drag the **Create Meeting** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|---|
| То | Definition: |
| | The details about the appointment or meeting. |
| | Allowed Values: |

| Field Name | Definition |
|------------|---|
| | A valid email address. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | [Example] |
| Subject | Definition: |
| | The details about the appointment or meeting. |
| | Allowed Values: |
| | A single line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | [Example] |
| Location | Definition: |
| | Specifies location for the appointment. |
| | Allowed Values: |
| | A single line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Start Time | Definition: |
| | Specifies starting date and time of the appointment |
| | or event. |
| | Allowed Values: |
| | A valid date and time. |
| | Default Value: |
| | None |

| Field Name | Definition |
|------------|---|
| | Custom Attributes: |
| | Yes |
| | Example: |
| | 6/12/2013 7:18:11 AM |
| End Time | Definition: Specifies ending date and time of the appointment or event. |
| | Allowed Values: |
| | A valid date and time. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Time Zone | Definition |
| | Select time zone for the appointment |
| | |
| | A valid time zone |
| | |
| | Coordinated Universal Time (UTC) |
| | |
| | No |
| | |
| Body | Definition: |
| | The body of the email. Accepts custom attributes and schema by typing \${. |
| | Allowed Values: |
| | Multi-line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | [Example] |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a Meeting in Microsoft Exchange Server

To create a meeting in Microsoft Exchange Server, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Exchange Server stencil.
- 3. On the Exchange Server stencil, drag the Create Meeting AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

Instructions

- 1. On the **Meeting Schedule for Exchange Server** window, click the Authentication tab.
- 2. On the Authentication tab, complete the fields as required to set up your Exchange Server authentication.
- 3. Click the Meeting tab.
- 4. Complete the fields as required to set up your Exchange Server meeting.
- 5. Complete any additional configuration for this AgileShape according to your requirements:
 - Meeting Schedule for Exchange Server Window Authentication Tab
 - Meeting Schedule for Exchange Server Window Meeting Tab
 - Create Meeting
 - AgilePart Common Setup

Yammer

This section describes the AgileShapes in the Yammer stencil.

Post Message

An AgilePart that posts a private message to a specified user or a group.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the **Yammer** stencil, drag the **Post Message** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|---|
| Credential | Opens the Following Window: Yammer Credentials Window Purpose of this Window: Specifies the unique identifiers for the Yammer application. |
| Message | Opens the Following Window: Create a Message - Send Private Message Tab - Sets up a message to send to a specified individual. Create a Message - Post in a Group Tab - Sets up a message to send to a specified group. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Create a Message - Send Private Message Tab

Sets up a message to send to a specified individual.

| ۵ | Post Message | x |
|-------------------------|--|---|
| Y € Post I | 1essage to Yammer | |
| Message Send Privat | e Message Post in a Group | |
| Message: Hi i have a | ttached the file |] |
| Add Sile U | du | |
| c:\downloa | n: Ids\Modifydetails.pdf | |
| NOTE: Atta | aching multiple files is not supported. | |
| Response Store the r | esponse Thread Id in Custom Attribute or Schema: | |
| \${/pd:myF | ields/pd:Doc} |] |
| | Second Cancel | |

Navigation

1. In AgilePoint Envision, open a process template.

- 3. On the **Yammer** stencil, drag the **Post Message** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Message** field, click the **Ellipses** button.
- 6. Click the Send Private Message tab.

| Field Name | Definition |
|-------------|---|
| То | Definition: Specifies the user name from the Select Participants Window. <u>Allowed Values:</u> A Yammer user ID. Click the Select User button to select. An AgilePoint user name. A custom attribute that represents a Yammer user ID or AgilePoint user name. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |
| Select User | Opens the Following Window: Select Participants Window Purpose of this Window: Specifies a Yammer user. |
| Message | Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes |

| Field Name | Definition |
|---|--|
| Add File Url | Definition: Specifies the absolute path of the attachment file. The |
| | Allowed Values: An absolute path and file name on the AgilePoint Server or SharePoint Server. Multiple attachments are not supported. Default Value: None Custom Attributes: Yes Example: |
| | c:\My Documents\sample1.doc \${HomeDirectory}\sample2.doc http://demo3:8000/DocumentLib1/sample3.doc |
| Store the response Thread Id in Custom Attribute or Schema | Definition: Specifies the name of the custom attribute that is used to store the response Thread ID. The Thread ID is an identifier used to track a Yammer conversation thread. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes |
| | Example: /pd:myFields/pd:ThreadID |

Create a Message - Post in a Group Tab

Sets up a message to send to a specified group.

| ۵ | Post Message × | | |
|-----------------------------|--|--|--|
| Y≑ | Post Message to Yammer | | |
| Messa Send To: Mes | ge Private Message Post in a Group AP2 If you are using custom attribute, then custom attribute should contain Group ID. asage: have attached the file | | |
| Add | File Url: | | |
| c:\d | ownloads\Modifydetails.pdf | | |
| NO | E: Attaching multiple files is not supported. | | |
| Respo Stor \${/ | Response Store the response Thread Id in Custom Attribute or Schema: \${/pd:myFields/pd:Doc} | | |
| | ✓ OK Cancel | | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the Yammer stencil, drag the Post Message AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Message** field, click the **Ellipses** button.
- 6. Click the **Post in a Group** tab.

| Field Name | Definition |
|-----------------|--|
| Post in a Group | <u>Definition:</u> Post the message to a group. |
| То | Definition: Specifies a group name from the list. Allowed Values: A valid group name. Default Value: None Custom Attributes: Yes |
| Message | Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes |
| Add File Url | Definition: Specifies the absolute path of the attachment file. The Allowed Values: An absolute path and file name on the AgilePoint Server or SharePoint Server. Multiple attachments are not supported. Default Value: None Custom Attributes: Yes |

| Field Name | Definition |
|---|--|
| | Example: • c:\My Documents\sample1.doc • \${HomeDirectory}\sample2.doc • http://demo3:8000/DocumentLib1/sample3.doc |
| Store the response Thread Id in Custom Attribute or Schema | Definition: Specifies the name of the custom attribute that is used to store the response Thread ID. The Thread ID is an identifier used to track a Yammer conversation thread. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes Example: /pd:myFields/pd:ThreadID |

Select Participants Window

Specifies a Yammer user.

| 2 | Select Participants | x |
|-----------------------|---------------------|---|
| Y ≑ sel | ect Yammer Users | |
| Select User Filter | Search | |
| Lily Allen | | |
| | | |
| | | |
| | ✓ OK Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the **Yammer** stencil, drag the **Post Message** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Message** field, click the **Ellipses** button.
- 6. On the Create a Message window, click the Select User button.

| Field Name | Definition |
|------------|--|
| Filter | Definition: |
| | Specifies the user name to search within Yammer network. |
| | Allowed Values: |
| | A single line of text. |
| | You can use asterisks (*) as wildcards. |
| | Default Value: |
| | None |

| Field Name | Definition |
|------------|---|
| | Custom Attributes: |
| | Yes |
| | Example: |
| | The following are some examples of filter expressions: |
| | * - All user names are searched. |
| | • a * - All user names that start with the letter <i>a</i> . |
| | • * a * - All user names that contain the letter <i>a</i> . |
| Search | Function: Performs search operation based on the specified |
| | Criteria. |

Yammer Credentials Window

Specifies the unique identifiers for the Yammer application.

| 2 | Yammer Cred | entials | x |
|---------------------------------|-------------|---------|----------|
| Y Yammer Credentials | | | |
| - Select Global AppSettings Key | | | |
| Application Name : DashB | oard | | ~ |
| Configuration Key : Agilep | pint | | ~ |
| Network Name : AgileP | pint, Inc | | |
| | | 쓪 ок | 🔀 Cancel |

Prerequisites

• You must set up an Enterprise Social Token for the Yammer application.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Yammer** stencil.
- 3. On the Yammer stencil, drag the following AgileShape, and drop it on the process template.
 - Post Message
 - Reply Message
 - Post Attachment
 - Invite User
 - Create User
 - Update User
 - Delete User
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the **Credential field**, click the **Ellipses** button.
- 6. On the **Connecting to Server** window, logon as a registered user to connect to the AgilePoint Server.

| 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 |
| Configuration Key | Definition: Specifies the unique authentication key for your application. This key is associated with an your administrator user account. This key can represent any identifying value for your application. Allowed Values: An alphanumeric string. Default Value: None |

| Field Name | Definition |
|------------|--------------------|
| | Custom Attributes: |
| | No |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Sending a Message in Yammer

To send a message in Yammer to a specified user or a group, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the Yammer stencil, drag the Post Message AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Message** field, click the **Ellipses** button.

Instructions

- 1. Do one of the following:
 - To send a message to an individual user, click the **Send Private Message** tab, and complete the following fields as required.

| Field Name | Value |
|------------|--|
| То | <u>Definition:</u> Specifies the user name from the Select Participants Window. <u>Allowed Values:</u> A Yammer user ID. Click the Select User button to select. An AgilePoint user name. A custom attribute that represents a Yammer user ID or AgilePoint user name. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |
| Message | Definition: |

| Field Name | Value |
|------------|---|
| | Specifies the content of the message. |
| | Allowed Values: |
| | Multiple lines of text in text-only format. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

• To send a message to a group, click the **Post in a Group** tab, and complete the following fields as required.

| Field Name | Value |
|------------|---|
| То | Definition: Specifies a group name from the list. Allowed Values: A valid group name. Default Value: None |
| | <u>Custom Attributes:</u> Yes |
| Message | Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Create a Message Send Private Message Tab
 - Create a Message Post in a Group Tab
 - Post Message

•

- Select Participants Window
- Yammer Credentials Window

Reply Message

An AgilePart that post a reply to a specified message thread in Yammer.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the **Yammer** stencil, drag the **Reply Message** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|---|
| Credential | Opens the Following Window: Yammer Credentials Window Purpose of this Window: |
| | Specifies the unique identifiers for the Yammer application. |
| Message | Opens the Following Window: Reply to Posted Message Window <u>Purpose of this Window:</u> Post a reply to a specified message thread in Yammer. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Reply to Posted Message Window

Post a reply to a specified message thread in Yammer.

| | Reply to Posted Message |
|--------------------|---------------------------------------|
| Y ≑ Reply № | lessage to Yammer |
| Message | |
| Thread Id: | |
| 365783687 | |
| Message: | |
| HI Please ch | eck the attached document |
| Add File Url | : Matife Datain add |
| NOTE: Attac | hing multiple files is not supported. |
| | ✓ OK Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the **Yammer** stencil, drag the **Reply Message** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Message** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|---|
| Thread Id | Definition: Specifies the ID of the Yammer message thread to which you want to post a reply message. Allowed Values: |

| Field Name | Definition |
|--------------|--|
| | A custom attribute. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | \${/pd:myFields/pd:ThreadID} |
| Message | Definition: |
| | Specifies the content of the message. |
| | Allowed Values: |
| | Multiple lines of text in text-only format. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Add File Url | Definition: Specifies the absolute path of the attachment file. The <u>Allowed Values:</u> An absolute path and file name on the AgilePoint Server or SharePoint Server. Multiple attachments are not supported. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes <u>Example:</u> |
| | c:\My Documents\sample1.doc \${HomeDirectory}\sample2.doc http://demo3:8000/DocumentLib1/sample3.doc |
| Schema | Opens the Following Window: Select XPath from Attributes Window |

| Field Name | Definition |
|------------|---|
| | Purpose of this Window: |
| | Enables you to select a schema node from the XML schema for your process. |

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes | × |
|------------------------------|---|
| Select XPath from Attributes | |
| Schema Process Attributes | |
| myFields empName (String) | |
| XPath: DataType: | |
| 🥪 OK 🔀 Cancel | |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.

- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the **Ellipses** button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|--|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: |
| | Read only. Click to select the XML node you want to use. |
| XPath | <u>Definition:</u> Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. |
| | <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. |

| Field Name | Definition |
|------------|---|
| | Note the following: |
| | First, you must select the metadata or attribute you want, and then click OK. |
| | You can select only one metadata or attribute at a time. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Yammer Credentials Window

Specifies the unique identifiers for the Yammer application.

| 2 | Yammer Credentials | × |
|--------------------------------|--------------------|----------|
| Y ← Yammer Credentials | | |
| | | |
| Select Global AppSettings Key | | |
| Application Name : DashBoard | | ¥ |
| Configuration Key : Agilepoint | | ¥ |
| Network Name : AgilePoint, Inc | | |
| | 🔶 ок | 🔀 Cancel |

Prerequisites

• You must set up an Enterprise Social Token for the Yammer application.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the **Yammer** stencil, drag the following AgileShape, and drop it on the process template.
 - Post Message

- Reply Message
- Post Attachment
- Invite User
- Create User
- Update User
- Delete User
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Credential field**, click the **Ellipses** button.
- 6. On the **Connecting to Server** window, logon as a registered user to connect to the AgilePoint Server.

| 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 |
| Configuration Key | Definition: Specifies the unique authentication key for your application. This key is associated with an your administrator user account. This key can represent any identifying value for your application. Allowed Values: An alphanumeric string. Default Value: None Custom Attributes: No |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Replying to a Message in Yammer

To reply to a message Yammer in a Yammer thread, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the **Yammer** stencil, drag the **Reply Message** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Message** field, click the **Ellipses** button.

Instructions

1. On the Reply to Posted Message window, complete the following fields as required:

| Field Name | Value |
|------------|--|
| Thread Id | Definition: Specifies the ID of the Yammer message thread to which you want to post a reply message. |
| | Allowed Values: A custom attribute. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |
| | Example: \${/pd:myFields/pd:ThreadID} |
| Message | Definition: Specifies the content of the message. <u>Allowed Values:</u> Multiple lines of text in text-only format. <u>Default Value:</u> None |
| | Custom Attributes: |

| Field Name | Value |
|------------|-------|
| | Yes |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Reply Message
 - Reply to Posted Message Window
 - Yammer Credentials Window

Post Attachment

An AgilePart that posts an attachment to a specified user or a group.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Yammer** stencil.
- 3. On the **Yammer** stencil, drag the **Post Attachment** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-------------|--|
| Credential | Opens the Following Window: Yammer Credentials Window Purpose of this Window: Specifies the unique identifiers for the Yammer application. |
| Attachments | Opens the Following Window: |
| Field Name | Definition |
|------------|--|
| | Post File Attachment - Send Private Attachment Tab - Specifies an attachment and a single recipient. |
| | Post File Attachment - Post in a Group Tab - Specifies a group to send an attachment. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Post File Attachment - Send Private Attachment Tab

Specifies an attachment and a single recipient.

| 2 | Post File Attachment |
|--------------------------------------|--------------------------------------|
| Y Post File Attachment | : |
| Message Send Private Attachment | Post in a Group |
| To: Lily Allen(15106513 | 01) 🔹 Select User |
| c:\downloads\ModifyDeta | ils.pdf |
| NOTE: Attaching multiple | e files is not supported. |
| Response Store the response Three | ad Id in Custom Attribute or Schema: |
| \${/pd:myFields/pd:Doc} | |
| | ✓ OK Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the Yammer stencil, drag the Post Attachment AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Attachment** field, click the **Ellipses** button.
- 6. Click the Send Private Attachment tab.

| Field Name | Definition |
|-------------------------|--|
| Send Private Attachment | Definition: Post an attachment to a specified user. |
| То | Definition: |

| Field Name | Definition |
|---|--|
| | Specifies the user name from the Select Participants Window. |
| | Allowed Values: |
| | A Yammer user ID. Click the Select User button to select. |
| | An AgilePoint user name. |
| | A custom attribute that represents a Yammer user ID or AgilePoint user name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Select User | Opens the Following Window: |
| | Select Participants Window |
| | Purpose of this Window: |
| | Specifies a Yammer user. |
| Add File Url | Definition: |
| | The |
| | Allowed Values: |
| | An absolute path and file name on the AgilePoint Server or SharePoint Server. |
| | Multiple attachments are not supported. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | c:\My Documents\sample1.doc |
| | \${HomeDirectory}\sample2.doc |
| | • http://demo3:8000/DocumentLib1/sample3.doc |
| Store the response Thread Id in Custom Attribute or | Definition: |
| | Specifies the name of the custom attribute that is used to store the response Thread ID. |

| Field Name | Definition |
|------------|---|
| | The Thread ID is an identifier used to track a Yammer conversation thread. |
| | Allowed Values: |
| | A custom attribute. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | /pd:myFields/pd:ThreadID |
| Schema | Opens the Following Window: |
| | Select XPath from Attributes Window |
| | Purpose of this Window: |
| | Enables you to select a schema node from the XML schema for your process. |

Post File Attachment - Post in a Group Tab

Specifies a group to send an attachment.

| 2 | Post File Attachment |
|---------------------------------|---|
| y € ₀₀ | st File Attachment |
| Message Send Priv To: AF | vate Attachment Post in a Group |
| If y Add File c:\down | you are using custom attribute, then custom attribute should contain Group ID. e Url: loads\ModifyDetails.pdf |
| NOTE: / Response Store th | Attaching multiple files is not supported. e response Thread Id in Custom Attribute or Schema: |
| \${/pd:n | nyFields/pd:Doc} |
| | ✓ OK Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the Yammer stencil, drag the Post Attachment AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Attachment** field, click the **Ellipses** button.
- 6. Click the **Post in a Group** tab.

| Field Name | Definition |
|-----------------|--|
| Post in a Group | Definition: Post an attachment to a group. |
| То | Definition: Specifies a group name from the list. |

| Field Name | Definition |
|---|--|
| | Allowed Values: |
| | A valid group name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Add File Url | Definition: |
| | Specifies the absolute path of the attachment file. The |
| | Allowed Values: |
| | An absolute path and file name on the AgilePoint Server or SharePoint Server. |
| | Multiple attachments are not supported. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | c:\My Documents\sample1.doc |
| | \${HomeDirectory}\sample2.doc |
| | • http://demo3:8000/DocumentLib1/sample3.doc |
| Store the response Thread Id in Custom Attribute or | Definition: |
| Schema | Specifies the name of the custom attribute that is used to store the response Thread ID. |
| | The Thread ID is an identifier used to track a Yammer conversation thread. |
| | Allowed Values: |
| | A custom attribute. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |

| Field Name | Definition |
|------------|---|
| | /pd:myFields/pd:ThreadID |
| Schema | Opens the Following Window: Select XPath from Attributes Window |
| | Purpose of this Window: |
| | Enables you to select a schema node from the XML schema for your process. |

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes |
|--|
| Select XPath from Attributes |
| Schema Process Attributes |
| www.www.www.www.www.www.www.www.www.ww |
| XPath: |
| DataType: |
| 🥪 OK 🔀 Cancel |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the **Ellipses** button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: |

| Field Name | Definition |
|------------|---|
| | Read only. |
| | Click to select the process attribute you want to use. |
| ОК | Function: |
| | Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. |
| | Note the following: |
| | First, you must select the metadata or attribute you want, and then click OK. |
| | You can select only one metadata or attribute at a time. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Yammer Credentials Window

Specifies the unique identifiers for the Yammer application.

| 2 | Yammer Credentials |
|--------------------------------|--------------------|
| Y⇐ Yammer Credentials | |
| | |
| Select Global AppSettings Key | |
| Application Name : DashBoard | ¥ |
| Configuration Key : Agilepoint | ✓ |
| Network Name : AgilePoint, Inc | |
| | ✓ OK Cancel |

Prerequisites

• You must set up an Enterprise Social Token for the Yammer application.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Yammer** stencil.
- 3. On the Yammer stencil, drag the following AgileShape, and drop it on the process template.
 - Post Message
 - Reply Message
 - Post Attachment
 - Invite User
 - Create User
 - Update User
 - Delete User
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Credential field**, click the **Ellipses** button.
- 6. On the **Connecting to Server** window, logon as a registered user to connect to the AgilePoint Server.

| Field Name | Definition |
|-------------------|--|
| Application Name | <u>Definition:</u> Specifies a unique name for your application. This key can represent any identifying value for your application. <u>Allowed Values:</u> An alphanumeric string. <u>Default Value:</u> None |
| Configuration Key | <u>Definition:</u> Specifies the unique authentication key for your application. This key is associated with an your administrator user account. This key can represent any identifying value for your application. <u>Allowed Values:</u> |

| Field Name | Definition |
|------------|-------------------------|
| | An alphanumeric string. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Sending an File Attachment in Yammer

To send a file attachment to a specified user or a group, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the **Yammer** stencil, drag the **Post Attachment** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Attachment** field, click the **Ellipses** button.

Instructions

- 1. Do one of the following:
 - To send an attachment to an individual user, click the **Send Private Attachment** tab, and complete the following fields as required.

| Field Name | Value |
|------------|--|
| То | <u>Definition:</u> Specifies the user name from the Select Participants Window. <u>Allowed Values:</u> A Yammer user ID. Click the Select User button to select. An AgilePoint user name. A custom attribute that represents a Yammer user ID or AgilePoint user name. <u>Default Value:</u> |
| | None |

| Field Name | Value |
|--|--|
| | Custom Attributes: |
| | Yes |
| Add File Url | Definition: |
| | file. The |
| | Allowed Values: |
| | An absolute path and file name on the AgilePoint Server or SharePoint Server. |
| | Multiple attachments are not supported. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | c:\My Documents\sample1.doc |
| | \${HomeDirectory}\sample2.doc |
| | http://demo3:8000/DocumentLib1/ sample3.doc |
| Store the response Thread Id in Custom Attribute | Definition: |
| | Specifies the name of the custom attribute that is used to store the response Thread ID. |
| | The Thread ID is an identifier used to track a Yammer conversation thread. |
| | Allowed Values: |
| | A custom attribute. |
| | <u>Default Value:</u> |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | /pd:myFields/pd:ThreadID |

• To send an attachment to a group, click the **Post in a Group** tab, and complete the following fields as required:

| Field Name | Value |
|---|--|
| То | Definition: Specifies a group name from the list. Allowed Values: A valid group name. Default Value: None Custom Attributes: Yes |
| Add File Url | Definition: Specifies the absolute path of the attachment file. The Allowed Values: An absolute path and file name on the AgilePoint Server or SharePoint Server. Multiple attachments are not supported. Default Value: None Custom Attributes: Yes Example: • c:\My Documents\sample1.doc • {HomeDirectory}\sample2.doc • http://demo3:8000/DocumentLib1/sample3.doc |
| Store the response Thread Id in Custom Attribute or Schema | Definition: Specifies the name of the custom attribute that is used to store the response Thread ID. The Thread ID is an identifier used to track a Yammer conversation thread. Allowed Values: A custom attribute. Default Value: None |

| Field Name | Value |
|------------|--------------------------|
| | Custom Attributes: |
| | Yes |
| | Example: |
| | /pd:myFields/pd:ThreadID |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Post Attachment
 - Post File Attachment Send Private Attachment Tab
 - Post File Attachment Post in a Group Tab
 - Yammer Credentials Window

Invite User

An AgilePart that sends an invitation to specified users to join your Yammer network.

| Y ≑ | 2 |
|------------|-------|
| Invite U | ser.1 |
| Ø | |

Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the Yammer stencil, drag the Invite User AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|------------|-----------------------------|
| Credential | Opens the Following Window: |
| | Yammer Credentials Window |

| Field Name | Definition |
|-------------|--|
| | Purpose of this Window: Specifies the unique identifiers for the Yammer application. |
| Invitations | Opens the Following Window: Invite User Window |
| | Purpose of this Window: |
| | Sends an invitation to the users to join the current Yammer network. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Invite User Window

Sends an invitation to the users to join the current Yammer network.

| ٨ | Invite User | x |
|-------------------------|---|----|
| Y< Invite Use | er . | |
| Lines Telformation | | |
| Enter your cov | worker's email addresses separated by semi-colon(;) | |
| lilly.allen@ag | jilepoint.com | |
| | | |
| | | |
| | | al |
| | | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the Yammer stencil, drag the Invite User AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Invitations field, click the Ellipses button.

| Field Name | Definition |
|---|---|
| Enter your coworker's email addresses separated by semi-colon (;) | Definition: Specifies the email addresses for people you want to invite as Yammer users. Allowed Values: One or more valid email addresses. Multiple email addresses must be separated with a semicolon (;). Default Value: None Custom Attributes: Yes |

| Field Name | Definition |
|------------|---|
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. |

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes | × |
|------------------------------|---|
| Select XPath from Attributes | |
| Schema Process Attributes | |
| myFields | |
| XPath: | |
| DataType: | |
| 🥪 OK 🔀 Cancel | |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.

- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the Ellipses button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use. |

| Field Name | Definition |
|------------|---|
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Yammer Credentials Window

Specifies the unique identifiers for the Yammer application.

| ٨ | Yammer Credentials | × |
|----------------------------|--------------------|---|
| Y< Yammer Creden | tials | |
| Select Global AppSetting | gs Key | |
| Application Name : | DashBoard v | |
| Configuration Key : | Agilepoint | |
| Network Name : | AgilePoint, Inc | |
| | Second Cancel | |

Prerequisites

• You must set up an Enterprise Social Token for the Yammer application.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Yammer** stencil.
- 3. On the Yammer stencil, drag the following AgileShape, and drop it on the process template.
 - Post Message
 - Reply Message
 - Post Attachment
 - Invite User
 - Create User
 - Update User
 - Delete User
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the **Credential field**, click the **Ellipses** button.
- 6. On the **Connecting to Server** window, logon as a registered user to connect to the AgilePoint Server.

| 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 |
| Configuration Key | Definition: Specifies the unique authentication key for your application. This key is associated with an your administrator user account. This key can represent any identifying value for your application. Allowed Values: An alphanumeric string. Default Value: None |

| Field Name | Definition |
|------------|--------------------|
| | Custom Attributes: |
| | No |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Inviting a User in Yammer

To send an invitation to the users to join the current Yammer network, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the Yammer stencil, drag the Invite User AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Invitations field, click the Ellipses button.

Instructions

1. On the **Invite User** window, complete the following field as required:

| Field Name | Definition |
|---|---|
| Enter your coworker's email addresses separated by semi-colon (;) | Definition: Specifies the email addresses for people you want to invite as Yammer users. Allowed Values: One or more valid email addresses. Multiple email addresses must be separated with a semicolon (;). Default Value: None Custom Attributes: Yes |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Invite User
 - Invite User Window
 - Yammer Credentials Window

Create User

An AgilePart that creates a user in your Yammer network.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the Yammer stencil, drag the Create User AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|---|
| Credential | Opens the Following Window: Yammer Credentials Window Purpose of this Window: Specifies the unique identifiers for the Yammer application. |
| User | Opens the Following Window: Create User Window - Specifies the user information for the user you want to create. Create User Window - Profile Tab - Specifies the profile information for the user you want to create. Create User Window - Contact Tab - Specifies the contact information for the user you want to create. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Create User Window

Specifies the user information for the user you want to create.

| 2 | Create User | x |
|------------------|----------------|---|
| Y= User Inform | mation | |
| | | |
| User Information | | |
| Basics Profile | Contact | _ |
| * First Na | ame. | |
| lilly | | |
| * Last Na | ame: | |
| allen | | |
| * Email: | | |
| lilly.allen@ | agilepoint.com | |
| Job Title | e: | |
| | | |
| Departn | ment: | |
| HR | | |
| Location | n: | |
| Mountain V | View, CA | |
| | | |
| | | |
| | Second Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Yammer** stencil.
- 3. On the **Yammer** stencil, drag the **Create User** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **User** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|---|
| First Name | Definition: The user's first name. <u>Allowed Values:</u> A single line of text. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |
| Last Name | Definition: The user's last name. <u>Allowed Values:</u> A single line of text. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |
| E-mail | Definition: The user's email address. <u>Allowed Values:</u> A valid email address. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |
| Job Title | <u>Definition:</u> Specifies the job title of the user. <u>Allowed Values:</u> A single line of text. |

| Field Name | Definition |
|------------|---|
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Location | Definition: |
| | Specifies location of the user. |
| | Allowed Values: |
| | A single line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Other Tabs | Definition: |
| | Other tabs on this window provide more detailed information about the user, such as information about their family, and contact information. You can populate these fields with text or custom attributes. |

Yammer Credentials Window

Specifies the unique identifiers for the Yammer application.

| 2 | Yammer Credentials |
|--------------------------------|--------------------|
| Y ╤ Yammer Credentials | |
| | |
| Select Global AppSettings Key | |
| Application Name : DashBoard | ~ |
| Configuration Key : Agilepoint | ~ |
| Network Name : AgilePoint, Inc | |
| | ↔ OK 🔀 Cancel |

Prerequisites

• You must set up an Enterprise Social Token for the Yammer application.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the Yammer stencil, drag the following AgileShape, and drop it on the process template.
 - Post Message
 - Reply Message
 - Post Attachment
 - Invite User
 - Create User
 - Update User
 - Delete User
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Credential field**, click the **Ellipses** button.
- 6. On the **Connecting to Server** window, logon as a registered user to connect to the AgilePoint Server.

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 |
| Configuration Key | Definition: |
| | Specifies the unique authentication key for your application. This key is associated with an your administrator user account. |
| | This key can represent any identifying value for your application. |
| | Allowed Values: |
| | An alphanumeric string. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a User in Yammer

To create a user in your Yammer network, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the **Yammer** stencil, drag the **Create User** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **User** field, click the **Ellipses** button.

Instructions

1. Complete the following fields as required.

| Field Name | Value |
|------------|--|
| First Name | <u>Definition:</u> The user's first name. |
| | Allowed Values: A single line of text |
| | Default Value: None |
| | Yes |
| Last Name | Definition: The user's last name. <u>Allowed Values:</u> A single line of text. <u>Default Value:</u> None |
| | Yes |
| E-mail | <u>Definition:</u> The user's email address. <u>Allowed Values:</u> A valid email address. <u>Default Value:</u> |
| | None <u>Custom Attributes:</u> Yes |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Create User
 - Create User Window

• Yammer Credentials Window

Update User

An AgilePart that updates information for a Yammer network user.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Active Directory stencil.
- 3. On the Active Directory stencil, drag the Update User AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|--|
| Credential | Opens the Following Window: Yammer Credentials Window Purpose of this Window: Specifies the unique identifiers for the Yammer application. |
| User | Opens the Following Window: Update User Window - Updates the information for a Yammer user. Update User Window - Profile Tab - Updates the existing profile information of the user. Update User Window - Contact Tab - Updates the existing contact information of the user. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Update User Window

Updates the information for a Yammer user.

| ۵ | Update User | x |
|-----------------------------|--|---|
| Y ⇐ User Information | | |
| Update User Information | | |
| Basics Profile Cont | act | _ |
| Select User: | | |
| Lily Allen | ¥ | |
| First Name: | | |
| Lily | | |
| Allen | | |
| Department: | | |
| Job Title: | | |
| Location: | | |
| | | |
| | ✓ OK✓ Cance | : |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the **Yammer** stencil, drag the **UdateUser** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **User** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------|---|
| Select User | Definition: Specifies the user name you want to associate with the action from the list. Allowed Values: A user name. Default Value: None Custom Attributes: No |
| First Name | Definition: The user's first name. <u>Allowed Values:</u> A single line of text. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |
| Last Name | Definition: The user's last name. <u>Allowed Values:</u> A single line of text. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |
| E-mail | <u>Definition:</u> The user's email address. <u>Allowed Values:</u> A valid email address. |

| Field Name | Definition |
|------------|---|
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Job Title | Definition: |
| | Specifies the job title of the user. |
| | Allowed Values: |
| | A single line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Location | Definition: |
| | Specifies location of the user. |
| | Allowed Values: |
| | A single line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Other Tabs | Definition: |
| | Other tabs on this window provide more detailed |
| | about their family, and contact information. You can populate these fields with text or custom attributes. |

Yammer Credentials Window

Specifies the unique identifiers for the Yammer application.

| 2 | Yammer Credentials | x |
|--------------------------------|--------------------|---|
| Y⇐ Yammer Credentials | | |
| | | |
| Select Global AppSettings Key | | |
| Application Name : DashBoard | ۷ | |
| Configuration Key : Agilepoint | × | |
| Network Name : AgilePoint, Inc | | |
| | Second Cancel | |

Prerequisites

• You must set up an Enterprise Social Token for the Yammer application.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the Yammer stencil, drag the following AgileShape, and drop it on the process template.
 - Post Message
 - Reply Message
 - Post Attachment
 - Invite User
 - Create User
 - Update User
 - Delete User
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Credential field**, click the **Ellipses** button.
- 6. On the **Connecting to Server** window, logon as a registered user to connect to the AgilePoint Server.

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 |
| Configuration Key | Definition: |
| | Specifies the unique authentication key for your application. This key is associated with an your administrator user account. |
| | This key can represent any identifying value for your application. |
| | Allowed Values: |
| | An alphanumeric string. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Updating a Yammer User

To update the information for a Yammer user, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the **Yammer** stencil, drag the **UdateUser** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **User** field, click the **Ellipses** button.
Instructions

- 1. On the **Update User** window, modify the user information as required.
- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Update User
 - Update User Window
 - Yammer Credentials Window

Delete User

An AgilePart that deletes a user from your Yammer network.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the Yammer stencil, drag the Delete User AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|--|
| Credential | Opens the Following Window: Yammer Credentials Window Purpose of this Window: Specifies the unique identifiers for the Yammer |
| | application. |
| User | Opens the Following Window: |

| Field Name | Definition |
|------------|--|
| | Delete User |
| | Purpose of this Window: |
| | An AgilePart that deletes a user from your Yammer network. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Delete User Window

Specifies the user to remove from your Yammer network.

| 2 | Delete User | x |
|--------------------------------|---|---|
| Y , Select u | ser you want to delete | |
| User Lily Allen | | |
| If you are usir | ig custom attribute, then custom attribute should contain User ID | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the **Yammer** stencil, drag the **Delete User** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **User** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|------------|---|
| User | Definition: Specifies the user name you want to associate with the action. Allowed Values: A user name. Default Value: None Custom Attributes: Yes |
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. |

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes |
|------------------------------|
| Select XPath from Attributes |
| Schema Process Attributes |
| myFields |
| XPath: |
| DataType: |
| 🥪 OK 🔀 Cancel |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the **Ellipses** button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Yammer Credentials Window

Specifies the unique identifiers for the Yammer application.

| ۵ | Yammer Credentials | x |
|--------------------------------|--------------------|----|
| Y Yammer Credentials | | |
| | | - |
| Select Global AppSettings Key | | |
| Application Name : DashBoard | ۷ | |
| Configuration Key : Agilepoint | × | |
| Network Name : AgilePoint, Inc | | |
| | 🥪 OK 🔀 Canc | el |

Prerequisites

• You must set up an Enterprise Social Token for the Yammer application.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Yammer stencil.
- 3. On the Yammer stencil, drag the following AgileShape, and drop it on the process template.
 - Post Message
 - Reply Message
 - Post Attachment
 - Invite User
 - Create User
 - Update User

- Delete User
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Credential field**, click the **Ellipses** button.
- 6. On the **Connecting to Server** window, logon as a registered user to connect to the AgilePoint Server.

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 |
| Configuration Key | Definition: |
| | Specifies the unique authentication key for your application. This key is associated with an your administrator user account. |
| | This key can represent any identifying value for your application. |
| | Allowed Values: |
| | An alphanumeric string. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Deleting a User in Yammer

To delete a user from your Yammer network, do the following.

Navigation

1. In AgilePoint Envision, open a process template.

- 2. Navigate to the Yammer stencil.
- 3. On the **Yammer** stencil, drag the **Delete User** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the User field, click the Ellipses button.

Instructions

- 1. On the **Delete User** window, select the user you want to delete from the **User** list.
- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Delete User
 - Delete User Window
 - Yammer Credentials Window

Database

This section describes the AgileShapes in the Database stencil.

Batch Insert

An AgilePart that inserts multiple new database records into a database table.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Database stencil.
- 3. On the **Database** stencil, drag the **Batch Insert** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|--------------|--|
| DatabaseType | Definition: |
| | Specifies the type of database to be used. |

| Field Name | Definition |
|------------------------------|--|
| | Allowed Values: |
| | • SqlServer |
| | Oracle |
| | Default Value: |
| | SqlServer |
| InsertXMLRepeatingDescriptor | Opens the Following Window: |
| | Configuration for Batch Inserting Database Record Window |
| | Purpose of this Window: |
| | Specifies where and how to insert the new database records into the database. |
| Timeout | Definition: |
| | Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape. |
| | Allowed Values: |
| | Any positive integer. |
| | Default Value: |
| | 600 |
| | Custom Attributes: |
| | No |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Batch Inserting Database Record Window

Specifies where and how to insert the new database records into the database.

| Configuration for Ins | erting Database Record | | × |
|--|------------------------------------|---------------------------------|---------------|
| Configura | tion for Inserting Database Record | | |
| Connection String: | server=localhost;datab | ase=pubs;trusted_Connection=yes | Create |
| Repeating XPath: | ି Specific Table ି ସ | tored Procedure | Schema |
| Table Name: | Before insert, remove records the | at meets following condition : | C Browse |
| | Remove all old records. | | |
| Columns & Data: DateTime format example:8/3/2012 | Column Name | Value | |
| 3:45:42 AM | | | |
| | | | Remove |
| | | ≪ | P OK 🔀 Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag the **Batch Insert** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the InsertXMLRepeatingDescriptor field, click the Ellipses button.

| Field Name | Definition | |
|-------------------|--|------------|
| Connection String | Definition: | |
| | Specifies the connection string that is used to connect to the database. | |
| | Click Choose to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) | |
| | • Click Create to create a new connection string. | |
| | Allowed Values: | |
| | A valid SQL connection string. | |
| | Default Value: | |
| | server=myserver;database=pubs;trusted_Connection | =yes |
| | Custom Attributes: | |
| | Yes | |
| | Example: | |
| | server=DataServer;database=StoreDb;trusted_Conn | ection=yes |
| Create | Opens the Following Window: | |
| | Database Connection Configuration Window | |
| | Purpose of this Window: | |
| | Creates a connection string with specified information. | |
| Choose | Opens the Following Window: | |
| | Browse Custom Attributes Window | |
| | Purpose of this Window: | |
| | Specifies a connection string from a list of shared custom attributes. | |
| RepeatingXPath | Definition: | |
| | Specifies an XPath to a root of repeating element in a schema where all the data are stored. These data will be inserted into the database during insert operation. | |
| | Allowed Values: | |
| | A valid XPath to a repeating xml node. | |

| Field Name | Definition |
|-----------------------------------|--|
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | /pd:myFields/pd:PersonalDetails |
| Specific Table / Stored Procedure | Definition: |
| | Specifies whether to insert the data into a specified |
| | table, or using a stored procedure. |
| | Allowed Values: |
| | Specific Table - Inserts the data into a specified database table. |
| | Stored Procedure - Inserts the data using a stored procedure. |
| | Default Value: |
| | Specific Table |
| Table Name | |
| | Definition: |
| | AgileShape inserts the record. |
| | Allowed Values: |
| | A valid database table name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Stored Procedure | Definition: |
| | Specifies the stored procedure name and |
| | parameters to execute at runtime. |
| | Allowed Values: |
| | A valid SQL stored procedure execute statement. |
| | Default Value: |
| | None |
| | Custom Attributes: |

| Field Name | Definition |
|--|--|
| | Yes <u>Example:</u> EXECUTE [dbo].[InsertBillItem] @ItemName |
| Browse | <u>Function:</u> Enables you to find the associated item. <u>Purpose of this Window:</u> Specifies a particular database table from the database. |
| Remove all old records | <u>Definition:</u> Removes all the old records from the database. <u>Allowed Values:</u> <u>Selected - Enables the remove all old records option.</u> <u>Deselected - Removes the record which satisfies the specified condition.</u> <u>Default Value:</u> Selected |
| Before insert, remove records that meets following condition | Definition: Removes the records from the database that satisfies the specified condition. This remove operation is performed before insert operation. Allowed Values: A valid SQL condition after WHERE clause. Default Value: None Custom Attributes: No |
| Column Name | Definition: Specifies the name of the column in the database. <u>Allowed Values:</u> A valid column name from the particular table in the database. <u>Default Value:</u> |

| Field Name | Definition |
|------------|---|
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | CustomerName |
| Value | Definition: |
| | Specifies an XPath to a single node inside the given repeating Xpath. |
| | Allowed Values: |
| | A valid XPath. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | \${/pd:AgilePoint/pd:Products/pd:ComponentName} |
| Add | Function: |
| | Creates new mapping to a database table column from the schema. |
| Remove | Function: |
| | Removes the mapping from the database table column. |

Database Connection Configuration Window

Creates a connection string with specified information.

| Database Connec | tion Configura | tion | × |
|-----------------|-------------------|--|---------------------------|
| Conf | igure Database C | Connection | |
| Database Authe | ntication —— | | |
| | User: | sa | Integrated Security |
| | Password : | | |
| Check | < "Integrated Sec | urity' to use windows authentication for d | database connection. |
| Database Locati | on | | |
| Da | atabase Server : | localhost | |
| | Database : | pubs 🔍 | (Retrieve database names) |
| | | \ | OK 🔀 Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. In one of the following windows, click **Create**. The specific windows that display vary, depending upon the AgileShape you are using:
 - Configuration for Inserting Database Record Window
 - Configuration for Batch Inserting Database Record Window
 - Configuration for Updating Database Record(s) Window
 - Configuration for Deleting Database Record(s) Window
 - Configuration for Stored Procedure or Generic SQL Window
 - Database Queries Window
 - Database Stored Procedure Window

| Field Name | Definition |
|------------|-------------|
| User | Definition: |

| Field Name | Definition |
|---------------------|--|
| | The user name for the database account AgilePoint Server uses to connect to the database. |
| | Allowed Values: |
| | A valid user name for the database. |
| | Default Value: |
| | sa |
| Password | Definition: Specifies a password for the specified user. <u>Allowed Values:</u> |
| | A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Integrated Security | Definition: When integrated security is checked, the current windows account credentials are used for authentication. |
| | Allowed Values: |
| | • Selected - The windows account credentials are used for authentication automatically. |
| | • Deselected - The user and password fields are enabled for database authentication. |
| | Default Value: |
| | Selected |
| Database Server | Definition: Specifies a database server name that provides database services. |
| | Allowed Values: |
| | A valid database server name. |
| | Default Value: |
| | localhost |
| | Custom Attributes: |

| Field Name | Definition |
|------------|---|
| | No |
| Database | <u>Definition:</u> List all the database names that are available for the authenticated user. <u>Allowed Values:</u> A valid database server host name. A valid IP address. <u>Default Value:</u> pubs <u>Custom Attributes:</u> No |

Browse Custom Attributes Window

Specifies a connection string from a list of shared custom attributes.

| Browse (| ustum Attributes | | × |
|----------|-----------------------------|--------------|-------------|
| 9 | Configure Database Conne | ection | |
| | Name | Value | Туре |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| List o | of Shared Custom Attributes | \ | OK 🔀 Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag any AgileShape and drop it on the process template.

- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. In one of the following windows, click **Choose**. The specific windows that display vary, depending upon the AgileShape you are using:
 - Configuration for Inserting Database Record Window
 - Configuration for Batch Inserting Database Record Window
 - Configuration for Updating Database Record(s) Window
 - Configuration for Deleting Database Record(s) Window
 - Configuration for Stored Procedure or Generic SQL Window
 - Database Queries Window
 - Database Stored Procedure Window
- 7. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

| Field Name | Definition |
|------------|--|
| Name | <u>Definition:</u> Specifies the name of custom attribute. <u>Allowed Values:</u> Read only. |
| Value | <u>Definition:</u> This field contains the value of the shared custom attribute. <u>Allowed Values:</u> Read only. |
| Туре | Definition: Specifies the data type of the shared custom attributes. <u>Allowed Values:</u> Read only. |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Inserting Multiple Database Records into a Database Table

To insert multiple new database records into a database table, do the following.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag the **Batch Insert** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **InsertXMLRepeatingDescriptor** field, click the **Ellipses** button.

Instructions

1. To set up your database connection, on the **Configuration for Inserting Database Record** window, complete the following field as required.

| Field Name | Value |
|-------------------|---|
| Connection String | Definition: |
| | Specifies the connection string that is used to connect to the database. |
| | Click Choose to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) |
| | Click Create to create a new connection string. |
| | Allowed Values: |
| | A valid SQL connection string. |
| | Default Value: |
| | server=myserver;database=pubs;trusted_Connectio |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | server=DataServer;database=StoreDb;trusted_Conr |

- 2. To insert the data in a database table, do one of the following.
 - To insert the data into a table:
 - 1. Select Specific Table.
 - 2. On the Table Name field, click Browse.
 - 3. Select the database table name as required.
 - 4. In the Column & Data section, click Add.
 - 5. Complete the following fields as required.

| Field Name | Value |
|-------------|---|
| Column Name | <u>Definition:</u> Specifies the name of the column in the database. |
| | Allowed Values: A valid column name from the particular table in the database. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> No |
| | <u>Example:</u> CustomerName |
| Value | Definition: Specifies an XPath to a single node inside the given repeating Xpath. |
| | Allowed Values: |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |
| | Example: \${/pd:AgilePoint/pd:Products/ pd:ComponentName} |

- To use a stored procedure:
 - 1. Select Stored Procedure.
 - 2. Complete the following field as required.

| Field Name | Value |
|------------------|---|
| Stored Procedure | Definition: Specifies the stored procedure name and parameters to execute at runtime. |

| Field Name | Value |
|------------|---|
| | Allowed Values: |
| | A valid SQL stored procedure execute statement. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | EXECUTE [dbo].[InsertBillItem] @ItemName |

- 3. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Browse Custom Attributes Window
 - Batch Insert
 - Configuration for Batch Inserting Database Record Window
 - Database Connection Configuration Window

Delete Records

An AgilePart that deletes multiple existing database records in a database table.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the Database stencil, drag the Delete Records AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|--------------|-------------|
| DatabaseType | Definition: |

| Field Name | Definition |
|------------------------------|--|
| | Specifies the type of database to be used. |
| | Allowed Values: |
| | • SqlServer |
| | • Oracle |
| | Default Value: |
| | SqlServer |
| InsertXMLRepeatingDescriptor | Opens the Following Window: |
| | Configuration for Deleting Database Record(s) Window |
| | Purpose of this Window: |
| | Specifies where and how to delete the records from the database. |
| Timeout | Definition: |
| | Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape. |
| | Allowed Values: |
| | Any positive integer. |
| | Default Value: |
| | 600 |
| | Custom Attributes: |
| | No |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding

Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Deleting Database Record(s) Window

Specifies where and how to delete the records from the database.

| Configuration for Deleting Database Record(s) | | |
|---|---|----------|
| Configuration | n for Deleting Database Record(s) | |
| Connection String: | server=localhost;database=pubs;trusted_Connection=yes | Create |
| | 1 | Choose |
| Table Name : | | C Browse |
| Condition (SQL format): | | |
| DateTime format example:8/3/2012 3:42:16 AM | | C Browse |
| | | ؇ ОК |
| | | 🔀 Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag the **Delete Records** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------------|--|
| Connection String | Definition: |
| | Specifies the connection string that is used to connect to the database. |

| Field Name | Definition |
|------------|---|
| | Click Choose to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) |
| | Click Create to create a new connection string. |
| | Allowed Values: |
| | A valid SQL connection string. |
| | Default Value: |
| | server=myserver;database=pubs;trusted_Connection=yes |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | server=DataServer;database=StoreDb;trusted_Connection=ye |
| Table Name | Definition: |
| | Specify the name of table from which the database records has to be deleted. |
| | Allowed Values: |
| | A valid database table name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Browse | |
| | Enables you to find the associated item. |
| | Purpose of this Window: |
| | Specifies a particular database table from the |
| | database. |
| Condition | Definition: |
| | The SQL WHERE clause that defines which database records should be updated. |
| | Allowed Values: |
| | A valid SQL WHERE clause. |
| | Default Value: |
| | None |

| Field Name | Definition |
|------------|--|
| | Custom Attributes: |
| | No |
| | Example: |
| | InvoiceNumber <= 3452 |
| Create | Opens the Following Window: |
| | Database Connection Configuration Window |
| | Purpose of this Window: |
| | Creates a connection string with specified information. |
| Choose | Opens the Following Window: |
| | Browse Custom Attributes Window |
| | Purpose of this Window: |
| | Specifies a connection string from a list of shared custom attributes. |

Database Connection Configuration Window

Creates a connection string with specified information.

| Database Connection Configuration | × |
|---|---|
| Configure Database Connection | |
| Database Authentication | |
| User : 🔤 🔽 🔽 🔽 | |
| Password : | |
| Charl Internated Convict to one windows with sub-sub-sub-sub-sub-sub-sub-sub-sub-sub- | |
| Check Integrated Security to use windows authentication for database connection. | |
| Database Location | _ |
| Database Server : localhost | |
| Database : pubs | |
| | |
| 🥪 OK 🛛 💥 Cancel | 1 |
| | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Database stencil.
- 3. On the Database stencil, drag any AgileShape and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. In one of the following windows, click **Create**. The specific windows that display vary, depending upon the AgileShape you are using:
 - Configuration for Inserting Database Record Window
 - Configuration for Batch Inserting Database Record Window
 - Configuration for Updating Database Record(s) Window
 - Configuration for Deleting Database Record(s) Window
 - Configuration for Stored Procedure or Generic SQL Window
 - Database Queries Window
 - Database Stored Procedure Window

| Field Name | Definition |
|------------|---|
| User | Definition: The user name for the database account AgilePoint Server uses to connect to the database. <u>Allowed Values:</u> A valid user name for the database. <u>Default Value:</u> sa |
| Password | Definition: Specifies a password for the specified user. Allowed Values: A valid password. Default Value: None Custom Attributes: No |

| Field Name | Definition |
|---------------------|--|
| Integrated Security | <u>Definition:</u> When integrated security is checked, the current windows account credentials are used for authentication. <u>Allowed Values:</u> <u>Selected</u> - The windows account credentials are used for authentication automatically. <u>Deselected</u> - The user and password fields are enabled for database authentication. |
| | Default Value: Selected |
| Database Server | Definition: Specifies a database server name that provides database services. Allowed Values: A valid database server name. Default Value: localhost Custom Attributes: No |
| Database | <u>Definition:</u> List all the database names that are available for the authenticated user. <u>Allowed Values:</u> A valid database server host name. A valid IP address. <u>Default Value:</u> pubs <u>Custom Attributes:</u> No |

Browse Custom Attributes Window

Specifies a connection string from a list of shared custom attributes.

| Bı | owse Custum Attributes | | × |
|----|----------------------------------|--------------|-------------|
| | Configure Database Conne | ection | |
| | Name | Value | Туре |
| | | | |
| | List of Shared Custom Attributes | ~ | OK 🔀 Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. In one of the following windows, click **Choose**. The specific windows that display vary, depending upon the AgileShape you are using:
 - Configuration for Inserting Database Record Window
 - Configuration for Batch Inserting Database Record Window
 - Configuration for Updating Database Record(s) Window
 - Configuration for Deleting Database Record(s) Window
 - Configuration for Stored Procedure or Generic SQL Window
 - Database Queries Window
 - Database Stored Procedure Window
- 7. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

| Field Name | Definition |
|------------|-------------|
| Name | Definition: |

| Field Name | Definition |
|------------|---|
| | Specifies the name of custom attribute. |
| | Allowed Values: |
| | Read only. |
| Value | Definition: This field contains the value of the shared custom attribute. <u>Allowed Values:</u> Read only. |
| Туре | <u>Definition:</u> Specifies the data type of the shared custom attributes. <u>Allowed Values:</u> Read only. |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Deleting Records from a Database

To delete records from a database, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag the **Delete Records** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the **Configuration for Deleting Database Record(s)** window, complete the following fields as required.

| Field Name | Value |
|-------------------|--|
| Connection String | Definition: |
| | Specifies the connection string that is used to connect to the database. |
| | Click Choose to select a connection string from the list of shared custom attributes |

| Field Name | Value | |
|------------|---|------------|
| | (defined and managed in Enterprise Manager.) Click Create to create a new connection string. | |
| | Allowed Values: | |
| | Default Value | |
| | Delauli Value: | |
| | server=myserver;database=pubs;trusted_Connection=y | |
| | Custom Attributes: | |
| | Yes | |
| | Example: | |
| | server=DataServer;database=StoreDb;trusted_Corr | nection=ye |
| Table Name | Definition: Specify the name of table from which the database records has to be deleted. | |
| | Allowed Values: | |
| | A valid database table name. | |
| | Default Value: | |
| | None | |
| | Custom Attributes: | |
| | Yes | |
| | | |
| Condition | Definition: | |
| | The SQL WHERE clause that defines which database records should be updated. | |
| | Allowed Values: | |
| | A valid SQL WHERE clause. | |
| | Default Value: | |
| | None | |
| | Custom Attributes: | |
| | No | |
| | Example: | |
| | InvoiceNumber <= 3452 | |

2. Complete any additional configuration for this AgileShape according to your requirements:

- AgilePart Common Setup
- Browse Custom Attributes Window
- Configuration for Deleting Database Record(s) Window
- Database Connection Configuration Window
- Delete Records

Insert Database

An AgilePart that inserts a new database record into a database table.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Database stencil.
- 3. On the **Database** stencil, drag the **Insert Database** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|--------------|---|
| Configure | Opens the Following Window: Configuration for Inserting Database Record Window Purpose of this Window: |
| | records into the database. |
| DatabaseType | Definition: Specifies the type of database to be used. Allowed Values: • SqlServer |
| | Oracle Default Value: |

| Field Name | Definition |
|------------|---|
| | SqlServer |
| Timeout | Definition: Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape. Allowed Values: Any positive integer. Default Value: 600 Custom Attributes: No |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Inserting Database Record Window

Specifies where and how to insert the new database records into the database.

| Configuration for Ins | serting Database Record | | × |
|---|----------------------------------|-----------------------------------|----------|
| | ation for Inserting Database Red | cord | |
| Connection String: | server=localhost;date | abase=pubs;trusted_Connection=yes | Create |
| Table Name: | | | C Browse |
| Columns & Data: | Column Name | Value | |
| DateTime format example:8/3/2012 4:01:27 AM | | | 🐣 Add |
| | | | Remove |
| | | | 🛩 ок |
| | | | 🔀 Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag the **Insert Database** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------------|--|
| Connection String | <u>Definition:</u> Specifies the connection string that is used to connect to the database. Click Choose to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) Click Create to create a new connection string. <u>Allowed Values:</u> |

| Field Name | Definition |
|-------------|--|
| | A valid SQL connection string. |
| | Default Value: |
| | server=myserver;database=pubs;trusted_Connection=yes |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | server=DataServer;database=StoreDb;trusted_Connection |
| Create | Opens the Following Window: |
| | Database Connection Configuration Window |
| | Purpose of this Window: |
| | Creates a connection string with specified |
| | information. |
| Choose | Opens the Following Window: |
| | Browse Custom Attributes Window |
| | Purpose of this Window: |
| | Specifies a connection string from a list of shared |
| | |
| Table Name | Definition: |
| | Specifies the name of the database table where this AgileShape inserts the record. |
| | Allowed Values: |
| | A valid database table name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| Column Name | Definition: |
| | Specifies the name of the column in the database. |
| | Allowed Values: |
| | A valid column name from the particular table in the database. |

| Field Name | Definition |
|------------|---|
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | CustomerName |
| Value | Definition: |
| | Specifies an XPath to a single node inside the given repeating Xpath. |
| | Allowed Values: |
| | A valid XPath. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | \${/pd:AgilePoint/pd:Products/pd:ComponentName} |
| Add | Function: |
| | Creates new mapping to a database table column from the schema. |
| Remove | Function: |
| | Removes the mapping from the database table column. |

Database Connection Configuration Window

Creates a connection string with specified information.

| Database Connec | tion Configura | tion | × |
|-----------------|-------------------|--|---------------------------|
| Conf | igure Database (| Connection | |
| Database Authe | ntication —— | | |
| | User: | sa | Integrated Security |
| | Password : | | |
| Check | k "Integrated Sec | urity' to use windows authentication for d | latabase connection. |
| Database Locati | on | | |
| Da | atabase Server : | localhost | |
| | Database : | pubs 💌 | (Retrieve database names) |
| | | \ | OK 🔀 Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. In one of the following windows, click **Create**. The specific windows that display vary, depending upon the AgileShape you are using:
 - Configuration for Inserting Database Record Window
 - Configuration for Batch Inserting Database Record Window
 - Configuration for Updating Database Record(s) Window
 - Configuration for Deleting Database Record(s) Window
 - Configuration for Stored Procedure or Generic SQL Window
 - Database Queries Window
 - Database Stored Procedure Window

| Field Name | Definition |
|------------|-------------|
| User | Definition: |
| Field Name | Definition |
|---------------------|--|
| | The user name for the database account AgilePoint Server uses to connect to the database. |
| | Allowed Values: |
| | A valid user name for the database. |
| | Default Value: |
| | sa |
| Password | Definition: Specifies a password for the specified user. <u>Allowed Values:</u> |
| | A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Integrated Security | Definition: When integrated security is checked, the current windows account credentials are used for authentication. |
| | Allowed Values: |
| | • Selected - The windows account credentials are used for authentication automatically. |
| | • Deselected - The user and password fields are enabled for database authentication. |
| | Default Value: |
| | Selected |
| Database Server | Definition: Specifies a database server name that provides database services. |
| | Allowed Values: |
| | A valid database server name. |
| | Default Value: |
| | localhost |
| | Custom Attributes: |

| Field Name | Definition |
|------------|---|
| | No |
| Database | <u>Definition:</u> List all the database names that are available for the authenticated user. <u>Allowed Values:</u> A valid database server host name. A valid IP address. <u>Default Value:</u> pubs <u>Custom Attributes:</u> No |

Browse Custom Attributes Window

Specifies a connection string from a list of shared custom attributes.

| Browse (| ustum Attributes | | × |
|----------|-----------------------------|--------------|-------------|
| 9 | Configure Database Conne | ection | |
| | Name | Value | Туре |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| List o | of Shared Custom Attributes | \ | OK 🔀 Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag any AgileShape and drop it on the process template.

- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. In one of the following windows, click **Choose**. The specific windows that display vary, depending upon the AgileShape you are using:
 - Configuration for Inserting Database Record Window
 - Configuration for Batch Inserting Database Record Window
 - Configuration for Updating Database Record(s) Window
 - Configuration for Deleting Database Record(s) Window
 - Configuration for Stored Procedure or Generic SQL Window
 - Database Queries Window
 - Database Stored Procedure Window
- 7. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

| Field Name | Definition |
|------------|---|
| Name | Definition: Specifies the name of custom attribute. <u>Allowed Values:</u> Read only. |
| Value | Definition: This field contains the value of the shared custom attribute. <u>Allowed Values:</u> Read only. |
| Туре | Definition: Specifies the data type of the shared custom attributes. <u>Allowed Values:</u> Read only. |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Inserting a New Database Records into a Database

To insert new database records in a database table, do the following.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Database stencil.
- 3. On the **Database** stencil, drag the **Insert Database** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the **Configuration for Inserting Database Record** window, complete the following fields as required.

| Field Name | Value |
|-------------------|---|
| Connection String | Definition: |
| | Specifies the connection string that is used to connect to the database. |
| | Click Choose to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) |
| | Click Create to create a new connection string. |
| | Allowed Values: |
| | A valid SQL connection string. |
| | Default Value: |
| | server=myserver;database=pubs;trusted_Connection=yes |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | server=DataServer;database=StoreDb;trusted_Connection= |
| Table Name | Definition: |
| | Specifies the name of the database table where this AgileShape inserts the record. |
| | Allowed Values: |
| | A valid database table name. |
| | Default Value: |
| | None |
| | Custom Attributes: |

| Field Name | Value |
|------------|----------|
| | Yes |
| | Example: |

- 2. In the Column & Data section, click Add.
- 3. Complete the following fields as required.

| Field Name | Value |
|-------------|---|
| Column Name | Definition: Specifies the name of the column in the database. |
| | Allowed Values: |
| | A valid column name from the particular table in the database. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | CustomerName |
| Value | Definition: |
| | Specifies an XPath to a single node inside the given repeating Xpath. |
| | Allowed Values: |
| | A valid XPath. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | \${/pd:AgilePoint/pd:Products/ pd:ComponentName} |

- 4. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Browse Custom Attributes Window
 - Configuration for Inserting Database Record Window

- Database Connection Configuration Window
- Insert Database

Query Database

An AgilePart that retrieves database data by executing dynamic SQL statements or calling stored procedures.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag the **Query Database** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|--------------|---|
| Configure | Opens the Following Window: |
| | Opens the one of the following windows, depending upon the setting of the SQL Type field: |
| | Database Queries Window - Specifies where and how the data is retrieved from the database, when using a SQL query. |
| | Database Stored Procedure Window - Specifies where and how the data is retrieved from the database, when using a stored procedure |
| DatabaseType | Definition: |
| | Specifies the type of database to be used. |
| | Allowed Values: |
| | • SqlServer |
| | Oracle |
| | Default Value: |
| | SqlServer |

| Field Name | Definition |
|-------------------|---|
| ReturnFirstRow | <u>Definition:</u> Specifies the AgileShape that always return the first record from the database table. <u>Allowed Values:</u> False - Fetches the last record from the database table. True - Fetches the first record from the database table. <u>Default Value:</u> False |
| SQLType | <u>Definition:</u> Specifies whether to retrieve the data from the database using a stored procedure, or using (one or more) dynamic SQL statements. <u>Allowed Values:</u> <u>SQL</u> - Data is retrieved from the database using one or more dynamic SQL statements. If the SqlType property is set to SQL when you click the Ellipses button, it will open a configuration window. <u>StoredProcedure</u> - Data is retrieved from the database using a stored procedure. |
| Timeout | Definition: Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape. Allowed Values: Any positive integer. Default Value: 600 Custom Attributes: No |
| IgnoreFailedQuery | Definition: |

| Field Name | Definition |
|------------|--|
| | Specifies whether the AgileShape continues making database queries if one of the database queries throws an error. |
| | Allowed Values: |
| | • False - The AgileShape stops making database queries when an error is thrown. |
| | True - If a database query throws an error, the AgileShape continues making queries. |
| | Default Value: |
| | False |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Database Queries Window

Specifies where and how the data is retrieved from the database, when using a SQL query.

| tabase Queries | | |
|---|---------------------------------|-----------------|
| Database Queries | | |
| Connection String: | | |
| server=localhost;database=pubs;trusted_Con | nection=yes | Crea <u>t</u> e |
| | | Choose |
| Attribute Name and Queries: | | |
| Name / Data Type | Query | 📥 Add |
| | | Edit |
| | | <u>R</u> emove |
| | | W OK |
| | | Court |
| I Barra austan attributa ta DataTina farmat | | Cancel |
| [Selection of checkbox will automatically parse custom attri | bute to valid DateTime format.] | |
| Parse custom attribute to DateTime format Selection of checkbox will automatically parse custom attri Return first row of query. | bute to valid DateTime format.] | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag the **Query Database** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **SQLType** list, select **SQL**.
- 6. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------------|--|
| Connection String | <u>Definition:</u> Specifies the connection string that is used to connect to the database. Click Choose to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) Click Create to create a new connection string. |

| ield Name | Definition | |
|---|--|-------|
| | Allowed Values: | |
| | A valid SQL connection string. | |
| | Default Value: | |
| | server=myserver;database=pubs;trusted_Connection= | yes |
| | Custom Attributes: | |
| | Yes | |
| | Example: | |
| | server=DataServer;database=StoreDb;trusted_Connec | ction |
| Create | Opens the Following Window: | |
| | Database Connection Configuration Window | |
| | Purpose of this Window: | |
| | Creates a connection string with specified | |
| | information. | |
| Choose | Opens the Following Window: | |
| | Browse Custom Attributes Window | |
| | Purpose of this Window: | |
| | Specifies a connection string from a list of shared | |
| | custom attributes. | |
| Add | Opens the Following Window: | |
| | Custom Attribute and Query Window | |
| | Purpose of this Window: | |
| | Specifies adding or editing the SQL query which are | |
| | executed at runtime. | |
| Edit | Opens the Following Window: | |
| | Custom Attribute and Query Window | |
| | Purpose of this Window: | |
| | Specifies adding or editing the SQL query which are executed at runtime. | |
| Remove | Function: | |
| | Removes the particular SQL query from the existing list of queries. | |
| Parse custom attribute to DateTime format | Definition: | |

| Field Name | Definition |
|---------------------------|--|
| | Parses a specified custom attribute to a valid DateTime format. |
| | Allowed Values: |
| | Selected - Parses the custom attribute to DateTime format. |
| | Deselected - The custom attribute remains in its default data format. |
| | Default Value: |
| | Selected |
| Return first row of query | Definition: |
| | Specifies which record to be fetch from the database. |
| | Allowed Values: |
| | Selected - Specifies to fetch the first record in the database column. |
| | • Deselected - The query fetches the last record. |
| | Default Value: |
| | Deselected |

Database Stored Procedure Window

Specifies where and how the data is retrieved from the database, when using a stored procedure

| Database Stored Procedu | ure | | | | | | × |
|---|-----------------|-------------------|--------------|---------------|-----------|-------|----------|
| Database S | tored Procedure | | | | | | |
| Connection String : | server=loca | alhost;database=p | ubs;trusted_ | Connection=ye | 28 | Creat | ie se |
| Stored Procedure Name : | | | | | | Brows | se |
| Parameters : | Parameter | Name Value/Attr | . Name | in/out | Data Type | Size | |
| Example of dateTime format: 2012-01-18 4:50:09 PM | | | | | | Remo | ve |
| | 1 | 🔗 ок | X Ca | ncel | | | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag the **Query Database** AgileShape, and drop it on the process template.
- 4. On the **SQL Type** list, select **Stored Procedure**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------------|---|
| Connection String | Definition: |
| | Specifies the connection string that is used to connect to the database. |
| | Click Choose to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) |
| | • Click Create to create a new connection string. |
| | Allowed Values: |
| | A valid SQL connection string. |
| | Default Value: |

| Field Name | Definition | |
|-----------------------|--|------------|
| | server=myserver;database=pubs;trusted_Connection | =yes |
| | Custom Attributes: | |
| | Yes | |
| | Example: | |
| | server=DataServer;database=StoreDb;trusted_Conn | ection=yes |
| Create | Opens the Following Window: | |
| | Database Connection Configuration Window | |
| | Purpose of this Window: | |
| | Creates a connection string with specified information. | |
| Choose | Opens the Following Window: | |
| | Browse Custom Attributes Window | |
| | Purpose of this Window: | |
| | Specifies a connection string from a list of shared custom attributes. | |
| Stored Procedure Name | Definition: | |
| | The name of the stored procedure. | |
| | Allowed Values: | |
| | A valid stored procedure name. | |
| | Default Value: | |
| | None | |
| | Custom Attributes: | |
| | Yes | |
| | Example: | |
| | GetUserDetail | |
| Parameter Name | Definition: | |
| | The parameters for the stored procedure. | |
| | Allowed Values: | |
| | A valid parameter for specified stored procedure. | |
| | Default Value: | |
| | None | |
| | Custom Attributes: | |

| Field Name | Definition |
|-----------------|---|
| | Yes |
| | Example: |
| | OrderNumber |
| Value/Attr Name | Definition: |
| | The value of the parameters for the stored procedure. |
| | Allowed Values: |
| | A valid value for the specified parameter. |
| | Default Value: |
| | System.String |
| | Custom Attributes: |
| | Yes |
| in/out | Definition: |
| | Specifies the in/out parameters for the stored procedure. |
| | Allowed Values: |
| | Input - Specifies that the parameter is an input value for the stored procedure. |
| | Output - Specifies that the parameter is an output value for the stored procedure. |
| | InputOuput - Specifies that the parameter can be input/output value for the stored procedure. |
| | ReturnValue - Specifies that the parameter is a return value for the stored procedure. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Data Type | Definition: |
| | Specifies the SQL server data type of the specified parameter for the stored procedure. |
| | Allowed Values: |
| | • Bit |
| | Decimal |
| | Float |

| Field Name | Definition | |
|------------|---|--|
| | DateTime | |
| | • VarChar | |
| | • Binary | |
| | • Integer | |
| | Default Value: | |
| | None | |
| | Custom Attributes: | |
| | Yes | |
| Size | Definition: | |
| | Specifies size of input parameter for the stored procedure. | |
| | Allowed Values: | |
| | Integer Number | |
| | Default Value: | |
| | None | |
| | Custom Attributes: | |
| | No | |
| Add | Function: | |
| | Adds new parameter for the stored procedure. | |

Database Connection Configuration Window

Creates a connection string with specified information.

| Database Connec | tion Configura | tion | × |
|-----------------|-------------------|--|---------------------------|
| Conf | igure Database C | Connection | |
| Database Authe | ntication —— | | |
| | User: | sa | Integrated Security |
| | Password : | | |
| Check | < "Integrated Sec | urity' to use windows authentication for d | database connection. |
| Database Locati | on | | |
| Da | atabase Server : | localhost | |
| | Database : | pubs 🔍 | (Retrieve database names) |
| | | \ | OK 🔀 Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. In one of the following windows, click **Create**. The specific windows that display vary, depending upon the AgileShape you are using:
 - Configuration for Inserting Database Record Window
 - Configuration for Batch Inserting Database Record Window
 - Configuration for Updating Database Record(s) Window
 - Configuration for Deleting Database Record(s) Window
 - Configuration for Stored Procedure or Generic SQL Window
 - Database Queries Window
 - Database Stored Procedure Window

| Field Name | Definition |
|------------|-------------|
| User | Definition: |

| Field Name | Definition |
|---------------------|---|
| | The user name for the database account AgilePoint Server uses to connect to the database. |
| | Allowed Values: |
| | A valid user name for the database. |
| | Default Value: |
| | sa |
| Password | Definition: Specifies a password for the specified user. <u>Allowed Values:</u> A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Integrated Security | <u>Definition:</u> When integrated security is checked, the current windows account credentials are used for authentication. <u>Allowed Values:</u> <u>Selected - The windows account credentials are used for authentication automatically.</u> <u>Deselected - The user and password fields are enabled for database authentication.</u> <u>Default Value:</u> Selected |
| Database Server | Definition: Specifies a database server name that provides database services. <u>Allowed Values:</u> A valid database server name. <u>Default Value:</u> localhost |
| | Custom Attributes: |

| Field Name | Definition |
|------------|---|
| | No |
| Database | <u>Definition:</u> List all the database names that are available for the authenticated user. <u>Allowed Values:</u> A valid database server host name. A valid IP address. <u>Default Value:</u> pubs <u>Custom Attributes:</u> No |

Browse Custom Attributes Window

Specifies a connection string from a list of shared custom attributes.

| Br | owse Custum Attributes | | × |
|----|----------------------------------|--------------|-------------|
| (| Configure Database Conne | ection | |
| [| Name | Value | Туре |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | List of Shared Custom Attributes | \ | OK 🔀 Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag any AgileShape and drop it on the process template.

- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. In one of the following windows, click **Choose**. The specific windows that display vary, depending upon the AgileShape you are using:
 - Configuration for Inserting Database Record Window
 - Configuration for Batch Inserting Database Record Window
 - Configuration for Updating Database Record(s) Window
 - Configuration for Deleting Database Record(s) Window
 - Configuration for Stored Procedure or Generic SQL Window
 - Database Queries Window
 - Database Stored Procedure Window
- 7. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

| Field Name | Definition |
|------------|--|
| Name | <u>Definition:</u> Specifies the name of custom attribute. <u>Allowed Values:</u> Read only. |
| Value | <u>Definition:</u> This field contains the value of the shared custom attribute. <u>Allowed Values:</u> Read only. |
| Туре | Definition: Specifies the data type of the shared custom attributes. <u>Allowed Values:</u> Read only. |

Custom Attribute and Query Window

Specifies adding or editing the SQL query which are executed at runtime.

| Custom Attribute and Query | | |
|---|---|---|
| Attribute Name: | | |
| Data Type: boolean | | |
| SQL: DateTime format example: 8/2/2012 1:53:13 AM | 4 | Column Browse Table Column OK Cancel Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag the **Query Database** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **SQLType** list, select **SQL**.
- 6. On the **Configure** field, click the **Ellipses** button.
- 7. On the Database Queries Window window, click Add.

| Field Name | Definition |
|----------------|---|
| Attribute Name | Definition: Specifies the name of custom attribute in which the selected data is stored. |
| | <u>Allowed Values:</u> A valid custom attribute name. <u>Default Value:</u> None |

| Field Name | Definition |
|---------------------|---|
| | Custom Attributes: |
| | Yes |
| Data Type | Definition: Displays the data type of the selected node. Allowed Values: • boolean - Stores true or false value. • string - Stores sequence of characters. • datetime - Stores datetime value. • decimal - Stores decimal number. • integer - Stores whole number. Default Value: boolean |
| SQL | Definition: The SQL statement that will be performed on the database by this AgileShape at runtime. Allowed Values: A valid SQL SELECT query. Default Value: None Custom Attributes: Yes Example: SELECT ShowName FROM EventList WHERE showID = 1001 |
| Browse Table Column | Function: Select the particular database column from the selected table. |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Retrieving Data from a Database

To retrieve data from the database using SQL statements or stored procedures, do the following.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag the **Query Database** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the **SQLType** list, select **SQL**.
- 6. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the **Database Queries** window, complete the following fields as required.

| Field Name | Value | |
|-------------------|---|--|
| Connection String | Definition: | |
| | Specifies the connection string that is used to connect to the database. | |
| | Click Choose to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) | |
| | Click Create to create a new connection string. | |
| | Allowed Values: | |
| | A valid SQL connection string. | |
| | Default Value: | |
| | server=myserver;database=pubs;trusted_Connecti | |
| | Custom Attributes: | |
| | Yes | |
| | Example: | |
| | server=DataServer;database=StoreDb;trusted_Cor | |
| Add | Opens the Following Window: | |
| | Custom Attribute and Query Window | |
| | Purpose of this Window: | |
| | Specifies adding or editing the SQL query which are executed at runtime. | |

2. Complete any additional configuration for this AgileShape according to your requirements:

• AgilePart - Common Setup

- Browse Custom Attributes Window
- Database Connection Configuration Window
- Database Stored Procedure Window
- Database Queries Window
- Query Database

Stored Procedure

An AgilePart that executes database stored procedures.



Good to Know

• This AgileShape does not support capturing return values or output parameters. See the Query Database AgileShape for additional information about retrieving data from the database.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Database stencil.
- 3. On the **Database** stencil, drag the **Stored Procedure** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|--------------|---|
| Configure | Opens the Following Window: Configuration for Stored Procedure or Generic SQL Window Purpose of this Window: Specifies where and how to insert the new database records into the database. |
| DatabaseType | Definition: Specifies the type of database to be used. <u>Allowed Values:</u> |

| Field Name | Definition |
|------------|---|
| | SqlServer Oracle Default Value: SqlServer |
| Timeout | Definition: Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape. Allowed Values: Any positive integer. Default Value: 600 Custom Attributes: No |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Stored Procedure or Generic SQL Window

Specifies where and how to insert the new database records into the database.

| Configuration for Store Procedure or Generic SQL | | | |
|--|---|--------|--|
| Configuration | n for Store Procedure or Generic SQL | | |
| Connection String: | server=localhost;database=pubs;trusted_Connection=yes | Create | |
| SQL: DateTime format | | | |
| example:8/3/2012 3:18:33 AM | | Tables | |
| | | V OK | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag the **Stored Procedure** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------------|---|
| Connection String | Definition: |
| | Specifies the connection string that is used to connect to the database. |
| | Click Choose to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) |
| | • Click Create to create a new connection string. |
| | Allowed Values: |
| | A valid SQL connection string. |
| | Default Value: |
| | server=myserver;database=pubs;trusted_Connection=yes |
| | Custom Attributes: |

| Field Name | Definition | |
|------------|---|-------|
| | Yes | |
| | Example: | |
| | server=DataServer;database=StoreDb;trusted_Connect | ction |
| Create | Opens the Following Window: | |
| | Database Connection Configuration Window | |
| | Purpose of this Window: | |
| | Creates a connection string with specified information. | |
| Choose | Opens the Following Window: | |
| | Browse Custom Attributes Window | |
| | Purpose of this Window: | |
| | Specifies a connection string from a list of shared custom attributes. | |
| SQL | Definition: | |
| | The SQL statement that will be performed on the database by this AgileShape at runtime. | |
| | Allowed Values: | |
| | A valid SQL SELECT query. | |
| | Default Value: | |
| | None | |
| | Custom Attributes: | |
| | Yes | |
| | Example: | |
| | SELECT ShowName FROM EventList WHERE showID = 1001 | |
| Tables | Function: | |
| | Selects the table from the database. | |

Database Connection Configuration Window

Creates a connection string with specified information.

| Database Co | onnection Configura | tion | × |
|-------------|-----------------------|--|---------------------------|
| | Configure Database (| Connection | |
| Database | Authentication | | |
| | User : | sa | Integrated Security |
| | Password : | | |
| | Check 'Integrated Sec | urity' to use windows authentication for c | latabase connection. |
| Database | Location | | |
| | Database Server : | localhost | |
| | Database : | pubs · · · | (Retrieve database names) |
| | | * | OK 🔀 Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. In one of the following windows, click **Create**. The specific windows that display vary, depending upon the AgileShape you are using:
 - Configuration for Inserting Database Record Window
 - Configuration for Batch Inserting Database Record Window
 - Configuration for Updating Database Record(s) Window
 - Configuration for Deleting Database Record(s) Window
 - Configuration for Stored Procedure or Generic SQL Window
 - Database Queries Window
 - Database Stored Procedure Window

| Field Name | Definition |
|------------|-------------|
| User | Definition: |

| Field Name | Definition |
|---------------------|---|
| | The user name for the database account AgilePoint Server uses to connect to the database. |
| | Allowed Values: |
| | A valid user name for the database. |
| | Default Value: |
| | sa |
| Password | <u>Definition:</u> Specifies a password for the specified user. <u>Allowed Values:</u> A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Integrated Security | <u>Definition:</u> When integrated security is checked, the current windows account credentials are used for authentication. <u>Allowed Values:</u> <u>Selected - The windows account credentials are used for authentication automatically.</u> <u>Deselected - The user and password fields are enabled for database authentication.</u> <u>Default Value:</u> Selected |
| Database Server | Definition: Specifies a database server name that provides database services. Allowed Values: A valid database server name. Default Value: localhost |
| | Custom Attributes: |

| Field Name | Definition |
|------------|---|
| | No |
| Database | <u>Definition:</u> List all the database names that are available for the authenticated user. <u>Allowed Values:</u> A valid database server host name. A valid IP address. <u>Default Value:</u> pubs <u>Custom Attributes:</u> No |

Browse Custom Attributes Window

Specifies a connection string from a list of shared custom attributes.

| Brows | e Custum Attributes | | × |
|-------|--------------------------------|--------------|-------------|
| 6 | Configure Database Conne | ction | |
| | Name | Value | Туре |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Li | st of Shared Custom Attributes | \ | OK 🔀 Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag any AgileShape and drop it on the process template.

- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. In one of the following windows, click **Choose**. The specific windows that display vary, depending upon the AgileShape you are using:
 - Configuration for Inserting Database Record Window
 - Configuration for Batch Inserting Database Record Window
 - Configuration for Updating Database Record(s) Window
 - Configuration for Deleting Database Record(s) Window
 - Configuration for Stored Procedure or Generic SQL Window
 - Database Queries Window
 - Database Stored Procedure Window
- 7. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

| Field Name | Definition |
|------------|--|
| Name | <u>Definition:</u> Specifies the name of custom attribute. <u>Allowed Values:</u> Read only. |
| Value | <u>Definition:</u> This field contains the value of the shared custom attribute. <u>Allowed Values:</u> Read only. |
| Туре | Definition: Specifies the data type of the shared custom attributes. <u>Allowed Values:</u> Read only. |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Executing a Stored Procedure

To execute a stored procedure, do the following.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag the **Stored Procedure** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the **Configuration for Store Procedure or Generic SQL** window, complete the following fields as required.

| Field Name | Value |
|-------------------|---|
| Connection String | Definition: |
| | Specifies the connection string that is used to connect to the database. |
| | Click Choose to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) |
| | Click Create to create a new connection string. |
| | Allowed Values: |
| | A valid SQL connection string. |
| | Default Value: |
| | server=myserver;database=pubs;trusted_Connection= |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | server=DataServer;database=StoreDb;trusted_Conner |
| SQL | Definition: |
| | The SQL statement that will be performed on the database by this AgileShape at runtime. |
| | Allowed Values: |
| | A valid SQL SELECT query. |
| | Default Value: |
| | None |

| Field Name | Value |
|------------|--|
| | Custom Attributes: |
| | Yes |
| | Example: |
| | SELECT ShowName FROM EventList WHERE showID = 1001 |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Browse Custom Attributes Window
 - Configuration for Stored Procedure or Generic SQL Window
 - Database Connection Configuration Window
 - Stored Procedure

Update Database

An AgilePart that updates multiple existing database records in a database table.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the Database stencil, drag the Update Database AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|-----------------------------|
| Configure | Opens the Following Window: |
| | Window |
| | Purpose of this Window: |

| Field Name | Definition |
|--------------|---|
| | Specifies where and how to insert the new database records into the database. |
| DatabaseType | Definition: Specifies the type of database to be used. Allowed Values: • SqlServer • Oracle Default Value: SqlServer |
| Timeout | Definition: Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape. Allowed Values: Any positive integer. Default Value: 600 Custom Attributes: No |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Updating Database Record(s) Window

Specifies where and how to insert the new database records into the database.

| Configuration for Updating Database Record(s) | | | |
|---|---|-------|-------------------------|
| | ation for Updating Database Record(s) | | |
| Connection String: | server=localhost;database=pubs;trusted_Connection=yes | | Create |
| Table Name: | | | C Browse |
| Condition (SQL format): | | | C Browse |
| Columns & Data: | Column Name | Value | |
| DateTime format example:8/3/2012 4:50:02 AM | | | <pre> Add Remove </pre> |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the Database stencil, drag the Update Database AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------------|--|
| Connection String | <u>Definition:</u> Specifies the connection string that is used to connect to the database. Click Choose to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) Click Create to create a new connection string. <u>Allowed Values:</u> A valid SQL connection string. <u>Default Value:</u> |
| | Server=myserver;database=pubs;trusted_Connection=yes Custom Attributes: Yes Example: server=DataServer;database=StoreDb;trusted_Connection= |
| Create | Opens the Following Window: Database Connection Configuration Window Purpose of this Window: Creates a connection string with specified information. |
| Choose | Opens the Following Window: Browse Custom Attributes Window Purpose of this Window: Specifies a connection string from a list of shared custom attributes. |
| Table Name | Definition: Specifies the name of the database table where this AgileShape inserts the record. Allowed Values: A valid database table name. Default Value: |

| Field Name | Definition |
|-------------|---|
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| Browse | Function: |
| | Enables you to find the associated item. |
| | Purpose of this Window: |
| | Specifies a particular database table from the database. |
| Condition | Definition: |
| | The SQL WHERE clause that defines which database records should be updated. |
| | Allowed Values: |
| | A valid SQL WHERE clause. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | InvoiceNumber <= 3452 |
| Column Name | Definition: |
| | Specifies the name of the column in the database. |
| | Allowed Values: |
| | A valid column name from the particular table in the database. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | CustomerName |
| Value | Definition: |
| Field Name | Definition |
|------------|---|
| | Specifies an XPath to a single node inside the given repeating Xpath. |
| | Allowed Values: |
| | A valid XPath. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | \${/pd:AgilePoint/pd:Products/pd:ComponentName} |
| Add | Function: |
| | Creates new mapping to a database table column from the schema. |
| Remove | Function: |
| | Removes the mapping from the database table column. |

Database Connection Configuration Window

Creates a connection string with specified information.

| Database Connec | tion Configura | tion | × |
|-----------------|-------------------|--|---------------------------|
| Conf | igure Database C | Connection | |
| Database Authe | ntication —— | | |
| | User: | sa | Integrated Security |
| | Password : | | |
| Check | < "Integrated Sec | urity' to use windows authentication for d | database connection. |
| Database Locati | on | | |
| Da | atabase Server : | localhost | |
| | Database : | pubs 🔍 | (Retrieve database names) |
| | | \ | OK 🔀 Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. In one of the following windows, click **Create**. The specific windows that display vary, depending upon the AgileShape you are using:
 - Configuration for Inserting Database Record Window
 - Configuration for Batch Inserting Database Record Window
 - Configuration for Updating Database Record(s) Window
 - Configuration for Deleting Database Record(s) Window
 - Configuration for Stored Procedure or Generic SQL Window
 - Database Queries Window
 - Database Stored Procedure Window

| Field Name | Definition |
|------------|-------------|
| User | Definition: |

| Field Name | Definition |
|---------------------|---|
| | The user name for the database account AgilePoint Server uses to connect to the database. |
| | Allowed Values: |
| | A valid user name for the database. |
| | Default Value: |
| | sa |
| Password | <u>Definition:</u> Specifies a password for the specified user. <u>Allowed Values:</u> A valid password. |
| | Default Value: |
| | None |
| | <u>Custom Attributes:</u> No |
| Integrated Security | <u>Definition:</u> When integrated security is checked, the current windows account credentials are used for authentication. <u>Allowed Values:</u> <u>Selected</u> - The windows account credentials are used for authentication automatically. <u>Deselected</u> - The user and password fields are enabled for database authentication. <u>Default Value:</u> Selected |
| Database Server | <u>Definition:</u> Specifies a database server name that provides database services. <u>Allowed Values:</u> A valid database server name. <u>Default Value:</u> localhost |
| | Custom Attributes: |

| Field Name | Definition |
|------------|---|
| | No |
| Database | <u>Definition:</u> List all the database names that are available for the authenticated user. <u>Allowed Values:</u> A valid database server host name. A valid IP address. <u>Default Value:</u> pubs <u>Custom Attributes:</u> No |

Browse Custom Attributes Window

Specifies a connection string from a list of shared custom attributes.

| Browse (| ustum Attributes | | × |
|----------|-----------------------------|--------------|-------------|
| 9 | Configure Database Conne | ection | |
| | Name | Value | Туре |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| List o | of Shared Custom Attributes | \ | OK 🔀 Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag any AgileShape and drop it on the process template.

- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. In one of the following windows, click **Choose**. The specific windows that display vary, depending upon the AgileShape you are using:
 - Configuration for Inserting Database Record Window
 - Configuration for Batch Inserting Database Record Window
 - Configuration for Updating Database Record(s) Window
 - Configuration for Deleting Database Record(s) Window
 - Configuration for Stored Procedure or Generic SQL Window
 - Database Queries Window
 - Database Stored Procedure Window
- 7. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

| Field Name | Definition |
|------------|---|
| Name | Definition: Specifies the name of custom attribute. <u>Allowed Values:</u> Read only. |
| Value | Definition: This field contains the value of the shared custom attribute. <u>Allowed Values:</u> Read only. |
| Туре | Definition: Specifies the data type of the shared custom attributes. <u>Allowed Values:</u> Read only. |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Updating Database Records in a Database Table

To update existing records in a database table, do the following.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the Database stencil, drag the Update Database AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the **Configuration for Updating Database Record(s)** window, complete the following fields as required.

| Field Name | Value |
|-------------------|---|
| Connection String | Definition: |
| | Specifies the connection string that is used to connect to the database. |
| | Click Choose to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) |
| | Click Create to create a new connection string. |
| | Allowed Values: |
| | A valid SQL connection string. |
| | Default Value: |
| | server=myserver;database=pubs;trusted_Connection=yes |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | server=DataServer;database=StoreDb;trusted_Connection |
| Table Name | Definition: |
| | Specifies the name of the database table where this AgileShape inserts the record. |
| | Allowed Values: |
| | A valid database table name. |
| | Default Value: |
| | None |
| | Custom Attributes: |

| Field Name | Value |
|------------|--|
| | Yes |
| | Example: |
| Condition | Definition: The SQL WHERE clause that defines which database records should be updated. Allowed Values: A valid SQL WHERE clause. Default Value: None Custom Attributes: No Example: InvoiceNumber <= 3452 |

- 2. In the Column & Data section, click Add.
- 3. Complete the following fields as required.

| Field Name | Value |
|-------------|--|
| Column Name | Definition: Specifies the name of the column in the database. <u>Allowed Values:</u> |
| | A valid column name from the particular table in the database. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | CustomerName |
| Value | Definition: |
| | Specifies an XPath to a single node inside the given repeating Xpath. |
| | Allowed Values: |

| Field Name | Value |
|------------|---|
| | A valid XPath. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | \${/pd:AgilePoint/pd:Products/ pd:ComponentName} |

- 4. Complete any additional configuration for this AgileShape according to your requirements:
 - AgilePart Common Setup
 - Browse Custom Attributes Window
 - Configuration for Updating Database Record(s) Window
 - Database Connection Configuration Window
 - Update Database

Extender

An AgileExtender is a type of AgileShape that allows users to overlay the AgilePoint process model with custom behavior. An AgileExtender is a kind of "meta shape" that runs on top of or in parallel to the process, rather than running inline within the process flow. This provides increased extensibility and allows layers of powerful functionality to be added to the process without making the core process model unnecessarily complex.

This section describes the AgileShapes in the Extender stencil, which provides access to the built-in AgileExtenders.

Service Level Agreement (SLA)

This AgileShape enables you to track the time it takes to complete a range of elements in a process instance. Within a process template, you can set more than one timer using the same SLA AgileExtender shape.



Navigation

1. In AgilePoint Envision, open a process template.

- 2. Navigate to the Extender stencil.
- 3. On the **Extender** stencil, drag the **Service Level Agreement** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|--|
| SLATimer | Opens the Following Window: Time Watch Between Activities Window Purpose of this Window: Sets up the SLA timer, including the range of AgileShapes you want to time. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Time Watch Between Activities Window

Sets up the SLA timer, including the range of AgileShapes you want to time.

| Time Watch Between Activities | |
|-------------------------------|--|
| Configuration of | of SLA (Service Level Agreement) Time Watcher |
| SLA Definitions | Activity Settings |
| SLA Timer | Start Activity: Approver1 On Event: Work/temOverDue |
| | End Activity: Approver1 On Event: CompleteWorkitem |
| | SLA Timing © Fixed Date 2/ 8/2013 |
| | Calculate Date Custom Time (e.g. 3D-2W) |
| | Business Time Business Time is applicable for both Calculate and Custom date |
| | Action Settings Notification: SelectEmailTemplate Sub Process: Delete FileIssue |
| 👆 Add 🔤 Remove | ✓ OK Kancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Extender stencil.
- 3. On the **Extender** stencil, drag the **Service Level Agreement** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **SLATimer** field, click the **Ellipses** button.

| Field Name | Definition |
|----------------|--|
| Add | <u>Function:</u> Creates a new timer with a name you specify. |
| Remove | <u>Function:</u> Deletes the selected timer. |
| Start Activity | Definition: |

| Field Name | Definition |
|----------------|--|
| | Specifies the activity upon which you want to start the timer. |
| | Allowed Values: |
| | The name of your activity. |
| | Default Value: |
| | None. |
| End Activity | Definition: |
| | Specifies the activity upon which you want to end the timer. |
| | Allowed Values: |
| | The name of your activity. |
| | Default Value: |
| | None |
| On Event | Definition: |
| | Specifies the particular event of the activity you want to start or end the timer. |
| | Allowed Values: |
| | The name of your event. |
| | Default Value: |
| | None |
| | Example: |
| | For a Manual activity, you can choose the AssignWorkItem event. |
| Fixed Date | Definition: |
| | Sets a particular date to expire the timer. |
| | Allowed Values: |
| | • Selected - Specifies to use a particular date to expire the timer. |
| | • Deselected - Specifies not to use a particular date to expire the timer. |
| | Default Value: |
| | Selected. |
| Calculate Date | Definition: |

| | Definition |
|-------------|---|
| | Determines whether to calculate a date to expire the timer based on the information you enter. |
| | Allowed Values: |
| | • Deselected - Specifies not to calculate a date to expire the timer. |
| | Selected - Specifies to calculate a date to expire the timer. This calculation includes the following elements: |
| | • An integer. |
| | This represents the length of the time unit. |
| | • A time unit. |
| | The Following types of time unit are used to calculate the time: |
| | Minute |
| | • Hour |
| | • Day |
| | • Week |
| | Default Value: |
| | Deselected |
| | Example: |
| | If the length is set to 3, and the time unit is set to Day, this indicates 3 days. For example, this sets a duration of 3 days after which the timer expires. |
| Custom Time | Definition: |
| | Specifies a custom attribute that identifies a timespan for the timer expiration. |
| | Allowed Values: |
| | A custom attribute where the value is in the value xD-yW . |
| | • xD - Indicates x number of days. |
| | • yW - Indicates y number of weeks. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | 3D-2W |

| Field Name | Definition |
|---------------|---|
| | This value indicates 3 days plus 2 weeks. |
| Business Time | Definition: Determines whether the time span represents actual time, or business hours only. |
| | <u>Allowed Values:</u> True - The time span represents a span of business hours only. For example, 5 days of business time might be equivalent to 7 days of actual time. 8 hours of business time might be |
| | equivalent to 24 hours of actual time. False - The time span represents actual time. It is unaffected by any business time configuration settings. |
| | Default Value: |
| | False |
| | Example: |
| | The Business Time property is set to True, and business hours are configured as 9 a.m. to 5 p.m. A Manual AgileShape with a Time Span of 6 business hours is entered at 4 p.m. on Tuesday, then the activity must be completed by 2 p.m. on Wednesday. |
| | Property Group: Basic |
| Notification | <u>Definition:</u> Specifies the name of an email template used to send the email notification when the timer expires. <u>Allowed Values:</u> The name of your email template. <u>Default Value:</u> None. |
| Sub Process | Definition: Specifies the name of the process template that is started as a sub process when the timer expires. The list is populated from the subprocesses in your process model. You can use process attributes to pass date from the parent process to the subprocess. |

| Field Name | Definition |
|------------|---|
| | Allowed Values: |
| | The name of your process template. |
| | If you configure a subprocess, you can set up process attributes to pass data from the parent process to the subprocess, similar to the SubProcess AgileShape. |
| | Click the Ellipses button to open the Initial Attributes Configuration Window |
| | Default Value: |
| | None. |
| | Custom Attributes: |
| | Yes |

Miscellaneous

This section describes the AgileShapes in the Miscellaneous stencil.

DateTimeOperation

An AgilePart that performs complex date calculations within a process model using a simple graphical user interface. The DateTime Services AgileShape can manipulate the operations between two DateTime input values or add extra DateTime values (seconds, minutes, hours, or days) to a given DateTime value.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **DateTimeOperation** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|---------------|---|
| Configuration | Opens the Following Window: DateTime Services Configuration Window Purpose of this Window: Sets up calculations that enable process activities to occur at a specified date and time. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

DateTime Services Configuration Window

Sets up calculations that enable process activities to occur at a specified date and time.

| DateTime Services Configuration. | X |
|---|---|
| Date Time Manipulation | |
| Input DateTime 1 Input DateTime 2 © Custom Attribute (\$()) \$(CustomDate1) Format dd/MM /yyyy HH:mm:ss © Static 3/25/2010 12:00:00 © Now © Now | |
| Operation C Add Substract C Substract C Calculate Difference C Calculate Difference C Compare Difference C Return Whichever is Earlier C Change Input DateTime to Output Format | |
| Output Result Result Period Period | |
| OK Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **DateTimeOperation** AgileShape, and drop it on the process template.
- 4. On the **Configuration** field, click the **Ellipses** button.

| Field Name | Definition |
|----------------|---|
| Input DateTime | Definition: |
| | Specifies the dates that are used to perform complex date calculations. |
| | Two DateTime fields are available: Input DateTime 1 and Input DateTime 2. |

| Field Name | Definition |
|------------|--|
| | Allowed Values: |
| | Custom Attribute - Specifies a custom attribute that identifies the DateTime. |
| | Click the Ellipses button to open the Select XPath from Attributes Window. |
| | Format - Applies the selected format to the date if you use a custom attribute. |
| | • Static - Specifies a static date and time. |
| | Now - Specifies the date and time the DateTime AgilePart is initiated. |
| | • None - Disables the Input DateTime 2 field. |
| | Default Value: |
| | Custom Attribute |
| Add | Definition: Specifies an amount of time to be added to the Input DateTime 1. Allowed Values: • An integer, or a custom attribute that represents an integer. Click the Ellipses button to open the Select XPath from Attributes Window. • The time unit. Options are: • Seconds • Minutes • Hours • Days • Weeks • Months • Years |
| | None |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |

| Field Name | Definition |
|---------------|--|
| | If the value is set to 10, and the time unit is set to Days, 10 Days are added/subtracted. |
| Subtract | Definition: Specifies an amount of time to be subtracted from the Input DateTime 1. Allowed Values: • An integer, or a custom attribute that represents an integer. Click the Ellipses button to open the Select XPath from Attributes Window. • The time unit. Options are: • Seconds • Minutes • Hours • Days • Weeks • Months • Years Default Value: None Custom Attributes: Yes Example: |
| | If the value is set to 10, and the time unit is set to Days, 10 Days are added/subtracted. |
| Business Time | Definition: Specifies that the AgilePoint work calendar is taken into account for date calculations. Allowed Values: • Deselected - The AgilePoint work calendar is not taken into account for calculations. • Selected - The AgilePoint work calendar is taken into account for calculations. • Deselected - The AgilePoint work calendar is taken into account for calculations. • Default Value: • Deselected |

| Field Name | Definition |
|--------------------|---|
| | Example: |
| | The Business Time field is set as selected, and business hours of work calendar are configured as 9 AM to 5 PM. If the task with completion time 8 hours is entered at 1 PM on Monday, then the activity must be completed by 12 PM on Tuesday. |
| Compare Difference | Definition: |
| | Specifies whether to compare the difference between the two Input DateTime values. |
| | Allowed Values: |
| | 1. A comparison operator. |
| | Following are the operators that are used to compare the two Input DateTime values: |
| | • <= |
| | • > |
| | • = |
| | • <> |
| | 2. An integer, or a custom attribute that represents an integer. |
| | Click the Ellipses button to open the Select XPath from Attributes Window. |
| | 3. The time unit. |
| | Options are: |
| | Seconds |
| | Minutes |
| | • Hours |
| | • Days |
| | • Weeks |
| | Months |
| | • Years |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Calculation Type | Definition: |
| | Specifies how the difference between the Input DateTime 1 and Input DateTime 2 is calculated. |

| Field Name | Definition |
|------------|---|
| | Allowed Values: |
| | Real - The actual difference between the two DateTime values. The result depends upon the option set in the Result field. |
| | • Relative - The relative difference between the two DateTime values. This setting is useful for situations when an action is allowed, for example, once per week or once per month. |
| | Default Value: |
| | Real |
| | Example: |
| | The difference between the dates Sat 29-Dec-2007 23:50:00 and Wed 02-Jan-2008 00:00:00 is calculated as follows. Note that these dates are 4 days apart, but occur in different years, different months, and different weeks. |
| | When you select the Real option the difference is calculated based on the actual number of days (and hours and minutes) between the two dates: 4 days and 10 minutes. |
| | When you select the Relative option, the difference is 4 days, 1 week or 1 month, or 1 year, depending upon the time unit specified. |
| Result | Definition: |
| | Specifies the type of value to return for the date calculations where the Calculation Type is set as Real. |
| | Allowed Values: |
| | Decimal - Returns the difference as is, including any decimals. |
| | Whole number - Returns the integer part of the result by removing the decimal part. |
| | Rounded - Rounds up (>=0.5) or rounds down (<0.5) the result. |
| | Default Value: |
| | Decimal |
| Return | Definition: Specifies whether to use the earlier or later value for Input DateTime1 or Input DateTime 2. |
| | Allowed Values: |

| Field Name | Definition |
|--|--|
| | Whichever is Earlier - Uses the earlier of Input DateTime1 and Input DateTime 2. |
| | Whichever is Later - Uses the later of Input DateTime1 and Input DateTime 2. |
| | Default Value: |
| | Whichever is Earlier |
| Change Input DateTime to Output Format | Definition: |
| | Specifies whether the format of the date entered for the Input DateTime 1 field is converted to the format specified in the Date String - Format field. |
| | The DateTime data type for Input DateTime 1 is converted to a string data type in the format provided in the Format list, and then stored into the variable that appears in Date Sting field. |
| | Allowed Values: |
| | Deselected - The value for Input DateTime 1 is not converted to the specified output format. |
| | Selected - The value for Input DateTime 1 is converted to the output format. |
| | When you select this option, the DateString and the Format options are available to covert the input format to the output format. |
| | Default Value: |
| | Deselected |
| Result Boolean | Definition: |
| | Specifies the name of the variable that stores the Boolean result returned from the Compare Difference date calculations. |
| | If the Compare Difference option is enabled, the difference is evaluated as a Boolean result, and the Boolean value is associated with the variable that appears in this field. |
| | Allowed Values: |
| | A variable that stores a Boolean DateTime evaluation result. |
| | Default Value: |
| | Result |
| | Custom Attributes: |
| | Yes |

| Field Name | Definition |
|---------------------------|---|
| Field Name Date String | Definition Definition: Specifies the name of the variable that stores the result returned from the date calculations if it is in DateTime format. The results of date calculations are converted from DateTime format to a String. The format of the string is specified in the Format list. Allowed Values: A variable that stores the result in the selected String format. Default Value: DateResult Custom Attributes: |
| | Yes |
| Difference | Definition: Specifies the result returned from the Compare Difference date calculations. in terms of a number of time units, such as 5 seconds, or 10 days. If Compare Difference is enabled, the difference is stored as a variable with the name that appears in this field. The value is the output value of the comparison. Allowed Values: • A variable that stores the value of the comparison result. • The time unit. Options are: • Seconds • Minutes • Hours • Days • Years Default Value: • DifferenceResult |

| Field Name | Definition |
|------------|--|
| | Custom Attributes: |
| | Yes |
| Test Mode | Definition: |
| | Displays the Test button to validate the specified DateTime settings. |
| | You can use the test mode to determine whether your DateTime settings will produce the desired result for your process before you run the process. |
| | Allowed Values: |
| | • Deselected - Test mode is disabled. |
| | • Selected - Enables the test mode and displays the Test button. |
| | Default Value: |
| | Deselected |
| Test | Function: |
| | Runs a test to validate the specified DateTime settings. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a DateTimeOperation from a Process

This example shows a scenario where it performs complex date calculation using information in a process, and adds extra DateTime values (seconds, minutes, hours, or days) to a given DateTime value using the DateTimeOperation AgileShape.

Instructional Goals

• Demonstrate how to compare DateTime values using theDateTimeOperation AgileShape.

Submit Budget Request Submit Budget Request Calculation Yes CFO Approval

Example Process: Budget Request with Deadline

Problem Statement

Submit and approve a budget request.

Business Requirements

- The process is initiated when an employee submits a budget request form.
- If the submission date is less than 30 days before the end of the year, the request goes to the CFO for approval.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **DateTimeOperation** AgileShape, and drop it on the process template.
- 4. On the **Configuration** field, click the **Ellipses** button.

Instructions

- 1. On the DateTime Services Configuration Window, in the Input DateTime 1 field, select Now.
- 2. In the Input DateTime 2 field, select Static, and enter 12/31/2014 12:00.
- 3. Select Calculate Difference.
- 4. Select **Compare Difference**. Select less than (<), and enter **30 Days**.
- 5. In the Result Boolean field, enter AuditDate.
- 6. Click Add, and enter 30 Days.
- 7. Click **OK**.
- 8. On your process model, select the **Delay** shape.
- 9. On the Configure field, click the Ellipses button.
- 10. On the Set Time for Delay Activity window, select Designated Date.
- 11. In the **Date** field, enter **\$AuditDate**.

The DateTime AgileShape tests the following statement:

(Time the process enters the DateTime activity) < (30 days before 12/31/2013).

If the result is Yes, the request is routed to the CFO for approval. If the result is No, the request is routed to the Manager for approval.

HTTP Post

This AgileShape can be used to post data from a client machine to a Web application which is predefined. The client receives response from the Web application. It also supports custom attributes and https and web proxy.



Note: This AgileShape has been deprecated. Beginning with AgilePoint BPMS v5.0 SP4 this AgileShape is available only through the Traditional AgileShape stencils, and not through the current stencils.



Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

| Field Name | Definition |
|------------|--|
| HttpPost | Opens the Http Post Configuration dialog box, where you can configure an HTTP post action. |

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Http Post Configuration Window

This window enables you to configure an HTTP post action.

| Field Name | Definition |
|------------|---|
| Credential | The HTTP page URL section should contain a valid URL such as http://MachineName:PortNumber/ WebApplication.aspx. |
| | The Authentication section specifies the authentication for doing the Http post function. |
| | Do one of the following: |

| Field Name | Definition |
|-------------|--|
| | Specify an account by Domain\\username and password. You can validate whether this account is valid by clicking on the Test button. |
| | • Use the AgilePoint System User at runtime, that means it will impersonate the system account of AgilePoint. |
| | • Use the default credential, this means it will use the account credentials that are used when logging into the Web application. |
| Request | This tab specifies a custom header by clicking on the ellipses button. |
| | Note: The Value field cannot accept special characters, such as "~!@#\$%^&*. ". |
| | You can add parameters that will be used while posting to a Web application, for example: |
| | • Schema - You can attach a Xpath if the process is based on a template with a associated schema. |
| | • Add - Append a new row in a table. |
| | • Remove - Delete the current row in a table. |
| | • Remove All - Remove all rows in a table. |
| Response | This tab binds a response. You can bind the response in two ways. One is to bind the response with an AgilePoint Schema, the other is to store it in a custom attribute. If the Web application that is called is based on Base64 Encode, make sure to select this option. |
| Security | This tab specifies SSL Authentication. |
| | If SSL Authentication is checked, you can add client certificates by clicking the ellipses button. |
| ProxyServer | This tab specifies whether a proxy can be used during the execution of the Http Post. |

PDF Converter

An AgilePart that converts multiple files in various formats to PDF files.



Good to Know

• Only files in the AgilePoint Server file system can be converted to PDF format.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **PDF Converter** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------------|---|
| Destination | Definition: Specifies the file path or folder where the output file is to be stored. Allowed Values: The file or folder name with complete path. Default Value: Name |
| | <u>Custom Attributes:</u> Yes |
| DestinationRepository | Definition: Specifies the repository for storing the output files. Allowed Values: • FileSystem Currently, only the FileSystem repository is supported. Default Value: FileSystem |
| Filter | Opens the Following Window: Filter Window Purpose of this Window: Specifies the file types you want to convert to PDF. |
| OverWriteFile | Definition: |

| Field Name | Definition |
|------------------|---|
| | Specifies whether the AgileShape overwrites the files if they already exist at the specified destination location. |
| | Allowed Values: |
| | False - The AgileShape does not overwrite any existing file. |
| | • True - The AgileShape overwrites the file if it exists with the same name at the destination location. |
| | Default Value: |
| | False |
| Recursive | Definition: |
| | Determines whether the AgileShape's specified action - such as copying, uploading, or deleting - is recursive. In other words, it determines whether the action is repeated in subfolders of the target folder or document library. |
| | Allowed Values: |
| | False - The AgileShape performs the action only on the files located at the specified source folder. Files within subfolders aren't affected. |
| | • True - The AgileShape performs the action on the files located at the specified source folder, as well as the files that are located within the subfolders. |
| | Default Value: |
| | False |
| Source | Definition: |
| | Specifies the name of the source file or folder containing files to be converted to the PDF files. |
| | Allowed Values: |
| | The source file or folder name with complete path. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| SourceRepository | Definition: Specifies the repository for storing the source files. |

| Field Name | Definition |
|------------|---|
| | Allowed Values: |
| | • FileSystem |
| | Currently, only the FileSystem repository is supported. |
| | Default Value: |
| | FileSystem |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Filter Window

Specifies the file types you want to convert to PDF.

| Filter |
|--|
| Filter |
| Document |
| Select All Document Types |
| Table Table Image: state |
| Image ↓ .bmp ↓ .emf ↓ .exif ↓ .dib ↓ .wmf ↓ .jpg ↓ .jpeg ↓ .jpe ↓ .jfif ↓ .gif ↓ .png ↓ .tiff |
| Select All Image Types |
| Select All Types |
| 💉 OK 🔀 Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **PDF Converter** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Filter field, click the Ellipses button.

| Field Name | Definition |
|------------|--|
| File Types | Definition: |
| | Specifies the types of files to be converted to PDF format. |
| | This is not a specific field, but rather this item describes all the options on the Filter window collectively. |
| | Allowed Values: |
| | • Specific file types - You can select one or more specific file types to convert. Other file types at your specified location are ignored. |

| Field Name | Definition |
|------------|--|
| | Groups of file types - You can select groups of file types, such as all document types (Select All Document Types) all image types (Select All Image Types), or all file types (Select All Types). |
| | Default Value: |
| | All selected. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Converting a File to PDF Format

To convert a file to PDF format, do the following.

Prerequisites

• The file you want to convert must be present in the Source folder.

Good to Know

• Only files in the AgilePoint Server file system can be converted to PDF format.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Miscellaneous** stencil.
- 3. On the Miscellaneous stencil, drag the PDF Converter AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following fields as required:

| Field Name | Definition |
|-------------|--|
| Destination | Definition: Specifies the file path or folder where the output file is to be stored. <u>Allowed Values:</u> |

| Field Name | Definition |
|------------|--|
| | The file or folder name with complete path. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Source | Definition: |
| | Specifies the name of the source file or folder containing files to be converted to the PDF files. |
| | Allowed Values: |
| | The source file or folder name with complete path. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - PDF Converter
 - AgilePart Common Setup

Read File

An AgilePart that uploads the contents of any file to a selected schema node of an ASP.NET application.

The process using this AgilePart must have an associated schema.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the Miscellaneous stencil, drag the Read File AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|---|
| Configure | Opens the Following Window: Read File Configuration Window |
| | <u>Purpose of this Window:</u> This window sets up a read file action. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Read File Configuration Window

This window sets up a read file action.

| Read File Co | onfiguration | × |
|--------------|------------------------------|---------------|
| | Read File Configuration | |
| Schema No | ode : | |
| File Path : | * File should be a text file | |
| | | 🥪 OK 🔀 Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **Read File** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------|---|
| Schema Node | Definition: Specifies the schema node you want to upload the file data. Allowed Values: An XPath to a schema node. You can use the Ellipses button to select the required schema from the Select XPath from Attributes Window. Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| File Path | Definition: |

| Field Name | Definition |
|------------|--|
| | Specifies the path of the file on the local file system that includes the content you want to upload to the schema node. |
| | Allowed Values: |
| | The file name with the full path. |
| | Note the following: |
| | • The file must be a text file. |
| | You can use the Ellipses button to select the file. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Reading a Text File from a Process

To read a text file from a process, do the following.

Prerequisites

• A target schema node to upload the contents of the file.

Good to Know

• The process using this AgileShape must have an associated schema.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Miscellaneous** stencil.
- 3. On the **Miscellaneous** stencil, drag the **Read File** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the Read File Configuration Window, complete the following fields as required:

| Field Name | Definition |
|-------------|--|
| Schema Node | Definition: Specifies the schema node you want to upload the file data. |
| | Allowed Values: An XPath to a schema node. You can use the Ellipses button to select the required schema from the Select XPath from Attributes Window. Default Value: None Custom Attributes: Yes |
| File Path | Definition: Specifies the path of the file on the local file system that includes the content you want to upload to the schema node. Allowed Values: The file name with the full path. Note the following: • The file must be a text file. • You can use the Ellipses button to select the file. Default Value: None Custom Attributes: No |

- 2. Complete any additional configuration for this AgileShape according to your requirements:
 - Read File
 - Read File Configuration Window
 - AgilePart Common Setup
Text File Writer

An AgilePart that extracts some or all of the content of a process to save in a file in a UNC or FTP folder.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **Text File Writer** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|---------------|---|
| Configuration | Opens the Following Window: Opens one of the following windows, depending upon the settings configured in the LocationType field: Text File Writer Configuration Window - UNC Tab - Sets up text file storage options for in a UNC destination. Text File Writer Configuration Window - FTP Tab - Sets up text file storage options for in an FTP destination. |
| LocationType | <u>Definition:</u> Determines the type of the location for storing the text file. <u>Allowed Values:</u> FTP - Uses the FTP path to store the text file. UNC - Uses the UNC path to store the text file. <u>Default Value:</u> UNC <u>Example:</u> |

| Field Name | Definition | |
|------------|--|--|
| | UNC - \\myserver\myshare\path\myfile.txt | |
| | • FTP - //myserver/myshare/path/myfile.txt | |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Text File Writer Configuration Window - UNC Tab

Sets up text file storage options for in a UNC destination.

| Text File Writer Configuration | | × | |
|--|--|-------------------|--|
| Text File Writer Configuration | | | |
| UNC File Content | | | |
| UNC Address: \\DEMO3\C:\Windows\sy { e.g. \\ <servername> or (</servername> | ystem32 C:\} | | |
| Use AP Installation Fo | lder | | |
| Check Address | uill us a Asila Paint Id | lastik. | |
| Note: To access ONC location, Process V | will use AglieFolit Id | lenuty | |
| Overwrite Existing File: | ⊖ Yes | ⊙ No | |
| Allow Debug: | ⊖ Yes | ⊙ No | |
| Folder Format: | \${/pd:myFields/pd | :UNCFolderPath} | |
| File Format: | \${/pd:myFields/pd | :UNCFileName}.txt | |
| *You may enter Custom Attribute Name | *You may enter Custom Attribute Name as \$ or \${} | | |
| | 🖉 ОК | 🔀 Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **Text File Writer** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In the LocationType field, click UNC.
- 6. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------|-------------|
| UNC Address | Definition: |

| Field Name | Definition |
|----------------------------|--|
| | Specifies the UNC path that serves as the destination address for the text file. |
| | Allowed Values: |
| | A valid UNC path. |
| | Default Value: |
| | A variable path based on your environment and authentication. |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | \\DEMO3\C:\Windows\system32 |
| Use AP Installation Folder | Definition: |
| | Determines whether you want to use AgilePoint installation folder for the UNC location. |
| | Allowed Values: |
| | Deselected - The AgilePoint installation folder is not used. |
| | Selected - The AgilePoint installation folder is used. |
| | Default Value: |
| | Deselected |
| Check Address | Function: |
| | Verifies whether the specified UNC location exists. |
| Overwrite Existing File | Definition: |
| | Specifies whether the AgileShape overwrites the files if they already exist at the specified destination location. |
| | Allowed Values: |
| | No - The AgileShape does not overwrite any existing file. |
| | • Yes - The AgileShape overwrites the file if it exists with the same name at the destination location. |
| | Default Value: |
| | No |

| Field Name | Definition |
|---------------|---|
| Folder Format | Definition: Specifies the folder structure to store the file. |
| | <u>Allowed Values:</u> A valid folder path. |
| | Default Value: [Department]\[ExpenseCode] |
| | <u>Custom Attributes:</u> Yes |
| | Example: \${/pd:myFields/pd:UNCFolderPath} |
| File Format | Definition: Specifies the format for the name of the file to be stored at the destination location. |
| | <u>Allowed Values:</u> A valid file name. |
| | <u>Default Value:</u> [MM-dd-yyyy]_[Submitter].txt |
| | <u>Custom Attributes:</u> Yes |
| | Example: \${/pd:myFields/pd:UNCFileName}.txt |

- Data Binding
- Using Process Attributes

Text File Writer Configuration Window - FTP Tab

Sets up text file storage options for in an FTP destination.

| Text File Writer Configuration | | | | |
|--|-----------|--------------------|--------------------|--|
| Text File Writer Conf | iguration | | | |
| FTP File Content | | | | |
| Host Address: | DEMO3 | | | |
| User ID: | | | | |
| Password: | | | | |
| Connection Type: | Normal | Anonymous | Check Connection | |
| Overwrite Existing File: | | () Yes | ⊙ No | |
| Allow Debug: | | () Yes | ⊙ No | |
| Folder Format: | | \${/pd:myFields/p | d:UNCFolderPath} | |
| File Format: | | \${/pd:myFields/pd | d:UNCFileName}.txt | |
| *You may enter Custom Attribute Name as \$ or \${} | | | | |
| | • | 🖉 ОК | 🔀 Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **Text File Writer** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In the **LocationType** field, click **FTP**.
- 6. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|--------------|-------------|
| Host Address | Definition: |

| Field Name | Definition | | |
|-----------------|--|--|--|
| | Specifies the FTP server location where you want to store the file. | | |
| | Allowed Values: | | |
| | A valid FTP location. | | |
| | <u>Default Value:</u> | | |
| | A variable path based on your environment and authentication. | | |
| | Custom Attributes: | | |
| | Yes | | |
| | Example: | | |
| | DEMO3 | | |
| User ID | Definition: | | |
| | The user name for your FTP account. | | |
| | Allowed Values: | | |
| | A valid user name for the authentication account. | | |
| | Default Value: | | |
| | None | | |
| | Custom Attributes: | | |
| | Yes | | |
| Password | Definition: | | |
| | The password for the authentication account. | | |
| | Allowed Values: | | |
| | A valid password. | | |
| | Default Value: | | |
| | None | | |
| | Custom Attributes: | | |
| | Yes | | |
| Connection Type | | | |
| | Determines whether a user accesses the ETP | | |
| | server as an authenticated or anonymous user. | | |
| | Allowed Values: | | |
| | • Normal - A user accesses the FTP server as an authenticated user. The user authentication | | |

| Field Name | Definition | | |
|-------------------------|---|--|--|
| | details are required, such as user name and password. Anonymous - A user accesses the FTP server as a guest. User authentication is not required. | | |
| | Default Value: | | |
| | Anonymous | | |
| Check Connection | <u>Function:</u> Verifies whether the connection settings are correct, such as host address, user ID, and password. | | |
| Overwrite Existing File | <u>Definition:</u> Specifies whether the AgileShape overwrites the files if they already exist at the specified destination location. <u>Allowed Values:</u> No - The AgileShape does not overwrite any existing file. Yes - The AgileShape overwrites the file if it exists with the same name at the destination location. <u>Default Value:</u> No | | |
| Folder Format | Definition: Specifies the folder structure to store the file. <u>Allowed Values:</u> A valid folder path. <u>Default Value:</u> [Department]\[ExpenseCode] <u>Custom Attributes:</u> Yes <u>Example:</u> \${/pd:myFields/pd:UNCFolderPath} | | |
| File Format | Definition: Specifies the format for the name of the file to be stored at the destination location. Allowed Values: | | |

| Field Name | Definition |
|------------|-------------------------------------|
| | A valid file name. |
| | Default Value: |
| | [MM-dd-yyyy]_[Submitter].txt |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | \${/pd:myFields/pd:UNCFileName}.txt |

- Data Binding
- Using Process Attributes

Text File Writer Configuration Window - File Content Tab

The content of the file created by the Text File Writer AgileShape.

| Text File Writer Configuration | | <u></u> | ٢ |
|---|-----------------------------------|------------------|---|
| Text File Writer Configuration | DN | | |
| FTP File Content | | | - |
| Total Items=\${/pd:myFields/pd:TotalIte Total Amount=\${/pd:myFields/pd:Total Thanks \${/pd:myFields/pd:RegardsBy} | ims} Amount} | | |
| Overwrite Existing File: | () Yes | ⊙ No | |
| Allow Debug: | () Yes | ⊙ No | |
| Folder Format: | \${/pd:myFields/pd:UNCFolderPath} | | |
| File Format: | \${/pd:myFields/pd: | :UNCFileName}.bd | |
| *You may enter Custom Attribute I | Name as \$ or \${} | | |
| | ؇ ОК | 🔀 Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **Text File Writer** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In the LocationType field, select either UNC or FTP.
- 6. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|--------------|--|
| File Content | Definition: |
| | Displays the content of the text file. |

| Field Name | Definition | |
|-------------------------|---|--|
| | Allowed Values: | |
| | The content of the file. | |
| | Default Value: | |
| | The content of the file. | |
| | Custom Attributes: | |
| | Yes | |
| | Example: | |
| | <pre>Expense Report submitted by \${/ pd:myFields/pd:UserName}</pre> | |
| | | |
| Overwrite Existing File | <u>Definition:</u> Specifies whether the AgileShape overwrites the files if they already exist at the specified destination location. <u>Allowed Values:</u> No - The AgileShape does not overwrite any existing file. Yes - The AgileShape overwrites the file if it exists with the same name at the destination location. <u>Default Value:</u> No | |
| Folder Format | Definition: Specifies the folder structure to store the file. <u>Allowed Values:</u> A valid folder path. <u>Default Value:</u> [Department]\[ExpenseCode] <u>Custom Attributes:</u> | |
| | [Department]\[ExpenseCode] Custom Attributes: Yes | |

| Field Name | Definition |
|-------------|---|
| | Example: |
| | \${/pd:myFields/pd:UNCFolderPath} |
| File Format | Definition: |
| | Specifies the format for the name of the file to be stored at the destination location. |
| | Allowed Values: |
| | A valid file name. |
| | Default Value: |
| | [MM-dd-yyyy]_[Submitter].txt |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | \${/pd:myFields/pd:UNCFileName}.txt |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a Text File from a Process

This example shows a scenario where a text file is created using information in a process, and saved to a file system using the Text File Writer AgileShape.

Instructional Goals

• Demonstrate how to create and store a text file using the Text File Writer AgileShape.

Example Process: Simple Budget Request



Problem Statement

Submit and approve a budget request.

Business Requirements

- The process is initiated when an employee submits a budget request form.
- The request goes to the CFO for approval.
- If the CFO approves the request, the following data from the Submit Budget Request form is recorded in a text file, and saved on a local file system:
 - Submitter Name
 - Department
 - Submission Date
 - Budget Amount

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the Miscellaneous stencil, drag the Text File Writer AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In the **LocationType** field, click **UNC**.
- 6. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the **UNC** tab, complete the following fields:

| Field Name | Value |
|-------------|-----------------------------|
| UNC Address | \\DEMO3\C:\Windows\system32 |

- 2. To verify the UNC address, click **Check Address**.
- 3. Click the File Content tab.
- 4. On the File Content tab, complete the following fields:

| Field Name | Value |
|--------------|--|
| File Content | Expense Report submitted by: \${/pd:myFields/ pd:SubmitterName} |
| | Department: \${/pd:myFields/pd:Department} |
| | Submission Date: \${/pd:myFields/ pd:BudgetSubmitDate} |
| | Budget Amount: \${/pd:myFields/pd:BudgetAmount} |

| Field Name | Value |
|---------------|-------------------------------------|
| Folder Format | \${/pd:myFields/pd:UNCFolderPath} |
| File Format | \${/pd:myFields/pd:UNCFileName}.txt |

Word

An AgilePart that creates Word documents (.doc or .docx files) or PDF files from Word templates (.dot or .dotx files), populating Mail Merge or bookmark fields in the template with values you specify in the generated document.



Note: For information about creating a Word template, see the online help for Microsoft Word regarding Word templates, Mail Merge fields, and bookmark fields.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **Word** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------|--|
| Configuration | Opens the Following Window: Word Configuration Window Purpose of this Window: Sets up a Word template conversion. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Word Configuration Window

Sets up a Word template conversion.



Note: For information about creating a Word template, see the online help for Microsoft Word regarding Word templates, Mail Merge fields, and bookmark fields.

| figuration | | | | |
|---|-------------|---------------|----------|---------------------------|
| Locations DesignTime Word Templa Runtime Word Template: | ate: | | | Browse |
| Destination: | Save as FDF | | | SharePoint Credentials |
| Word field * | | Process value | W | Load Word fields |
| | | | | et All |
| | | | iii Disp | lay Literal Boolean Value |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **Word** AgileShape, and drop it on the process template.
- 4. On the **Word Creator** field, click the **Ellipses** button.

| Field Name | Definition |
|--------------------------|--|
| DesignTime Word Template | Definition: Specifies the name of the Word template file that is |
| | used at design time. |
| | The design-time template document is used for mapping purpose, as it allows an access to all the dynamic fields of a word document. This document is not used at runtime. |

| Field Name | Definition |
|-----------------------|---|
| | Allowed Values: |
| | A valid Word template file name with the full path. |
| | You can use the Browse button to select the file. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Runtime Word Template | Definition: |
| | Specifies the name of the Word template file to be used by AgilePoint Server at runtime. |
| | Allowed Values: |
| | A valid Word template file name with the full path. |
| | • A custom attribute. |
| | Use the Ellipses button to select a custom attribute from the Select XPath from Attributes Window. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | |
| Destination | Definition: |
| | Specifies the file path or folder where the output file is to be stored. |
| | Allowed Values: |
| | • A valid file path. |
| | • A custom attribute. |
| | Use the Ellipses button to select a custom attribute from the Select XPath from Attributes Window. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

| Field Name | Definition |
|------------------------|---|
| Save as PDF | <u>Definition:</u> Determines whether the generated file is saved as a PDF file, instead of a Word document. <u>Allowed Values:</u> <u>Deselected - The generated file is saved as a Word document.</u> <u>Selected - The generated file is saved as a PDF document.</u> <u>Default Value:</u> Deselected |
| SharePoint Credentials | Opens the Following Window: Logging on to SharePoint from a Process Template or AgileShape. Purpose of this Window: For process templates and AgileShapes that uses data from SharePoint, the first time you access SharePoint during your AgilePoint Envision user session |
| Word field | Definition: Specifies the word field that is to be mapped to the process value. The mapping is performed to update the fields in the Word document or PDF document, generated as output. Allowed Values: Read only - A word field. Use the Left Arrow button to move the word field column. |
| Process Value | <u>Definition:</u> Specifies the process value to be mapped to the word field to update each field in the Word document. <u>Allowed Values:</u> A number or a text string that can contain spaces. This must be in accordance with the data type of the word field. A custom attribute. |

| Field Name | Definition |
|------------------|--|
| | Note the following: |
| | Once a word field is in the Word field column, to map a word field to a process value, first select the row, and then click the Ellipses button to select from the Select XPath from Attributes Window. |
| | You can type a custom attribute directly in the Process Value column. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Load Word fields | Function: |
| | Loads the dynamic fields specified using the |
| | DesignTime Word Template to the Word Fields box. |
| Word Fields Box | Definition: |
| | Specifies the dynamic fields populated from the Word document. The dynamic fields are used for |
| | the mapping purpose. |
| | Allowed Values: |
| | Read only. |
| | The dynamic fields from the Word document are populated when you click the Load Word fields button. |
| Left Arrow | Function: |
| | Moves the selected Word fields from the Word Fields box to the Word field column. |
| SelectAll | Definition: |
| | Determines whether to select all the word fields in the Word Fields box at the same time. |
| | Allowed Values: |
| | Deselected - Selects only one Word field at a time. |
| | • Selected - Selects all the Word fields at the same time. |
| | Default Value: |
| | Deselected |

| Field Name | Definition | |
|-------------------------------|---|--|
| Display Literal Boolean Value | Definition: | |
| | Determines whether the generated Word document displays the literal value of a Boolean field - for example, display the words Yes or No for a boolean field. | |
| | By default, the Word AgileShape displays the Boolean values as a selection box - X for True, and empty for False. | |
| | Allowed Values: | |
| | Deselected - Displays the Boolean values as a selection box. | |
| | Selected - Displays the literal value of a Boolean field. | |
| | Default Value: | |
| | Deselected | |

- Data Binding
- Using Process Attributes

Logging on to SharePoint from a Process Template or AgileShape

For process templates and AgileShapes that uses data from SharePoint, the first time you access SharePoint during your AgilePoint Envision user session, you must link it to a SharePoint list.

Instructions

1. On the **Connect to SharePoint** dialog box, complete the fields to specify the user account you want to use to connect to SharePoint, and then click **OK**.

These credentials will be saved and used each time you open the process model.

| Connect to SharePoint | | |
|---|---|--|
| Connect to Sha | arePoint Site | |
| Windows Authentic | ation | |
| | Current User (AP14\Administrator) Custom User | |
| Claims Authenticati | on | |
| | Form Based Authentication Office 365 Federated Authentication | |
| User Information Domain: | | |
| Username: | Administrator@agilityclouds.com | |
| Password: | | |
| Fed Auth Url: | https://fs.agilityclouds.com | |
| | ✓ OK Cancel | |

| Field Name | Definition |
|------------------------|--|
| Windows Authentication | Definition: Specifies whether, and what type, of Windows Authentication is used to connect to SharePoint. |
| Claims Authentication | <u>Definition:</u> Specifies whether to use Claims authentication, and what type of Claims authentication, to use to connect to SharePoint. <u>Allowed Values:</u> If this option is selected, the following types of Claims Authentication are available: Form Based Authentication - Activates Forms based authentication using a custom membership provider to connect to an on-premises SharePoint environment. Office 365 - Activates Claims authentication to connect to SharePoint in an Office 365 |

| Field Name | Definition |
|--------------|--|
| | environment. This option can be used side-by- side with on-premises SharePoint. Federated Authentication - Activates |
| | Federated authentication to connect to SharePoint for example, ADFS. |
| | Note: Out of the box, AgilePoint supports ADFS authentication. If you want to use your own authentication provider, see Federated Authentication Example in the Documentation Library. |
| | Default Value: |
| | Deselected |
| Domain | Definition: |
| | The authentication domain. |
| | This does not apply to Forms-Based Authentication. |
| Username | Definition: |
| | The user ID of the SharePoint authentication account. |
| | Allowed Values: |
| | A valid user name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Password | Definition: |
| | The password for the authentication account. |
| | Allowed Values: |
| | A valid password. |
| | <u>Default Value:</u> |
| | None |
| | Custom Attributes: |
| | Yes |
| Fed Auth Url | Definition: |

| Field Name | Definition |
|------------|--|
| | The URI of the federated authentication provider. This provider issues security tokens for federated authentication. |
| | Allowed Values: |
| | A valid federated authentication provider URI. |
| | <u>Default Value:</u> None |
| | Custom Attributes: No |
| | Example: https://fs.agilityclouds.com |

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a Word Document from a Process

This example shows a scenario where a Word document is created from a Word templates using information in a process. The Word AgileShape populates Mail Merge fields in your template with the values you specify.

Instructional Goals

Demonstrate how to create a Word documents using the Word AgileShape.

Example Process: Budget Request



Problem Statement

Determine the installation machine for a client/server application.

Business Requirements

• A customer completes an online form to determine the machines where they need to install a client/server application.

This process is based on a simplified version of the AgilePoint BPMS Genesis Edition pre-installation intake form.

Prerequisites

- Download the attached Word template file **ClientServerMachines.dotx** with the following Mail Merge fields:
 - ServerMachineName The name of the machine in the customer's environment where the server component of the client/server component must be installed.
 - **ClientMachineName** The name of the machine in the customer's environment where the client component of the client/server component must be installed.
- Place ClientServerMachines.dotx on the file system for AgilePoint Server.
- A process model with a form that includes input fields for the following custom attributes:
 - **ServerMachineName** The name of the machine in the customer's environment where the server component of the client/server component must be installed.
 - **ClientMachineName** The name of the machine in the customer's environment where the client component of the client/server component must be installed.
 - CustomerEmailAddress The email address where the completed Word document will be sent.
- Set up an email AgileShape to send the resulting file **ClientServerMachines.docx** to the email address entered in the **CustomerEmailAddress** field.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **Word** AgileShape, and drop it on the process template.
- 4. On the Word Creator field, click the Ellipses button.

Instructions

- 1. On the **Configuration** window, in the **DesignTime Word Template** field, select the Word template select the file **ClientServerMachines.dotx**.
- 2. In the Runtime Word Template filed, select the Word template select the file ClientServerMachines.dotx.
- 3. In the **Destination** field, enter the path of the output file for your form.
- 4. Click Load Word fields.
- 5. To select the Mail Merge fields in ClientServerMachines.dotx, click Select All.
- 6. To move the Mail Merge fields to the Word fields list, click the Left Arrow button.
- 7. In the **Process Value** column, enter the following process attribute names:
 - ServerMachineName
 - ClientMachineName

When a customer enters his server machine name and client machine name on the input form, these values are populated in the Word template, and the resulting Word document. This Word document is then emailed to the customer.

Downloads

ClientServerMachines.zip.

Creating Repeating Tables using the Word AgileShape

To create the repeating tables using the Word AgileShape, do the following.

Prerequisites

- Microsoft Word installed in your environment.
- An understanding of Microsoft Word templates.

For information about creating a Word template, see the online help for Microsoft Word regarding Word templates, Mail Merge fields, and bookmark fields.

Navigation

- 1. In Microsoft Word, create or open a template file.
- 2. In your Word template, insert a table, or navigate to an existing table where you want to add a repeating node.

Instructions

- 1. In your Word template table, in the row where you want to start a repeating node, place your cursor in the far left table column.
- 2. On the **Insert** tab, click **Quick Parts > Field**.
- 3. In the Categories list, select All.
- 4. In the Field names list, select MergeField.
- 5. In the Field name field, enter TableStart:[node name].

Replace **[node name]** with the name of your repeating node. The start and end tags must indicate the same node name. For example, **TableStart:Employee** and **TableEnd:Employee**.

Example:

| Name | Department | Title |
|---|------------|-------|
| < <tablestart:employee>></tablestart:employee> | | |

- 6. Place the cursor in the table column where you want to end the repeating node.
- 7. On the **Insert** tab, click **Quick Parts > Field**.
- 8. In the Categories list, select All.
- 9. In the Field names list, select MergeField.
- 10. In the Field name field, enter TableEnd:[node name].

Replace **[node name]** with the name of your repeating node. The start and end tags must indicate the same node name. For example, **TableStart:Employee** and **TableEnd:Employee**.

Example:

| Name | Department | Title |
|---|------------|---|
| < <tablestart:employee>></tablestart:employee> | | < <tableend:employee>></tableend:employee> |

- 11. Within each column of your repeating row, between the TableStart and the TableEnd tags, insert a merge field with the name of the custom attribute you want to insert from your process. Repeat this procedure for each table cell in your row.
 - a. On the Insert tab, click Quick Parts > Field.
 - b. In the Categories list, select All.
 - c. In the Field names list, select MergeField.
 - d. In the **Field name** field, enter your custom attribute name.

Example:

| Name | Department | Title |
|---|---|---|
| < <tablestart:employee>> <<fullname>></fullname></tablestart:employee> | < <employeedepartment>></employeedepartment> | < <employeetitle>> <<tableend:employee>></tableend:employee></employeetitle> |

XML Manipulation

An AgilePart that calculates the values in XML by formula or custom expression.



Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **XML Manipulation** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|--|
| Configure | Opens the Following Window: Multiple Formulae Dialog Window |
| | Purpose of this Window: |

| Field Name | Definition |
|------------|---|
| | Defines the formula to be calculated for the XML Manipulation AgileShape at runtime. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Multiple Formulae Dialog Window

Defines the formula to be calculated for the XML Manipulation AgileShape at runtime.

| Multiple Formulae Dialog | | | |
|--------------------------|------------------|---|--|
| • | Multiple Formul | ae Dialog | |
| | Name | Fomula | |
| + | \${FullName} | @concat(\${/pd:myFields/pd:FirstName},\${/pd:myFields/pd:LastNa | |
| | /pd:myFields/pd: | @today() | |
| * | | | Add Edit Edit Remove OK Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **XML Manipulation** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|---|
| Add | Opens the Following Window: Formula Window Purpose of this Window: Defines a formula for the XML Manipulation AgileShape. |
| Edit | Opens the Following Window: Formula Window Purpose of this Window: Defines a formula for the XML Manipulation AgileShape. |
| Name | <u>Definition:</u> Specifies the name of the custom attribute. <u>Allowed Values:</u> Read only - Populated when you set the options on the Formula Window. |
| Formula | Definition: Specifies the formula to be calculated. Allowed Values: Read only - Populated when you set the options on the Formula Window. |
| Remove | Function: Deletes the selected formula from the list. |

- Data Binding
- Using Process Attributes

Formula Window

Defines a formula for the XML Manipulation AgileShape.

| Formula | - | |
|------------------|---|--------------|
| Form | nula | |
| Attribute Name : | \${FullName} | |
| Formula : | @concat(\${/pd:myFields/pd:FirstName}. \${/pd:myFields/pd:LastName}) | Insert Field |
| | | Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **XML Manipulation** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. To add formulas for XML calculation, on the Multiple Formulae Dialog window, click Add.

| Field Name | Definition |
|----------------|-------------|
| Attribute Name | Definition: |

| Field Name | Definition |
|-----------------|---|
| | Specifies the name of the custom attribute. |
| | Allowed Values: |
| | A custom attribute. |
| | XML metadata. |
| | You can use the Ellipses button to select the process attribute. This button is activated only when the process has an associated attributes or schema. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Insert Field | |
| | Opens the schema to select the required XML data |
| | element. |
| | Then, adds the selected XML data to the formula to be calculated. |
| | Opens the Following Window: |
| | Select XPath from Attributes Window |
| | Purpose of this Window: |
| | Enables you to select a schema node from the XML schema for your process. |
| Insert Function | Opens the Following Window: |
| | Insert Function Window |
| | Purpose of this Window: |
| | Defines a function for use in an XML Manipulation |
| | formula. |
| Formula | Definition: |
| | Specifies the formula to be calculated. |
| | Allowed Values: |
| | • A valid formula or expression. |
| | Populated if you specify a function using the Insert Function and Insert Field (optional). |
| | Using the Insert Field, you can add an XML field to the formula. |
| | Default Value: |

| Field Name | Definition |
|------------|---|
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | <pre>@concat(\${/pd:myFields/pd:FirstName}.\${/ pd:myFields/pd:LastName})</pre> |

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes | × |
|--------------------------------|---|
| Select XPath from Attributes | |
| Schema Process Attributes | |
| myFields ■ empName (String) | |
| XPath: | |
| DataType: V OK Cancel | |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the Ellipses button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use. |
| XPath | <u>Definition:</u> Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | Definition: |

| Field Name | Definition |
|------------|---|
| | Displays the process attributes associated with the process in a tree-view structure. |
| | Allowed Values: |
| | Read only. |
| | Click to select the process attribute you want to use. |
| ОК | Function: |
| | Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. |
| | Note the following: |
| | First, you must select the metadata or attribute you want, and then click OK. |
| | You can select only one metadata or attribute at a time. |

- Data Binding
- Using Process Attributes

Insert Function Window

Defines a function for use in an XML Manipulation formula.

| Insert Function | × |
|--|---|
| Insert I | Function |
| Categories: | Functions: |
| Text Math DateTime Formatting | concat stringlen |
| | Return the concatenation of the arguments in the xml schema or the custom attribute. |
| | OK Kancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **XML Manipulation** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. To add formulas for XML calculation, on the **Multiple Formulae Dialog** window, click **Add**.
- 7. To define functions for formulas for XML calculation, on the **Formula** window, click **Insert Function**.

| Field Name | Definition |
|------------|--|
| Categories | Definition: Displays the function categories. Select the category you want. Allowed Values: |

| Field Name | Definition |
|------------|---|
| | Text - Displays the functions related to string data type in the Functions list. For example, concat, stringlen. |
| | Math - Displays the mathematical functions in the Functions list. For example, sum, avg, max. |
| | DateTime - Displays the DateTime related functions in the Functions list. For example, mindate, maxdate, adddays. |
| | • Formatting - Displays the functions related to formatting in the Functions list. For example, fmtnum, fmtdate. |
| | Default Value: |
| | Text |
| Functions | Definition: |
| | Displays a list of functions for the specified function category. |
| | Allowed Values: |
| | The name of your function. |
| | Default Value: |
| | • concat |
| | • stringlen |
| ОК | Function: |
| | Completes the task and inserts the selected function in the place where this window was invoked - in the Formula to be calculated. |
| | Note the following: |
| | First, you must select the function you want, and then click OK. |
| | • You can select only one function at a time. |

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Modifying Process Behavior Using XML Manipulation

This example shows a scenario where an XML file is created using information in a process, and calculates the values in an XML by formula or custom expression using an XML Manipulation AgileShape.

Instructional Goals

 Demonstrate how to calculate the values in an XML by formula or custom expression using an XML Manipulation AgileShape.

Example Process: Budget Request



Problem Statement

Submit budget requests from multiple international department heads.

Business Requirements

- Both the US Manager and India Manager of a department submit budget request forms.
- The local currency is standardized to US dollars.
- The request is routed for review by the manager or CFO, depending upon the standardized budget amount.

Prerequisites

- A process model with the following process attributes:
 - BudgetAmountUS The budget amount for the US office in US dollars (USD).
 - BudgetAmountIndiaInr The budget amount for the India office in Indian rupees (INR).
 - BudgetAmountIndiaUsd The budget amount for the India office in (USD).
 - TotalBudgetAmountUsd The total budget amount of both offices in USD.
 - ExchangeRateInrToUsd The number of INR in on USD.
- A web form where the US manager can enter the requested budget amount in USD and the India manager can enter the requested budget amount in INR.
- A web service that queries the current exchange rate from INR to USD, and then populates ExchangeRateInrToUsd with this ratio.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Miscellaneous stencil.
- 3. On the **Miscellaneous** stencil, drag the **XML Manipulation** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. To add formulas for XML calculation, on the Multiple Formulae Dialog window, click Add.

Instructions

- 1. On the Formula Window, in the Attribute Name field, enter BudgetAmountIndiaUsd.
- 2. Place your cursor in the Formula field, and click Insert Function.
- 3. On the Insert Function Window, in the Categories list, select Math.
- 4. In the Functions list, select Product.
- 5. Click OK.
- 6. On the Formula window, in the Formula field, place your cursor after @product, and click Insert Field.
- 7. On the Select XPath from Attributes Window, select BudgetAmountIndiaInr.
- 8. Click OK.
- 9. On the Formula window, in the Formula field, place your cursor after @product, and click Insert Field.
- 10. On the Select XPath from Attributes window, select ExchangeRateInrToUsd.
- 11. Click OK.
- 12. On the Multiple Formulae Dialog window, click Add.
- 13. On the Formula window, in the Attribute Name field, enter TotalBudgetAmountUsd.
- 14. Place your cursor in the Formula field, and click Insert Function.
- 15. On the Insert Function window, in the Categories list, select Math.
- 16. In the Functions list, select Sum.
- 17. Click **OK**.
- 18. On the Formula window, in the Formula field, place your cursor after @sum, and click Insert Field.
- 19. On the Select XPath from Attributes window, select BudgetAmountIndiaUsd.
- 20. Click **OK**.
- 21. On the Formula window, in the Formula field, place your cursor after BudgetAmountIndiaUsd, and click Insert Field.
- 22. On the Select XPath from Attributes window, select TotalBudgetAmountUsd.

The result of these formulas is a total budget amount that converts the budget amount from the India office from INR to USD, and then adds this amount to the budget from the US office. This provides a total budget amount in USD. This value can then be evaluated by the multiple condition AgileShape to determine whether the request needs to be routed to the Director or CFO.

Active Directory

This section describes the AgileShapes in the Active Directory stencil.

Create User

Creates a new user in Active Directory.



Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

| Field Name | Definition |
|----------------------|--|
| Context | Opens the Set Context Properties window, where you can specify the Active Directory properties. |
| LocationType | Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported. |
| NewUserConfiguration | Specifies the user information to create in Active Directory. |

AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

| Set Context Properties | × |
|--|--|
| Set Context Properties | |
| Context Properties | |
| Context Domain (e.g. abc.xyz.com): | Directory Type: |
| | LDAP |
| Domain\User Name: | Directory Address (blank for default): |
| | |
| Password: | Directory Port (389 for default): |
| | 389 |
| | |
| Secure Connection | |
| Use AgilePoint system user at runtime | |
| *You may enter Custom Attribute Name as \${} | |
| | |
| Γ. | ✓ ΩK ¥ Cancel |
| L | |

| Field Name | Definition |
|-------------------|---|
| Context Domain | The domain name. |
| Username | The username of the account to be used to create a group in Active Directory at run time. |
| Password | The password of the account to be used to create a group in the domain at run time. |
| Directory Type | The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported. |
| Directory Address | Specifies a host address of the Active Directory. You can enter one of the following: |
| | • IP address - The IP address of the Active Directory. For example, 211.325.5.3. |
| | • IP address/[relative distinguished name (RDN)] - The IP address of the Active Directory with the container name (CN), organizational unit (OU), |

| Field Name | Definition |
|-------------------|---|
| | or both for the user. For example, 211.325.5.3/ OU=MyGroup |
| Directory Port | Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server. |
| Secure Connection | In this version, the SSL is not supported; it will be an enhancement in the future. |

Update User

This AgileShape can be used to update user information in Active Directory.



Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

| Field Name | Definition |
|--------------|--|
| Context | Opens the Set Context Properties window, where you can specify the Active Directory properties. |
| LocationType | Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported. |
| UserInfo | Allows for the update of user information and organization details. |
| | • Note: The Context property must be completed before configuring this property. |
| | Note: If the process template has an associated schema, the Schema button appears. |
| | Note: If the domain configured in context property cannot be accessed at design time, the Search button will not be available. |
| | There are several ways to update user information in Active Directory: |
| | Enter the user name manually. |
| | • Click the Search button and select the user name from the list that is populated. |

| Field Name | Definition |
|------------|---|
| | Search for a user name that is a custom attribute. The format of the custom attribute should be as follows:\$\{CustomAttributeName\} |
| | • Update user information via an Xpath. This is done by clicking the Schema button, and selecting a node. The user name will be obtained via the Xpath at run time. |

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

| Set Context Properties | × |
|---|--|
| Set Context Properties | |
| Context Properties | |
| Context Domain (e.g. abc.xyz.com): | Directory Type: |
| | LDAP |
| Domain\User Name: | Directory Address (blank for default): |
| | |
| Password: | Directory Port (389 for default): |
| | 389 |
| , | |
| Secure Connection | |
| 🔲 Use AgilePoint system user at runtime | |
| *You may enter Custom Attribute Nam | e as \${} |
| | |
| | 💞 OK 🔀 Cancel |

| Field Name | Definition |
|-------------------|--|
| Context Domain | The domain name. |
| Username | The username of the account to be used to create a group in Active Directory at run time. |
| Password | The password of the account to be used to create a group in the domain at run time. |
| Directory Type | The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported. |
| Directory Address | Specifies a host address of the Active Directory. |
| | You can enter one of the following: |
| | • IP address - The IP address of the Active Directory. For example, 211.325.5.3. |
| | • IP address/[relative distinguished name (RDN)] - The IP address of the Active Directory with the container name (CN), organizational unit (OU), or both for the user. For example, 211.325.5.3/ OU=MyGroup |
| Directory Port | Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server. |
| Secure Connection | In this version, the SSL is not supported; it will be an enhancement in the future. |

Remove User

This AgileShape can be used to remove a user(s) from AD. The user name(s) can be a real name, custom attribute, or schema.

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Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

| Field Name | Definition |
|------------|---|
| Context | Opens the Set Context Properties window, where you can specify the Active Directory properties. |

| Field Name | Definition |
|--------------|---|
| LocationType | Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported. |
| UserNames | Specifies the user information to be affected (e.g., used or disabled) from Active Directory. When you need to affect multiple users, the user names should be separated by a semicolon. |
| | Note: The Context property must be completed before configuring this property. |
| | Note: If the process template has an associated schema, the Schema button appears. |
| | Note: If the domain configured in context property cannot be accessed at design time, the Search button will not be available. |
| | There are several ways to specify user names to be affected in Active Directory: |
| | • Enter the user name manually. |
| | • Click the Search button and select the user name from the list that is populated. |
| | Remove a user name that is a custom attribute. The format of the custom attribute should be as follows:\$\{CustomAttributeName\} |
| | • Remove a user name via an Xpath. This is done by clicking the Schema button, and selecting a node. The user name will be obtained via the Xpath at run time. |

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

| Set Context Properties | × |
|--|--|
| Set Context Properties | |
| Context Properties | |
| Context Domain (e.g. abc.xyz.com): | Directory Type: |
| | LDAP |
| Domain\User Name: | Directory Address (blank for default): |
| | |
| Password: | Directory Port (389 for default): |
| | 389 |
| | |
| Secure Connection | |
| Use AgilePoint system user at runtime | |
| *You may enter Custom Attribute Name as \${} | |
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| L | |

| Field Name | Definition |
|-------------------|---|
| Context Domain | The domain name. |
| Username | The username of the account to be used to create a group in Active Directory at run time. |
| Password | The password of the account to be used to create a group in the domain at run time. |
| Directory Type | The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported. |
| Directory Address | Specifies a host address of the Active Directory. You can enter one of the following: |
| | • IP address - The IP address of the Active Directory. For example, 211.325.5.3. |
| | • IP address/[relative distinguished name (RDN)] - The IP address of the Active Directory with the container name (CN), organizational unit (OU), |

| Field Name | Definition |
|-------------------|---|
| | or both for the user. For example, 211.325.5.3/ OU=MyGroup |
| Directory Port | Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server. |
| Secure Connection | In this version, the SSL is not supported; it will be an enhancement in the future. |

Disable User

This AgileShape can be used to disable users from AD. The user name can be a real name, custom attribute, or schema.



Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

| Field Name | Definition |
|--------------|---|
| Context | Opens the Set Context Properties window, where you can specify the Active Directory properties. |
| LocationType | Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported. |
| UserNames | Specifies the user information to be affected (e.g., used or disabled) from Active Directory. When you need to affect multiple users, the user names should be separated by a semicolon. |
| | Note: The Context property must be completed before configuring this property. |
| | Note: If the process template has an associated schema, the Schema button appears. |
| | Note: If the domain configured in context property cannot be accessed at design time, the Search button will not be available. |
| | There are several ways to specify user names to be affected in Active Directory: |
| | • Enter the user name manually. |

| Field Name | Definition |
|------------|---|
| | • Click the Search button and select the user name from the list that is populated. |
| | Remove a user name that is a custom attribute. The format of the custom attribute should be as follows:\$\{CustomAttributeName\} |
| | • Remove a user name via an Xpath. This is done by clicking the Schema button, and selecting a node. The user name will be obtained via the Xpath at run time. |

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

| Set Context Properties | × |
|--|--|
| Set Context Properties | |
| Context Properties | |
| Context Domain (e.g. abc.xyz.com): | Directory Type: |
| | LDAP |
| Domain\User Name: | Directory Address (blank for default): |
| | |
| Password | Directory Port (389 for default): |
| | 389 |
| | |
| Secure Connection | |
| 🔲 Use AgilePoint system user at runtime | |
| *You may enter Custom Attribute Name as \${} | |
| | |
| | 🥪 OK 🛛 💥 Cancel |
| L | |

| Field Name | Definition |
|-------------------|--|
| Context Domain | The domain name. |
| Username | The username of the account to be used to create a group in Active Directory at run time. |
| Password | The password of the account to be used to create a group in the domain at run time. |
| Directory Type | The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported. |
| Directory Address | Specifies a host address of the Active Directory. |
| | You can enter one of the following: |
| | • IP address - The IP address of the Active Directory. For example, 211.325.5.3. |
| | • IP address/[relative distinguished name (RDN)] - The IP address of the Active Directory with the container name (CN), organizational unit (OU), or both for the user. For example, 211.325.5.3/ OU=MyGroup |
| Directory Port | Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server. |
| Secure Connection | In this version, the SSL is not supported; it will be an enhancement in the future. |

Create Group

This AgileShape can be used to create a group in Active Directory. The group can be a real name, custom attribute, or schema.



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Note: This value cannot contain certain special characters, such as $!() \sim # @ \% / []:; - | = + ? < >$,etc. (& and * are supported.) This AgilePart will detect whether invalid characters are used, if so, each special character will be replaced with an underscore ("_") automatically.

Note: If errors occur during the execution, a message will be written into the SharePoint Integration log file.

Properties for This AgilePart

| Field Name | Definition |
|--------------|---|
| Context | Opens the Set Context Properties window, where you can specify the Active Directory properties. |
| Create Group | Opens the Create Group window, where you can specify the group information to create in Active Directory. If the process template is associated with a schema, the Schema buttons will appear allowing you to select an Xpath. Custom attributes are also supported. |
| LocationType | Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported. |

AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

| Set Context Properties | × |
|--------------------------------------|--|
| Set Context Properties | |
| Context Properties | |
| Context Domain (e.g. abc.xyz.com): | Directory Type: |
| | LDAP 🔽 |
| Domain\User Name: | Directory Address (blank for default): |
| | |
| Password: | Directory Port (389 for default): |
| | 389 |
| | |
| Secure Connection | |
| Use AgilePoint system user at runtim | e |
| *You may enter Custom Attribute Na | me as \${} |
| | |
| | QK € Cancel |
| | |

| Field Name | Definition |
|-------------------|---|
| Context Domain | The domain name. |
| Username | The username of the account to be used to create a group in Active Directory at run time. |
| Password | The password of the account to be used to create a group in the domain at run time. |
| Directory Type | The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported. |
| Directory Address | Specifies a host address of the Active Directory. You can enter one of the following: |
| | • IP address - The IP address of the Active Directory. For example, 211.325.5.3. |
| | • IP address/[relative distinguished name (RDN)] - The IP address of the Active Directory with the container name (CN), organizational unit (OU), |

| Field Name | Definition |
|-------------------|---|
| | or both for the user. For example, 211.325.5.3/ OU=MyGroup |
| Directory Port | Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server. |
| Secure Connection | In this version, the SSL is not supported; it will be an enhancement in the future. |

Create Group Window

Specifies the group information to create in Active Directory. If the process template is associated with a schema, the Schema buttons will appear allowing you to select an Xpath. Custom attributes are also supported.

Field Definitions

| Field Name | Definition |
|-------------------------------|---|
| Group Name | Specifies the affected group name (the group name to be created, removed, etc.). The Group Name cannot be duplicated in the domain. Also, once the Group is created, it cannot be changed. |
| Group Name (Pre-Windows 2000) | Specifies the log name of the account, the difference between the Group Name above and this field is it can be modified after it has been created. |
| Email Address | Specifies the email address of the group. |
| Verify Group | This button verifies the availability of the group name. The button is available just for the context domain if the context is reachable at design time. For example, if the context domain binds with a custom attribute, and the value depends on it at run time, in this case, the button is unavailable. |
| Group Scope | Refers to the profile of Group Scope in Active Directory. |
| GroupType | Refers to the profile of Group Type in Active Directory. |

Remove Group

This AgileShape can be used to remove groups in AD. The group can be a real name, custom attribute, or schema.



Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

| Field Name | Definition |
|--------------|---|
| Context | Opens the Set Context Properties window, where you can specify the Active Directory properties. |
| LocationType | Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported. |
| Remove Group | Specifies the group names to be removed from Active Directory. When you need to remove multiple groups, the group names should be separated by a semicolon. |
| | • Note: The Context property must be completed before configuring this property. |
| | Note: If the process template has an associated schema, the Schema button appears. |
| | Note: If the domain configured in context property cannot be accessed at design time, the Search button will not be available. |
| | There are several ways to specify group names to be removed from Active Directory: |
| | • Enter the group name manually. |
| | Click the Search button and select the group name from the list that is populated. |
| | Remove a group name that is a custom attribute. The format of the custom attribute should be as follows:\$\{CustomAttributeName\} |
| | • Remove a group name via an Xpath. This is done by clicking the Schema button, and selecting a node. The group name will be obtained via the Xpath at run time. |

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

Specifies the Active Directory properties.

| Set Context Properties | × |
|--|--|
| Set Context Properties | |
| Context Properties | |
| Context Domain (e.g. abc.xyz.com): | Directory Type: |
| | LDAP |
| Domain\User Name: | Directory Address (blank for default): |
| | |
| Password: | Directory Port (389 for default): |
| | 389 |
| | |
| Secure Connection | |
| Use AgilePoint system user at runtime | |
| *You may enter Custom Attribute Name as \${} | |
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| | |

| Field Name | Definition |
|-------------------|---|
| Context Domain | The domain name. |
| Username | The username of the account to be used to create a group in Active Directory at run time. |
| Password | The password of the account to be used to create a group in the domain at run time. |
| Directory Type | The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported. |
| Directory Address | Specifies a host address of the Active Directory. |
| | You can enter one of the following: |

| Field Name | Definition |
|-------------------|--|
| | • IP address - The IP address of the Active Directory. For example, 211.325.5.3. |
| | • IP address/[relative distinguished name (RDN)] - The IP address of the Active Directory with the container name (CN), organizational unit (OU), or both for the user. For example, 211.325.5.3/ OU=MyGroup |
| Directory Port | Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server. |
| Secure Connection | In this version, the SSL is not supported; it will be an enhancement in the future. |

Remove User from Group

This AgileShape can be used to remove user(s) from a group in AD. The group or user name(s) can be a real name, custom attribute, or schema.



Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

| Field Name | Definition |
|---------------------|--|
| Context | Opens the Set Context Properties window, where you can specify the Active Directory properties. |
| LocationType | Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported. |
| RemoveUserFromGroup | Specifies the information for user name and group to be removed from Active Directory. When you need to remove multiple users, the user names should be separated by a semicolon. |
| | Note: The Context property must be completed before configuring this property. |
| | Note: If the process template has an associated schema, the Schema button appears. |

| Field Name | Definition |
|------------|--|
| | Note: If the domain configured in context property cannot be accessed at design time, the Search button will not be available. |
| | There are several ways to specify group names to be removed from Active Directory: |
| | • Enter the group name and user name(s) manually. |
| | Click the Search button and select the Group Name and User Name(s) from the list that is populated. |
| | Enter a custom attribute name for a Group Name and User Names(s). The format of the custom attribute should be as follows:\$ \{CustomAttributeName\} |
| | • Remove a group name via an Xpath. This is done by clicking the Schema button, and selecting a node. The group name will be obtained via the Xpath at run time. |

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

| Set Context Properties | × |
|---------------------------------------|--|
| Set Context Properties | |
| Context Properties | |
| Context Domain (e.g. abc.xyz.com): | Directory Type: |
| | LDAP |
| Domain\User Name: | Directory Address (blank for default): |
| | |
| Password: | Directory Port (389 for default): |
| | 389 |
| | |
| | |
| Use AgilePoint system user at runtime | |
| *You may enter Custom Attribute Nam | ie as \${} |
| | |
| Γ | ✓ OK ¥ Cancel |
| L | |

| Field Name | Definition |
|-------------------|---|
| Context Domain | The domain name. |
| Username | The username of the account to be used to create a group in Active Directory at run time. |
| Password | The password of the account to be used to create a group in the domain at run time. |
| Directory Type | The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported. |
| Directory Address | Specifies a host address of the Active Directory. You can enter one of the following: |
| | • IP address - The IP address of the Active Directory. For example, 211.325.5.3. |
| | • IP address/[relative distinguished name (RDN)] - The IP address of the Active Directory with the container name (CN), organizational unit (OU), |

| Field Name | Definition |
|-------------------|---|
| | or both for the user. For example, 211.325.5.3/ OU=MyGroup |
| Directory Port | Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server. |
| Secure Connection | In this version, the SSL is not supported; it will be an enhancement in the future. |

Retrieve User Information

This AgileShape can be used to retrieve user information from AD. The user name can be a real name, custom attribute, or schema.



Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

| Field Name | Definition |
|--------------|--|
| Context | Opens the Set Context Properties window, where you can specify the Active Directory properties. |
| LocationType | Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported. |
| UserInfo | Allows for the update of user information and organization details. |
| | Note: The Context property must be completed before configuring this property. |
| | Note: If the process template has an associated schema, the Schema button appears. |
| | Note: If the domain configured in context property cannot be accessed at design time, the Search button will not be available. |
| | There are several ways to update user information in Active Directory: |
| | • Enter the user name manually. |

| Field Name | Definition |
|------------|---|
| | • Click the Search button and select the user name from the list that is populated. |
| | Search for a user name that is a custom attribute. The format of the custom attribute should be as follows:\$\{CustomAttributeName\} |
| | • Update user information via an Xpath. This is done by clicking the Schema button, and selecting a node. The user name will be obtained via the Xpath at run time. |

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

| Set Context Properties | × |
|--|--|
| Set Context Properties | |
| Context Properties | |
| Context Domain (e.g. abc.xyz.com): | Directory Type: |
| | LDAP |
| Domain\User Name: | Directory Address (blank for default): |
| | |
| Password: | Directory Port (389 for default): |
| | 389 |
| 1 | 1903 |
| Secure Connection | |
| 🔲 Use AgilePoint system user at runtime | |
| *You may enter Custom Attribute Nam | east{} |
| | |
| L. L | |
| | V OK 🔀 Cancel |
| | |

| Field Name | Definition |
|-------------------|--|
| Context Domain | The domain name. |
| Username | The username of the account to be used to create a group in Active Directory at run time. |
| Password | The password of the account to be used to create a group in the domain at run time. |
| Directory Type | The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported. |
| Directory Address | Specifies a host address of the Active Directory. |
| | You can enter one of the following: |
| | • IP address - The IP address of the Active Directory. For example, 211.325.5.3. |
| | • IP address/[relative distinguished name (RDN)] - The IP address of the Active Directory with the container name (CN), organizational unit (OU), or both for the user. For example, 211.325.5.3/ OU=MyGroup |
| Directory Port | Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server. |
| Secure Connection | In this version, the SSL is not supported; it will be an enhancement in the future. |

Add User to Group

This AgileShape can be used to add a user to a group in AD.



Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

| Field Name | Definition |
|----------------|---|
| AddUserToGroup | Specifies for the configuration of user information to be added to a group in Active Directory. |

| Field Name | Definition | |
|--------------|---------------------------------|---|
| | () | Note: The Context property must be completed before configuring this property. |
| | () | Note: If the process template has an associated schema, the Schema button appears. |
| | () | Note: If the domain configured in context property cannot be accessed at design time, the Search button will not be available. |
| | There addec | are several ways to specify user names to be to a group in Active Directory: |
| | • Enter the user name manually. | |
| | • C | lick the Search button and select the user name om the list that is populated. |
| | Ad Ad Th fo | dd a user name that is a custom attribute. he format of the custom attribute should be as llows:\$\{CustomAttributeName\} |
| | ● Ad cli Th ru | dd a user name via an Xpath. This is done by icking the Schema button, and selecting a node. ne user name will be obtained via the Xpath at in time. |
| Context | Opens can si | s the Set Context Properties window, where you becify the Active Directory properties. |
| LocationType | Speci provid | fies the Active Directory Services Interface ler type. At this time, only LDAP is supported. |

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

| Set Context Properties | × |
|---------------------------------------|--|
| Set Context Properties | |
| Context Properties | |
| Context Domain (e.g. abc.xyz.com): | Directory Type: |
| | LDAP |
| Domain\User Name: | Directory Address (blank for default): |
| | |
| Password: | Directory Port (389 for default): |
| | 389 |
| | |
| Secure Connection | |
| Use AgilePoint system user at runtime | |
| *You may enter Custom Attribute Nam | e as \${} |
| | |
| Γ. | ✓ ΩK ¥ Cancel |
| L | |

| Field Name | Definition | |
|-------------------|---|--|
| Context Domain | The domain name. | |
| Username | The username of the account to be used to create a group in Active Directory at run time. | |
| Password | The password of the account to be used to create a group in the domain at run time. | |
| Directory Type | The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported. | |
| Directory Address | Specifies a host address of the Active Directory. You can enter one of the following: | |
| | • IP address - The IP address of the Active Directory. For example, 211.325.5.3. | |
| | • IP address/[relative distinguished name (RDN)] - The IP address of the Active Directory with the container name (CN), organizational unit (OU), | |

| Field Name | Definition |
|-------------------|---|
| | or both for the user. For example, 211.325.5.3/ OU=MyGroup |
| Directory Port | Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server. |
| Secure Connection | In this version, the SSL is not supported; it will be an enhancement in the future. |

XRM Manual Activities 2011

This AgileXRM stencil has AgileShapes for creating different Activity Types in Dynamics CRM 2011, including any Custom Activity. These are used by Power Users.

There is also an AgileShape for surfacing a task in the Intranet Portal (See See "Create Intranet Task") for involving Standard Users in the processes.

Create Appointment

This shape creates an Appointment Activity in CRM.

This shape can optionally have an AgileLightForm (ALF form) associated with it. This permits creating activitybased forms, which have all the fields necessary for carrying out this task by the user.

When the activity is Marked as Completed, the process flow continues.



Other fields including any custom fields in the Appointment entity can be updated using the Activity Properties property.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 stencil.
- 3. On the **XRM Manual Activities 2011** stencil, drag the **Create Appointment** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------------|--|
| ConfigureParticipants | Opens the Following Window: Participants Window - Assign Mode Purpose of this Window: Default value: \${ProcessInitiator} Click the ellipsis button to open the configuration dialog: |
| ActivityProperties | Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields: |
| AllDayEvent | Definition: Sets the All Day Event flag of the appointment. |
| End On | <u>Definition:</u> Sets the End Time of the appointment. It must be a dynamic value. |
| Form | Opens the Following Window: Form Configuration Window Purpose of this Window: This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened: |
| Location | Definition: Sets the Location of the appointment. It could be a static or dynamic value. |
| OptionalAttendees | Definition: Sets the list of Optional Attendees of the appointment. This can be a semicolon separated list of IDs of any valid entity (Account, Contact, Lead, Facility/ Equipment or User) |

| Field Name | Definition |
|-------------------|---|
| OwnerID | Definition: When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record |
| RequiredAttendees | Definition: Sets the list of Required Attendees of the appointment. This can be a semicolon separated list of IDs of any valid entity (Account, Contact, Lead, Facility/ Equipment or User) |
| ShowTimeAs | <u>Definition:</u> Sets the Show Time As field of the appointment. Possible values are: Default Free Tentative Busy OutOfOffice |
| Start On | <u>Definition:</u> Sets the Start Time of the appointment. It must be a dynamic value. |
| Subject | Definition: This sets the subject field of the activity in CRM, this value can be either static or dynamic. Clicking the ellipsis button opens a window for setting the subject content: This window accepts dynamic values by typing these special characters \${ which opens the Schema Selector Dialog |
| TaskDescription | Definition:This sets the value of the description field in the CRM activity.Clicking the ellipsis button opens a window for setting the description content.This window accepts dynamic values by typing these special characters \${ which opens the Schema Selector Dialog |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Participants Window - Assign Mode

Default value: \${ProcessInitiator} Click the ellipsis button to open the configuration dialog:

| Participants | Assign Mode | × |
|--------------|----------------------|--------|
| User | \${ProcessInitiator} | |
| 🔵 Query | Configure | |
| 🔿 Queue | | • |
| 🔿 Team | | - |
| | | |
| | ОК | Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **ConfigurePartcipants** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|--|
| User | Definition: |
| | Can contain a static or dynamic value which can be one or more user IDs or user names. |
| | Multiple values should be separated by a semicolon "," |
| | When multiple values are used, each participant gets a task and the shape is not Completed until all |

| Field Name | Definition |
|------------|--|
| | the participants have Completed (or Cancelled) their corresponding tasks. |
| | Type \${ to open the Schema Selector Dialog. |
| Query | Function: |
| | Click to open the Query Expression Builder. |
| | The query should return 1 or more values of one of these types: |
| | systemuserid (e.g. ownerid of an account) |
| | username (e.g. DOMAIN\loginid) |
| | SeeQuery Expression Builder |
| Queue | Definition: |
| | Select the corresponding Queue from the list. The task will appear in the selected Queue. |
| | When this is selected, the OwnerID property can also be set. |
| Team | Definition: |
| | Select the corresponding Team from the list. The task will be assigned to the chosen Team. If any member of the Team completes (or Cancels) the task, the shape is Completed and the process progresses to the next step(s). |

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:

| 6 | | Set Additi | onal Activity Properties | |
|---|--------------------------|------------|--------------------------|---|
| | Activity Type Task(task) | ۲ | | |
| | Field | | Value | |
| | | - | | |
| l | | | | |
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| | | | | _ |
| | | | 0K Cancel | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the ActivityProperties field, click the Ellipses button.

| Field Name | Definition |
|--------------|--|
| ActivityType | Definition: Shows all the activity types including custom activity types |
| Field | Definition: |

| Field Name | Definition |
|------------|---|
| | Select the field for the selected Activity Type |
| Value | Definition: Sets the value of the Field. Type \${ to open the Schema Selector Dialog to enter a dynamic value |
| Down Arrow | <u>Function:</u> Add new Field-Value pair or Remove existing Field- Value pair |

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:

| | | Search: | P |
|---|---------------------------------|-----------------|---------------------------|
| | Name | Category | Created On |
| • | Case Management Accept Solution | Case Management | 2012-05-11T19:05:50+02:00 |
| | Case Management Additional Info | Case Management | 2012-05-11T19:05:56+02:00 |
| | Case Management Review | Case Management | 2012-05-11T19:05:56+02:00 |
| | Ticket Entry Form | Case Management | 2012-05-11T19:05:57+02:00 |
| | | | |
| 6 | New 🗹 Edit 🛕 Preview | | OK Cancel |

When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Manual Activities 2011
 - XRM Manual Activities 4
 - XRM External Connector

- 3. Do one of the following:
 - On the XRM Manual Activities 2011 or XRM Manual Activities 4 stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Form** field, click the **Ellipses** button.

Form Example

The following is an example of a form created using the AgileXRM Form Designer.

| Task: Regarding: Offline Windows Internet Explorer | | | |
|---|--------------------------|----------------------------|--------------------|
| At http://wdd.5555/AP/Activities/task/edit.aspiller/7015056 | 2-4267-8/11-6148-000-294 | Ifel 🍷 😽 🗙 🛛 🦉 Live Search | ۶۰ |
| X Winner in the second second | | A . B . C A . N | and field a Tank a |
| The reasons and Cose of C at 1 Stoke Up to 1 | sctone - | a.e | e savey - root - |
| Tesk Regarding: Offline. | | | |
| Overview | | | |
| Customer* | | | |
| Subject Configuration Problem | Case Type | | • |
| Case Origin Assignment Information | Satisfaction | | • |
| Owner 🛠 🔒 System Administrator | | | |
| Fallow Up By | Priority | Normal | ⊇. |
| | | ٦ | Save Data |
| Status: Open | | | - |

Create Appointment Example

The following is an example of a form created using the Create Appointment AgileShape.

| Appointment New | t | | Appointments |
|------------------|----------------------------------|---------------|--------------------|
| • Appointment | | | |
| Subject * | Subject property | | |
| Location | Location property | | |
| Regarding | Main Entity of the running proce | SS | |
| Scheduling Infor | rmation | | |
| Required | Required property | | |
| Optional | OptionalAttendees property | | |
| Start Time * | Start On property | Duration | 30 minutes |
| End Time * | End On property | All Day Event | AllDay Event prope |
| Show Time As | ShowTimeAs property 🔹 | Priority | Piority property |
| TaskDescription | property | | |
| Notes | | | |
| ▼ Details | | | |
| Owner* | 🔓 Activity Participant 🛛 🖾 | Organizer | 8 |
| Category | | Sub-Category | |
| Status | Open | | |

Create Manual Task

This shape is used for creating a CRM Task activity. The Task Owner will be the user/team that the task is assigned to (i.e. Participant), and the Regarding field will be the Main Entity of the process.

This shape can optionally have an AgileLightForm (ALF form) associated with it. This permits creating activitybased forms, which have all the fields necessary for carrying out this task by the user.

When the task is Marked as Completed in CRM, the process continues.

Other fields including any custom fields in the Task entity can be updated using the Activity Properties property.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 stencil.
- 3. On the **XRM Manual Activities 2011** stencil, drag the **Create Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|--------------------|--|
| ActivityProperties | Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields: |
| Form | Opens the Following Window: Form Configuration Window Purpose of this Window: This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened: |
| OwnerID | Definition: When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record |

| Field Name | Definition |
|-----------------|--|
| Subject | Definition: |
| | This sets the subject field of the activity in CRM, this value can be either static or dynamic. |
| | Clicking the ellipsis button opens a window for setting the subject content: |
| | This window accepts dynamic values by typing these special characters \${ which opens the Schema Selector Dialog |
| TaskDescription | Definition: |
| | This sets the value of the description field in the CRM activity. |
| | Clicking the ellipsis button opens a window for setting the description content. |
| | This window accepts dynamic values by typing these special characters \${ which opens the Schema Selector Dialog |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.
Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:

| 6 | 5 | | | | |
|---|--------------------------|---|-------|----|--------|
| | Activity Type Task[task] | | l | | |
| ľ | Field | | Value | | |
| | | - | | | |
| | | | | | |
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| l | | | | | |
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| l | | | | | |
| l | | | | | |
| | | | | | |
| h | | | | OK | Canaal |
| | | | | UN | Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the ActivityProperties field, click the Ellipses button.

Field Definitions

| Field Name | Definition |
|--------------|---|
| ActivityType | Definition: Shows all the activity types including custom activity types |
| Field | Definition: Select the field for the selected Activity Type |
| Value | Definition: Sets the value of the Field. Type \${ to open the Schema Selector Dialog to enter a dynamic value |
| Down Arrow | <u>Function:</u> Add new Field-Value pair or Remove existing Field- Value pair |

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:

| | | Search: | | 2 |
|---------------------------------|---------------------------------|------------------------------|---------------------------|------|
| | Name | Category | Created On | |
| Case Management Accept Solution | | Case Management | 2012-05-11T19:05:50+02:00 | |
| | Case Management Additional Info | Case Management | 2012-05-11T19:05:56+02:00 | |
| | Case Management Review | Case Management | 2012-05-11T19:05:56+02:00 | |
| | Ticket Entry Form | Case Management | 2012-05-11T19:05:57+02:00 | |
| | | | | |
| L | 🙀 New 🧭 Edit 🔯 Preview | | OK Car | ncel |

When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Manual Activities 2011
 - XRM Manual Activities 4
 - XRM External Connector
- 3. Do one of the following:
 - On the XRM Manual Activities 2011 or XRM Manual Activities 4 stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Form field, click the Ellipses button.

Form Example

The following is an example of a form created using the AgileXRM Form Designer.

| Fask: Regarding: Offline Windows Internet Explorer | |
|--|--|
| C | 811-6146-000c29e1fe1 • 4 🗙 🕅 🗱 Live Search 🖉 • |
| 🗴 🖬 Snapt 📓 🗹 | |
| 👷 Favorites 🙀 Task: Regarding: Offline. | 💁 👻 🔝 🐨 📾 👻 Page 👻 Safety 👻 Tools 👻 |
| 👍 🗟 Save and Oose 🔓 🛃 🥥 🕸 🖉 Follow Up 🔌 Scions - | · • • • • • • |
| Regarding: Offline. | |
| Process Task | . (0) |
| General | î |
| Trie Coffine | |
| Customer* 🔒 Microsoft | (Z) |
| Subject Configuration Problem | Case Type |
| Case Origin 9 | Saturation |
| Assignment Information | |
| Owner K System Administrator | |
| Fallow Up By <10/10/1000 [1] Pr | Norty Nord + |
| | Save Data |
| Status: Open | |

Create Manual Task Example

The following is an example of a form created using the Create Manual Task AgileShape.

| New | | Ta | asks 💌 🕆 | 4 |
|-----------------------------|------------------------------|--------------------------|--------------------|---|
| • Task | | | | - |
| Subject * | Subject property | | | |
| TaskDescript | ion property | | | |
| Regarding | Main Entity of the | running process | Q | |
| Owner* | 🐰 Task Participa | nt | a | |
| | | | | |
| Duration Due | 30 minutes | Priority | Piority property - | |
| Duration Due Category | 30 minutes TimeSpan propert | Priority Sub-Category | Piority property - | |

Create Intranet Task

This creates a task for a Standard User. That is a user who is in AgileXRM but is not necessarily a CRM Licensed user.

The task will be presented to the user via the Task List WebPart in SharePoint, where the user can interact with it.



- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 stencil.
- 3. On the XRM Manual Activities 2011 stencil, drag the Create Intranet Task AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------|--|
| QueryExpression | Opens the Following Window: Advanced Find - QueryExpression Configuration Window |
| Form | Opens the Following Window: Form Configuration Window Purpose of this Window: This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened: |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Advanced Find - QueryExpression Configuration Window



- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM Manual Activities 2011
- 3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

5. On the QueryExpression field, click the Ellipses button.

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:

| | | | 2 | |
|---------------------------------|------------------------|-----------------|---------------------------|------|
| | Name | Category | Created On | |
| Case Management Accept Solution | | Case Management | 2012-05-11T19:05:50+02:00 | |
| Case Management Additional Info | | Case Management | 2012-05-11T19:05:56+02:00 | |
| Case Management Review | | Case Management | 2012-05-11T19:05:56+02:00 | |
| Ticket Entry Form | | Case Management | 2012-05-11T19:05:57+02:00 | |
| | | | | |
| | 🙀 New 🧭 Edit 🔯 Preview | | ОК Са | ncel |

When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Manual Activities 2011
 - XRM Manual Activities 4
 - XRM External Connector
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** or **XRM Manual Activities 4** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Form field, click the Ellipses button.

Form Example

The following is an example of a form created using the AgileXRM Form Designer.

| Canal III II | | | | |
|--|---|----------------------------|----------------------|--|
| a sealar an C | 1 | | | |
| avorites 🗼 Ta | sk: Regarding: Offline. | | <u>@</u> • ⊠ • ⊐ ⊕ · | Page * Safety * To |
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| Task | | | | |
| Reg | arding: Offline. | | | |
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| General | | | | i [` |
| Overview | | | | |
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| Customer | Co Normal | | | |
| Customer 🗮 | Mcrosoft | | | 3 |
| Customer * | Configuration Problem | Case Type | | - |
| Customer * | Configuration Problem | Case Type | | - |
| Customer * Subject * Case Origin | Morosoft Configuration Problem | Cave Type Satisfaction | | |
| Cuetomer * Subject * Case Origin Assignment Informa | Monusoft Configuration Problem | Case Type | | |
| Cuetomer * Subject * Case Origin Assignment Soforma Overer * | Microsoft Configuration Problem don | Case Type • Satefaction | | |
| Cuetomer * Subject * Case Origin Assignment Soforma Overer * Follow Up By | Microsoft Configuration Problem | Case Type | Normal | |
| Customer * Subject * Case Origin Assignment Soforma Owner * Follow Up By | Configuration Problem Configuration Problem | Case Type | Normal | |

Email Activity

This shape creates an Email activity in CRM.

The Email can be sent automatically (if AutoComplete is set to True) or manually by the user through clicking the Send button in the ribbon. In either case, once sent, the process continues.

This shape can optionally have an AgileLightForm (ALF form) associated with it. This permits creating activitybased forms, which have all the fields necessary for carrying out this task by the user.



Other fields including any custom fields in the Email entity can be updated using the Activity Properties property.

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 stencil.
- 3. On the **XRM Manual Activities 2011** stencil, drag the **Email Activity** AgileShape, and drop it on the process template.

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------------|---|
| QueryExpression | Opens the Following Window: Advanced Find - QueryExpression Configuration Window |
| ConfigureParticipants | Opens the Following Window: Participants Window - Assign Mode Purpose of this Window: Default value: \${ProcessInitiator} Click the ellipsis button to open the configuration dialog: |
| ActivityProperties | Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields: |
| AgilePointTemplate | <u>Definition:</u> By clicking on Add Mail Template the standard Envision email configuration window is opened (See Defining an Email Template) Valid values for thenFrom field are: A single CRM Domain Logon Name (domainname) A single ID of a valid entity: Account, Lead, Contact, Queue or User Valid values for the To, CC and BCC fields are: A single CRM Domain Logon Name (domainname) A single ID of a valid entity: Account, Lead, Contact, Queue or User Valid values for the To, CC and BCC fields are: A single CRM Domain Logon Name (domainname) A single ID of a valid entity: Account, Lead, Contact, Queue or User A single ID of a valid entity: Account, Lead, Contact, Queue or User |
| Form | Opens the Following Window: Form Configuration Window Purpose of this Window: |

| Field Name | Definition |
|------------|---|
| | This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened: |
| OwnerID | Definition: When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Advanced Find - QueryExpression Configuration Window

| | | | | | Advanced Fin | 1 | | | | |
|------|------|---------|-------------|------|--------------|---|---|---|----|--------|
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| _ Q. | uery | Columns | Save Output | Test | | | | | | |
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Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM Manual Activities 2011
- 3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the QueryExpression field, click the Ellipses button.

Participants Window - Assign Mode

Default value: \${ProcessInitiator} Click the ellipsis button to open the configuration dialog:

| Participants | Assign Mode | x |
|--------------|----------------------|--------|
| User | \${ProcessInitiator} | |
| O Query | Configure | |
| 🔘 Queue | | |
| 🔿 Team | | |
| | | |
| | ОК | Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **ConfigurePartcipants** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition | |
|------------|--|--|
| User | Definition: | |
| | Can contain a static or dynamic value which can be one or more user IDs or user names. | |
| | Multiple values should be separated by a semicolon "," | |
| | When multiple values are used, each participant gets a task and the shape is not Completed until all | |

| Field Name | Definition | |
|------------|--|--|
| | the participants have Completed (or Cancelled) their corresponding tasks. | |
| | Type \${ to open the Schema Selector Dialog. | |
| Query | Function: | |
| | Click to open the Query Expression Builder. | |
| | The query should return 1 or more values of one of these types: | |
| | systemuserid (e.g. ownerid of an account) | |
| | username (e.g. DOMAIN\loginid) | |
| | SeeQuery Expression Builder | |
| Queue | Definition: | |
| | Select the corresponding Queue from the list. The task will appear in the selected Queue. | |
| | When this is selected, the OwnerID property can also be set. | |
| Team | Definition: | |
| | Select the corresponding Team from the list. The task will be assigned to the chosen Team. If any member of the Team completes (or Cancels) the task, the shape is Completed and the process progresses to the next step(s). | |

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:

| Ì | | Set Addition | onal Activity Properties |
|---|--------------------------|--------------|--------------------------|
| | Activity Type Task(task) | • | |
| | Field | | Value |
| | | - | |
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- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the ActivityProperties field, click the Ellipses button.

Field Definitions

| Field Name | Definition |
|--------------|---|
| ActivityType | Definition: Shows all the activity types including custom activity types |
| Field | Definition: |

| Field Name | Definition | |
|------------|--|--|
| | Select the field for the selected Activity Type | |
| Value | <u>Definition:</u> Sets the value of the Field. Type \${ to open the Schema Selector Dialog to enter a dynamic value | |
| Down Arrow | <u>Function:</u> Add new Field-Value pair or Remove existing Field- Value pair | |

Email Template Wizard

Specifies the content of an email template. An email template determines recipients, subject, body, and other aspects of an automated email template sent from AgilePoint.

| Email Templates | s Wizard | |
|-----------------|--|--------------------------|
| E Na | I Template Wizard | |
| Actions | Settings Remove Rename Macro Priority: High • Format: Default | • |
| Email Settings | | _ |
| Name: | CFOApproval Get Global Templates | |
| From | | |
| Ter | | |
| 10: | <pre>>(laskParticipantUsername)</pre> | |
| CC: | | |
| BCC: | | |
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| Subject: | Review Job Position - \${/pd:myFields/pd:Title} | _ |
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Navigation

1. In AgilePoint Envision, open a process template.

- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
 - Activity Entry Message (Email)
 - Reminder Message (Email)
 - Task Completed Message (Email)
 - Task Reassigned Message (Email)
- 5. On the Email Template Wizard, do one of the following:
 - To modify an existing email template, in the Name list, select the name of the template you want to modify.
 - To create a new email template:
 - 1. Click New.
 - 2. On the New Name window, enter the name you want to identify your email template.
 - 3. Click OK.

Field Definitions

| Field Name | Definition |
|------------|---|
| New | Function: |
| | Opens the New Name window, where you can enter the name of the message template. |
| | Allowed Values: |
| | Free text in text format. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Rename | Function: |
| | Opens the New Name window, where you can change the name of the message template. |
| | Allowed Values: |
| | A single line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |

| Field Name | Definition |
|------------|---|
| | No |
| Remove | <u>Function:</u> Deletes the message template from the Name list. |
| Name | Definition: Specifies the Email Template you want to modify. <u>Allowed Values:</u> A single line of text. <u>Default Value:</u> An email template, if one exists. |
| From | Definition: Specifies the recipients in the From field of an Email Notification. Allowed Values: A semicolon-delineated list of valid email addresses. If process attributes are used, domain\username is converted automatically to a valid email format. Default Value: None Custom Attributes: Yes Example: me@mydomain.com; \${ProcessInitiator}; \${ProcessParticipantUserNames} |
| То | Definition: Specifies the recipients in the To field of an Email Notification. Allowed Values: A semicolon-delineated list of valid email addresses. If process attributes are used, domain\username is converted automatically to a valid email format. Default Value: None |

| Field Name | Definition |
|-------------------------|---|
| | Custom Attributes: |
| | Yes |
| | Example: |
| | me@mydomain.com; \${ProcessInitiator}; \${ProcessParticipantUserNames} |
| СС | Definition: |
| | Specifies the recipients in the CC field of an Email Notification. |
| | Allowed Values: |
| | A semicolon-delineated list of valid email addresses. |
| | If process attributes are used, domain\username is converted automatically to a valid email format. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | me@mydomain.com; \${ProcessInitiator}; \${ProcessParticipantUserNames} |
| Subject | Definition: |
| | Specifies the subject line of an email notification. |
| | Allowed Values: |
| | A single line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | <pre>\${ActivityName} in \${ProcessName} is complete</pre> |
| Multi-language List (+) | Definition: |
| | Specifies an additional language for which you can define the content of an email. |
| | Allowed Values: |

| Field Name | Definition | |
|-----------------------------|--|--|
| | A list of languages. | |
| | Example: | |
| | af-ZA | |
| | sq-AL | |
| | am-ET | |
| Priority | Definition: | |
| | Specifies the priority setting for an email notification. | |
| | Allowed Values: | |
| | • High | |
| | • Normal | |
| | • Low | |
| | Default Value: | |
| | Normal | |
| Format | Definition: | |
| | Specifies the display format for an email. | |
| | Allowed Values: | |
| | • HTML - Displays the email in HTML format. | |
| | • Text - Displays the email in text-only format. | |
| | Default - Displays the email in your organization's default format. This is set by your AgilePoint system administrator. Typically this is HTML. | |
| | <u>Default Value:</u> | |
| | Default | |
| Left to Right/Right to Left | Definition: | |
| | Specifies the alignment of text in the content section of an email. | |
| | Allowed Values: | |
| | • Left to Right | |
| | Right to Left | |
| | Default Value: | |
| | Left to Right | |
| Content | Definition: | |

| Field Name | Definition | | |
|-------------|---|--|--|
| | Specifies the content of the body of an email. | | |
| | Allowed Values: | | |
| | Rich text in HTML format, or free text in text format. | | |
| | Default Value: | | |
| | None | | |
| | Custom Attributes: | | |
| | Yes | | |
| Attachments | Definition: | | |
| | Specifies one or more files you want to include in an email. | | |
| | Allowed Values: | | |
| | The full path and file name for the attachments you want to include. Lists are separated by semicolons. | | |
| | Note: The file that you would like to attach must reside on the local machine. | | |
| | Default Value: | | |
| | None | | |
| | Custom Attributes: | | |
| | Yes | | |
| | Example: | | |
| | C:\My Documents\sample1.doc; \${HomeDirectory}\sample2.doc; \${AttachDoc} | | |

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:

| | | Search: | 2 |
|---|---------------------------------|-----------------|---------------------------|
| | Name 🔺 | Category | Created On |
| • | Case Management Accept Solution | Case Management | 2012-05-11T19:05:50+02:00 |
| | Case Management Additional Info | Case Management | 2012-05-11T19:05:56+02:00 |
| | Case Management Review | Case Management | 2012-05-11T19:05:56+02:00 |
| | Ticket Entry Form | Case Management | 2012-05-11T19:05:57+02:00 |
| | | | |
| G | New 🗹 Edit 🛕 Preview | | 0K Cancel |

When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Manual Activities 2011
 - XRM Manual Activities 4
 - XRM External Connector
- 3. Do one of the following:
 - On the XRM Manual Activities 2011 or XRM Manual Activities 4 stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Form field, click the Ellipses button.

Form Example

The following is an example of a form created using the AgileXRM Form Designer.

| Task: Regarding: Offline. | - Windows Internet Explorer | | | |
|---------------------------|---|----------------------------------|----------------------------|--------------------|
| Coor At http://ad | 05555/AP/Activities/task/edit.aspx?idx701505d | -4267-df11-614d-000-29e | Ifel 🔹 🔄 🗙 🕅 🗱 Live Search | - م |
| 🗙 🛄 Snapit 🔛 💓 | | | | |
| 👷 Favorites 🍌 Task: F | legarding: Offline. | | 💁 T 🔯 T 🖂 🛞 T Pag | · Safety · Tools · |
| 🛺 🖬 🗟 Save and O | Sone 🔐 🛃 🎯 🕴 🖉 Follow Up 🔌 8 | ctions - | | 9 (sh - |
| Process Task | ling: Offline. | | | |
| | | | | . 0 |
| Overview | | | | |
| Title | Offine | | | |
| Customer* | Provent | | | 3 |
| Subject | Configuration Problem | Case Type | | • |
| Case Origin | | Satisfaction | | - H I I |
| Assignment Information | | | | |
| Owner | System Administrator | | | |
| Follow Up By | <niii td="" www<=""><td>Priority</td><td>Normal</td><td>•</td></niii> | Priority | Normal | • |
| | | | <u>ه</u> | ave Data |
| Status: Open | | | | |

Email Activity Example

The following is an example of a form created using the Email Activity AgileShape.

| E-mail New | | | E-mail Messages |
|-------------------|--------------------------------|---------------|------------------|
| ★ E-mail | | | |
| From | 💈 From field of AgilePoint E | mail Template | |
| То | To field of AgilePoint Email T | emplate | |
| Cc | CC field of AgilePoint Email T | emplate | |
| Bcc | BCC field of AgilePoint Email | Template | |
| Subject | Subject field of AgilePoint En | nail Template | |
| Regarding | Main Entity of process | | |
| 🐰 🗈 🏗 В | | 谭 谭 🛃 - A | • A • 🔤 🗎 |
| Email body of Agi | lePoint Email Template | | |
| ▼ Details | | | |
| Owner* | 🜡 Activity Participant 🗔 | Priority | Piority property |
| Duration | 30 minutes 💌 | Category | |
| Due | TimeSpan property | Sub-Category | |

Fax Activity

This shape creates a Fax Activity in CRM.

This shape can optionally have an AgileLightForm (ALF form) associated with it. This permits creating activitybased forms, which have all the fields necessary for carrying out this task by the user.

When the activity is Marked as Completed, the process flow continues.

AgileShapes



Other fields including any custom fields in the Fax entity can be updated using the Activity Properties property.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 stencil.
- 3. On the **XRM Manual Activities 2011** stencil, drag the **Fax Activity** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition | | |
|------------------------|--|--|--|
| ConfigureParticipants | Opens the Following Window: Participants Window - Assign Mode Purpose of this Window: Default value: \${ProcessInitiator} Click the ellipsis button to open the configuration dialog: | | |
| ActivityProperties | Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields: | | |
| CommunucationDirection | Definition: This is for setting the direction of the communication with the Recipient as Incoming or Outgoing | | |
| Destination | <u>Definition:</u> This is the Phone Number of the call with the Recipient. It could be a static or dynamic value. | | |
| Form | Opens the Following Window: Form Configuration Window | | |

| Field Name | ame Definition | |
|-----------------|---|--|
| | Purpose of this Window: | |
| | This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened: | |
| OwnerID | Definition: | |
| | When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record | |
| Recipient | Definition: | |
| | This sets the Recipient(s) for this communication. | |
| | This can be: | |
| | One Recipient: Use the ID of a valid entity (Account, Contact, Lead or User) or CRM Domain Logon Name (domainname) | |
| | Multiple Recipients: Use a semicolon separated list of IDs of any valid entity (Account, Contact, Lead or User) | |
| Sender | Definition: | |
| | This sets the Sender for this communication. | |
| | This must be a single ID of a valid entity (Account, Contact, Lead or User) or CRM Domain Logon Name (domainname) | |
| Subject | Definition: | |
| | This sets the subject field of the activity in CRM, this value can be either static or dynamic. | |
| | Clicking the ellipsis button opens a window for setting the subject content: | |
| | This window accepts dynamic values by typing these special characters \${ which opens the Schema Selector Dialog | |
| TaskDescription | Definition: | |
| | This sets the value of the description field in the CRM activity. | |
| | Clicking the ellipsis button opens a window for setting the description content. | |
| | This window accepts dynamic values by typing these special characters \${ which opens the Schema Selector Dialog | |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Participants Window - Assign Mode

Default value: \${ProcessInitiator} Click the ellipsis button to open the configuration dialog:

| Participants | Assign Mode | x |
|--------------|----------------------|----------|
| User | \${ProcessInitiator} | |
| 🔘 Query | Configure | |
| 🚫 Queue | | - |
| 🔿 Team | | T |
| | | |
| | OK | Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **ConfigurePartcipants** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|------------|--|
| User | Definition: |
| | Can contain a static or dynamic value which can be one or more user IDs or user names. |
| | Multiple values should be separated by a semicolon "," |
| | When multiple values are used, each participant gets a task and the shape is not Completed until all |

| Field Name | Definition |
|------------|--|
| | the participants have Completed (or Cancelled) their corresponding tasks. |
| | Type \${ to open the Schema Selector Dialog. |
| Query | Function: |
| | Click to open the Query Expression Builder. |
| | The query should return 1 or more values of one of these types: |
| | systemuserid (e.g. ownerid of an account) |
| | username (e.g. DOMAIN\loginid) |
| | SeeQuery Expression Builder |
| Queue | Definition: |
| | Select the corresponding Queue from the list. The task will appear in the selected Queue. |
| | When this is selected, the OwnerID property can also be set. |
| Team | Definition: |
| | Select the corresponding Team from the list. The task will be assigned to the chosen Team. If any member of the Team completes (or Cancels) the task, the shape is Completed and the process progresses to the next step(s). |

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:

| 6 | | Set Additi | onal Activity Properties | |
|---|--------------------------|------------|--------------------------|---|
| | Activity Type Task(task) | ۲ | | |
| | Field | | Value | |
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| | | | | _ |
| | | | 0K Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the ActivityProperties field, click the Ellipses button.

Field Definitions

| Field Name | Definition |
|--------------|--|
| ActivityType | Definition: Shows all the activity types including custom activity types |
| Field | Definition: |

| Field Name | Definition |
|------------|--|
| | Select the field for the selected Activity Type |
| Value | <u>Definition:</u> Sets the value of the Field. Type \${ to open the Schema Selector Dialog to enter a dynamic value |
| Down Arrow | <u>Function:</u> Add new Field-Value pair or Remove existing Field- Value pair |

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:

| | | Search: | 2 |
|---|---------------------------------|-----------------|---------------------------|
| _ | Name | Category | Created On |
| • | Case Management Accept Solution | Case Management | 2012-05-11T19:05:50+02:00 |
| | Case Management Additional Info | Case Management | 2012-05-11T19:05:56+02:00 |
| | Case Management Review | Case Management | 2012-05-11T19:05:56+02:00 |
| | Ticket Entry Form | Case Management | 2012-05-11T19:05:57+02:00 |
| | | | |
| 6 | New 🧭 Edit 🛕 Preview | | OK Cancel |

When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Manual Activities 2011
 - XRM Manual Activities 4
 - XRM External Connector

- 3. Do one of the following:
 - On the XRM Manual Activities 2011 or XRM Manual Activities 4 stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Form** field, click the **Ellipses** button.

Form Example

The following is an example of a form created using the AgileXRM Form Designer.

| Task: Regarding: Offline V | Vindows Internet Explorer | | | |
|---------------------------------------|---|----------------------|--------------------------|-------------------------|
| Color A http://wdd | 5555/AP/Activities/task/edit.asps?id=701505dc-420 | 7-811-6148-000-29419 | el 🔹 🔤 🗙 🛛 🦉 Live Search | <i>p</i> . |
| X Snapt E C | | | D . D . C A . | Process fields as Tanks |
| Task Reg | e 🔐 🛃 🖼 🗍 🖉 🖉 Folow Up 🗞 (stor | | | e tale - |
| Task Regardi Process Task | ng: Offline. | | | |
| Overview | where | | | |
| Customer * |) Novert | | | |
| Subject | Configuration Problem | Case Type | | - |
| Case Origin Assignment Information | | Satisfaction | | |
| Owner* | 😫 System Administratur | | | |
| Police Up By | 400/www (1) | Priority | Normal | <u> </u> |
| | | | | Save Data |
| Status: Open | | | | - |

Fax Activity Example

The following is an example of a form created using the Fax Activity AgileShape.

| Fax | | | |
|--|--|-----------------------------------|------------------|
| Sender | 🐰 Sender property | Fax Number | Destination pr |
| Recipient | Recipient property | Direction | C Incoming |
| Subject * | Subject property | | |
| TaskDescripti | ion property | | |
| TaskDescripti | on property Main Entity of the running | process | |
| TaskDescripti Regarding Owner * | Main Entity of the running | process | |
| TaskDescripti Regarding Owner * Duration | Main Entity of the running Activity Participant 30 minutes | process Priority | Piority property |
| TaskDescripti Regarding Owner * Duration Due | Main Entity of the running Activity Participant 30 minutes | process Priority Cover Page | Piority property |

Generic Activity

This shape can create any type of activity in CRM, and is particularly suited for use with custom activity types.

When the activity is Marked as Completed, the process flow continues.

Apart from the Subject (subject) and TaskDescription (description) fields, the other fields in the activity, including any custom fields, can be updated using the Activity Properties property.

968



- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 stencil.
- 3. On the **XRM Manual Activities 2011** stencil, drag the **Generic Activity** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------------|--|
| ConfigureParticipants | Opens the Following Window: Participants Window - Assign Mode Purpose of this Window: Default value: \${ProcessInitiator} Click the ellipsis button to open the configuration dialog: |
| ActivityProperties | Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields: |
| Form | Opens the Following Window: Form Configuration Window Purpose of this Window: This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened: |
| OwnerID | Definition: |

| Field Name | Definition |
|-----------------|--|
| | When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record |
| Subject | Definition: |
| | This sets the subject field of the activity in CRM, this value can be either static or dynamic. |
| | Clicking the ellipsis button opens a window for setting the subject content: |
| | This window accepts dynamic values by typing these special characters \${ which opens the Schema Selector Dialog |
| TaskDescription | Definition: |
| | This sets the value of the description field in the CRM activity. |
| | Clicking the ellipsis button opens a window for setting the description content. |
| | This window accepts dynamic values by typing these special characters \${ which opens the Schema Selector Dialog |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Participants Window - Assign Mode

Default value: \${ProcessInitiator} Click the ellipsis button to open the configuration dialog:

| Participants | | x |
|--------------|----------------------|---|
| | Assign Mode | |
| | | |
| | | |
| User | \${ProcessInitiator} | |
| 🔿 Query | Configure | |
| 🚫 Queue | | |
| 🔘 Team | T | |
| | | |
| | OK | 1 |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **ConfigurePartcipants** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|------------|-------------|
| User | Definition: |

| Field Name | Definition |
|------------|--|
| | Can contain a static or dynamic value which can be one or more user IDs or user names. |
| | Multiple values should be separated by a semicolon "," |
| | When multiple values are used, each participant gets a task and the shape is not Completed until all the participants have Completed (or Cancelled) their corresponding tasks. |
| | Type \${ to open the Schema Selector Dialog. |
| Query | Function: |
| | Click to open the Query Expression Builder. |
| | The query should return 1 or more values of one of these types: |
| | systemuserid (e.g. ownerid of an account) |
| | username (e.g. DOMAIN\loginid) |
| | SeeQuery Expression Builder |
| Queue | Definition: |
| | Select the corresponding Queue from the list. The task will appear in the selected Queue. |
| | When this is selected, the OwnerID property can also be set. |
| Team | Definition: |
| | Select the corresponding Team from the list. The task will be assigned to the chosen Team. If any member of the Team completes (or Cancels) the task, the shape is Completed and the process progresses to the next step(s). |

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:
| 6 | | Set Additi | ional Activity Properties | |
|---|--------------------------|------------|---------------------------|--|
| | Activity Type Task(task) | • |] | |
| | Field | | Value | |
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| | | | | |
| | | | OK Cancel | |
| | | | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the ActivityProperties field, click the Ellipses button.

Field Definitions

| Field Name | Definition |
|--------------|--|
| ActivityType | Definition: Shows all the activity types including custom activity types |
| Field | Definition: |

| Field Name | Definition |
|------------|---|
| | Select the field for the selected Activity Type |
| Value | Definition: Sets the value of the Field. Type \${ to open the Schema Selector Dialog to enter a dynamic value |
| Down Arrow | <u>Function:</u> Add new Field-Value pair or Remove existing Field- Value pair |

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:

| | | Search: | P |
|---|---------------------------------|-----------------|---------------------------|
| | Name | Category | Created On |
| • | Case Management Accept Solution | Case Management | 2012-05-11T19:05:50+02:00 |
| | Case Management Additional Info | Case Management | 2012-05-11T19:05:56+02:00 |
| | Case Management Review | Case Management | 2012-05-11T19:05:56+02:00 |
| | Ticket Entry Form | Case Management | 2012-05-11T19:05:57+02:00 |
| | | | |
| 6 | New 🗹 Edit 🛕 Preview | | OK Cancel |

When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Manual Activities 2011
 - XRM Manual Activities 4
 - XRM External Connector

- 3. Do one of the following:
 - On the XRM Manual Activities 2011 or XRM Manual Activities 4 stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Form field, click the Ellipses button.

Form Example

The following is an example of a form created using the AgileXRM Form Designer.

| Task Regarding Offine Windows Internet Explorer | |
|---|--------|
| 🕽 💭 💌 🍌 http://wddk55555/AP/Activities/task/edit.aspx%dv701505dc-4287-dt21-b14d-000c29e1fe1 💌 🐓 🗙 🕅 🗱 Live Search | ۰ م |
| 🛄 Snapt 📑 🔠 | |
| r Favorites 🍌 Task: Regarding: Offline. 🕼 👻 🔝 🛞 👻 Page 🖛 Safety 🖛 Ta | ools * |
| 🗿 🖬 🗟 Severand Close 🗟 😫 🕼 🕴 🕼 Follow Up 💊 Schore - 🛛 🔍 😌 Sek | . • |
| Task Regarding: Offline. | |
| | อไ |
| Gereni | |
| Tite Coffice | |
| Cutore* 📦 Novet | |
| Subject 🗮 Configuration Problem 🛐 Case Type | |
| Case Origin | |
| Assignment Information | |
| Owner 🕷 💄 System Administrator | |
| Follow tip by childron IS Priorby Normal • | |
| Seve Data | |
| atus: Open | - |

Letter Activity

This shape creates a Letter Activity in CRM.

This shape can optionally have an AgileLightForm (ALF form) associated with it. This permits creating activitybased forms, which have all the fields necessary for carrying out this task by the user.

When the activity is Marked as Completed, the process flow continues.



Other fields including any custom fields in the Letter entity can be updated using the Activity Properties property.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 stencil.
- 3. On the **XRM Manual Activities 2011** stencil, drag the **Letter Activity** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------------------|---|
| ConfigureParticipants | Opens the Following Window: Participants Window - Assign Mode |
| | Purpose of this Window: |
| | Default value: \${ProcessInitiator} Click the ellipsis button to open the configuration dialog: |
| ActivityProperties | Opens the Following Window: Set Additional Activity Properties Window |
| | Purpose of this Window: |
| | Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields: |
| CommunucationDirection | Definition: This is for setting the direction of the communication with the Recipient as Incoming or Outgoing |
| Destination | Definition: |
| | This is the Phone Number of the call with the Recipient. It could be a static or dynamic value. |
| Form | Opens the Following Window: Form Configuration Window |
| | Purpose of this Window: |
| | This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened: |
| OwnerID | Definition: |

| Field Name | Definition |
|-----------------|---|
| | When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record |
| Recipient | <u>Definition:</u> This sets the Recipient(s) for this communication. This can be: One Recipient: Use the ID of a valid entity (Account, Contact, Lead or User) or CRM Domain Logon Name (domainname) Multiple Recipients: Use a semicolon separated |
| | list of IDs of any valid entity (Account, Contact, Lead or User) |
| Sender | <u>Definition:</u> This sets the Sender for this communication. This must be a single ID of a valid entity (Account, Contact, Lead or User) or CRM Domain Logon Name (domainname) |
| Subject | <u>Definition:</u> This sets the subject field of the activity in CRM, this value can be either static or dynamic. Clicking the ellipsis button opens a window for setting the subject content: This window accepts dynamic values by typing these special characters \${ which opens the Schema Selector Dialog |
| TaskDescription | Definition: This sets the value of the description field in the CRM activity. Clicking the ellipsis button opens a window for setting the description content. This window accepts dynamic values by typing these special characters \${ which opens the Schema Selector Dialog |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Participants Window - Assign Mode

Default value: \${ProcessInitiator} Click the ellipsis button to open the configuration dialog:

| Participants | | x |
|--------------|----------------------|----------|
| | Assign Mode | |
| | | |
| | | |
| O User | \${ProcessInitiator} | |
| | | |
| O Query | Configure | |
| | | |
| 🔘 Queue | | T |
| | | |
| 🔘 Team | | |
| | | |
| | | |
| | |) |
| | | Consel |
| | UK | Lancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the **ConfigurePartcipants** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|------------|---|
| User | Definition: Can contain a static or dynamic value which can be one or more user IDs or user names. Multiple values should be separated by a semicolon "," When multiple values are used, each participant gets a task and the shape is not Completed until all the participants have Completed (or Cancelled) their corresponding tasks. Type \${ to open the Schema Selector Dialog. |
| Query | Function: Click to open the Query Expression Builder. The query should return 1 or more values of one of these types: • systemuserid (e.g. ownerid of an account) • username (e.g. DOMAIN\loginid) SeeQuery Expression Builder |
| Queue | Definition: Select the corresponding Queue from the list. The task will appear in the selected Queue. When this is selected, the OwnerID property can also be set. |
| Team | Definition: |

| Field Name | Definition |
|------------|--|
| | Select the corresponding Team from the list. The task will be assigned to the chosen Team. If any member of the Team completes (or Cancels) the task, the shape is Completed and the process progresses to the next step(s). |

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:

| È | | Set Addition | onal Activity Properties | |
|---|---------------|--------------|--------------------------|-----------|
| | Activity Type | Task(task) | l | |
| | Field | | Value | |
| | | • | | |
| l | | | | |
| l | | | | |
| l | | | | |
| | | | | |
| l | | | | |
| l | | | | |
| l | | | | |
| l | | | | |
| | | | | |
| | | | | OK Cancel |
| | | | | OK Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.

- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **ActivityProperties** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|--------------|---|
| ActivityType | Definition: Shows all the activity types including custom activity types |
| Field | Definition: Select the field for the selected Activity Type |
| Value | Definition: Sets the value of the Field. Type \${ to open the Schema Selector Dialog to enter a dynamic value |
| Down Arrow | <u>Function:</u> Add new Field-Value pair or Remove existing Field- Value pair |

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:

| | | Search: | | |
|----|---------------------------------|-----------------|---------------------------|------|
| _ | Name | Category | Created On | |
| • | Case Management Accept Solution | Case Management | 2012-05-11T19:05:50+02:00 | |
| | Case Management Additional Info | Case Management | 2012-05-11T19:05:56+02:00 | |
| | Case Management Review | Case Management | 2012-05-11T19:05:56+02:00 | |
| | Ticket Entry Form | Case Management | 2012-05-11T19:05:57+02:00 | |
| | | | | |
| į. | New 🗹 Edit 🛕 Preview | | OK Ca | ncel |

When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Manual Activities 2011
 - XRM Manual Activities 4
 - XRM External Connector
- 3. Do one of the following:
 - On the XRM Manual Activities 2011 or XRM Manual Activities 4 stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Form field, click the Ellipses button.

Form Example

The following is an example of a form created using the AgileXRM Form Designer.

| 💋 Task: Regarding: Offline. | Windows Internet Explorer | | | OBI |
|-----------------------------|--|----------------------------------|-------------------------|-------------------------|
| G 🕢 🕶 🍌 http://ed | \$5555/AP/Activities/task/edit.aspx7id=7015056 | ic-4267-df11-b14d-000-c29e3 | fel 🔹 🔄 🗙 💐 Live Search | ρ. |
| 🗙 🛄 Snagit 🧱 🖽 | | | | |
| 👷 Favorites 🛛 🚲 Task: B | legarding: Offline. | | 💁 + 🔯 + 🖾 🖶 + | Page = Safety = Tools = |
| 🥢 🖬 🗟 Save and O | lose 🔓 🛃 🥥 I 🕸 I 🖉 Folow Up 💊 | áctions - | | 9 90 - ¹ |
| Regard | ling: Offline. | | | |
| Process Task | cles | | | |
| General | | | | |
| Overview | | | | |
| Title | Offine | | | |
| Customer 🛸 | Picrosoft | | | |
| Subject | Configuration Problem | Сане Туре | | - |
| Case Origin | | Satisfaction | | • • |
| Assignment Information | | | | |
| Owner | System Administrator | | | |
| Follow Up By | <1400/mm> | Priority | Normal | <u> </u> |
| | | | 6 | Save Data |
| Status: Open | | | | |

Letter Activity Example

The following is an example of a form created using the Letter Activity AgileShape.

982

| Letter New | | | Letters |
|-----------------|----------------------------|--------------|----------------------|
| • Letter | | | |
| Sender | 🐰 Sender property | Address | Destination property |
| Recipient | Recipient property | Direction | C Incoming 🔎 Outg |
| Subject * | Subject property | | |
| Regarding | Main Entity of the running | process | |
| Owner* | & Activity Participant | process | |
| Duration | 30 minutes | Priority | Piority property |
| Due | TimeSpan property | M | |
| Category | | Sub-Category | |
| Activity Status | Open | | |

Phone Call Activity

This shape creates a Phone Call Activity in CRM.

This shape can optionally have an AgileLightForm (ALF form) associated with it. This permits creating activitybased forms, which have all the fields necessary for carrying out this task by the user.

When the activity is Marked as Completed, the process flow continues.



Other fields including any custom fields in the Phone Call entity can be updated using the Activity Properties property.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 stencil.
- 3. On the **XRM Manual Activities 2011** stencil, drag the **Phone Call Activity** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------------------|--|
| ConfigureParticipants | Opens the Following Window: Participants Window - Assign Mode |
| | Purpose of this Window: Default value: \${ProcessInitiator} Click the ellipsis button to open the configuration dialog: |
| ActivityProperties | Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields: |
| CommunucationDirection | Definition: This is for setting the direction of the communication with the Recipient as Incoming or Outgoing |
| Destination | <u>Definition:</u> This is the Phone Number of the call with the Recipient. It could be a static or dynamic value. |
| Form | Opens the Following Window: Form Configuration Window Purpose of this Window: This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened: |

| Field Name | Definition | |
|-----------------|---|--|
| OwnerID | Definition: When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record | |
| Recipient | <u>Definition:</u> This sets the Recipient(s) for this communication. This can be: One Recipient: Use the ID of a valid entity (Account, Contact, Lead or User) or CRM Domain Logon Name (domainname) Multiple Recipients: Use a semicolon separated list of IDs of any valid entity (Account, Contact, Lead or User) | |
| Sender | <u>Definition:</u> This sets the Sender for this communication. This must be a single ID of a valid entity (Account, Contact, Lead or User) or CRM Domain Logon Name (domainname) | |
| Subject | Definition:This sets the subject field of the activity in CRM, this value can be either static or dynamic.Clicking the ellipsis button opens a window for setting the subject content:This window accepts dynamic values by typing these special characters \${ which opens the Schema Selector Dialog | |
| TaskDescription | Definition:This sets the value of the description field in the CRM activity.Clicking the ellipsis button opens a window for setting the description content.This window accepts dynamic values by typing these special characters \${ which opens the Schema Selector Dialog | |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Participants Window - Assign Mode

Default value: \${ProcessInitiator} Click the ellipsis button to open the configuration dialog:

| Participants | | x |
|--------------|----------------------|----------|
| | Assign Mode | |
| | | |
| | | |
| O User | \${ProcessInitiator} | |
| | | |
| O Query | Configure | |
| | | |
| 🔘 Queue | | T |
| | | |
| 🔘 Team | | |
| | | |
| | | |
| | |) |
| | | Consel |
| | UK | Lancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the **ConfigurePartcipants** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|------------|---|
| User | Definition: Can contain a static or dynamic value which can be one or more user IDs or user names. Multiple values should be separated by a semicolon "," When multiple values are used, each participant gets a task and the shape is not Completed until all the participants have Completed (or Cancelled) their corresponding tasks. Type \${ to open the Schema Selector Dialog. |
| Query | Function: Click to open the Query Expression Builder. The query should return 1 or more values of one of these types: • systemuserid (e.g. ownerid of an account) • username (e.g. DOMAIN\loginid) SeeQuery Expression Builder |
| Queue | Definition: Select the corresponding Queue from the list. The task will appear in the selected Queue. When this is selected, the OwnerID property can also be set. |
| Team | Definition: |

| Field Name | Definition |
|------------|--|
| | Select the corresponding Team from the list. The task will be assigned to the chosen Team. If any member of the Team completes (or Cancels) the task, the shape is Completed and the process progresses to the next step(s). |

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:

| Set Additional Activity Properties | | | | | |
|------------------------------------|---|-----------|--|--|--|
| Activity Type Task[task] | - | 1 | | | |
| Field | | Value | | | |
| | - | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | OK Cancel | | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.

- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **ActivityProperties** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|--------------|---|
| ActivityType | Definition: Shows all the activity types including custom activity types |
| Field | Definition: Select the field for the selected Activity Type |
| Value | Definition: Sets the value of the Field. Type \${ to open the Schema Selector Dialog to enter a dynamic value |
| Down Arrow | <u>Function:</u> Add new Field-Value pair or Remove existing Field- Value pair |

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:

| | | Search: | | \mathbf{P} |
|---|---------------------------------|-----------------|---------------------------|--------------|
| _ | Name | Category | Created On | |
| • | Case Management Accept Solution | Case Management | 2012-05-11T19:05:50+02:00 | |
| | Case Management Additional Info | Case Management | 2012-05-11T19:05:56+02:00 | |
| | Case Management Review | Case Management | 2012-05-11T19:05:56+02:00 | |
| | Ticket Entry Form | Case Management | 2012-05-11T19:05:57+02:00 | |
| | | | | |
| 6 | 🖗 New 🛛 🗹 Edit 🛛 🛕 Preview | | OK Car | ncel |

When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Manual Activities 2011
 - XRM Manual Activities 4
 - XRM External Connector
- 3. Do one of the following:
 - On the XRM Manual Activities 2011 or XRM Manual Activities 4 stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Form field, click the Ellipses button.

Form Example

The following is an example of a form created using the AgileXRM Form Designer.

| 💋 Task: Regarding: Offline. | Windows Internet Explorer | | | OBI |
|-----------------------------|--|----------------------------------|-------------------------|-------------------------|
| G 🕢 🕶 🍌 http://ed | \$5555/AP/Activities/task/edit.aspx7id=7015056 | ic-4267-df11-b14d-000-c29e3 | fel 🔹 🔄 🗙 💐 Live Search | ρ. |
| 🗙 🛄 Snagit 🧱 🖽 | | | | |
| 👷 Favorites 🛛 🚲 Task: B | legarding: Offline. | | 💁 + 🔯 + 🖾 🖶 + | Page = Safety = Tools = |
| 🥢 🖬 🗟 Save and O | lose 🔓 🛃 🥥 I 🕸 I 🖉 Folow Up 💊 | áctions - | | 9 90 - ¹ |
| Regard | ling: Offline. | | | |
| Process Task | cles | | | |
| General | | | | |
| Overview | | | | |
| Title | Offine | | | |
| Customer 🛸 | Picrosoft | | | |
| Subject | Configuration Problem | Сане Туре | | - |
| Case Origin | | Satisfaction | | • • |
| Assignment Information | | | | |
| Owner | System Administrator | | | |
| Follow Up By | <1400/mm> | Priority | Normal | <u> </u> |
| | | | 6 | Save Data |
| Status: Open | | | | |

Phone Call Activity Example

The following is an example of a form created using the Phone Call Activity AgileShape.

| Phone Call | | | |
|---|--|---------------------|--------------------|
| Sender | Sender property | Phone Number | Destination proper |
| Recipient | Recipient property | Direction | C Incoming 🔎 Ou |
| Subject * | Subject property | | |
| TaskDescript | tion property | | |
| TaskDescript | tion property Main Entity of the running | process | |
| TaskDescript Regarding Owner* | tion property Main Entity of the running S Activity Participant | process | |
| TaskDescript Regarding Owner * Duration | tion property Main Entity of the running & Activity Participant 30 minutes | process Priority | Piority property |
| TaskDescript Regarding Owner * Duration Due | tion property Main Entity of the running & Activity Participant 30 minutes TimeSpan property | process Priority | Piority property |

Service Activity

Note: This shape will be greatly enhanced in a future version.

This shape creates a Service Activity in CRM.

This shape can optionally have an AgileLightForm (ALF form) associated with it. This permits creating activitybased forms, which have all the fields necessary for carrying out this task by the user.

When the activity is Marked as Completed, the process flow continues.

991



Other fields including any custom fields in the Service entity can be updated using the Activity Properties property.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 stencil.
- 3. On the **XRM Manual Activities 2011** stencil, drag the **Service Activity** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------------|--|
| ConfigureParticipants | Opens the Following Window: Participants Window - Assign Mode <u>Purpose of this Window:</u> Default value: \${ProcessInitiator} Click the ellipsis button to open the configuration dialog: |
| ActivityProperties | Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields: |
| Form | Opens the Following Window: Form Configuration Window Purpose of this Window: This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened: |
| OwnerID | Definition: |

| Field Name | Definition |
|-----------------|--|
| | When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record |
| Service | Definition: This sets the Service associated with this activity. It should be the ID of a Service entity. |
| Subject | Definition: |
| | This sets the subject field of the activity in CRM, this value can be either static or dynamic. |
| | Clicking the ellipsis button opens a window for setting the subject content: |
| | This window accepts dynamic values by typing these special characters \${ which opens the Schema Selector Dialog |
| TaskDescription | Definition: |
| | This sets the value of the description field in the CRM activity. |
| | Clicking the ellipsis button opens a window for setting the description content. |
| | This window accepts dynamic values by typing these special characters \${ which opens the Schema Selector Dialog |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Participants Window - Assign Mode

Default value: \${ProcessInitiator} Click the ellipsis button to open the configuration dialog:

| Pa | rticipants | | x |
|----|------------|----------------------|---|
| | | Assign Mode | |
| | | | |
| | | | |
| | User | \${ProcessInitiator} | |
| | 🔘 Query | Configure | |
| | | | |
| | 🔘 Queue | _ | |
| | | | |
| | 🔘 Team | | |
| | | | |
| | | | |
| | | OK Cancel | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **ConfigurePartcipants** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|------------|--|
| User | Definition: Can contain a static or dynamic value which can be one or more user IDs or user names. |
| | Multiple values should be separated by a semicolon ";" |
| | When multiple values are used, each participant gets a task and the shape is not Completed until all the participants have Completed (or Cancelled) their corresponding tasks. |
| | Type \${ to open the Schema Selector Dialog. |
| Query | <u>Function:</u> Click to open the Query Expression Builder. The query should return 1 or more values of one of these types: systemuserid (e.g. ownerid of an account) username (e.g. DOMAIN\loginid) SeeQuery Expression Builder |
| Queue | <u>Definition:</u> Select the corresponding Queue from the list. The task will appear in the selected Queue. When this is selected, the OwnerID property can also be set. |
| Team | Definition: Select the corresponding Team from the list. The task will be assigned to the chosen Team. If any member of the Team completes (or Cancels) the task, the shape is Completed and the process progresses to the next step(s). |

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:

| 6 | Set | Additio | anal Activity Properties |
|---|--------------------------|---------|--------------------------|
| | Activity Type Task(task) | - | |
| | Field | | Value |
| | | • | |
| l | | | |
| l | | | |
| l | | | |
| l | | | |
| l | | | |
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| | | | |
| | | | 0K Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the ActivityProperties field, click the Ellipses button.

Field Definitions

| Field Name | Definition |
|--------------|--|
| ActivityType | Definition: Shows all the activity types including custom activity types |
| Field | Definition: |

| Field Name | Definition |
|------------|---|
| | Select the field for the selected Activity Type |
| Value | Definition: Sets the value of the Field. Type \${ to open the Schema Selector Dialog to enter a dynamic value |
| Down Arrow | <u>Function:</u> Add new Field-Value pair or Remove existing Field- Value pair |

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:

| Search: | | | |
|---------|---------------------------------|-----------------|---------------------------|
| | Name | Category | Created On |
| • | Case Management Accept Solution | Case Management | 2012-05-11T19:05:50+02:00 |
| | Case Management Additional Info | Case Management | 2012-05-11T19:05:56+02:00 |
| | Case Management Review | Case Management | 2012-05-11T19:05:56+02:00 |
| | Ticket Entry Form | Case Management | 2012-05-11T19:05:57+02:00 |
| | | | |
| 6 | New 🗹 Edit 🛕 Preview | | OK Cancel |

When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Manual Activities 2011
 - XRM Manual Activities 4
 - XRM External Connector

- 3. Do one of the following:
 - On the XRM Manual Activities 2011 or XRM Manual Activities 4 stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Form** field, click the **Ellipses** button.

Form Example

The following is an example of a form created using the AgileXRM Form Designer.

| Task: Regarding: Offline V | Vindows Internet Explorer | | | |
|---------------------------------------|--|----------------------|--------------------------|-------------------------|
| Color A http://wdd | 5555/AP/Activities/task/edit.asps?id=701505dc-420 | 7-811-6148-000-29419 | el 🔹 🔤 🗙 🛛 🦉 Live Search | <i>p</i> . |
| X Snapt E C | | | D . D . C A . | Process fields as Tanks |
| Task Reg | e 🔐 🛃 🖼 🗍 🖉 🖉 Folow Up 🗞 (stor | | | e tale - |
| Task Regardi Process Task | ng: Offline. | | | |
| Overview | where the second se | | | |
| Customer * |) Novert | | | |
| Subject | Configuration Problem | Case Type | | - |
| Case Origin Assignment Information | | Satisfaction | | |
| Owner* | 😫 System Administratur | | | |
| Police Up By | 400/www (1) | Priority | Normal | <u> </u> |
| | | | | Save Data |
| Status: Open | | | | - |

Service Activity Example

The following is an example of a form created using the Service Activity AgileShape.

| Service Activi | ty | | | Service | Activities |
|--------------------------------------|----------------------------|----------|--------------|------------------|------------|
| New | | | | | |
| Service Activity | 1 | | | | |
| Subject * | Subject property | | | | |
| Service * | Service property | | Site | | 0 |
| Customers | | | | | |
| Resources | | | | | |
| Location | | | | | |
| Show Time As | | • | | | |
| Scheduling Infor | mation | | | | |
| Start Time * | | | | | |
| End Time * | | | | | |
| Duration | | | | | 1 |
| All Day Event | E | | | | |
| Notes | | | | | |
| Add a new note | | | | | |
| | | | | | |
| | | | | | |
| ▼ Details | | | | | |
| Regarding | Main Entity of the running | ng proce | ss | | |
| Owner* | 💈 Activity Participant | | Priority | Piority property | |
| Category | | | Sub-Category | | |
| Status | Open | | | | |

999

XRM Automatic Activities 2011

This AgileXRM stencil contains AgileShapes that act upon CRM automatically. Most of these have equivalent or improved functionality to their CRM Workflow counterparts.

Additionally it contain a Search shape (similar to CRM Query in CRM WF), a Word/PDF creation shape (using Mail Merge), as well as two Sub-process shapes.

Add Note

Use this shape to add a Note to an entity.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Add Note AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|------------|---|
| EntityId | <u>Definition:</u> This should be the ID of the desired entity record. This value is usually a dynamic value. |
| EntityType | Definition: Select the entity type. This can only be a static value selected from the drop-down list |
| Subject | <u>Definition:</u> Sets the title of the Note. It can be a static or a dynamic value. |

| Field Name | Definition |
|------------|---|
| Text | <u>Definition:</u> Set the text of the body of the Note. It can be a static or a dynamic value. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Add Note Example

The following is an example of a form created using the Add Note AgileShape.

| Notes | |
|-------------------------|------------------------------|
| Add a new note | |
| Title: Subject property | |
| 19-Aug-11 11:40 AM by | Edited 19-Aug-11 11:41 AM by |
| Text property | |
| | |
| | |
| | |

Assign to Manager

This shape will assign the Main Entity to the current owner's manager as defined in CRM.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Assign to Manager AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

Attaching Files to Activities at Runtime

- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Attach Document

This activity creates an attachment or attachments (annotation s) in a CRM entity.

The file or files to be attached must be accessible from the Process Engine server. The file must be located either in a local disk or UNC path and the user of the application pool user of AgilePoint Server must have access to this path.

Note: It is best practice not to attach files to entities as CRM is not the best place for document management. Rather, files should be stored in SharePoint in associated libraries.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Attach Document AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|--------------------|---|
| EntityId | <u>Definition:</u> Default value: \${CrmBeId} This should be the ID of the desired entity record. This value is usually a dynamic value. |
| EntityName | Definition: Default value: Current Main Entity Select the entity type. This can be a static or dynamic value |
| FilePath | Definition: The full path to the local file or files (using wildcards) on the Process Server or a UNC path. This can be a dynamic value or contain dynamic values: e.g. C:\\${DirectoryName}\\${FileName} or \\server \\sharedir\\${filename2} or C:\myDir*.docx The Process Server (AgilePoint Server) Application Pool Identity must have Read permission on the file(s) |
| RemoveFileFromDisk | Definition: If set to True, the file or files are deleted from disk after being attached to the Entity. For this to work the Process Server (AgilePoint Server) Application Pool Identity should have Delete permission on the file(s) |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications

- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Change Ownership

This shape is used to change the Owner of an entity record to another User or Team.



Good to Know

• Owner field is a special field and cannot be changed using the Update Entity shape.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Change Ownership AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|------------|-------------|
| EntityId | Definition: |

| Field Name | Definition |
|------------|---|
| | This should be the ID of the desired entity record. This value is usually a dynamic value. |
| EntityName | Definition: Select the entity type. This can be a static or dynamic value |
| NewOwner | Definition:This can be any of these:If OwnerType property is set to User then it can be either CRM Domain Logon Name (domainname) or User (systemuserid).If OwnerType property is set to Team then it must be the Team ID.(teamid) |
| OwnerType | <u>Definition:</u> This can be either User or Team |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

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Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Change Ownership (Multi)

This shape is used to change the Owner of multiple entity records to another User or Team.

The set of records that are affected are selected by either:

- The ones returned by the query configured in the QueryExpression property
- From a semicolon-separated list of IDs passed via the EntityIds property



Good to Know

• Owner field is a special field and cannot be changed using the Update Entity (Multi) shape.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Change Ownership (Multi) AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|---|
| EntityIds | Definition: This could be a list of entity record IDs separated with a semicolon (;). It can take dynamic variable(s) |
| EntityName | <u>Definition:</u> Select the entity type. This can be a static or dynamic value |
| NewOwner | Definition: This can be any of these: |

| Field Name | Definition |
|-----------------|---|
| | If OwnerType property is set to User then it can be either CRM Domain Logon Name (domainname) or User (systemuserid). |
| | If OwnerType property is set to Team then it must be the Team ID.(teamid) |
| OwnerType | Definition: |
| | This can be either User or Team |
| QueryExpression | Opens the Following Window: |
| | Advanced Find - QueryExpression Configuration Window |

Common AgilePart Properties

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Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.
Advanced Find - QueryExpression Configuration Window

| | Advanced Find |
|--------------------------------|---------------|
| Luery Columns Save Dutput Test | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | OK Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM Manual Activities 2011
- 3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the QueryExpression field, click the Ellipses button.

Converter

This shape is used to perform these conversions on the Main Entity:

- Kit to Product
- Product to Kit
- Quote to Order
- Order to Invoice



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Converter AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

| Field Name | Definition |
|----------------|--|
| SaveStatusTo | Definition: Default value: Success Specifies the name of a process variable that should be updated when the AgileShape is exited. Depending if the shape executed correctly or if an error occurred, then the values true or false will be stored (as a String) in the process variable specified by this property. It is common to use a Single Condition shape directly afterwards, bound to the process variable |
| ConversionType | Definition: This can be one of the following: KitToProduct ProductToKit QuoteToSales (i.e. Quote To Order) OrderToInvoice |
| EntityId | Definition: |

| Field Name | Definition |
|----------------|--|
| | This should be the ID of the desired entity record. This value is usually a dynamic value. |
| SaveEntityIdTo | Definition: Set the name of the process variable that will hold the ID of the entity that is going to be created. The process variable can then be used elsewhere in the process |

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

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Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Convert Lead

This shape converts a Lead to an Account and/or Contact and/or Opportunity.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Convert Lead AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

| Field Name | Definition |
|-------------------|---|
| Currency | <u>Definition:</u> When creating an opportunity, currency must be specified. This can be a static or dynamic value. |
| LeadId | Definition: ID of the Lead to be converted. |
| PotentialCustomer | Definition: Need to be specified when creating an opportunity only. If Lead is also converted to Contact or Account, potential customer is set to this Account or Contact automatically and this value does not need to be provided. |
| SaveEntityIdTo | Definition: Set the name of the process variable that will hold the ID of the entity that is going to be created. The process variable can then be used elsewhere in the process |
| ToAccount | Definition: If set to True an Account is created |
| ToContact | Definition: If set to True a Contact is created |

| Field Name | Definition |
|---------------|---|
| ToOpportunity | Definition: If set to True an Opportunity is created |

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

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Common AgilePart Tasks

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- Using Email Templates and Notifications
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Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Convert Lead Example

The following is an example of a form created using the Convert Lead AgileShape.

| • | Qualify and | con | vert into the fo | llowing reco | rds |
|---|-------------|-------|------------------------|---------------|--------------------|
| | Status | Qu | alified | | - |
| | Accou | int | ToAccount | property | |
| | Conta | ct | ToContact | property | |
| | С Орро | rtun | i ty ToOpportur | nity property | |
| | Poter | ntial | Customer | Potential | Customer propertio |
| | Curre | ncy | | 🥰 Currer | ncy property 🗖 |
| | C Open | new | ly created reco | rds | |
| 0 | Disqualify | | | | |
| | Status | Lo | st | | Ŧ |

Create Association

This shape is used to create a record in a M:M relationship, for example to add a Role to a User.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Create Association AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------|--|
| Configuration | Opens the Following Window: Create Association Window |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

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Create Association Window

| ` | Create Association |
|----------|---|
| | Entity |
| | Account(account) |
| ID | ···· |
| Relation | Marketing List(list)->listaccount_association |
| Ма | Related Entity |
| ID | |
| | |
| | OK Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Create Association AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|------------|--|
| Entity | <u>Definition:</u> Select the entity type from one side of the M:M relationship |
| Entity ID | Definition: Enter the Entity ID for the above entity type. This can be a dynamic value. |

| Field Name | Definition |
|-------------------|---|
| | Click the ellipsis button to open the Schema Selector dialog |
| Relation | <u>Definition:</u> Select the entity type for the other side of the M:M relationship |
| Related Entity ID | <u>Definition:</u> Enter the Entity ID for the related entity type. This can be a dynamic value. Click the ellipsis button to open the Schema Selector dialog |

Create Connection (AgileXRM 2011)

This shapes is used to create Connections between two records



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 stencil.
- 3. On the **XRM Automatic Activities 2011** stencil, drag the **Create Connection** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

| Field Name | Definition |
|---------------|--|
| Configuration | Opens the Following Window: Connections Editor Window |

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
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Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Connections Editor Window

| | Connect from | |
|--------------|------------------|---|
| Entity | Account(account) | |
| Record ID | | |
| As this role | Employer | • |
| | Connect to | |
| As this role | Employee | • |
| Record ID | | |
| Entity | Contact(contact) | |
| | Details | |
| Description | | |
| 📄 Set Date | lange | |
| Start Date | | |
| End Date | | |
| | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 stencil.
- 3. On the **XRM Automatic Activities 2011** stencil, drag the **Create Connection** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|-----------------------------|--|
| Connect from - Entity | <u>Definition:</u> Entity name of the From side of the connection |
| Connect from - Record ID | Definition: Record ID of the From side of the connection |
| Connect from - As this role | Definition: Role of the From side of the connection |
| Connect to - As this role | Definition: Role of the To side of the connection |
| Connect to - Record ID | Definition: Record ID of the To side of the connection |
| Connect to - Entity | Definition: Entity name of the To side of the connection |
| Description | Definition: Text field to add explanation to the connection. |
| Set Date Range | Definition: If set, enables the Start and End Date fields |
| Set Date Range - Start Date | Definition: Connection valid from this date |
| Set Date Range - End Date | Definition: Connection valid to this date |

Create Connection Example

The following is an example of a form created using the Create Connection AgileShape.

| Connection New | oft | | Connections |
|-------------------|-----------------------------------|--------------|-----------------------------|
| ▼ Connect To | | | |
| Name | 🚛 Conn. To Entity & Record ID 🛛 🧔 | As this role | Conn. To As this role field |
| Description | Description field | | |
| Connected From | Conn.From Entity & Record ID | As this role | Sconn.From As this role f |
| Start Date | Start Date field | | |
| End Date | End Date field | | |
| Owner* | System Administrator | | |
| Status | Active | | |

Create Entity

This activity is used to create an entity record, including custom entities and even entities not related to the Main Entity.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Create Entity** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------------|--|
| EntitySpecification | Opens the Following Window: Set Properties - EntitySpecification Configuration Window Purpose of this Window: |
| | in the entity. |
| EntityType | Definition: Select the entity type. This can only be a static value selected from the drop-down list |
| MainProcessEntity | Definition: Indicates if the newly created entity becomes the Main Entity or not (i.e. the CrmBeld process variable will hold the ID of the created record, and CrmBeType variable will hold the entity type) Note: This functionality is for a process that does not have a Main Entity since the record is created as part of the process itself, rather than initiated against an existing record. What it is not designed for, is for changing the Main Entity mid-process. The only supported way of acting upon a different Main Entity is to use Sub-processes that have the desired Main Entity. |
| SaveEntityIdTo | Definition: Set the name of the process variable that will hold the ID of the entity that is going to be created. The process variable can then be used elsewhere in the process |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

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Common AgilePart Tasks

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- Using Email Templates and Notifications
- Data Binding
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Add/Remove Timer

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Set Properties - EntitySpecification Configuration Window

This is for updating the values of different attributes in the entity.

| · | | Set properties |
|-------------------|---|---|
| Field | | Value |
| Name (new_name) | - | Enhancement Request Regarding \${TicketTitle} |
| Case (new_caseid) | - | \${ticketid} |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | OK Cancel |
| | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag any of the following AgileShape, and drop it on the process template:
 - Create Entity
 - Update Entity
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the EntitySpecification field, click the Ellipses button.

Field Definitions

| Field Name | Definition |
|------------|---|
| Field | Definition: Select the desired attribute to update from the list of all the attributes for the entity |
| Value | Definition: |

| Field Name | Definition |
|------------|--|
| | The Value to set for the attribute. It can be static or dynamic. For dynamic value type \${ to open the Schema Selector Dialog |
| Down Arrow | <u>Function:</u> Add a new row or Remove an existing row from the grid |

Delete Entity

This shape deletes an entity record from CRM.



Good to Know

Standard CRM rules and restrictions apply (e.g. Role, Referential integrity etc).

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Delete Entity AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

| Field Name | Definition |
|------------|---|
| EntityId | <u>Definition:</u> This should be the ID of the desired entity record. This value is usually a dynamic value. |
| EntityName | <u>Definition:</u> Select the entity type. This can be a static or dynamic value |

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

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Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Delete Entity (Multi)

This shape deletes multiple entity records from CRM.

The set of records that are affected are selected by either:

- The ones returned by the query configured in the QueryExpression property
- From a semicolon-separated list of IDs passed via the EntityIds property



Good to Know

• Standard CRM rules and restrictions apply (e.g. Role, Referential integrity etc).

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Delete Entity (Multi) AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------|---|
| EntityIds | Definition: This could be a list of entity record IDs separated with a semicolon (;). It can take dynamic variable(s) |
| EntityName | <u>Definition:</u> Select the entity type. This can be a static or dynamic value |
| QueryExpression | Opens the Following Window: Advanced Find - QueryExpression Configuration Window |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

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Advanced Find - QueryExpression Configuration Window



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:

- XRM Automatic Activities 2011
- XRM Automatic Activities 4
- XRM Manual Activities 2011
- 3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the QueryExpression field, click the Ellipses button.

Detach Document

This shape is used to copy/move all attachments (annotations) from an entity to a SharePoint Library or Folder (which must already exist).

An entity Field (of Type Text and of Format URL) can be configured to hold the URL of the filename in SharePoint, so that the file in SharePoint is associated with the entity.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Detach Document AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

| Field Name | Definition |
|-------------|---|
| EntityId | <u>Definition:</u> This should be the ID of the desired entity record. This value is usually a dynamic value. |
| EntityName | <u>Definition:</u> Select the entity type. This can be a static or dynamic value |
| RemoveNotes | Definition: |

| Field Name | Definition |
|---------------|---|
| | If set to True, the attachment is deleted from the entity after being stored in SharePoint |
| SharePointUrl | Definition: This is the URL of an existing SharePoint Library or Folder where the file in the attachment is going to be stored. It can contain dynamic values with \${ |
| UrlFieldName | Definition: This is the name of the field of the entity to store the URL of the filename that is now stored in SharePoint. Make sure the field is of Type Text and of Format URL. |

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

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Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Search XRM

This shape can:

- Check if a certain Search criteria in CRM is met or not
- Optionally, return the records that meet a certain search criteria in CRM



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Search XRM AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

| Field Name | Definition |
|-----------------|--|
| Exists | Definition: The holds the name of the variable that is set depending if the query expression returns zero (False) or one-or-more records (True). By default the name of the variable is Exists, but this can set to any valid variable name. It is common to use this variable to take decisions later in the process. |
| QueryExpression | Opens the Following Window: Advanced Find - QueryExpression Configuration Window |
| ResultCount | Definition: The holds the name of the variable that is set to the number of records that the query expression has returned. By default the name of the variable is ResultCount, but this can set to any valid variable name. |

| Field Name | Definition |
|------------------|---|
| ReturnAllRecords | <u>Definition:</u> Default value: False False – The variables defined in the Save Output tab of the QueryExpression dialog are set to the first record that meets the search criteria True - The variables defined in the Save Output tab of the QueryExpression dialog are set to a |
| | by the search criteria |

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Advanced Find - QueryExpression Configuration Window

| | Advanced Find |
|--------------------------------|---------------|
| Query Columns Save Output Test | |
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| | |
| | OK Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM Manual Activities 2011
- 3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the QueryExpression field, click the Ellipses button.

Send XRM Email

This shape is used to send an email using a CRM Email Template.

The Regarding object of this email will be the Main Entity of the process, that means that the created email activity will be in activity history of the record.

Use this shape if you want to reutilize existing CRM Email Templates.

AgileXRM Email Templates, which are used in the other Email Shapes, are much more powerful and flexible. For a comparison see the Email Shape Comparison Table.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Send XRM Email AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

| Field Name | Definition |
|----------------|--|
| RegardingType | Definition: This is the entity type for the Email Template. Use the ellipsis button to open the configuration dialog Opens the Following Window: Send mail using XRM template Window |
| Senderld | <u>Definition:</u> This is the ID of the User or Queue. In case of User it can be a dynamic value. Use the ellipsis button to open the configuration dialog <u>Opens the Following Window:</u> <u>Send mail using XRM template Window</u> |
| SenderTypeName | Definition: This is either User (systemuser) or Queue (queue). Use the ellipsis button to open the configuration dialog Opens the Following Window: |

| Field Name | Definition |
|--------------|---|
| | Send mail using XRM template Window |
| TemplateName | Definition: |
| | This is the name of the Email Template in CRM. Use the ellipsis button to open the configuration dialog |
| | Opens the Following Window: |
| | Send mail using XRM template Window |

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

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Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Send mail using XRM template Window

| end mail using XRM template | Template |
|-----------------------------|---|
| Regarding entity incident | Available templates Closed Case Acknowledgement |
| | From |
| Owner User | |
| Queue | - |
| | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Send XRM Email AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On one of the following fields, click the **Ellipses** button:
 - RegardingType
 - Senderld
 - SenderTypeName
 - TemplateName

Field Definitions

| Field Name | Definition |
|---------------------|--|
| Regarding entity | Definition: This is the entity type for the Email Template. |
| Available templates | Definition: |

| Field Name | Definition |
|------------|---|
| | This is the name of the Email Template in CRM |
| Owner User | Definition: This is the ID of the User (systemuser) that will be the Owner of this email activity. It can be a dynamic value by entering \${ |
| Queue | Definition: This list the available Queue Names. Select which is to become the Owner of the email activity |

Set Status

This shape is used to change the Status & Status Reason of a record in CRM.



Good to Know

• Status fields are special fields and cannot be changed using the Update Entity shape.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Set Status** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

| Field Name | Definition |
|-------------------|---|
| ClosePendingTasks | Definition: When set to True, it closes all open tasks associated to this record, before the status is changed |

| Field Name | Definition |
|----------------------|---|
| Closing Task Subject | Definition: Certain types of entities (e.g. Opportunity) create a Close Task when their status is changed to Closed. This property sets the Subject field of that Close Task. |
| EntityId | <u>Definition:</u> This should be the ID of the desired entity record. This value is usually a dynamic value. |
| EntityName | <u>Definition:</u> Select the entity type. This can be a static or dynamic value |
| Status | Definition:Note: Set the EntityName property first in order to fill the drop-down list of this property.This combo field is for selecting the Status and Status Reason combination for the entityHowever, it can take a dynamic value by typing \${variable}which should resolve to a Status value (not the display name –e.g. 2 instead of "Inactive") |
| StatusStateValue | Definition: This is the value of the Status Reason to be used. If the Status property is set from the drop-down, then this property is filled automatically. If however, the Status property is set to a variable, then you can also use a \${variable} for this property, and it should resolve to a value (not the display name –e.g. 2 instead of "Inactive") |

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

• Attaching Files to Activities at Runtime

- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Set Status (Multi)

This shape is used to change the Status & Status Reason of multiple entity records in CRM.

The set of records that are affected are selected by either:

- The ones returned by the query configured in the QueryExpression property
- From a semicolon-separated list of IDs passed via the EntityIds property



Good to Know

• Status fields are special fields and cannot be changed using the Update Entity (Multi) shape.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Set Status (Multi) AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

| Field Name | Definition |
|----------------------|---|
| ClosePendingTasks | <u>Definition:</u> When set to True, it closes all open tasks associated to this record, before the status is changed |
| Closing Task Subject | <u>Definition:</u> Certain types of entities (e.g. Opportunity) create a Close Task when their status is changed to Closed. This property sets the Subject field of that Close Task. |
| EntityIds | Definition: This could be a list of entity record IDs separated with a semicolon (;). It can take dynamic variable(s) |
| EntityName | <u>Definition:</u> Select the entity type. This can be a static or dynamic value |
| QueryExpression | Opens the Following Window: Advanced Find - QueryExpression Configuration Window |
| Status | Definition: Note: Set the EntityName property first in order to fill the drop-down list of this property. This combo field is for selecting the Status and Status Reason combination for the entity However, it can take a dynamic value by typing \${variable}which should resolve to a Status value (not the display name –e.g. 2 instead of "Inactive") |
| StatusStateValue | Definition: This is the value of the Status Reason to be used. If the Status property is set from the drop-down, then this property is filled automatically. If however, the Status property is set to a variable, then you can also use a \${variable} for this property, and it should resolve to a value (not the display name –e.g. 2 instead of "Inactive") |

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Advanced Find - QueryExpression Configuration Window

| 2 | Advanced Find |
|--------------------------------|---------------|
| Query Columns Save Output Test | |
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| | OK Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM Manual Activities 2011
- 3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the QueryExpression field, click the Ellipses button.

Subprocess

When entered, this AgileShape will initiate another AgileXRM process instance as a sub-process.

This functionality is useful for breaking complex processes to more manageable chunks and also allows creating more modular processes, and enhances reusability.

It allows selecting any AgileXRM Process. For initiating other types of processes, use the Subprocess shape in the Generic stencil.

This shape does NOT share the context of the caller with the child, assuming that the Main Entity of the child is different. To pass variables to the child process use the SubProcessParams property.

child

When selecting a sub-process, it is possible to initiate the latest version or a particular version. Please see below for details of choosing which version of the sub-process template to initiate.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Subprocess AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

| Field Name | Definition |
|-------------|--|
| NamePrefix | Definition: SubProcesses and SubDialogs Instance Names can be overridden by using this property. It can have static and dynamic values, e.g. "Order Detail \${OrderItemID}". This is added as such to the name of the process instance: processInstanceID + "_! _" + NamePrefix + "_!_" NOTE: The value of this property overrides the one set at SubProcess/ SubDialog level in the Process Name tab of the XRM Connection window in Envision. |
| Sub Process | Opens the Following Window: Process Selector Window Purpose of this Window: |

| Field Name | Definition |
|------------------|---|
| | This opens the Process Selector dialog for choosing which process and version to initiate. |
| SubProcessParams | Opens the Following Window: Subprocess Parameters Window Purpose of this Window: This opens the Subprocess Parameters dialog for passing variables to the sub-process: |
| Wait | Definition:Default value: True• True - The process will wait for the sub-process to finish before considering this step completed (i.e. synchronous)False - The process will launch the sub-process but will not wait for it to complete(i.e. asynchronous) |

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.
Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Process Selector Window

This opens the Process Selector dialog for choosing which process and version to initiate.

| Process Selector | |
|---|--|
| Process Template Product Defect Process | |
| Process Version | |
| Latest Version | |
| Specific Version | |
| Latest Major Version | |
| O My Dynamic Major Version | |
| Version Not Found Behavior | |
| Start Latest Version | |
| Throw an Exception | |
| | |
| OK Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM AgileDialogs 2011
- 3. Do one of the following:
 - On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Subprocess or Subprocess (Multi) AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
 - **SubDialog** AgilePart
 - **Dialog Task** AgileWork
 - Intranet Dialog Task AgileWork

- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
 - Sub Process
 - Sub Dialog
 - Dialog
- 6. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

| Field Name | Definition |
|--|--|
| Process Template | <u>Definition:</u> This drop-down list will show all the processes that are already published in the Process Engine (AgilePoint Server). Select the name of the process that you want to initiate as a sub-process. |
| Process Version - Latest Version | <u>Function:</u> The process model version that has the status of Released is initiated, (usually, but not necessarily, the latest version of the model) |
| Process Version - Specific Version | <u>Function:</u> When this is chosen, all the available versions (including ones with the status of Retired) are listed in the drop-down list. Select the specific version of the model that you want to initiate as a sub-process. |
| Process Version - Latest Major Version | <u>Function:</u> Version numbers are in the form Major.Minor (e.g. 4.06 or 3.50). When this option is selected, all the available Major versions of the selected Process Template are listed in the drop-down (including ones with the status of Retired). When the process arrives to this shape, it starts the highest Minor version of the chosen Major version. |
| Process Version - My Dynamic Major Version | <u>Function:</u> The calling parent process has a Major version. The version of the sub-process that is initiated is the highest Minor version of this Major version. This functionality is useful under 2 circumstances: |

| Field Name | Definition |
|---|--|
| | You only have one environment (production) and it is not possible to test your new processes in another environment before publishing them to the production environment. |
| | Although you do have a test environment, you need to keep running these interdependent processes in the same version. |
| | It is best to set the Major version for all these related processes to the same value. When you want to deploy many new Templates, increment the Major version for all of them, so that existing running processes do not initiate the new Templates but the corresponding Template in their own Major version. |
| | For example, you have 3 related processes: |
| | Process A at version 1.04 |
| | Sub-Process B at version 1.34 – initiated from A |
| | Sub-Process C at version 1.20 – initiated from B |
| | Let's say you continue enhancing these processes and you then publish B 2.0 first and C 2.0 on another day. If the sub-processes shapes were configured with this option, new A process instances will continue initiating B 1.34, and B in turn would continue to initiate C 1.20. This is even though there are new versions of B and C available in the Process Engine. Once you publish A 2.0, then the new instances of A would initiate the new versions of B and C (i.e. 2.0). |
| Version Not Found Behavior - Start Latest Version | Function: |
| | This is default behavior. |
| | If the Process Option above was Specific Version, Latest Major Version or My Dynamic Major Version; and at runtime such a version is not available, then the Engine is instructed to run the latest version of the process irrespective of the Process Option (i.e. treat it as if the Process Option was Latest Version) |
| Version Not Found Behavior - Throw an Exception | <u>Function:</u> Rather than initiating the Latest Version, this option would cause the Engine to throw an exception at runtime when the desired version is not found. This way the System Administrator gets a chance to correct the error. |

Log on to AgilePoint Server

The first time you configure the shape, this dialog will be shown to get the credentials for connecting to the Process Engine (AgilePoint Server), in order to list the published sub-processes.

Note: The credentials are saved and reused in subsequent accesses to the Process Engine.

| Connecting to Se | ver 💽 💌 |
|------------------|---------------------------------------|
| | ecting to Server |
| Server Url: | http://agilepoint3/AgilePointServer |
| Logon as | current user (AD2008R2\Administrator) |
| 🔘 Logon as t | he following user: |
| User Informatio | n |
| Domain: | AD2008R2 |
| Username: | Administrator |
| Password: | |
| | 🥪 OK 🔀 Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM AgileDialogs 2011
- 3. Do one of the following:
 - On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Subprocess or Subprocess (Multi) AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
 - SubDialog AgilePart
 - **Dialog Task** AgileWork

- Intranet Dialog Task AgileWork
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
 - Sub Process
 - Sub Dialog
 - Dialog

| Field Name | Definition |
|-----------------------------|--|
| Server Url | Definition: This is the URL of the Process Engine (AgilePoint Server). Whenever a new URL is used it is added to the drop-down list-box, so next time it is needed, it is easier to select than reenter it. |
| Logon as current user | Definition: Authenticates using the local machine's Windows user account. This option can be used with Windows authentication only. |
| Logon as the following user | <u>Definition:</u> Authenticates using the credentials you specify. <u>Allowed Values:</u> <u>Selected</u> - The domain, username and password fields are enabled to fetch the input from an user. <u>Deselected</u> - Specifies that the logon as current user (AD2008R2\Administrator) option is enabled. <u>Default Value:</u> Deselected |
| Domain | Definition: The authentication domain. This does not apply to Forms-Based Authentication. |
| User Name | Definition: |

| Field Name | Definition |
|------------|--|
| | The user name you want to associate with the action. |
| | Allowed Values: |
| | A user name, not including the domain. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Password | Definition: |
| | The password for the authentication account. |
| | Allowed Values: |
| | A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

Subprocess Parameters Window

This opens the Subprocess Parameters dialog for passing variables to the sub-process:

| Subpro | ocess Parameters | | - | | x |
|--------|------------------|-------|---|--------|---|
| | Name | Value | | | |
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| | Schema | ОК | | Cancel | |
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- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Subprocess or Subprocess (Multi) AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the SubProcessParams field, click the Ellipses button.

| Field Name | Definition |
|------------|---|
| Name | <u>Definition:</u> This is the name of the Process Variable (aka Custom Attribute) to be created in the sub-process |
| Value | Definition: |

| Field Name | Definition |
|------------|---|
| | This is the value that the variable is going to have. It can be a static value, a Process Variable or a value from the Schema |
| Schema | Function: |
| | This opens the Schema Selector Dialog to select one for the Value column. |

Schema Selector Dialog

When configuring some shapes, it is possible to pass dynamic context data or process variables as the value of the parameters. The procedure is always the same, either there is an ellipsis button (...), a button called Schema or the user can invoke the dialog by typing the characters \${ in which case the following dialog would appear:



The user can then select the correct attribute from the tree and press OK to insert it in the corresponding place where the dialog was invoked.

When writing in Search Variable field, fields are auto-filtered to make selection easier.

Subprocess (Multi)

This shape is used to start one sub-process for each record returned by a query.

If the Wait parameter is set to True, the process continues once all the subprocesses that were initiated by this shape are completed.

Typically this is used to manage the lifecycle of child entities, for example Order Line Items of an Order.



- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Subprocess (Multi) AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------|--|
| EntityIds | Definition: This could be a list of entity record IDs separated with a semicolon (;). It can take dynamic variable(s) |
| EntityName | <u>Definition:</u> Select the entity type. This can be a static or dynamic value |
| NamePrefix | Definition: SubProcesses and SubDialogs Instance Names can be overridden by using this property. It can have static and dynamic values, e.g. "Order Detail \${OrderItemID}". This is added as such to the name of the process instance: processInstanceID + "_! _" + NamePrefix + "_!_" NOTE: The value of this property overrides the one set at SubProcess/ SubDialog level in the Process Name tab of the XRM Connection window in Envision. |
| QueryExpression | Opens the Following Window: Advanced Find - QueryExpression Configuration Window |
| Sub Process | Opens the Following Window: Process Selector Window Purpose of this Window: |

| Field Name | Definition |
|------------------|---|
| | This opens the Process Selector dialog for choosing which process and version to initiate. |
| SubProcessParams | Opens the Following Window: Subprocess Parameters Window Purpose of this Window: This opens the Subprocess Parameters dialog for passing variables to the sub-process: |
| Wait | Definition:Default value: True• True - The process will wait for the sub-process to finish before considering this step completed (i.e. synchronous)False - The process will launch the sub-process but will not wait for it to complete(i.e. asynchronous) |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Advanced Find - QueryExpression Configuration Window



- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM Manual Activities 2011
- 3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the **QueryExpression** field, click the **Ellipses** button.

Process Selector Window

This opens the Process Selector dialog for choosing which process and version to initiate.

| Process Selector |
|---|
| Process Template Product Defect Process |
| Process Version |
| Latest Version |
| © Specific Version |
| Latest Major Version |
| My Dynamic Major Version |
| Version Not Found Behavior |
| Start Latest Version |
| Throw an Exception |
| |
| OK Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM AgileDialogs 2011
- 3. Do one of the following:
 - On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Subprocess or Subprocess (Multi) AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
 - SubDialog AgilePart
 - **Dialog Task** AgileWork
 - Intranet Dialog Task AgileWork
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

- 5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
 - Sub Process
 - Sub Dialog
 - Dialog
- 6. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

| Field Name | Definition |
|--|--|
| Process Template | Definition: This drop-down list will show all the processes that are already published in the Process Engine (AgilePoint Server). Select the name of the process that you want to initiate as a sub-process. |
| Process Version - Latest Version | <u>Function:</u> The process model version that has the status of Released is initiated, (usually, but not necessarily, the latest version of the model) |
| Process Version - Specific Version | <u>Function:</u> When this is chosen, all the available versions (including ones with the status of Retired) are listed in the drop-down list. Select the specific version of the model that you want to initiate as a sub-process. |
| Process Version - Latest Major Version | <u>Function:</u> Version numbers are in the form Major.Minor (e.g. 4.06 or 3.50). When this option is selected, all the available Major versions of the selected Process Template are listed in the drop-down (including ones with the status of Retired). When the process arrives to this shape, it starts the highest Minor version of the chosen Major version. |
| Process Version - My Dynamic Major Version | <u>Function:</u> The calling parent process has a Major version. The version of the sub-process that is initiated is the highest Minor version of this Major version. This functionality is useful under 2 circumstances: 1. You only have one environment (production) and it is not possible to test your new processes |

| Field Name | Definition | |
|---|--|--|
| | in another environment before publishing them to the production environment. | |
| | Although you do have a test environment, you need to keep running these interdependent processes in the same version. | |
| | It is best to set the Major version for all these related processes to the same value. When you want to deploy many new Templates, increment the Major version for all of them, so that existing running processes do not initiate the new Templates but the corresponding Template in their own Major version. | |
| | For example, you have 3 related processes: | |
| | Process A at version 1.04 | |
| | • Sub-Process B at version 1.34 – initiated from A | |
| | Sub-Process C at version 1.20 – initiated from B | |
| | Let's say you continue enhancing these processes and you then publish B 2.0 first and C 2.0 on another day. If the sub-processes shapes were configured with this option, new A process instances will continue initiating B 1.34, and B in turn would continue to initiate C 1.20. This is even though there are new versions of B and C available in the Process Engine. Once you publish A 2.0, then the new instances of A would initiate the new versions of B and C (i.e. 2.0). | |
| Version Not Found Behavior - Start Latest Version | Function: | |
| | This is default behavior. | |
| | If the Process Option above was Specific Version, Latest Major Version or My Dynamic Major Version; and at runtime such a version is not available, then the Engine is instructed to run the latest version of the process irrespective of the Process Option (i.e. treat it as if the Process Option was Latest Version) | |
| Version Not Found Behavior - Throw an Exception | Function: Rather than initiating the Latest Version, this option would cause the Engine to throw an exception at runtime when the desired version is not found. This way the System Administrator gets a chance to correct the error. | |

Log on to AgilePoint Server

The first time you configure the shape, this dialog will be shown to get the credentials for connecting to the Process Engine (AgilePoint Server), in order to list the published sub-processes.

Note: The credentials are saved and reused in subsequent accesses to the Process Engine.

| Connecting to Server | | |
|--|-------------------------------------|--|
| | ecting to Server | |
| Server Url: | http://agilepoint3/AgilePointServer | |
| Logon as current user (AD2008R2\Administrator) | | |
| 🔘 Logon as t | the following user: | |
| User Informatio | n | |
| Domain: | AD2008R2 | |
| Username: | Administrator | |
| Password: | | |
| | 🥪 OK 🔀 Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM AgileDialogs 2011
- 3. Do one of the following:
 - On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Subprocess or Subprocess (Multi) AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
 - SubDialog AgilePart
 - **Dialog Task** AgileWork

- Intranet Dialog Task AgileWork
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
 - Sub Process
 - Sub Dialog
 - Dialog

| Field Name | Definition |
|-----------------------------|---|
| Server Url | Definition: This is the URL of the Process Engine (AgilePoint Server). Whenever a new URL is used it is added to the drop-down list-box, so next time it is needed, it is easier to select than reenter it. |
| Logon as current user | <u>Definition:</u> Authenticates using the local machine's Windows user account. This option can be used with Windows authentication only. |
| Logon as the following user | <u>Definition:</u> Authenticates using the credentials you specify. <u>Allowed Values:</u> <u>Selected</u> - The domain, username and password fields are enabled to fetch the input from an user. <u>Deselected</u> - Specifies that the logon as current user (AD2008R2\Administrator) option is enabled. <u>Default Value:</u> |
| Domain | Definition: The authentication domain. This does not apply to Forms-Based Authentication. |
| User Name | Definition: |

| Field Name | Definition |
|------------|--|
| | The user name you want to associate with the action. |
| | Allowed Values: |
| | A user name, not including the domain. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Password | Definition: |
| | The password for the authentication account. |
| | Allowed Values: |
| | A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |

Subprocess Parameters Window

This opens the Subprocess Parameters dialog for passing variables to the sub-process:

| Subpr | ocess Parameters | | - | | x |
|-------|------------------|-------|---|--------|---|
| | Name | Value | | | |
| • | | | | - | |
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| | Schema | ОК | | Cancel | |
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- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Subprocess or Subprocess (Multi) AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the SubProcessParams field, click the Ellipses button.

| Field Name | Definition |
|------------|---|
| Name | <u>Definition:</u> This is the name of the Process Variable (aka Custom Attribute) to be created in the sub-process |
| Value | Definition: |

| Field Name | Definition |
|------------|---|
| | This is the value that the variable is going to have. It can be a static value, a Process Variable or a value from the Schema |
| Schema | Function: |
| | This opens the Schema Selector Dialog to select one for the Value column. |

Schema Selector Dialog

When configuring some shapes, it is possible to pass dynamic context data or process variables as the value of the parameters. The procedure is always the same, either there is an ellipsis button (...), a button called Schema or the user can invoke the dialog by typing the characters \${ in which case the following dialog would appear:



The user can then select the correct attribute from the tree and press OK to insert it in the corresponding place where the dialog was invoked.

When writing in Search Variable field, fields are auto-filtered to make selection easier.

Update Entity

This activity is used to update an entity record, including custom entities and even entities not related to the Main Entity.



- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Update Entity AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------------|---|
| EntityId | <u>Definition:</u> This should be the ID of the desired entity record. This value is usually a dynamic value. |
| EntitySpecification | Opens the Following Window: Set Properties - EntitySpecification Configuration Window Purpose of this Window: This is for updating the values of different attributes in the entity. |
| EntityType | Definition: Select the entity type. This can only be a static value selected from the drop-down list |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Set Properties - EntitySpecification Configuration Window

This is for updating the values of different attributes in the entity.

| | (| Set properties |
|-------------------|---|---|
| Field | | Value |
| Name (new_name) | - | Enhancement Request Regarding \${TicketTitle} |
| Case (new_caseid) | - | \$(ticketid) |
| | | |
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| | | OK Cancel |
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- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag any of the following AgileShape, and drop it on the process template:
 - Create Entity
 - Update Entity
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the EntitySpecification field, click the Ellipses button.

| Field Name | Definition |
|------------|---|
| Field | Definition: Select the desired attribute to update from the list of all the attributes for the entity |
| Value | Definition: |

| Field Name | Definition |
|------------|--|
| | The Value to set for the attribute. It can be static or dynamic. For dynamic value type \${ to open the Schema Selector Dialog |
| Down Arrow | <u>Function:</u> Add a new row or Remove an existing row from the grid |

Update Entity (Multi)

This activity is used to update multiple entity records at the same time, including custom entities and even entities not related to the Main Entity.

The set of records that are affected are selected by either:

- The ones returned by the query configured in the QueryExpression property
- From a semicolon-separated list of IDs passed via the EntityIds property

| <u>/ </u> | 2 |
|----------------------------|---|
| Update Entity (Multi).1 | * |
| | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Update Entity (Multi) AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.

Properties for This AgileShape

| Field Name | Definition |
|------------|---|
| EntityIds | Definition: This could be a list of entity record IDs separated with a semicolon (;). It can take dynamic variable(s) |
| EntityName | Definition: |

| Field Name | Definition |
|---------------------|---|
| | Select the entity type. This can be a static or dynamic value |
| EntitySpecification | Opens the Following Window: Set Properties - EntitySpecification Configuration Window Purpose of this Window: This is for updating the values of different attributes in the entity. |
| QueryExpression | Opens the Following Window: Advanced Find - QueryExpression Configuration Window |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Set Properties - EntitySpecification Configuration Window

This is for updating the values of different attributes in the entity.

| | -[| Set properties | |
|-------------------|----|---|---|
| Field | | Value | |
| Name (new_name) | • | Enhancement Request Regarding \${TicketTitle} | |
| Case (new_caseid) | • | \${ticketid} | |
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- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag any of the following AgileShape, and drop it on the process template:
 - Create Entity
 - Update Entity
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the EntitySpecification field, click the Ellipses button.

Field Definitions

| Field Name | Definition |
|------------|---|
| Field | Definition: Select the desired attribute to update from the list of all the attributes for the entity |
| Value | Definition: The Value to set for the attribute. It can be static or dynamic. For dynamic value type \${ to open the Schema Selector Dialog |
| Down Arrow | Function: Add a new row or Remove an existing row from the grid |

Advanced Find - QueryExpression Configuration Window

| | | | | | Advanced Find | | | |
|---|-------|---------|-------------|------|---------------|------|----|--------|
| 1 | Query | Columns | Save Output | Test | | | | |
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| | 3 | | | | | | ОК | Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM Manual Activities 2011
- 3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the QueryExpression field, click the Ellipses button.

Wait for Update (AgileXRM 2011)

This activity is used to wait until a condition is met in XRM repository. This can be used in many scenarios. For example:

- Make all order items processes to wait until customer account credit rating is High.
- Make a process wait until product stock is sufficient to fulfill an order

The process will wait until the condition configured in the query is met.

It is common to Add a Timer to this shape in order not to wait indefinitely. This way when the due date is reached, the process will continue using the alternative route:





Wait for Update

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 stencil.

- 3. On the **XRM Automatic Activities 2011** stencil, drag the **Wait for Update** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------|---|
| EntityId | <u>Definition:</u> This should be the ID of the desired entity record. This value is usually a dynamic value. |
| EntityName | <u>Definition:</u> Select the entity type. This can be a static or dynamic value |
| QueryExpression | Opens the Following Window: Advanced Find - QueryExpression Configuration Window |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Advanced Find - QueryExpression Configuration Window

| | Advanced Find |
|--------------------------------|---------------|
| Query Columns Save Output Test | |
| | |
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| | OK Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM Manual Activities 2011
- 3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the QueryExpression field, click the Ellipses button.

XRM Workflow

This automatic activity kicks off a CRM Workflow. This permits reutilizing any existing CRM Workflows. Please note that by definition, CRM Workflows are asynchronous, so this shape will not wait for the execution of the Workflow to complete before becoming completed itself.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil.
- 3. On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Run XRM Workflow AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|---|
| EntityId | <u>Definition:</u> This should be the ID of the desired entity record. This value is usually a dynamic value. |
| EntityName | <u>Definition:</u> Select the entity type. This can be a static or dynamic value |
| Workflow | Definition: This is the name of the CRM Workflow for the selected EntityName property. This can be a dynamic value using \${ |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

XRM AgileDialogs 2011 Stencil

This AgileXRM stencils contains the AgileShapes for AgileDialogs models.

Page Form

This shape is used in AgileDialogs models only and is for designing a Page (a group of controls similar to Prompts & Responses in CRM dialogs) in an AgileDialog.

For a detailed explanation of how to use this shape and other AgileDialog shapes, please see the AgileDialogs Design Guide document.



- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM AgileDialogs 2011 stencil.
- 3. On the **XRM AgileDialogs 2011** stencil, drag the **Page Form** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-------------------|--|
| FormConfiguration | Opens the Following Window: AgileDialogs Form Window Purpose of this Window: Click the ellipsis to open the Form Configuration dialog. |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

AgileDialogs Form Window

Click the ellipsis to open the Form Configuration dialog.

| AgileDialogs Form | _ = × |
|------------------------------|---|
| Tools Preview On Load Scri | pt |
| -B Form Questions | Configuration Help Advanced |
| | Name Required |
| | Display Name Type |
| | Question Caption |
| | Times New Romar 🔹 3 🔹 🛛 B 🔏 🖳 🗌 🖄 🔛 🗌 🔛 |
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| Form Properties | |
| Disable Back (Clear History) | Save |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM AgileDialogs 2011 stencil.
- 3. On the **XRM AgileDialogs 2011** stencil, drag the **Page Form** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the FormConfiguration field, click the Ellipses button.

SubDialog

This shape is used in AgileDialogs models only and is for initiating a SubDialog from another.

For a detailed explanation of how to use this shape and other AgileDialog shapes, please see the AgileDialogs Design Guide document.



- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM AgileDialogs 2011 stencil.
- 3. On the **XRM AgileDialogs 2011** stencil, drag the **SubDialog** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|------------|--|
| NamePrefix | Definition: SubProcesses and SubDialogs Instance Names can be overridden by using this property. It can have static and dynamic values, e.g. "Order Detail \${OrderItemID}". This is added as such to the name of the process instance: processInstanceID + "_! _" + NamePrefix + "_!_" NOTE: The value of this property overrides the one set at SubProcess/ SubDialog level in the Process Name tab of the XRM Connection window in Envision. |
| Sub Dialog | Opens the Following Window: Process Selector Window Purpose of this Window: This opens the Process Selector dialog for choosing which process and version to initiate. |

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.
Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Process Selector Window

This opens the Process Selector dialog for choosing which process and version to initiate.

| Proce | ess Selector | |
|---|----------------------------|--|
| Process Template Product Defect Process | | |
| | Process Version | |
| ۲ | Latest Version | |
| 0 | Specific Version | |
| 0 | Latest Major Version | |
| My Dynamic Major Version | | |
| | Version Not Found Behavior | |
| ۲ | Start Latest Version | |
| 0 | Throw an Exception | |
| | | |
| | OK Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM AgileDialogs 2011
- 3. Do one of the following:
 - On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Subprocess or Subprocess (Multi) AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
 - SubDialog AgilePart
 - Dialog Task AgileWork
 - Intranet Dialog Task AgileWork
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
 - Sub Process
 - Sub Dialog
 - Dialog
- 6. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

| Field Name | Definition |
|------------------------------------|---|
| Process Template | Definition: This drop-down list will show all the processes that are already published in the Process Engine (AgilePoint Server). Select the name of the process that you want to initiate as a sub-process. |
| Process Version - Latest Version | <u>Function:</u> The process model version that has the status of Released is initiated, (usually, but not necessarily, the latest version of the model) |
| Process Version - Specific Version | Function: |

| Field Name | Definition |
|--|--|
| | When this is chosen, all the available versions (including ones with the status of Retired) are listed in the drop-down list. Select the specific version of the model that you want to initiate as a sub-process. |
| Process Version - Latest Major Version | Function: |
| | Version numbers are in the form Major.Minor (e.g. 4.06 or 3.50). When this option is selected, all the available Major versions of the selected Process Template are listed in the drop-down (including ones with the status of Retired). When the process arrives to this shape, it starts the highest Minor version of the chosen Major version. |
| Process Version - My Dynamic Major Version | Function: |
| | The calling parent process has a Major version. The version of the sub-process that is initiated is the highest Minor version of this Major version. |
| | This functionality is useful under 2 circumstances: |
| | You only have one environment (production) and it is not possible to test your new processes in another environment before publishing them to the production environment. |
| | Although you do have a test environment, you need to keep running these interdependent processes in the same version. |
| | It is best to set the Major version for all these related processes to the same value. When you want to deploy many new Templates, increment the Major version for all of them, so that existing running processes do not initiate the new Templates but the corresponding Template in their own Major version. |
| | For example, you have 3 related processes: |
| | Process A at version 1.04 |
| | • Sub-Process B at version 1.34 – initiated from A |
| | • Sub-Process C at version 1.20 – initiated from B |
| | Let's say you continue enhancing these processes and you then publish B 2.0 first and C 2.0 on another day. If the sub-processes shapes were configured with this option, new A process instances will continue initiating B 1.34, and B in turn would continue to initiate C 1.20. This is even though there are new versions of B and C available in the Process Engine. Once you publish A 2.0, then the new instances of A would initiate the new versions of B and C (i.e. 2.0). |

| Field Name | Definition |
|---|--|
| Version Not Found Behavior - Start Latest Version | Function:This is default behavior.If the Process Option above was Specific Version, Latest Major Version or My Dynamic Major Version; and at runtime such a version is not available, then the Engine is instructed to run the latest version of the process irrespective of the Process Option (i.e. treat it as if the Process Option was Latest Version) |
| Version Not Found Behavior - Throw an Exception | Function: Rather than initiating the Latest Version, this option would cause the Engine to throw an exception at runtime when the desired version is not found. This way the System Administrator gets a chance to correct the error. |

Log on to AgilePoint Server

The first time you configure the shape, this dialog will be shown to get the credentials for connecting to the Process Engine (AgilePoint Server), in order to list the published sub-processes.

Note: The credentials are saved and reused in subsequent accesses to the Process Engine.

| Connecting to Server | | | |
|---|-------------------------------------|---|--|
| | ecting to Server | | |
| Server Url: | http://agilepoint3/AgilePointServer | • | |
| Ogon as current user (AD2008R2\Administrator) | | | |
| 🔘 Logon as t | he following user: | | |
| User Information | n | | |
| Domain: | AD2008R2 | | |
| Username: | Administrator | | |
| Password: | | | |
| | 🥪 OK 🔀 Cancel | | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM AgileDialogs 2011
- 3. Do one of the following:
 - On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Subprocess or Subprocess (Multi) AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
 - SubDialog AgilePart
 - Dialog Task AgileWork
 - Intranet Dialog Task AgileWork
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
 - Sub Process
 - Sub Dialog
 - Dialog

| Field Name | Definition |
|-----------------------------|--|
| Server Url | Definition: This is the URL of the Process Engine (AgilePoint Server). Whenever a new URL is used it is added to the drop-down list-box, so next time it is needed, it is easier to select than reenter it. |
| Logon as current user | Definition: Authenticates using the local machine's Windows user account. This option can be used with Windows authentication only. |
| Logon as the following user | Definition: Authenticates using the credentials you specify. |

| Field Name | Definition |
|------------|---|
| | Allowed Values: |
| | Selected - The domain, username and password fields are enabled to fetch the input from an user. |
| | Deselected - Specifies that the logon as current user (AD2008R2\Administrator) option is enabled. |
| | Default Value: |
| | Deselected |
| Domain | Definition: |
| | The authentication domain. |
| | This does not apply to Forms-Based Authentication. |
| User Name | Definition: |
| | The user name you want to associate with the action. |
| | Allowed Values: |
| | A user name, not including the domain. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Password | Definition: |
| | The password for the authentication account. |
| | Allowed Values: |
| | A valid password. |
| | Default Value: |
| | None |

Dialog Task

This shape is used in AgileXRM processes (not in AgileDialogs models) and creates a Manual Task for the participant. When the task is opened, the AgileDialog starts for the user to interact with.

Custom Attributes:

Yes

When the AgileDialog is completed this activity is completed and the process continues.

Use this shape rather than one of the Manual Activities shapes (with an associated ALF form), when the user needs to be guided to complete the task.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM AgileDialogs 2011 stencil.
- 3. On the **XRM AgileDialogs 2011** stencil, drag the **DialogTask** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-----------------------|---|
| ConfigureParticipants | Opens the Following Window: Participants Window - Assign Mode Purpose of this Window: Default value: \${ProcessInitiator} Click the ellipsis button to open the configuration dialog: |
| ActivityProperties | Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields: |
| Dialog | Opens the Following Window: Process Selector Window Purpose of this Window: This opens the Process Selector dialog for choosing which process and version to initiate. |

| Field Name | Definition |
|-----------------|---|
| InParameters | Opens the Following Window: Parameters Window - In Parameters Purpose of this Window: Optional This is for passing parameters to the dialog. These process variables will be available in the dialog. Click the ellipsis button to open the config window: |
| OutParameters | Opens the Following Window: Parameters Window - Out Parameters Purpose of this Window: Optional This is for passing parameters from Dialogs to the calling Parent Process. It is also possible to use the Update Parent Process shape in the Dialog itself to update Process Variables in the parent process, but this way it is simpler, especially when the calling process could be any or it is not known when designing the Dialog. Click the ellipsis button to open the config window: |
| OwnerID | Definition: When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record |
| Subject | Definition:This sets the subject field of the activity in CRM, this value can be either static or dynamic.Clicking the ellipsis button opens a window for setting the subject content:This window accepts dynamic values by typing these special characters \${ which opens the Schema Selector Dialog |
| TaskDescription | Definition: This sets the value of the description field in the CRM activity. Clicking the ellipsis button opens a window for setting the description content. This window accepts dynamic values by typing these special characters \${ which opens the Schema Selector Dialog |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Participants Window - Assign Mode

Default value: \${ProcessInitiator} Click the ellipsis button to open the configuration dialog:

| Participants | Assign Mode | x |
|--------------|----------------------|----------|
| User | \${ProcessInitiator} | |
| O Query | Configure | |
| 🔘 Queue | | |
| 🔿 Team | | _ |
| | | |
| | ОК | Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **ConfigurePartcipants** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|--|
| User | Definition: |
| | Can contain a static or dynamic value which can be one or more user IDs or user names. |
| | Multiple values should be separated by a semicolon ";" |
| | When multiple values are used, each participant gets a task and the shape is not Completed until all |

| Field Name | Definition |
|------------|--|
| | the participants have Completed (or Cancelled) their corresponding tasks. |
| | Type \${ to open the Schema Selector Dialog. |
| Query | Function: |
| | Click to open the Query Expression Builder. |
| | The query should return 1 or more values of one of these types: |
| | systemuserid (e.g. ownerid of an account) |
| | username (e.g. DOMAIN\loginid) |
| | SeeQuery Expression Builder |
| Queue | Definition: |
| | Select the corresponding Queue from the list. The task will appear in the selected Queue. |
| | When this is selected, the OwnerID property can also be set. |
| Team | Definition: |
| | Select the corresponding Team from the list. The task will be assigned to the chosen Team. If any member of the Team completes (or Cancels) the task, the shape is Completed and the process progresses to the next step(s). |

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:

| Ì | Set Additional Activity Properties | | |
|---|------------------------------------|---|-----------|
| | Activity Type Task(task) | • | |
| | Field | | Value |
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| | | | |
| | | | 0K Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM Manual Activities 2011 or XRM AgileDialogs 2011 stencil.
- 3. Do one of the following:
 - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the ActivityProperties field, click the Ellipses button.

| Field Name | Definition |
|--------------|--|
| ActivityType | Definition: Shows all the activity types including custom activity types |
| Field | Definition: |

| Field Name | Definition |
|------------|---|
| | Select the field for the selected Activity Type |
| Value | Definition: Sets the value of the Field. Type \${ to open the Schema Selector Dialog to enter a dynamic value |
| Down Arrow | <u>Function:</u> Add new Field-Value pair or Remove existing Field- Value pair |

Process Selector Window

This opens the Process Selector dialog for choosing which process and version to initiate.

| Process Selector | | | | |
|---|--|--|--|--|
| Process Template Product Defect Process | | | | |
| Process Version | | | | |
| Latest Version | | | | |
| © Specific Version | | | | |
| C Latest Major Version | | | | |
| My Dynamic Major Version | | | | |
| Version Not Found Behavior | | | | |
| Start Latest Version | | | | |
| Throw an Exception | | | | |
| | | | | |
| OK Cancel | | | | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM AgileDialogs 2011

- 3. Do one of the following:
 - On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Subprocess or Subprocess (Multi) AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
 - SubDialog AgilePart
 - **Dialog Task** AgileWork
 - Intranet Dialog Task AgileWork
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
 - Sub Process
 - Sub Dialog
 - Dialog
- 6. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

| Field Name | Definition |
|--|--|
| Process Template | Definition: |
| | This drop-down list will show all the processes that are already published in the Process Engine (AgilePoint Server). |
| | Select the name of the process that you want to initiate as a sub-process. |
| Process Version - Latest Version | Function: |
| | The process model version that has the status of Released is initiated, (usually, but not necessarily, the latest version of the model) |
| Process Version - Specific Version | Function: |
| | When this is chosen, all the available versions (including ones with the status of Retired) are listed in the drop-down list. Select the specific version of the model that you want to initiate as a sub-process. |
| Process Version - Latest Major Version | Function: |
| | Version numbers are in the form Major.Minor (e.g. 4.06 or 3.50). When this option is selected, all the available Major versions of the selected Process Template are listed in the drop-down (including ones with the status of Retired). When the process |

| Field Name | Definition |
|---|--|
| | arrives to this shape, it starts the highest Minor version of the chosen Major version. |
| Process Version - My Dynamic Major Version | Function: |
| | The calling parent process has a Major version. The version of the sub-process that is initiated is the highest Minor version of this Major version. |
| | This functionality is useful under 2 circumstances: |
| | You only have one environment (production) and it is not possible to test your new processes in another environment before publishing them to the production environment. |
| | Although you do have a test environment, you need to keep running these interdependent processes in the same version. |
| | It is best to set the Major version for all these related processes to the same value. When you want to deploy many new Templates, increment the Major version for all of them, so that existing running processes do not initiate the new Templates but the corresponding Template in their own Major version. |
| | For example, you have 3 related processes: |
| | Process A at version 1.04 |
| | Sub-Process B at version 1.34 – initiated from A |
| | Sub-Process C at version 1.20 – initiated from B |
| | Let's say you continue enhancing these processes and you then publish B 2.0 first and C 2.0 on another day. If the sub-processes shapes were configured with this option, new A process instances will continue initiating B 1.34, and B in turn would continue to initiate C 1.20. This is even though there are new versions of B and C available in the Process Engine. Once you publish A 2.0, then the new instances of A would initiate the new versions of B and C (i.e. 2.0). |
| Version Not Found Behavior - Start Latest Version | Function: |
| | This is default behavior. |
| | If the Process Option above was Specific Version, Latest Major Version or My Dynamic Major Version; and at runtime such a version is not available, then the Engine is instructed to run the latest version of the process irrespective of the Process Option (i.e. treat it as if the Process Option was Latest Version) |

| Field Name | Definition |
|---|---|
| Version Not Found Behavior - Throw an Exception | <u>Function:</u> Rather than initiating the Latest Version, this option would cause the Engine to throw an exception at runtime when the desired version is not found. This way the System Administrator gets a chance to correct the error. |

Log on to AgilePoint Server

The first time you configure the shape, this dialog will be shown to get the credentials for connecting to the Process Engine (AgilePoint Server), in order to list the published sub-processes.

Note: The credentials are saved and reused in subsequent accesses to the Process Engine.

| Connecting to Server | | | | | | |
|----------------------|--|---|--|--|--|--|
| | ecting to Server | | | | | |
| Server Url: | http://agilepoint3/AgilePointServer | • | | | | |
| Logon as o | Logon as current user (AD2008R2\Administrator) | | | | | |
| 🔘 Logon as t | Cogon as the following user: | | | | | |
| User Information | n | | | | | |
| Domain: | AD2008R2 | | | | | |
| Username: | Administrator | | | | | |
| Password: | | | | | | |
| | 🥪 OK 🔀 Cancel | | | | | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM AgileDialogs 2011
- 3. Do one of the following:

- On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Subprocess or Subprocess (Multi) AgileShape, and drop it on the process template.
- On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
 - **SubDialog** AgilePart
 - **Dialog Task** AgileWork
 - Intranet Dialog Task AgileWork
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
 - Sub Process
 - Sub Dialog
 - Dialog

| Field Name | Definition |
|-----------------------------|---|
| Server Url | <u>Definition:</u> This is the URL of the Process Engine (AgilePoint Server). Whenever a new URL is used it is added to the drop-down list-box, so next time it is needed, it is easier to select than reenter it. |
| Logon as current user | Definition: Authenticates using the local machine's Windows user account. This option can be used with Windows authentication only. |
| Logon as the following user | <u>Definition:</u> Authenticates using the credentials you specify. <u>Allowed Values:</u> <u>Selected - The domain, username and password fields are enabled to fetch the input from an user.</u> <u>Deselected - Specifies that the logon as current user (AD2008R2\Administrator) option is enabled.</u> Default Value: |

| Field Name | Definition |
|------------|---|
| | Deselected |
| Domain | <u>Definition:</u> The authentication domain. This does not apply to Forms-Based Authentication. |
| User Name | Definition: The user name you want to associate with the action. Allowed Values: A user name, not including the domain. Default Value: None Custom Attributes: No |
| Password | Definition: The password for the authentication account. <u>Allowed Values:</u> A valid password. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |

Parameters Window - In Parameters

Optional This is for passing parameters to the dialog. These process variables will be available in the dialog. Click the ellipsis button to open the config window:

| Parame | eters | | - | | x |
|--------|--------|-------|---|--------|---|
| | Name | Value | | | |
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| | Schema | ОК | | Cancel | |
| | | | | | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM AgileDialogs 2011 stencil.
- 3. On the **XRM AgileDialogs 2011** stencil, drag the **DialogTask** or **Intranet Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **InParameters** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|---|
| Name | <u>Definition:</u> This is the name of the Process Variable (aka Custom Attribute) to be created in the sub-process |
| Value | Definition: |

| Field Name | Definition |
|------------|---|
| | This is the value that the variable is going to have. It can be a static value, a Process Variable or a value from the Schema |
| Schema | <u>Function:</u> This opens the Schema Selector Dialog to select one for the Value column. |

Parameters Window - Out Parameters

Optional This is for passing parameters from Dialogs to the calling Parent Process. It is also possible to use the Update Parent Process shape in the Dialog itself to update Process Variables in the parent process, but this way it is simpler, especially when the calling process could be any or it is not known when designing the Dialog. Click the ellipsis button to open the config window:

| Param | eters | | _ | | x |
|-------|-------|-----------------|---|--------|---|
| | Name | Dialog Variable | | | |
| + | | | | | |
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| | | OK | | Cancel | |
| | | | | | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM AgileDialogs 2011 stencil.

- 3. On the **XRM AgileDialogs 2011** stencil, drag the **DialogTask** or **Intranet Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **OutParameters** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|----------------|---|
| Name | Definition: This is the name of the Process Variable (aka Custom Attribute) to be created in the sub-process Do not use this format \${ProcessVariable1}, just the name |
| DialogVariable | Definition: This is the name of the Dialog Variable whose value we want to assign to our process variable Do not use this format \${DialogVariable1}, just the name |

Intranet Dialog Task

This shape is used in AgileXRM processes (not in AgileDialogs models) and creates an Intranet Manual Task for the participant. When the task is opened, the AgileDialog starts for the user to interact with.

When the AgileDialog is completed this activity is completed and the process continues.

Use this shape rather than the Intranet Manual Task shape (with an associated ALF form), when the user needs to be guided to complete the task.



- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM AgileDialogs 2011 stencil.
- 3. On the **XRM AgileDialogs 2011** stencil, drag the **Intranet Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|---------------|---|
| Dialog | Opens the Following Window: Process Selector Window Purpose of this Window: This opens the Process Selector dialog for choosing which process and version to initiate. |
| InParameters | Opens the Following Window: Parameters Window - In Parameters Purpose of this Window: Optional This is for passing parameters to the dialog. These process variables will be available in the dialog. Click the ellipsis button to open the config window: |
| OutParameters | Opens the Following Window: Parameters Window - Out Parameters Purpose of this Window: Optional This is for passing parameters from Dialogs to the calling Parent Process. It is also possible to use the Update Parent Process shape in the Dialog itself to update Process Variables in the parent process, but this way it is simpler, especially when the calling process could be any or it is not known when designing the Dialog. Click the ellipsis button to open the config window: |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Process Selector Window

This opens the Process Selector dialog for choosing which process and version to initiate.

| Process Selector |
|---|
| Process Template Product Defect Process |
| Process Version |
| Latest Version |
| © Specific Version |
| Latest Major Version |
| My Dynamic Major Version |
| Version Not Found Behavior |
| Start Latest Version |
| Throw an Exception |
| |
| OK Cancel |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM AgileDialogs 2011

- 3. Do one of the following:
 - On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Subprocess or Subprocess (Multi) AgileShape, and drop it on the process template.
 - On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
 - SubDialog AgilePart
 - **Dialog Task** AgileWork
 - Intranet Dialog Task AgileWork
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
 - Sub Process
 - Sub Dialog
 - Dialog
- 6. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

| Field Name | Definition |
|--|--|
| Process Template | Definition: |
| | This drop-down list will show all the processes that are already published in the Process Engine (AgilePoint Server). |
| | Select the name of the process that you want to initiate as a sub-process. |
| Process Version - Latest Version | Function: |
| | The process model version that has the status of Released is initiated, (usually, but not necessarily, the latest version of the model) |
| Process Version - Specific Version | Function: |
| | When this is chosen, all the available versions (including ones with the status of Retired) are listed in the drop-down list. Select the specific version of the model that you want to initiate as a sub-process. |
| Process Version - Latest Major Version | Function: |
| | Version numbers are in the form Major.Minor (e.g. 4.06 or 3.50). When this option is selected, all the available Major versions of the selected Process Template are listed in the drop-down (including ones with the status of Retired). When the process |

| Field Name | Definition |
|---|--|
| | arrives to this shape, it starts the highest Minor version of the chosen Major version. |
| Process Version - My Dynamic Major Version | Function: |
| | The calling parent process has a Major version. The version of the sub-process that is initiated is the highest Minor version of this Major version. |
| | This functionality is useful under 2 circumstances: |
| | You only have one environment (production) and it is not possible to test your new processes in another environment before publishing them to the production environment. |
| | Although you do have a test environment, you need to keep running these interdependent processes in the same version. |
| | It is best to set the Major version for all these related processes to the same value. When you want to deploy many new Templates, increment the Major version for all of them, so that existing running processes do not initiate the new Templates but the corresponding Template in their own Major version. |
| | For example, you have 3 related processes: |
| | Process A at version 1.04 |
| | Sub-Process B at version 1.34 – initiated from A |
| | Sub-Process C at version 1.20 – initiated from B |
| | Let's say you continue enhancing these processes and you then publish B 2.0 first and C 2.0 on another day. If the sub-processes shapes were configured with this option, new A process instances will continue initiating B 1.34, and B in turn would continue to initiate C 1.20. This is even though there are new versions of B and C available in the Process Engine. Once you publish A 2.0, then the new instances of A would initiate the new versions of B and C (i.e. 2.0). |
| Version Not Found Behavior - Start Latest Version | Function: |
| | This is default behavior. |
| | If the Process Option above was Specific Version, Latest Major Version or My Dynamic Major Version; and at runtime such a version is not available, then the Engine is instructed to run the latest version of the process irrespective of the Process Option (i.e. treat it as if the Process Option was Latest Version) |

| Field Name | Definition |
|---|---|
| Version Not Found Behavior - Throw an Exception | <u>Function:</u> Rather than initiating the Latest Version, this option would cause the Engine to throw an exception at runtime when the desired version is not found. This way the System Administrator gets a chance to correct the error. |

Log on to AgilePoint Server

The first time you configure the shape, this dialog will be shown to get the credentials for connecting to the Process Engine (AgilePoint Server), in order to list the published sub-processes.

Note: The credentials are saved and reused in subsequent accesses to the Process Engine.

| Connecting to Ser | ver | × |
|-------------------|---------------------------------------|---|
| | ecting to Server | |
| Server Url: | http://agilepoint3/AgilePointServer | • |
| Logon as o | current user (AD2008R2\Administrator) | |
| 🔘 Logon as t | he following user: | |
| User Information | n | |
| Domain: | AD2008R2 | |
| Username: | Administrator | |
| Password: | | |
| | 🥪 OK 🔀 Cancel | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - XRM Automatic Activities 2011
 - XRM Automatic Activities 4
 - XRM AgileDialogs 2011
- 3. Do one of the following:

- On the XRM Automatic Activities 2011 or XRM Automatic Activities 4 stencil, drag the Subprocess or Subprocess (Multi) AgileShape, and drop it on the process template.
- On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
 - **SubDialog** AgilePart
 - **Dialog Task** AgileWork
 - Intranet Dialog Task AgileWork
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
 - Sub Process
 - Sub Dialog
 - Dialog

| Field Name | Definition |
|-----------------------------|---|
| Server Url | <u>Definition:</u> This is the URL of the Process Engine (AgilePoint Server). Whenever a new URL is used it is added to the drop-down list-box, so next time it is needed, it is easier to select than reenter it. |
| Logon as current user | Definition: Authenticates using the local machine's Windows user account. This option can be used with Windows authentication only. |
| Logon as the following user | <u>Definition:</u> Authenticates using the credentials you specify. <u>Allowed Values:</u> <u>Selected - The domain, username and password fields are enabled to fetch the input from an user.</u> <u>Deselected - Specifies that the logon as current user (AD2008R2\Administrator) option is enabled.</u> Default Value: |

| Field Name | Definition |
|------------|---|
| | Deselected |
| Domain | <u>Definition:</u> The authentication domain. This does not apply to Forms-Based Authentication. |
| User Name | Definition: The user name you want to associate with the action. Allowed Values: A user name, not including the domain. Default Value: None Custom Attributes: No |
| Password | Definition: The password for the authentication account. <u>Allowed Values:</u> A valid password. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |

Parameters Window - In Parameters

Optional This is for passing parameters to the dialog. These process variables will be available in the dialog. Click the ellipsis button to open the config window:

| Param | eters | | - | | x |
|-------|--------|-------|---|--------|---|
| | Name | Value | | | |
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| | | | | | |
| E | Schema | OK | | Cancel | |
| | | | | | |

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM AgileDialogs 2011 stencil.
- 3. On the **XRM AgileDialogs 2011** stencil, drag the **DialogTask** or **Intranet Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **InParameters** field, click the **Ellipses** button.

| Field Name | Definition |
|------------|--|
| Name | Definition: This is the name of the Process Variable (aka Custom Attribute) to be created in the sub-process |
| Value | Definition: |

| Field Name | Definition | |
|------------|--|--|
| | This is the value that the variable is going to have. I can be a static value, a Process Variable or a value from the Schema | |
| Schema | Function: | |
| | This opens the Schema Selector Dialog to select one for the Value column. | |

Schema Selector Dialog

When configuring some shapes, it is possible to pass dynamic context data or process variables as the value of the parameters. The procedure is always the same, either there is an ellipsis button (...), a button called Schema or the user can invoke the dialog by typing the characters \${ in which case the following dialog would appear:



The user can then select the correct attribute from the tree and press OK to insert it in the corresponding place where the dialog was invoked.

When writing in Search Variable field, fields are auto-filtered to make selection easier.

Parameters Window - Out Parameters

Optional This is for passing parameters from Dialogs to the calling Parent Process. It is also possible to use the Update Parent Process shape in the Dialog itself to update Process Variables in the parent process, but this way it is simpler, especially when the calling process could be any or it is not known when designing the Dialog. Click the ellipsis button to open the config window:

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|---|-------|-------|
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- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM AgileDialogs 2011 stencil.
- 3. On the **XRM AgileDialogs 2011** stencil, drag the **DialogTask** or **Intranet Dialog Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **OutParameters** field, click the **Ellipses** button.

| Field Name | Definition |
|----------------|---|
| Name | Definition: |
| | This is the name of the Process Variable (aka Custom Attribute) to be created in the sub-process |
| | Do not use this format \${ProcessVariable1}, just the name |
| DialogVariable | Definition: |

| Field Name | Definition | |
|------------|---|--|
| | This is the name of the Dialog Variable whose value we want to assign to our process variable | |
| | Do not use this format \${DialogVariable1}, just the name | |

XRM External Connector Stencil

This AgileXRM stencil holds the AgileShapes that allow extending the platform to External Users (i.e. Users who are not in the organization's Active Directory, rather they are stored in CRM Contacts)

Note: In order to use this stencil, the AgileXRM External Connector should be licensed.

Internet Task

This shapes creates a task for an External User (a user which is not in the Active Directory of the organization).

These users are CRM Contacts and have a corresponding Username and Password stored in custom AgileXRM fields.

These users are identified in AgileXRM as a single user called [DOMAIN]\EXTERNALUSER.

The task will be presented to the user via the Task List WebPart in SharePoint, where the user can interact with it.



Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM External Connector stencil.
- 3. On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

| Field Name | Definition |
|-------------------|-------------|
| ExternalUserLogin | Definition: |

| Field Name | Definition | |
|------------|--|--|
| | This is either the ID of the Contact (each external user has a corresponding Contact record) or the login name of the external user (the ascentn_login field in Contact stores the login name). This value can be configured dynamically using \${ which opens the See "Schema Selector Dialog" | |
| Form | Opens the Following Window: Form Configuration Window | |
| | Purpose of this Window: | |
| | This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened: | |

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:

| Search: | | | 2 | |
|---------|---------------------------------|-----------------|---------------------------|-------|
| | Name | Category | Created On | |
| • | Case Management Accept Solution | Case Management | 2012-05-11T19:05:50+02:00 | |
| | Case Management Additional Info | Case Management | 2012-05-11T19:05:56+02:00 | |
| | Case Management Review | Case Management | 2012-05-11T19:05:56+02:00 | |
| | Ticket Entry Form | Case Management | 2012-05-11T19:05:57+02:00 | |
| | | | | |
| j. | New 🗹 Edit 🛕 Preview | | ОК Са | ancel |

When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencil:
 - XRM Manual Activities 2011
 - XRM Manual Activities 4
 - XRM External Connector
- 3. Do one of the following:
 - On the XRM Manual Activities 2011 or XRM Manual Activities 4 stencil, drag the appropriate AgileShape, and drop it on the process template.
 - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Form** field, click the **Ellipses** button.

Form Example

The following is an example of a form created using the AgileXRM Form Designer.

| 💋 Task: Regarding: Offline. | - Windows Internet Explorer | | | |
|---------------------------------|---|-------------------------|----------------------------|-------------------------|
| 😋 🕢 🕶 🍌 http://ad | 08 5555/AP/Activities/task/edit.aspv7id=7015056 | ic-4267-df11-b14d-000x2 | Relfel 🔹 🔄 🗙 💐 Live Search | ρ. |
| 🗙 🛄 Snagit 📓 💇 | | | | |
| 👷 Favorites 🙀 Task: | Regarding: Offline. | | 🖞 • 🔯 • 🖷 🖶 • | Page * Safety * Tools * |
| 🛺 🖬 🗟 Seve and d | Done 🔓 🛃 🎯 i 🕸 i 🖉 Folow Up 💊 | éctions - | | @ (94) - · |
| Process Task Regard | ding: Offline. | | | |
| Customer | Arout | | | |
| Subject 👾 Case Origin | Configuration Problem | Case Type | | |
| Assignment Information Owner | System Administrator | Priority | Nomal | Save Data |
| Status: Open | | | | |

Internet Dialog Task

This shape is used in AgileXRM processes (not in AgileDialogs models) and creates an Internet Manual Task for the participant. When the task is opened, the AgileDialog starts for the user to interact with.

When the AgileDialog is completed this activity is completed and the process continues.

Use this shape rather than the Internet Manual Task shape (with an associated ALF form), when the user needs to be guided to complete the task.

This shapes creates a task for an External User (a user which is not in the Active Directory of the organization).

These users are CRM Contacts and have a corresponding Username and Password stored in custom AgileXRM fields of the Contact entity.

These users are identified in AgileXRM as a single user called [DOMAIN] \EXTERNALUSER.

The task will be presented to the user via the Task List WebPart in SharePoint, where the user can interact with it.



- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the XRM External Connector stencil.
- 3. On the **XRM External Connector** stencil, drag the **Internet Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

SAP Integration

This section describes the AgileShapes in the SAP Integration stencil. These AgileShapes enable integration between SAP and AgilePoint.



Note: Before you can use SAP integration AgileParts, you must install, and configure the iNet BPS SAP integration software and set up the SAP AgileConnector on the AgilePoint Server.

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.

Configuring iNet BPS

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

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

To configure the iNET BPS:

- 1. Click Start > All Programs > iNetServer > Administration Console.
- 2. On the iNet Connection Server window, complete the following fields:

| Field Name | Definition |
|--------------------|--|
| Connection Pool | Identifies the connection pool for the SAP system. |
| | The first time you set up the SAP AgileConnector, you must select one of the "unconfigured" default connection pools, and then configure it to meet your needs. |
| Description | A free text description of the connection pool. |
| Destination String | ASHOST - IP address or host name of the SAP server. |
| | • SYSNR - The system number the SAP server. |
| Connection mode | Determines the manner in which AgilePoint connects to SAP. Select Shared & anonymous . |
| Client | The SAP client number. |
| User | The SAP user name. |
| Password | The SAP password. |
| Language | The language abbreviation for your SAP language. The default value is EN . |
| Pool size | • Max - 10 |
| | • Min - 1 |

3. Click Validate.

A "Validation succeeded" message displays in the bottom field, and the **System** field auto-populates.

- 4. Click Save.
- 5. On the pop-up, click Yes to restart the SAP connection service.
- 6. Once the status field shows the "restarted" message, click Exit.

SAP Integration AgileConnector

This AgilePoint Server extension (AgileConnector) enables you to run the SAP Integration component of the AgilePoint BPMS Suite.

Enabling the SAP AgileConnector

To configure the SAP AgileConnector, do the following.

Navigation

- 1. On the AgilePoint Server machine, click Start > All Programs > AgilePoint > AgilePoint Configuration.
- 2. On the AgilePoint Server Configuration Tool window, click the Extensions tab.

Instructions

- 1. On the **Extensions** tab, click **Add**.
- Browse to the assembly [AgilePoint Server installation folder]\bin \Ascentn.AgileConnector.SAPIntegration.dll, and then click OK to add this extension to AgilePoint Server.

Configuring the SAP AgileConnector

To configure the SAP AgileConnector, do the following.

Navigation

- 1. On the AgilePoint Server machine, click **Start > All Programs > AgilePoint > AgilePoint Configuration**.
- 2. On the AgilePoint Server Configuration Tool window, click the Extensions tab.

Instructions

- 1. On the Extensions tab, select the SAPIntegration AgileConnector.
- 2. Click the **Configure** button.
- 3. In the configuration window for the SAP Integration AgileConnector, configure the following fields as required.

| Field Name | Definition |
|---|---|
| Max Threads for SAP Integration | Definition: Specifies the maximum number of concurrent connections between AgilePoint Server and SAP. Allowed Values: Any integer. Default Value: 5 |
| Send Notification for Suspended Processes | Definition: |

| Field Name | Definition |
|------------|---|
| | Specifies whether the SAP Integration AgileConnector sends a notification to the AgilePoint system administrator if a process instances is suspended as a result of an SAP integration error. |
| | Allowed Values: |
| | • Deselected - No email notification is sent. |
| | Selected - Sends an email notification if a process instance is suspended. |
| | Default Value: |
| | Deselected |

Call SAP Function

An AgilePart that calls a function in an SAP database. This AgilePart can be used alone to call a single function, or with other Call SAP Function AgileParts and Start and End SAP Transaction AgileParts to create a more complex transaction. For more information, see the *AgilePoint BPMS User's Guide*.



Note: For Generic processes, create the schema before using the Call SAP Function AgilePart. The process schema is required to use this AgilePart. If you want to map the schema to an SAP query, you must design the schema to accommodate the data the query returns.

Properties for This AgilePart

| Field Name | Definition |
|---------------|---|
| Configuration | Opens the SAP Connection Browser window, where you can set up and select a connection to an SAP system. You can use this window to access the configuration for an SAP function. |

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

SAP Connection Browser

The SAP Connection Browser window enables you to set up and select a connection to an SAP system. You can use this screen to access the configuration for an SAP function.

To configure an SAP connection and map the SAP data to your schema, do the following:

1. In AgilePoint Envision, create or open a process model of any type.



Note: For Generic processes, create the schema before using the Call SAP Function AgilePart. The process schema is required to use this AgilePart. If you want to map the schema to an SAP query, you must design the schema to accommodate the data the query returns.

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

| SAP Connection Browser | | × |
|------------------------|--------------|----------|
| 1 | | |
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| Add SAP System | | |
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| | | |

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

| emote mac | hine name: | , | | |
|-------------|----------------|---|--|--|
| Connect | 1 | | | |
| elect Pool | _ | | | |
| S BI7 | /3 | | | |
| E S SE | 00 SAP R/3 4.7 | | | |
| escription: | 00 SAP R/3 4.7 | | | |
| escription: | SAP R/3 4.7 | | | |
| escription: | 00 SAP R/3 4.7 | | | |

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

| SAP Connection | Browser | | | × |
|--------------------------------------|--|-------|----------|----------|
| 🕡 💽 | | | | |
| E SAP R/ BAP BAP BAP BAP | Add RFC Elter Browse Tables Edit | LOYEE | | |
| E C SAP | Delete Delete Juenes Reports | | | |
| | | | | |
| | | | <u> </u> | 🔀 Cancel |

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

| SAP <u>S</u> ystem: | R47 |
|---------------------|------|
| unction | GET* |
| Group pattern: | × |
| Description | GET |

- 8. In the **Description** field, enter a name for the filter.
- 9. When you have finished creating the filter, click **OK**.
- 10. In the **SAP Connection Browser** window, select the SAP function you want, and click **OK**. The **SAP Integration Configuration** window opens.
- 11. (Optional) On the SAP Integration Configuration window, specify a runtime connection string.
- 12. (Optional) Click Change Connection to select a different SAP database. (This starts the procedure over.)
- 13. (SAP Queries Only) If you are configuring an SAP query, on the **Query Filter** tab, enter the following information in the fields provided:
 - Query column
 - Comparison operator
 - Value
 - Conjunction

Note: Queries can return a large number of rows. You must ensure that the filter conditions narrow the results to a manageable number.

- 14. (SAP BAPI Only) If you are configuring an SAP BAPI, on the **Input Mapping** tab, enter map the fields in your schema to the SAP fields.
- 15. (Queries or BAPI) On the Output Mapping tab, enter map the fields in your schema to the SAP fields.



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Note: SAP queries can return multiple rows. Therefore, if you want to map to SAP queries, the schema must be designed to accommodate repeating group nodes. If a field is not mapped to a repeating group, only the first row of a query result is updated in the schema.

| SAP Integration Configuration | × |
|--|-------------------|
| SAP Integration Configuration | |
| SAP Connection SAP Server SERVER=(local);P00LID=00 Function Name BAPI_GET_CUSTOMERS Specify Runtime Connection String [Can use custom attributes in the format \$ or \${}] | Change Connection |
| SERVER=(local)POOLID=00 | |
| Input Mapping Output Mapping | |
| BAPLGET_CUSTOMERS CUSTOMER_LIST CUSTOMER_BALANCE CUSTOMER_LAST_ORDER CUSTOMER_NAME CUSTOMER | myFields |
| Data Conversion | |
| No Data Conversion needed | |
| Custom Data Conversion | slote |
| | Cancel |

16. When you have finished, click OK.

Begin SAP Transaction

An AgilePart that starts an SAP Transaction. This AgilePart is used with two or more Call SAP Function AgileParts and an End SAP Transaction AgilePart to create a complex SAP transaction. For more information, see the *AgilePoint BPMS User's Guide*.

TransactionName

A unique name that identifies the transaction. To complete a transaction, the value of this property must match the value of the TransactionName property for an End SAP Transaction AgilePart.

Properties for This AgilePart

| Field Name | Definition |
|-----------------|--|
| TransactionName | A unique name that identifies the transaction. To complete a transaction, the values of this property in the Begin SAP Transaction and End SAP Transaction AgileParts must match. |

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

End SAP Transaction

An AgilePart that ends an SAP Transaction. This AgilePart is used with two or more Call SAP Function AgileParts and Begin SAP Transaction AgilePart to create a complex SAP transaction. For more information, see the *AgilePoint BPMS User's Guide*.

TransactionName

A unique name that identifies the transaction. To complete a transaction, the value of this property must match the value of the TransactionName property for an Begin SAP Transaction AgilePart.

Properties for This AgilePart

| Field Name | Definition |
|-----------------|--|
| TransactionName | A unique name that identifies the transaction. To complete a transaction, the values of this property in the Begin SAP Transaction and End SAP Transaction AgileParts must match. |

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

AgileForms Stencil

This section describes the AgileShapes in the AgileForms stencil.

AgileForm Shape

Generates an AgileForm you define. This form appears as an activity in the participant's Task List. For detailed information regarding AgileForms, see the AgileForms Online Help.



Note: The default value of the Work To Perform property for this shape is **FormRender**. Do not change this value.

Properties for This AgilePart

| Field Name | Definition |
|-----------------|--|
| Edit Form | Opens the AgileForms form editor, which edits the form. For detailed information about editing forms in AgileForms, see the AgileForms online help. |
| Export Form | Saves the form as an AgileForms XML form file. |
| Import Form | Imports an AgileForms XML form file, and replaces the form for this shape with the imported one. All fields from the imported form are added to the form library for the current process. |
| Preview Form | Opens the AgileForms preview window, where you can preview the form. |
| ReportView | Default value: False |
| | Specifies whether an AgileForms AgileShape will be used in Report View. |
| | This property can be set to the following values: |
| | • True - The AgileShape will serve as the Report View form. |
| | Only one AgileShape can have this value in a single process model. |
| | • False - The AgileShape will not serve as the Report View form. |
| | If all AgileForms AgileShapes in a process model are set to False, the AgileForm for the Submit step is used for the Report View, as if it were set to True. |
| SaveOptionField | Definition: |
| | A field that enables the process participant to save an AgileForm, rather than submitting it, at runtime. |
| | Allowed Values: |

| Field Name | Definition | | |
|----------------|---|--|--|
| | A schema node. | | |
| | Default Value: | | |
| | None | | |
| | Custom Attributes: | | |
| | No | | |
| | Example: | | |
| | Yes/No | | |
| | • Text | | |
| | Select One, with the values "Save" and "Do not Save". | | |
| SaveOptionText | Definition: | | |
| | Specifies the label of the SaveOptionField. | | |
| | Allowed Values: | | |
| | A text string. | | |
| | Default Value: | | |
| | None | | |
| | Custom Attributes: | | |
| | No | | |
| | Example: | | |
| | • Yes | | |
| | • Save | | |
| SubmitStep | Default value: False | | |
| | This property should be set to 'True' if the Form is used as the Submit step (i.e. the first step where you are creating the list item). | | |
| | Note: If you have set a custom field as required in a SharePoint list, it must be editable on the Submit step, otherwise SharePoint throws an exception. | | |
| | Note: If you have set a field to be of type Multiple lines of text, the field cannot be set as Read Only. | | |
| Transfer Form | Transfers a form from one AgileForm AgileShape to another within a process. If you transfer a form to an | | |

| Field Name | Definition | | |
|----------------|---|--|--|
| | AgileShape the current form is overwritten with the one that is transferred. | | |
| Edit Library | Opens the AgileForms form library editor. Each field you add to an AgileForm is added to the form library for the process. The fields in a form library are available for use for to all forms within a process. | | |
| Export Library | Saves the form as an AgileForms XML form library fil | | |
| Import Library | Imports an AgileForms XML form library file. Note: If you import a form library, the current form library will be overwritten with the imported form library. If you want to add form fields to an existing form library, AgilePoint recommends importing a form, instead of a form library. | | |

AgileWork Properties

This AgileWork inherits the properties of the AgileWork AgileShape. For a list of these properties, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

AgileForm Serial

Generates an AgileForm for serial, or sequential, approvals. This form appears as an activity in the identified participants' Task List.

In a serial approval model, the task cannot move forward until a defined set of participants submits an approval in a specified order. (For approvals that do not require a particular approval sequence, use the AgileForm Parallel AgileShape.) You can define the set of approvers and number of required approvers. All approvers for the AgileForm Serial AgileShape use the same approval form.

For detailed information regarding AgileForms, see the AgileForms Online Help.



Note: The default value of the Work To Perform property for this shape is **FormRender**. Do not change this value.

Properties for This AgilePart

| Field Name | Definition |
|------------|--|
| Approvers | Default value: \$Approvers |
| | This property specifies the name of the custom attribute that (initially) contains the user names of the |

| Field Name | Definition | | |
|---------------|--|--|--|
| | approvers. The user names should be separated by a semicolon. Each time this AgileShape is entered at runtime, the AgileShape will assign a task to the first username specified by this property. Then the custom attribute associated with this property will be modified to remove the username so that the next username will be assigned the task during the next iteration through the loop. Note: The value of this property must be the name of a custom attribute. The value of the custom attribute must be initialized elsewhere using an Update Custom Attributes AgileShape. | | |
| LoopCondition | Default value: \$HasMoreApprover | | |
| | This property specifies the name of the custom attribute that will be updated each time the AgileShape is exited to indicate whether more Approvers are still waiting to be assigned the task. The value of the specified custom attribute should be checked (using a SingleCondition AgileShape within the loop) to determine whether the loop should be exited or not. Note: The value of this property must be the name of a custom attribute. The value of the custom attribute must be initialized elsewhere using an Update Custom Attributes AgileShape. | | |
| Configuration | This property allows the process modeler to configure the participants for the approval task. | | |
| | Click the Ellipses button to open the configuration dialog. | | |
| Edit Form | Opens the AgileForms form editor, which edits the form. For detailed information about editing forms in AgileForms, see the AgileForms online help. | | |
| Export Form | Saves the form as an AgileForms XML form file. | | |
| Import Form | Imports an AgileForms XML form file, and replaces the form for this shape with the imported one. All fields from the imported form are added to the form library for the current process. | | |
| Preview Form | Opens the AgileForms preview window, where you can preview the form. | | |
| ReportView | Default value: False | | |

| Field Name | Definition | | |
|-----------------|---|--|--|
| | Specifies whether an AgileForms AgileShape will be used in Report View. | | |
| | This property can be set to the following values: | | |
| | • True - The AgileShape will serve as the Report View form. | | |
| | Only one AgileShape can have this value in a single process model. | | |
| | • False - The AgileShape will not serve as the Report View form. | | |
| | If all AgileForms AgileShapes in a process model are set to False, the AgileForm for the Submit step is used for the Report View, as if it were set to True. | | |
| SaveOptionField | Definition: | | |
| | A field that enables the process participant to save an AgileForm, rather than submitting it, at runtime. | | |
| | Allowed Values: | | |
| | A schema node. | | |
| | Default Value: | | |
| | None | | |
| | Custom Attributes: | | |
| | No | | |
| | Example: | | |
| | • Yes/No | | |
| | • Text | | |
| | Select One, with the values "Save" and "Do not Save". | | |
| SaveOptionText | Definition: | | |
| | Specifies the label of the SaveOptionField. | | |
| | <u>Allowed Values:</u> A text string. <u>Default Value:</u> | | |
| | | | |
| | | | |
| | None | | |
| | Custom Attributes: No | | |
| | | | |
| | Example: | | |

| Field Name | Definition | | |
|----------------|--|--|--|
| | Yes | | |
| | • Save | | |
| SubmitStep | Default value: False | | |
| | This property should be set to 'True' if the Form is used as the Submit step (i.e. the first step where you are creating the list item). | | |
| | Note: If you have set a custom field as required in a SharePoint list, it must be editable on the Submit step, otherwise SharePoint throws an exception. | | |
| | Note: If you have set a field to be of type Multiple lines of text, the field cannot be set as Read Only. | | |
| Transfer Form | Transfers a form from one AgileForm AgileShape to another within a process. If you transfer a form to an AgileShape the current form is overwritten with the one that is transferred. | | |
| Edit Library | Opens the AgileForms form library editor. | | |
| | Each field you add to an AgileForm is added to the form library for the process. The fields in a form library are available for use for to all forms within a process. | | |
| Export Library | Saves the form as an AgileForms XML form library file | | |
| Import Library | Imports an AgileForms XML form library file. | | |
| | • Note: If you import a form library, the current form library will be overwritten with the imported form library. If you want to add form fields to an existing form library, AgilePoint recommends importing a form, instead of a form library. | | |

AgileWork Properties

This AgileWork inherits the properties of the AgileWork AgileShape. For a list of these properties, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

AgileForm Parallel

Generates an AgileForm for parallel (non-sequential) approvals. This form appears as an activity in the identified participants' Task List.

In a parallel approval model, the task cannot move forward until a defined set of participants submits an approval. However, the approvers need not approve in any particular order. (For approvals that require a particular sequence, use the AgileForm Serial AgileShape.) Each approver must be defined as an individual participant, using either an ID or a custom attribute. Each participant can also use a unique AgileForm.

For detailed information regarding AgileForms, see the AgileForms Online Help.



Note: The default value of the Work To Perform property for this shape is **FormRender**. Do not change this value.

Properties for This AgilePart

| Field Name | Definition | | |
|-----------------|---|--|--|
| Configuration | Opens the AgileForm Parallel Configuration Window, where you can configure an AgileForm Parallel approval. | | |
| Edit Library | Opens the AgileForms form library editor. Each field you add to an AgileForm is added to the form library for the process. The fields in a form libra are available for use for to all forms within a process | | |
| Export Library | Saves the form as an AgileForms XML form library fi | | |
| Import Library | Imports an AgileForms XML form library file. Note: If you import a form library, the current form library will be overwritten with the imported form library. If you want to add form fields to an existing form library, AgilePoint recommends importing a form, instead of a form library. | | |
| SaveOptionField | Definition: A field that enables the process participant to save an AgileForm, rather than submitting it, at runtime. Allowed Values: A schema node. Default Value: None | | |

| Field Name | Definition | | |
|----------------|---|--|--|
| | Custom Attributes: | | |
| | No | | |
| | Example: | | |
| | Yes/No | | |
| | • Text | | |
| | Select One, with the values "Save" and "Do not Save". | | |
| SaveOptionText | Definition: | | |
| | Specifies the label of the SaveOptionField. | | |
| | Allowed Values: | | |
| | A text string. | | |
| | Default Value: | | |
| | None | | |
| | Custom Attributes: | | |
| | No | | |
| | Example: | | |
| | • Yes | | |
| | • Save | | |

AgileWork Properties

This AgileWork inherits the properties of the AgileWork AgileShape. For a list of these properties, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

AgileForm Parallel Configuration Window

This property allows the process modeler to configure the participants for the approval task and the form each participant sees.

- 1. Click the **Ellipses** button to open the configuration dialog.
- 2. On the Dynamic Parallel Configuration dialog box, click Add, or select a participant and click Edit.
- 3. Add a participant in the **Participant** field. You must use a single participant (as opposed to a role or group), but you can use a custom attribute to identify the participant.
- 4. Define the form for the approval using the following buttons on this dialog box.

Field Definitions

| Field Name | Definition | | |
|------------|--|--|--|
| Edit | Opens the AgileForms form editor, which enables you to edit the form. For detailed information about editing forms in AgileForms, see the AgileForms online help. | | |
| Preview | Opens the AgileForms preview window, where you can preview the form. | | |
| Export | Saves the form as an AgileForms XML form file. | | |
| Import | Imports an AgileForms XML form file, and replaces the form for this shape with the imported one. All fields from the imported form are added to the form library for the current process. | | |
| Transfer | Transfers a form from one AgileForm AgileShape to another within a process. If you transfer a form to an AgileShape the current form is overwritten with the one that is transferred. | | |

AgileForm Dynamic Group

This AgileShape can be used as similar to the Manual AgileShape, however it facilitates dynamic group functionality. When users are added/removed from a group, the change is persisted at runtime.

Properties for This AgilePart

| Field Name | Definition | |
|----------------|--|--|
| Group/Role | Default value: AgilePointGroup | |
| | Specifies whether an AgilePoint Group or an AgilePoint Role will be used to perform the work. | |
| Group/RoleName | Specifies the name of the AgilePoint group or AgilePoint role that will be used to perform the work. | |
| ReportView | Default value: False | |
| | Specifies whether an AgileForms AgileShape will be used in Report View. | |
| | This property can be set to the following values: | |
| | • True - The AgileShape will serve as the Report View form. | |
| | Only one AgileShape can have this value in a single process model. | |

| Field Name | Definition | | |
|-----------------|---|--|--|
| | False - The AgileShape will not serve as the Report View form. | | |
| | If all AgileForms AgileShapes in a process model are set to False, the AgileForm for the Submit step is used for the Report View, as if it were set to True. | | |
| SaveOptionField | Definition: | | |
| | A field that enables the process participant to save an AgileForm, rather than submitting it, at runtime. | | |
| | Allowed Values: | | |
| | A schema node. | | |
| | Default Value: | | |
| | None | | |
| | Custom Attributes: | | |
| | No | | |
| | Example: | | |
| | • Yes/No | | |
| | • Text | | |
| | Select One, with the values "Save" and "Do not Save". | | |
| SaveOptionText | Definition: | | |
| | Specifies the label of the SaveOptionField. | | |
| | Allowed Values: | | |
| | A text string. | | |
| | Default Value: | | |
| | None | | |
| | Custom Attributes: | | |
| | No | | |
| | Example: | | |
| | • Yes | | |
| | • Save | | |
| SubmitStep | Default value: False | | |
| | This property should be set to 'True' if the Form is used as the Submit step (i.e. the first step where you are creating the list item). | | |

| Field Name | Definition | |
|------------|------------|---|
| | () | Note: If you have set a custom field as required in a SharePoint list, it must be editable on the Submit step, otherwise SharePoint throws an exception. |
| | () | Note: If you have set a field to be of type Multiple lines of text, the field cannot be set as Read Only. |

AgileWork Properties

This AgileWork inherits the properties of the AgileWork AgileShape. For a list of these properties, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

AgileForm Process Adaptation

This AgileShape is a combination of the Dynamic Parallel, Dynamic Sequential, and Voting AgileWork. It allows for a running process instance to adapt by adding a new participant to complete a task in either a Parallel or Sequential fashion at runtime to support dynamic processes. Manageability at runtime is accomplished either through the AgilePoint Enterprise Manager or the Process Viewer.



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.



Note: A modification to the Process Viewer web.config file is required in order to see the Process Adaptation functionality in the Process Viewer.



To enable the **Open Process Adaptation** link in the Process Viewer, make the following modification to the AgilePoint Web application's web.config file:

The value for the Process Adaptation is the URL of the process adaptation URL in AgilePoint Enterprise Manager.

For the Process Viewer in SharePoint using AgileForms, add the key entry into the SharePoint web.config at C: \Inetpub\wwwroot\wss\VirtualDirectories\8000\web.config.

Properties for This AgilePart

| Field Name | Definition |
|-----------------------|---|
| UserDefinedProperties | Note: Developers may need to write code to fully implement this. This property allows the process modeler to configure initial ClientData values that will be associated with the AgileShape's associated task(s) at runtime. This is basically a way of allowing you to specify a set of name/value pairs that are passed to your Web page via an object called a WorkItem. This is an alternative to passing data via URL parameters. In your Web page you can retrieve this data via the ClientData |
| • | - |

| Field Name | Definition |
|----------------------|--|
| | property of the WorkItem. It is then up to you to decide how to use the data. |
| | Click the Ellipses button to open the configuration dialog. |
| | User Defined Properties |
| | User Defined Properties |
| | Name A Value |
| | ManagerApproval \${/pd:myFields/pd:ManagerApproval Boolean |
| Voting Configuration | This property allows the process modeler to configure data binding to the data schema within a repeating table for which to establish the approval data. The "Mandatory" option provides an added level of functionality, requiring any participants that have been identified as "Mandatory" to approve, or the final decision will be not-approved. The final result is also configured here by setting a custom attribute to store the final result and specifying the percentage of participants that will need to approve before the final decision is considered as approved. For example, the process designer specifies the voting percentage as 60%. If 60% of the approvers approve the preceding request, then the final decision is considered as approved. Click the Ellipses button to open the configuration dialog. |

| Field Name | Definition |
|-----------------------|--|
| | Voting Configuration Voting Configuration |
| | Approvals XPath /pd:my/pd:Voters Enter the XML tag names for below fields. User ID /pd:my/pd:VoterID Status /pd:my/pd:Approve Mandatory (No Mandatory required if blank) |
| | Final Result Final Result XPath /pd:myFields/pd:VotingResult Set final result as 'Approve' when 65 % of the users approve' when 65 SharePoint and InfoPath Integration are used. |
| ApprovalType | The property can be set to Sequential or Parallel at design time. This property determines a runtime whether the task will be delivered in a sequential or parallel fashion to the participants of the task. This can be changed at runtime via AgilePoint Enterprise Manager or the Process Viewer. 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. |
| UpdateCustomAttribute | This property allows the process modeler to configure an update to a custom attribute value based on an event type. |

Default value: False

| Field Name | Definition |
|-----------------|---|
| | This property should be set to 'True' if the Form is used as the Submit step (i.e. the first step where you are creating the list item). |
| | Note: If you have set a custom field as required in a SharePoint list, it must be editable on the Submit step, otherwise SharePoint throws an exception. |
| | Note: If you have set a field to be of type Multiple lines of text, the field cannot be set as Read Only. |
| SaveOptionField | Definition: |
| | A field that enables the process participant to save an AgileForm, rather than submitting it, at runtime. |
| | Allowed Values: |
| | A schema node. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | Yes/No Text |
| | Select One, with the values "Save" and "Do not Save". |
| SaveOptionText | Definition: |
| | Specifies the label of the SaveOptionField. |
| | Allowed Values: |
| | A text string. |
| | Default Value: |
| | None |
| | <u>Custom Attributes:</u> No |
| | Example: |
| | • Yes |

| Field Name | Definition |
|------------|------------|
| | Save |

AgileWork Properties

This AgileWork inherits the properties of the AgileWork AgileShape. For a list of these properties, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Common AgileShape Configuration Windows

This section describes the configuration windows that are shared across multiple AgileShapes.

Attaching Files to Activities at Runtime

You an attach one or more files from a process repository to an activity at runtime, so that if a participant or administrator clicks the activity in the Process Viewer, The file title is displayed with a hyperlink to the file.

To attach a file to an activity, do the following.

Prerequisites

• Set up an AgilePoint process repository in SharePoint.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileShape, and drop it on the process model.
- 3. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 4. On the Configure Attachments field, click the Ellipses button.

Instructions

- 1. On the Configure Attachments Window, click Add.
- 2. On the Get SharePoint Document Library Window, enter the SharePoint Server URL for the SharePoint site where your file attachment resides.
- 3. Modify the authentication information as required.
- 4. Click Get Document Libraries.
- 5. In the **Document Library** list, select the library where your file attachment resides.
- 6. In the Select a document list, select your file.

Browse Custom Attributes Window

Specifies a connection string from a list of shared custom attributes.

| × | |
|---|--|
| | |

1142

| D | rowse custum Attributes | | <u>_</u> | \mathbf{x} |
|---|----------------------------------|--------|-------------|--------------|
| | Configure Database Conne | ection | | |
| | Name | Value | Туре | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | List of Shared Custom Attributes | * | OK 🔀 Cancel | |
| | | | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. In one of the following windows, click **Choose**. The specific windows that display vary, depending upon the AgileShape you are using:
 - Configuration for Inserting Database Record Window
 - Configuration for Batch Inserting Database Record Window
 - Configuration for Updating Database Record(s) Window
 - Configuration for Deleting Database Record(s) Window
 - Configuration for Stored Procedure or Generic SQL Window
 - Database Queries Window
 - Database Stored Procedure Window
- 7. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

| Field Name | Definition |
|------------|-------------|
| Name | Definition: |

| Field Name | Definition |
|------------|---|
| | Specifies the name of custom attribute. |
| | Allowed Values: |
| | Read only. |
| Value | Definition: |
| | This field contains the value of the shared custom attribute. |
| | Allowed Values: |
| | Read only. |
| Туре | Definition: |
| | Specifies the data type of the shared custom attributes. |
| | Allowed Values: |
| | Read only. |

Configure Attachments Window

Specifies files to attach to an AgileShape from a process repository.

| Configure Attachments | | | |
|-----------------------|---|---|-----------------------------------|
| F | Select documents from the SharePoint document library | | |
| Attachm | ients | | |
| | Title | Attachment View | e . |
| 1 | 2011-12-27T12 | http://win-5qcd1jdlb8g:8000/ErrorTest/2011-12-27T12_3 📝 | |
| | | | Add Remove Open Open K Cancel |
| *View Att | *View Attachment in Process Viewer Page | | |

Prerequisites

• Set up an AgilePoint process repository in SharePoint.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileShape, and drop it on the process model.
- 3. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 4. On the **Configure Attachments** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition | |
|------------|--|--|
| Add | Opens the Following Window: | |
| | Get SharePoint Document Library Window | |
| | Purpose of this Window: | |

| Field Name | Definition |
|------------------------------|---|
| | Specifies files to attach to an AgileShape from a process repository. |
| Remove | <u>Function:</u> Removes a document from the Attachments list. |
| Open | <u>Function:</u> Opens a document in the Attachments list for preview. |
| Other Predecessor Activities | <u>Definition:</u> Specifies whether to display a link to the attached file in the AgilePoint Process Viewer. <u>Allowed Values:</u> <u>Selected</u> - The link is displayed in the process viewer. <u>Deselected</u> - The link is not displayed in the process viewer. <u>Default Value:</u> Selected |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Custom Mapping Code Window

Specifies custom C# code that can be used to map fields to an XML schema.

| Custom Mapping Co | le | | | × |
|--|---|----------|----|----------|
| Custom | Mapping Code | | | |
| Input Type : Output Type : Method Name : | Int32 String convertIntegerToString | | | |
| Custom Mapping Meth public String co | od code: onvertIntegerToString (Int32 value) | (| | |
| | | | | |
| | | | | |
|) Validate | | ~ | ок | 🔀 Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - SharePoint
 - Web Services
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - CAML Query
 - WSE (Web Service Extension)
 - WCF (Windows Communication Foundation)
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In one of the following fields, click the **Ellipses** button. The fields that display vary, depending upon the AgsileShape you are using. For example, **Configure**.
- 6. On one of the following windows, under the **Output Mapping** or **Request/Response** tab, click the **Ellipses** button:
 - CAML Query Builder Configuration Window Output Mapping Tab
 - WebService Configuration Window Request Tab
 - WebService Configuration Window Response Tab

- Configuration for WCF Service Window Request Tab
- Configuration for WCF Service Window Response Tab

Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options:

- **Reset All Mappings** Deletes all mappings that have been made in the Schema Mapper for this activity.
- **Remove Invalid Mappings only** Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same.
- **Cancel** Aborts opening the Schema Mapper window.
- 7. On the Schema Mapper Window, select the Custom Data Conversion option, and then click Add.

Field Definitions

| Field Name | Definition |
|-------------|--|
| Input Type | Definition: |
| | Specifies the data type of a source schema data field. |
| | This indicates that the data type of the source schema field didn't match to the destination schema field on the Schema Mapper Window. |
| | Allowed Values: |
| | Read only. |
| Output Type | Definition: |
| | Specifies the data type of a destination schema data field. |
| | This indicates that the data type of the source schema field didn't match to the destination schema field on the Schema Mapper Window. |
| | Allowed Values: |
| | Read only. |
| Method Name | Definition: |
| | Specifies the name of a method you want to create for custom data conversion. |
| | Allowed Values: |
| | Any method name. |
| | Default Value: |

| Field Name | Definition |
|----------------------------|---|
| | Populated on the basis of the data type of the selected schema fields on the Schema Mapper Window. Custom Attributes: No |
| Custom Mapping Method Code | Definition: Specifies the code for the custom mapping data conversion. <u>Allowed Values:</u> A valid code. <u>Default Value:</u> None <u>Custom Attributes:</u> No |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Enabling Sequential Approvals by Multiple Participants

This example demonstrates how to create a task with multiple approvals in an ordered sequence using the Dynamic Sequential Approval AgileShape. This example uses process attributes to loop through a specified list of approvers in sequential order. At runtime, the process does not move forward until all the identified reviewers have approved the activity in the prescribed order.

Instructional Goals

• Demonstrate how to set up sequential approvals for an activity.

Example Process: Create or Update a Human Resources Policy



Problem Statement

Create or update a human resources (HR) policy within an organization.

Business Requirements

- The process is initiated when an HR employee submits an update to the company HR policies.
- The policy must be approved by multiple reviewers in sequential order.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. On the **Premier Extension** stencil, drag the **Dynamic Sequential Approval** AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. On the Dynamic Sequential Approval AgileShape, complete the following fields.

| Field Name | Value |
|-----------------|-------------------------------|
| Approvers | \$HRApprovers |
| LoopCondition | \$MoreHRApprovers |
| Work to Perform | Your ASP.NET or InfoPath form |

- 2. On the **Premier Extension** stencil, drag the **Update Custom Attributes** AgileShape, and drop it on the process template.
- 3. On the **Configuration** field, click the **Ellipses** button.
- 4. On the Create or Update Custom Attribute window, click Add.
- 5. In the AttributeName column, enter HRApprovers.

You can also click the **Schema** button to select the **HRApprovers** attribute from your InfoPath or ASP.NET XML schema.

6. In the **Expression** column, enter a C# expression that indicates the list of approvers for your Dynamic Sequential Approval task.

| Field Name | Value |
|------------|--|
| Expression | Definition: Specifies a value that is assigned to the custom attribute at runtime by a code snippet. |
| | Allowed Values: |
| | A C# code snippet. The following rules apply: |

| Field Name | Value |
|------------|--|
| | You can specify simple expressions only. For example, assignment, call, increment, decrement, and new object expressions. |
| | The string value must be enclosed within the quotation marks. For example, "Name". |
| | • You cannot leave the Expression field empty. |
| | <u>Default Value:</u> |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | ● "True" |
| | @"AP5\John; AP5\Bob; AP5\Lily; AP5\Fred"; |

- 7. On the Create or Update Custom Attribute window, click Add.
- 8. In the AttributeName column, enter MoreHRApprovers.
- 9. In the **Expression** column, enter "True".

Database Connection Configuration Window

Creates a connection string with specified information.

| Database Connection Configura | tion X |
|-------------------------------|--|
| Configure Database D | ionnection |
| Database Authentication | |
| User: | sa 🔽 Integrated Security |
| Password : | |
| Check Heteroted Cos | , and the same standard and a strength of the standard strength of the strengt |
| Check Integrated Sec | unity to use windows authentication for database connection. |
| Database Location | |
| Database Server : | localhost |
| Database : | nubs (Retrieve database names) |
| | |
| | QK V Cancel |
| | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Database stencil.
- 3. On the Database stencil, drag any AgileShape and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. In one of the following windows, click **Create**. The specific windows that display vary, depending upon the AgileShape you are using:
 - Configuration for Inserting Database Record Window
 - Configuration for Batch Inserting Database Record Window
 - Configuration for Updating Database Record(s) Window
 - Configuration for Deleting Database Record(s) Window
 - Configuration for Stored Procedure or Generic SQL Window
 - Database Queries Window
 - Database Stored Procedure Window

Field Definitions

| Field Name | Definition |
|------------|---|
| User | Definition: The user name for the database account AgilePoint Server uses to connect to the database. <u>Allowed Values:</u> A valid user name for the database. <u>Default Value:</u> sa |
| Password | Definition: Specifies a password for the specified user. Allowed Values: A valid password. Default Value: None Custom Attributes: No |

| Field Name | Definition |
|---------------------|---|
| Integrated Security | <u>Definition:</u> When integrated security is checked, the current windows account credentials are used for authentication. <u>Allowed Values:</u> <u>Selected</u> - The windows account credentials are used for authentication automatically. <u>Deselected</u> - The user and password fields are enabled for database authentication. <u>Default Value:</u> Selected Selected |
| Database Server | Definition: Specifies a database server name that provides database services. Allowed Values: A valid database server name. Default Value: localhost Custom Attributes: No |
| Database | <u>Definition:</u> List all the database names that are available for the authenticated user. <u>Allowed Values:</u> A valid database server host name. A valid IP address. <u>Default Value:</u> pubs <u>Custom Attributes:</u> No |

Excel Services Configuration Window - Write Tab

Sets up an operation to create an Excel file.
AgileShapes

| Seneral Excel Services URL http://AP6/_vti_bin/excelservice.asmx | | | | | |
|---|-------------|----------------|---|---|---|
| Run-time | Template | http://AP6/Exc | celRuntimeTemplates/ExcelServices.xlsx | | |
| Design-ti | me Template | D:\Users\Admi | nistrator\Desktop\SharePoint\Excel\ExcelServices.xlsx | | C Browse |
| Save To | | http://AP6/Exc | celRuntimeTemplates/ | | Voverwrite if exist |
| | ExcelField1 | | (XPATH)/my:myFields/my:field1 | | ExcelField2 ExcelField3 ExcelField4 |
| | ExcelField | | ProcessValue | | ExcelField2 |
| | ExcelField2 | | (VPATH)/my/my/fields/my/field? | | ExcelField4 |
| | ExcelField6 | Rance | (XPATH)/my:myFields/my:RepeatingGroup/myfield6 | < | ExcelField6RangeType2 |
| | ExcelField6 | RangeType2 | my:myFields/my:RepeatingGroup/my.field5 | | Result Test 1 Result Test 2 |
| * | | | | | ResultTest3 ResultTest4 |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Excel Write
 - Excel Calculate
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

| Field Name | Definition |
|--------------------|-------------|
| Excel Services URL | Definition: |

| Field Name | Definition |
|-------------------|---|
| | Specifies the URL of the SharePoint Excel Services. |
| | |
| | A volid Share Point Event Services LIPI |
| | A value SharePoint Excel Services ORL. |
| | A custom attribute. |
| | To odd XML metadata upo the Ellipses button |
| | |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | URL - http://ind-01:8888/_vti_bin/ ExcelService.asmx |
| | A custom attribute - \$\{SharePointURL\}\$ \{ExcelService\} |
| Run-time Template | Definition: |
| | Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. |
| | Allowed Values: |
| | • A valid Excel template file name with the full path. |
| | A custom attributes. For example, \$ \{SharePointURL\}\$\{RuntimeTemplateLibrary \}\$\{ExcelFilename\} |
| | XML metadata |
| | To add XML metadata, use the Ellipses button. |
| | Note the following: |
| | • The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. |
| | • This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. |
| | Default Value: |

| Field Name | Definition |
|----------------------|---|
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://ind-01:8888/ExcelServicesDemo/ ExcelServices.xlsx |
| Design-time Template | Definition: |
| | Specifies the name of an Excel template file that is used at design time. |
| | Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. |
| | The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. |
| | Allowed Values: |
| | A valid Excel template file name with the full path. |
| | Note the following: |
| | The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. |
| | Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | C:\Excel\ExcelSheet\ExcelServices.xlsx |
| Save To | Definition: |
| | Specifies the location where you want to save the resulting Excel document. |
| | Allowed Values: |
| | A valid URI. |

| Field Name | Definition |
|------------------|---|
| | The URI can be the URL for a SharePoint document library, or a directory path. A custom attributes. For example, \$ \{SharePointURL\}\$\{ExcelDocLibrary\}\$ \{ExcelFilename\}. XML metadata To add XML metadata, use the Ellipses button. Default Value: None Custom Attributes: Yes |
| | Example: http://ind-01:8888/ExcelServicesDemo/\${/ my:myFields/my:SaveWrite}.xlsx |
| Named Fields Box | Definition: Specifies the named fields populated from the Excel sheet once you specify the Design-time Template file. This field is used for the mapping purpose. You must map the Excel named fields to the process values to: • Write to an Excel document. • Read from an Excel document. • Read from an Excel document. • A named field in Microsoft Excel is the name of a cell or range that is used instead of the cell's reference name. For example, empName, a named field, is easier to use instead of its cell's reference name, C21. Allowed Values: A named field selected from the list. Default Value: None Custom Attributes: No |
| Refresh | Function: Reloads the named fields from the Excel sheet to the Named Fields box. |

| Field Name | Definition |
|---------------------|--|
| | Note: You must click the Refresh button if the file specified in the Design-time Template changes. |
| Left Arrow | <u>Function:</u> Populates the selected named field from the Named Fields Box box to the ExcelField column. You can add only one named field at a time. |
| Right Arrow | <u>Function:</u> Deletes the selected row. |
| Overwrite if exists | <u>Definition:</u> Overwrites an existing file specified using the Save To field. <u>Allowed Values:</u> <u>Deselected</u> - The AgileShape doesn't overwrite the existing file. <u>Selected</u> - The AgileShape overwrites the file if it already exists. |
| | Default Value: Deselected |
| ExcelField | Definition: Specifies the Excel named field to be mapped to the process value. The mapping is performed to update the named fields in the Excel sheet. Allowed Values: A named field. Use the Left Arrow button to move the named field from the Named Fields box to the ExcelField column. Image: The value of the named field in the ExcelField column can be evaluated from a string containing a custom attribute. For example, \$\{MyExcelField\} or field\$\{year\}\$ \{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! Default Value: |
| | None <u>Custom Attributes:</u> |

| Field Name | Definition | |
|--------------|---|--|
| | Yes | |
| ProcessValue | Definition: | |
| | Specifies the process value. The value is mapped to the named field to update the named fields in the Excel sheet. | |
| | Allowed Values: | |
| | A number or a text string that can contain spaces. | |
| | This must be in accordance with the data type of the Excel named field. | |
| | • A custom attribute. | |
| | Note the following: | |
| | Once a named field is in the ExcelField column, map a named field to the process value. First, select the row, and then click the Ellipses button to select from the Select XPath from Attributes Window. | |
| | You can type a custom attribute directly in the ProcessValue column. | |
| | Note: The name of the custom attribute in the ProcessValue column can be derived from a string containing another custom attribute. For example, \$ \{MyCustomAttribute\} or customattribute \$\{year\}\$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! | |
| | Note: You can also use advance XPath expressions such as filtering. For example, (XPATH)/my:myFields/my:field2[.>32] returns all items that match the filter (field2 > 32). In addition, you can combine XPath expressions and custom attributes such as: (XPATH)/my:myFields/my:field2[.>\$ \{myCustomAttribute\}] | |
| | • Note: If you have an XPath expression that returns more than one value, there is a feature for mapping them with a named field that is defined as a one-dimensional range in the Excel document. The AgilePart fills the range with returned values from the XPath expression, but if the range does not contain enough cells for the number of values, the AgilePart doesn't fill past the range of cells in order to protect rest of the | |

| Field Name | Definition |
|------------|--|
| | worksheet and the remaining values are simply discarded. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |

- Data Binding
- Using Process Attributes

Excel Services Configuration Window - Read Tab

Specifies an operation to read and store data from an Excel file.

AgileShapes

| cel Services | Configuratio | n s Configuration | | | — × |
|--|--------------------------------------|---|--|-----------------------|---|
| General Excel Ser Run-time Design-tir | vices URL Template me Template | http://AP6/_vti_bin/excelservice.asmx http://AP6/ExcelRuntimeTemplates/\${my: D:\Users\Administrator\Desktop\SharePoi | myFields/my:SaveWrite}xdsx int\Excel\ExcelServices.xdsx | | Browse |
| Mappings Read * | ExcelField ResultTest1 | ProcessValue (XPATH)/my.myFields/my:ResultRea | Formatted d | < | Refresh ExcelField1 ExcelField2 ExcelField6Range ExcelField6Range ExcelField6Range Type2 ResultTest1 ResultTest2 ResultTest3 ResultTest4 |
| | | | | ✓ 0 | K Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the SharePoint stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Excel Read
 - Excel Calculate
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configuration** field, click the **Ellipses** button.

| Field Name | Definition |
|--------------------|-------------|
| Excel Services URL | Definition: |

| Field Name | Definition |
|-------------------|---|
| | Specifies the URL of the SharePoint Excel Services |
| | |
| | Allowed Values: |
| | A valid SharePoint Excel Services URL. |
| | A custom attribute. |
| | • XINL metadata |
| | To add XML metadata, use the Ellipses button. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | URL - http://ind-01:8888/_vti_bin/ ExcelService.asmx |
| | A custom attribute - \$\{SharePointURL\}\$ \{ExcelService\} |
| Run-time Template | Definition: |
| | Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. |
| | Allowed Values: |
| | A valid Excel template file name with the full path. |
| | A custom attributes. For example, \$ <pre>\{SharePointURL\}\$\{RuntimeTemplateLibrary <pre>\}\$\{ExcelFilename\}</pre></pre> |
| | XML metadata |
| | To add XML metadata, use the Ellipses button. |
| | Note the following: |
| | • The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. |
| | • This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. |
| | Default Value: |

| Field Name | Definition |
|----------------------|---|
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://ind-01:8888/ExcelServicesDemo/ |
| | ExcelServices.xlsx |
| Design-time Template | Definition: |
| | Specifies the name of an Excel template file that is used at design time. |
| | Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. |
| | The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. |
| | Allowed Values: |
| | A valid Excel template file name with the full path. |
| | Note the following: |
| | The Run-time Template file and the Design- time Template file must have the same named fields. This indicates that both the files must have same content. |
| | Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | C:\Excel\ExcelSheet\ExcelServices.xlsx |
| Named Fields Box | Definition: |
| | Specifies the named fields populated from the Excel sheet once you specify the Design-time Template file. |
| | This field is used for the mapping purpose. You must map the Excel named fields to the process values to: |

| Field Name | Definition |
|-------------|---|
| | Write to an Excel document. |
| | Read from an Excel document. |
| | A named field in Microsoft Excel is the name of a cell or range that is used instead of the cell's reference name. For example, empName, a named field, is easier to use instead of its cell's reference name, C21. |
| | Allowed Values: |
| | A named field selected from the list. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Refresh | <u>Function:</u> Reloads the named fields from the Excel sheet to the Named Fields box. |
| | Note: You must click the Refresh button if the file specified in the Design-time Template changes. |
| Left Arrow | Function: |
| | Populates the selected named field from the Named Fields Box box to the ExcelField column. |
| | You can add only one named field at a time. |
| Right Arrow | Function: |
| | Deletes the selected row. |
| ExcelField | Definition: |
| | Specifies the Excel named field to be mapped to the process value. The mapping is performed to read the value in the named field in the Excel sheet into a process attribute. |
| | Allowed Values: |
| | A named field. |
| | Use the Left Arrow button to move the named field from the Named Fields box to the ExcelField column. |

| Field Name | Definition |
|--------------|---|
| | Note: In the Read AgileShape, the named field cannot be a range in the Excel document but only a cell. |
| | Note: The value of the named field in the ExcelField column can be evaluated from a string containing a custom attribute. For example, \$\{MyExcelField\} or field\$\{year\}\$ \{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| ProcessValue | Definition: |
| | Specifies the name of the process attribute. The process attribute is mapped to the named field to read the value in the named field in the Excel sheet. |
| | Allowed Values: |
| | A custom attribute. |
| | Note: The name of the custom attribute in the ProcessValue column can be derived from a string containing another custom attribute. For example, \$ \{MyCustomAttribute\} or customattribute \$\{year\}\$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! |
| | Default Value: |
| | None |
| | However, when you add a row for a named field using the Left Arrow button, the ProcessValue column is populated with the Excel named field's name. |
| | Custom Attributes: |
| | Yes |
| Formatted | Function: |
| | Determines whether the formatted value of the Excel cell is read instead of the actual value. |
| | The formatted values are useful to denote numbers or dates such as in emails. |

| Field Name | Definition |
|------------|--|
| | Allowed Values: |
| | Deselected - The actual value of the cell is read. For example, 1023 |
| | Selected - The formatted value of the cell is read. For example, €1,023.34 |
| | Default Value: |
| | Deselected |
| | However, when you add a row for a named field using the Left Arrow button, by default, the Formatted check box is selected. |
| | Example: |
| | When the Formatted check box is selected: |
| | A Percentage type cell returns 15% instead of 15, where 15 is the actual value and % is the formatting code. |
| | A Currency type cell returns €1,023.34 instead of 1023.34, where 1023.34 is the actual value and € is the formatting code. |
| | This indicates that the formatting code of the Excel cell is also read along with the cell value. |

- Data Binding
- Using Process Attributes

Exchange Server Configuration Window

Integrates an AgileShape with Microsoft Exchange Server. When this connection is properly configured, the AgileShape will then insert, update, and remove tasks for the assigned participants, so that the tasks can be viewed directly from Microsoft Outlook.

| \leq | | | |
|----------------------------------|---|-----------------------|---|
| Server Url and | Authentication | | |
| Exchange 2 | 2003/2007 C Exchange 2010 | | |
| Url: | https://agilepoint:8000 | | |
| Domain: | agilepoint | | |
| Username: | user@agilepoint.com | | |
| Password: | **** | | |
| Get help for o | ont system User At Runtime configuring Microsoft Exchange Server | Mailbox access right | |
| Task Properties Import the su | on Exchange Server bject, body and priority from the folk | owing email template: | |
| Acknowledge | ment | | - |
| Category: | | | |
| -Defaults | | | |
| [CDerault] | | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Premier Extension stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Dynamic Parallel Approval
 - Dynamic Sequential Approval
 - Vote
 - Web Form
 - Workload Balance
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In the EnabledExchangeServer field, click True.

6. In the **ExchangeServer** field, click the **Ellipses** button.

| Field Name | Definition |
|-------------------------------------|---|
| Exchange 2003/2007 or Exchange 2010 | Definition: Specifies the version of your Microsoft Exchange Server. Allowed Values: |
| | Exchange 2003/2007 - Enables to configure this AgileShape to access Exchange Server 2003/2007. Exchange 2010 - Enables to configure this |
| | AgileShape to access Exchange Server 2010. |
| | Default Value: |
| | Exchange 2003/2007 |
| Url | Definition: |
| | Specifies the Exchange Server URL. |
| | Allowed Values: |
| | Exchange 2003/2007 - https://[machine name]: [port] |
| | Exchange 2010 - https://[machine name]:[port]/ EWS/Exchange.asmx |
| | Default Value: |
| | https://[MachineName]:[Port] |
| | Custom Attributes: |
| | No |
| | Example: |
| | Exchange 2003/2007 - https:// mydomain.com:2030 |
| | Exchange 2010 - https://mydomain.com:2030/ EWS/Exchange.asmx |
| Domain | Definition: |
| | The authentication domain. |
| | Allowed Values: |
| | A valid domain. |
| | Default Value: |

| Field Name | Definition |
|---------------------------------------|--|
| | None |
| | Custom Attributes: |
| | None |
| Username | Definition: |
| | The user name for an Exchange Server administrator. |
| | Allowed Values: |
| | A valid user name. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Password | Definition: |
| | The password for the authentication account. |
| | Allowed Values: |
| | A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Use AgilePoint System User at Runtime | Definition: |
| | Specifies whether to use the AgilePoint system user account (usually the same as the AgilePoint Service account) for the action when the process is running. |
| | Allowed Values: |
| | Selected - Uses the AgilePoint system user account for the action at runtime. |
| | • Deselected - Uses the credentials specified on this window at runtime. |
| | Default Value: |
| | Deselected |
| | Custom Attributes: |
| | No |

| Field Name | Definition |
|--|---|
| Import the subject, body, and priority from the following email template | <u>Definition:</u> Specifies an email template to be used for sending emails from Microsoft Outlook. <u>Allowed Values:</u> <u>A list of automatically populated email templates</u> if designed for the process. <u>None - Specifies that no email template is created within the process.</u> <u>Default Value:</u> None |
| Category | Definition: Specifies an Outlook category to associate with the task. A category provides a way to group tasks that are created using the same AgileShape. For example, if different AgileShapes have been configured to use Exchange Server, then in this case, a category acts as a keyword which uniquely identifies the tasks created using one AgileShape. Allowed Values: A text string. Default Value: <default> No</default> |
| Remove Outlook Task if workflow Task is cancelled. | Definition: Determines whether to delete the task item from the participant's task list on Microsoft Outlook when the task is cancelled in the process. Allowed Values: • Selected - Deletes the task item from Microsoft Outlook when the task is cancelled in the process. • Deselected - The task item is not updated on Microsoft Outlook even if the task is cancelled in the process. • Deselected - The task item is not updated on Microsoft Outlook even if the task is cancelled in the process. Default Value: |

| Field Name | Definition |
|------------|------------|
| | Selected |

- Data Binding
- Using Process Attributes

Get SharePoint Document Library Window

Specifies files to attach to an AgileShape from a process repository.

| t SharePoint Document Library | | | |
|---|-------------------|---|-----------------|
| Select documents from the SharePoint document library | | | |
| Connect SharePoint | | | _ |
| SharePoint Server Url: | http://mysite.com | m/ResearchLib/Forms/AllItems.aspx | Get Doc Library |
| Domain: | WIN-5QCD 1JDLE | 38G | |
| User Name: | Administrator | | |
| Password: | | | |
| Windows Authentic | ation 📃 Use | Form Based Authentication 📃 Use Form Office 365 | |
| | | | |
| | | | |
| Select a Document Lit | brary | Select a document | |
| Select a Document Lib Document Library | brary | Select a document | |
| Select a Document Lib Document Library DeleteDocumentTest | brary | Select a document Name Form 1.xml | |
| Select a Document Lit Document Library DeleteDocumentTest DotNetProxyLib | brary | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Exemplates | brary | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter | brary | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_45_01.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib | brary | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_45_01.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery | brary | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_43_40.xml 2011-12-27T12_45_01.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery Master Page Gallery | h E | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_43_0.xml | |
| Select a Document Lit Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib | brary | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_45_01.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates | h E | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_45_01.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents | h E | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_45_01.xml | € ОК |
| Select a Document Lit Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib ReportDocumentLib Reporting Templates Shared Documents Site Assets | brary | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_45_01.xml | € OK |

Prerequisites

• Set up an AgilePoint process repository in SharePoint.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileShape, and drop it on the process model.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. On the **Configure Attachments** field, click the **Ellipses** button.
- 5. On the **Configure Attachments** window, click **Add**.

| Field Name | Definition |
|----------------------|--|
| SharePoint Site URL | Definition: The URL of the SharePoint site where your file resides. <u>Allowed Values:</u> A valid SharePoint site URL. <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes <u>Example:</u> • http://[machine name]:[port]/sites/[site name] • \$\{DocUrl\} |
| Get Document Library | <u>Function:</u> Populates the dialog box with data from the specified SharePoint Document Library. |
| Domain | Definition: The authentication domain. This does not apply to Forms-Based Authentication. |
| User Name | Definition: The user name you want to associate with the action. |

| Field Name | Definition |
|--------------------------------|--|
| | Allowed Values: |
| | A user name, not including the domain. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Password | |
| | Delimition: |
| | The password for the admentication account. |
| | Allowed Values: |
| | A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Windows Authentication | Definition: |
| | Specifies whether to use Windows authentication. |
| | Allowed Values: |
| | • Selected - The connection uses Windows authentication. |
| | Deselected - The connection uses Forms authentication. |
| | Default Value: |
| | Selected |
| Use Forms Based Authentication | Definition: |
| | Specifies whether to use Forms authentication. |
| | Allowed Values: |
| | Selected - The connection uses Forms-Based Authentication. |
| | Deselected - The connection uses another specified type of authentication. |
| | It is possible to use Office 365 and Forms authentication together. |
| | Default Value: |

| Field Name | Definition |
|------------------|---|
| | Deselected |
| Use Office 365 | Definition: Specifies whether to use claims authentication for Office 365. |
| | Allowed Values: |
| | • Selected - Forms authentication for Office 365 is enabled. |
| | • Deselected -Forms authentication for Office 365 is disabled. |
| | It is possible to use Office 365 and Forms authentication together. |
| | Default Value: |
| | Deselected |
| Document Library | Function: |
| | Displays a list of document libraries on the selected SharePoint site. Select a document library to display the list of stored documents. |
| Name | Function: |
| | Displays a list of documents in the selected document library. Select a document to add it as an attachment. |

- Data Binding
- Using Process Attributes

Logging on to SharePoint from a Process Template or AgileShape

For process templates and AgileShapes that uses data from SharePoint, the first time you access SharePoint during your AgilePoint Envision user session, you must link it to a SharePoint list.

Instructions

1. On the **Connect to SharePoint** dialog box, complete the fields to specify the user account you want to use to connect to SharePoint, and then click **OK**.

These credentials will be saved and used each time you open the process model.

| Connect to SharePoint | | |
|---|---|--|
| Connect to Sha | rePoint Site | |
| Windows Authentica | ation | |
| | Current User (AP14\Administrator) Custom User | |
| Claims Authentication | on | |
| □ F □ C ▼ F | Form Based Authentication Office 365 Federated Authentication | |
| User Information Domain: | | |
| Username: | Administrator@agilityclouds.com | |
| Password: | | |
| Fed Auth Url: | https://fs.agilityclouds.com | |
| | V OK Cancel | |

| Field Name | Definition |
|------------------------|--|
| Windows Authentication | Definition: Specifies whether, and what type, of Windows Authentication is used to connect to SharePoint. |
| Claims Authentication | <u>Definition:</u> Specifies whether to use Claims authentication, and what type of Claims authentication, to use to connect to SharePoint. <u>Allowed Values:</u> If this option is selected, the following types of Claims Authentication are available: Form Based Authentication - Activates Forms based authentication using a custom membership provider to connect to an on-premises SharePoint environment. Office 365 - Activates Claims authentication to connect to SharePoint in an Office 365 |

| Field Name | Definition | |
|--------------|--|--|
| | environment. This option can be used side-by- side with on-premises SharePoint. | |
| | Federated Authentication - Activates Federated authentication to connect to SharePoint for example, ADFS. | |
| | • Note: Out of the box, AgilePoint supports ADFS authentication. If you want to use your own authentication provider, see Federated Authentication Example in the Documentation Library. | |
| | Default Value: | |
| | Deselected | |
| Domain | Definition: | |
| | The authentication domain. | |
| | This does not apply to Forms-Based Authentication. | |
| Username | Definition: | |
| | The user ID of the SharePoint authentication account. | |
| | Allowed Values: | |
| | A valid user name. | |
| | Default Value: | |
| | None | |
| | Custom Attributes: | |
| | No | |
| Password | Definition: | |
| | The password for the authentication account. | |
| | Allowed Values: | |
| | A valid password. | |
| | Default Value: | |
| | None | |
| | Custom Attributes: | |
| | Yes | |
| Fed Auth Url | Definition: | |

| Field Name | Definition |
|------------|--|
| | The URI of the federated authentication provider. This provider issues security tokens for federated authentication. |
| | Allowed Values: |
| | A valid federated authentication provider URI. |
| | <u>Default Value:</u> None |
| | Custom Attributes: No |
| | Example: https://fs.agilityclouds.com |

Login Window

Specifies the authentication credentials to run a web service method at runtime.

| Login 🛛 🗙 |
|---|
| Login |
| Please enter a valid credential to access this web service: |
| Use Form Based Authentication |
| Domain: |
| Username: |
| Password: |
| ✓ Use AgilePoint system user at runtime |
| 🥪 OK 🔀 Cancel |

Prerequisites

• A valid Web Service — for example a live, valid WSDL file.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Windows Communication Foundation
 - Web Service
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Credential** field, click the **Ellipses** button.

| Field Name | Definition |
|---------------------------------------|--|
| Domain | <u>Definition:</u> The authentication domain. This does not apply to Forms-Based Authentication. |
| User Name | Definition: The user name you want to associate with the action. <u>Allowed Values:</u> A user name, not including the domain. <u>Default Value:</u> None <u>Custom Attributes:</u> No |
| Password | Definition: The password for the authentication account. <u>Allowed Values:</u> A valid password. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |
| Use AgilePoint System User at Runtime | Definition: |

| Field Name | Definition |
|------------|--|
| | Specifies whether to use the AgilePoint system user account (usually the same as the AgilePoint Service account) for the action when the process is running. |
| | Allowed Values: |
| | Selected - Uses the AgilePoint system user account for the action at runtime. |
| | Deselected - Uses the credentials specified on this window at runtime. |
| | Default Value: |
| | Deselected |
| | Custom Attributes: |
| | No |

Log on to AgilePoint Server

Specifies the logon credentials to connect to an AgilePoint Server.

| Connecting to Server | | |
|---|-------------------------------------|--|
| | ecting to Server | |
| Server Url: | http://agilepoint3/AgilePointServer | |
| Ogon as current user (AD2008R2\Administrator) | | |
| Logon as the following user: | | |
| -User Information | n | |
| Domain: | AD2008R2 | |
| Username: | Administrator | |
| Password: | | |
| | ✓ OK Cancel | |

Navigation

1. In AgilePoint Envision, open a process template.

- 2. Navigate to the **Database** stencil.
- 3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. In one of the following windows, click **Choose**. The specific windows that display vary, depending upon the AgileShape you are using:
 - Configuration for Inserting Database Record Window
 - Configuration for Batch Inserting Database Record Window
 - Configuration for Updating Database Record(s) Window
 - Configuration for Deleting Database Record(s) Window
 - Configuration for Stored Procedure or Generic SQL Window
 - Database Queries Window
 - Database Stored Procedure Window

| Field Name | Definition |
|-----------------------------|--|
| Server Url | Definition: |
| | This is the URL of the Process Engine (AgilePoint Server). |
| | Whenever a new URL is used it is added to the drop-down list-box, so next time it is needed, it is easier to select than reenter it. |
| Windows Authentication | Definition: |
| | Specifies whether, and what type, of Windows Authentication is used to connect to SharePoint. |
| Logon as the following user | Definition: |
| | Authenticates using the credentials you specify. |
| | Allowed Values: |
| | • Selected - The domain, username and password fields are enabled to fetch the input from an user. |
| | • Deselected - Specifies that the logon as current user (AD2008R2\Administrator) option is enabled. |
| | Default Value: |
| | Deselected |

| Field Name | Definition |
|------------|---|
| Domain | <u>Definition:</u> The authentication domain. This does not apply to Forms-Based Authentication. |
| User Name | Definition: The user name you want to associate with the action. Allowed Values: A user name, not including the domain. Default Value: None Custom Attributes: No |
| Password | Definition: The password for the authentication account. <u>Allowed Values:</u> A valid password. <u>Default Value:</u> None <u>Custom Attributes:</u> Yes |

Schema Mapper Window

Maps SharePoint fields, form fields, web methods, or other input sources to an XML schema.

| chema Mapper | | 2 |
|--|----------|------------------|
| data row file fileLeafRef temCount | | myFields |
| | Auto Map | |
| Data Conversion | | |
| C Default Data Conversion | | |
| C Custom Data Conversion | | |
| | Add | i Edit. 💶 Delete |
| L | | V OK X Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to one of the following stencils:
 - SharePoint
 - Web Services
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - CAML Query
 - WSE (Web Service Extension)
 - WCF (Windows Communication Foundation)
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. In one of the following fields, click the **Ellipses** button. The fields that display vary, depending upon the AgsileShape you are using. For example, **Configure**.
- 6. On one of the following windows, under the **Output Mapping** or **Request/Response** tab, click the **Ellipses** button:
 - CAML Query Builder Configuration Window Output Mapping Tab
 - WebService Configuration Window Request Tab
 - WebService Configuration Window Response Tab
 - Configuration for WCF Service Window Request Tab

Configuration for WCF Service Window - Response Tab

Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options:

- **Reset All Mappings** Deletes all mappings that have been made in the Schema Mapper for this activity.
- **Remove Invalid Mappings only** Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same.
- **Cancel** Aborts opening the Schema Mapper window.

| Field Name | Definition |
|---|--|
| Field Name Mapping Schemas for Request/Response and Process Model | Definition Definition: Maps the schemas for a service's request or response and the AgilePoint schema: CAML query schema for a response and AgilePoint schema WSE service schema for a request/response and the AgilePoint schema WCF service schema for a request/response and the AgilePoint schema WCF service schema for a request/response and the AgilePoint schema The source and the destination schemas are displayed in a tree-view structure in the left and right panes. Allowed Values: Read only - However, the drag and drop operations are supported to map the schemas. Drag a data node from the source schema pane to the destination schema pane: Green line - The data type of source and destination nodes matches. Blue line - The data type of source and destination nodes doesn't match. The data conversion is required to map the schemas. |
| | Red line - Specifies that the custom data conversion is required. |
| Automap | <u>Function:</u> Maps all fields in the data source and the process schema that have the same name. |
| No Data Conversion needed | Definition: |

| Field Name | Definition |
|-------------------------|--|
| | Determines whether the data conversion is not required between the source and the destination schema data fields. |
| | Allowed Values: |
| | Deselected - Data conversion is required between the schema data fields. |
| | • Selected - Data conversion is not required between the schema data fields. |
| | Default Value: |
| | None |
| | However, the No Data Conversion needed option is selected if the data type of the source and destination schema data fields matches. |
| Default Data Conversion | Definition: |
| | Determines whether the default data conversion is required between the source and the destination schema fields. |
| | Allowed Values: |
| | • Deselected - Default data conversion is not required between the schema data fields. |
| | • Selected - Default data conversion is required between the schema data fields. |
| | Default Value: |
| | None |
| | However, the Default Data Conversion option is selected if the data type of the source and destination schema fields doesn't match. |
| Custom Data Conversion | Definition: |
| | Determines whether the custom data conversion is required. You can create your own data conversion types by using the Add button. |
| | Allowed Values: |
| | Deselected - Custom data conversion is not required. |
| | • Selected - Custom data conversion is required. |
| | Default Value: |
| | Deselected |
| Add | Opens the Following Window: |

| Field Name | Definition |
|------------|--|
| | Custom Mapping Code Window <u>Purpose of this Window:</u> Specifies custom C# code that can be used to map fields to an XML schema. |
| Edit | Opens the Following Window: Custom Mapping Code Window Purpose of this Window: Specifies custom C# code that can be used to map fields to an XML schema. |
| Delete | Function: Deletes the selected custom data conversion from the list. |

- Data Binding
- Using Process Attributes

Select User Window

This window specifies the user to select required user name from the list.

| elect User | | × |
|--|---|-----------------|
| Select User | | |
| Enable wildcard in finding us Please ensure the name doesn Please Select User(s) | er name (e.g. *name), and press 'Search'. 't contain ''('' or '')''. | <u> </u> Search |
| Name | Description | T |
| | | 🛩 ок |
| | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Active Directory stencil.
- 3. On the Active Directory stencil, drag any of the following AgileShape, and drop it on the process template:
 - Update User
 - Remove User
 - Disable User
 - Remove Group
 - Remove User From Group
 - Retrieve User Information
 - Add User To Group
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On one of the following fields, click the **Ellipses** button:
 - UserInfo
 - UserNames

- RemoveGroup
- RemoveUserFromGroup
- AddUserToGroup
- 6. On the respective configuration window, click the **Search** button. The specific windows that display vary, depending upon the AgileShape you are using.

Field Definitions

| Field Name | Definition |
|---------------|--|
| User Name box | Definition: Specifies the criteria for searching the user in an Active Directory. |
| | Allowed Values: A single line of text. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> Yes |
| Search | Function: Performs search operation based on the specified criteria. |
| Name | Definition: List all the user name which satisfies the specified criteria. <u>Allowed Values:</u> Read only. |
| Description | Definition: Displays description of corresponding user name. <u>Allowed Values:</u> Read only. |

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes |
|------------------------------|
| Select XPath from Attributes |
| Schema Process Attributes |
| myFields mpName (String) |
| XPath: DataType: |
| 🥪 OK 🔀 Cancel |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the **Ellipses** button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| OK | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |
Common Configuration Tasks

- Data Binding
- Using Process Attributes

Set Context Properties Window

Specifies the connection details for Active Directory.

| Set Context Properties Set Context Properties | × |
|---|--|
| Context Properties | |
| Context Domain (e.g. abc.xyz.com): | Directory Type: |
| Domain\User Name: | Directory Address (blank for default): |
| Password: | Directory Port (389 for default): 389 |
| Secure Connection | |
| 🔲 Use AgilePoint system user at runtime | |
| *You may enter Custom Attribute Nam | ie as \${} |
| | 🥪 OK 🔀 Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Active Directory stencil.
- 3. On the Active Directory stencil, drag the Create User AgileShape, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the **Context** field, click the **Ellipses** button.

Field Definitions

| Field Name | Definition |
|-----------------|---|
| Context Domain | Definition: The domain name for the Active Directory. Allowed Values: A valid domain. Default Value: None Custom Attributes: Yes |
| Domain\Username | Definition: The authentication domain and username of the account to be used to create a group in the Active Directory at run time. Allowed Values: A valid domain and user name. Default Value: None Custom Attributes: Yes Example: mydomain\jsmith |
| Password | Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes |
| Directory Type | Definition: |

| Field Name | Definition | | | |
|-------------------|---|--|--|--|
| | Specifies the Active Directory protocol. At this time, only LDAP is supported. | | | |
| | Allowed Values: | | | |
| | • LDAP - Specifies to use the LDAP protocol for accessing Active Directory. | | | |
| | Default Value: | | | |
| | LDAP | | | |
| | Custom Attributes: | | | |
| | No | | | |
| Directory Address | Definition: | | | |
| | Specifies a host address of the Active Directory. | | | |
| | Allowed Values: | | | |
| | IP address - The IP address of the Active Directory. | | | |
| | IP address/[relative distinguished name (RDN)] - The IP address of the Active Directory with the container name (CN), organizational unit (OU), or both for the user. | | | |
| | Default Value: | | | |
| | None | | | |
| | Custom Attributes: | | | |
| | Yes | | | |
| | Example: | | | |
| | • 211.325.5.3 | | | |
| | • 211.325.5.3/OU=MyGroup | | | |
| Directory Port | Definition: | | | |
| | Specifies a port number of the Active Directory. By default, it is In the case of a remote domain, the port should match the port of the remote domain server. | | | |
| | Allowed Values: | | | |
| | A valid port number. | | | |
| | Default Value: | | | |
| | 389 | | | |
| | Custom Attributes: | | | |
| | Yes | | | |

| Field Name | Definition | |
|---------------------------------------|--|--|
| Secure Connection | Definition: | |
| | Specifies to connect to Active Directory using a secure (SSL) connection. | |
| | In this version, SSL is not supported; it will be an enhancement in the future. | |
| | Allowed Values: | |
| | • Deselected - Specifies to connect to Active Directory using an unsecured connection. | |
| | Default Value: | |
| | Deselected | |
| | Custom Attributes: | |
| | No | |
| Use AgilePoint System User at Runtime | Definition: | |
| | Specifies whether to use the AgilePoint system user account (usually the same as the AgilePoint Service account) for the action when the process is running. | |
| | Allowed Values: | |
| | Selected - Uses the AgilePoint system user account for the action at runtime. | |
| | • Deselected - Uses the credentials specified on this window at runtime. | |
| | Default Value: | |
| | Deselected | |
| | Custom Attributes: | |
| | No | |

Setting Up Custom Classes in C# and Visual Basic

The Managed Code C# and Managed Code VB AgileParts allow developers to add custom classes to their code snippets. To set up support for custom classes, do the following.

Instructions

- 1. Create a custom assembly as a class library using managed code C# or managed code VB.
- 2. Deploy the custom assembly to the GAC on all AgilePoint Server and Envision machines.
- 3. In a text editor, create a new file.
- 4. In the text file, paste the following:

```
<?xml version="1.0" encoding="utf-8" ?>
```

```
<configuration>
<assemblies>
<Assembly>Infragistics2.WebUI.Misc.v8.1,
Version=8.1.20081.1000, Culture=neutral,
PublicKeyToken=7dd5c3163f2cd0cb
</Assembly>
</assemblies>
</configuration>
```

- 5. Replace the information in the **<Assembly>** element with the correct information for your assembly. You can add as many Assembly nodes as required.
- 6. Save the file with the name **CustomAssembly.xml**.
- 7. Place a copy of the file in all of the following locations:
 - The root installation folder for AgilePoint Server.
 - The GAC of the AgilePoint Server machine.

This information refers to the assembly **Infragistics2.WebUI.Misc.v8.1.dll**, and not to the CustomAssembly.xml file.

- The root installation folder for each AgilePoint Envision instance where the custom classes will be used.
- The GAC of each AgilePoint Envision machine.

This information refers to the assembly **Infragistics2.WebUI.Misc.v8.1.dll**, and not to the CustomAssembly.xml file.

User Defined Properties Window

Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable-like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want.

| User Defined Properties | | | × |
|-------------------------|---------------------------------|-------------|------------|
| User Defined Prope | erties | | |
| Name | Z Value | Туре | Schema |
| ManagerApproval | \${/pd:myFields/pd:ManagerAppro | val Boolean | |
| | | | Add Remove |
| | | | Remove All |
| | | | ✓ OK |
| 1 | | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Premier Extension** stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Dynamic Parallel Approval
 - Dynamic Sequential Approval
 - Process Adaptation
 - Vote
 - Web Form
 - Workload Balance
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the UserDefinedProperties field, click the Ellipses button.

Field Definitions

| Field Name | Definition |
|------------|---|
| Add | <u>Function:</u> Creates a row where you can specify a ClientData property. |

| Field Name | Definition | | |
|------------|--|--|--|
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XM | | |
| | schema for your process. To activate the Schema button, select the row you want. | | |
| Name | Definition: Specifies the name for the ClientData. Image: Construct of the clientData property is used to store data related to the AgileWork AgileShapes. This is like defining a variable to store specific values. Allowed Values: A text string with spaces. Default Value: None | | |
| | Custom Attributes: Yes | | |
| Value | Definition: The value for the ClientData variable. Allowed Values: A number or a text string that can contain spaces. You can dynamically set the value for the variable by using XML metadata. Default Value: None Custom Attributes: Yes | | |
| Туре | Definition: Determines the data type for the ClientData variable. <u>Allowed Values:</u> Integer | | |

| Field Name | Definition | | | |
|------------|---|--|--|--|
| | String | | | |
| | • Float | | | |
| | Decimal | | | |
| | DateTime | | | |
| | • Boolean | | | |
| | Default Value: | | | |
| | None | | | |
| Remove | Function: | | | |
| | Deletes the selected row from the user defined properties list. | | | |
| | | | | |
| | Function: | | | |
| | Deletes all rows from the user defined properties list. | | | |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Web Service Explorer Window

Finds and selects a web service using the Universal Description Discovery and Integration (UDDI) standard.

| Web Service Explorer | | × |
|--|--|---|
| Web Service Explorer | | |
| Authentication | UDDI Server URL http://uddi.microsoft.com/inquire.asmx | |
| Windows Authentication | http://uddi.microsoft.com/inquire.asmx | |
| C None | Searching for wild card character is '%' (%Sample%) | |
| | % | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| 阈 Search | 😔 OK 🔀 Cancel | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the Web Services stencil.
- 3. Drag one of the following AgileShapes, and drop it on the process model:
 - Web Service Extension
 - Web Service
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the **Configure** field, click the **Ellipses** button.
- 6. On the configuration window, click uddi:

Field Definitions

| Field Name | Definition |
|------------------------|-------------|
| Windows Authentication | Definition: |

| Field Name | Definition |
|-----------------|---|
| | Specifies whether to use the Windows system user credentials to access the UDDI Server. |
| | Allowed Values: |
| | Windows Authentication - Windows authentication is used. |
| | None - User authentication is not required to access the UDDI Server. |
| | <u>Default Value:</u> |
| | Windows |
| UDDI Server URL | Definition: Specifies the UDDI server URL where your web |
| | service or WCF service is registered. |
| | Allowed Values: |
| | A valid UDDI server URL. |
| | Default Value: |
| | http://uddi.microsoft.com/inquire.asmx |
| | Custom Attributes: |
| | No |
| Searching for | Definition: |
| | Specifies the web service or WCF service you want to search on the UDDI server using the filter expression. |
| | Allowed Values: |
| | A text string used to filter the results. You can use % as a wildcard. |
| | <u>Default Value:</u> |
| | % |
| | Custom Attributes: |
| | No |
| Search | Function: |
| | Locates the specified web service or WCF service on the UDDI server. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Yammer Credentials Window

Specifies the unique identifiers for the Yammer application.

| ٨ | Yamn | ner Credential | S | | x |
|--------------------------|----------------|----------------|------|----------|---|
| Y\ Yammer Creden | ials | | | | |
| Select Global AppSetting | s Key | | | | |
| Application Name : | DashBoard | | | ~ | |
| Configuration Key : | Agilepoint | | | ~ | |
| Network Name : | gilePoint, Inc | | | | |
| | | | 쓪 ок | 🔀 Cancel | |

Prerequisites

• You must set up an Enterprise Social Token for the Yammer application.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the **Yammer** stencil.
- 3. On the Yammer stencil, drag the following AgileShape, and drop it on the process template.
 - Post Message
 - Reply Message
 - Post Attachment
 - Invite User
 - Create User

- Update User
- Delete User
- 4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 5. On the Credential field, click the Ellipses button.
- 6. On the **Connecting to Server** window, logon as a registered user to connect to the AgilePoint Server.

Field Definitions

| Field Name | Definition |
|-------------------|--|
| Application Name | <u>Definition:</u> Specifies a unique name for your application. This key can represent any identifying value for your application. <u>Allowed Values:</u> An alphanumeric string. <u>Default Value:</u> |
| | None |
| Configuration Key | Definition: Specifies the unique authentication key for your application. This key is associated with an your administrator user account. This key can represent any identifying value for your application. Allowed Values: An alphanumeric string. Default Value: None Custom Attributes: No |

Menu Options Overview

This section provides an overview of AgilePoint Envision's menu commands. Since AgilePoint Envision is a Microsoft Visio add-in, most of the available menu commands in AgilePoint Envision function the same as in Microsoft Visio. This section only covers menu items that are unique to AgilePoint Envision.

File Menu Options

The following menu options are available from the File menu in AgilePoint Envision.

File > New > Generic

This option allows the user to create a new process model based on the Generic process template.

File > New > Microsoft InfoPath

This option allows the user to create a new process model based on the Microsoft InfoPath process template.

After selecting this option, you will be asked to choose the InfoPath form that will be associated with the process model.

File > New > Microsoft SPDoc

This option allows the user to create a new process model based on the Microsoft SharePoint Document Library process template. After selection this option, you will be asked to choose the SharePoint Document Library that the process model will be associated with.

| Select SharePoint Document Library | | | | |
|------------------------------------|------------|----------------|---|--|
| Document Library Url : | | | | |
| | | | ▼ | |
| Search SharePoint Site | | | | |
| | <u>O</u> K | <u>C</u> ancel | | |

If you don't know the exact URL of the Document Library, you can click the **Search SharePoint Site** link to select the Document Library.

| Select Sha | Select SharePoint Document Library | | | | | | | |
|------------|------------------------------------|---------|------------|--|---------------|----|---|---------|
| Documer | nt Library | y Url : | | | | | | |
| | | | | | | | | - |
| Site | e Url : | http:// | | | | | • | Connect |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | <u>o</u> ĸ | | <u>C</u> ance | el | | |

Type or select the SharePoint Site URL and click Connect. The directories available within that site appear.

| Select SharePoint | Document Libra ry | |
|-------------------|--|----------|
| Document Library | Url : | |
| http://vserver7/s | sites/AscentnFinancialSite/Financial Control Doc Lib | • |
| Site Url : | http://localhost | Connect |
| 🗄 🕀 🔁 Sales | | _ |
| 📄 🧔 Sites | | |
| 🖻 🛞 A | scentn Financial Site | |
| | 🔓 ExpenseReport_InfoPath | |
| | 🖻 Financial Control Doc Lib | |
| | 🖥 List Template Gallery | |
| | 🔋 Restored List A | |
| | 🔋 Shared Documents | |
| | 🔋 Site Template Gallery | |
| | 🔋 Web Part Gallery | |
| 📃 🗄 🚳 Strate | eqy | • |
| | | |
| | OK Cancel | |
| | | |

Click on the Document Library for which you would like to associate with the process model and click OK.

File > New > Microsoft SPList

This option allows the user to create a new process model based on the Microsoft SharePoint List template.

After selection this option, you will be asked to choose the SharePoint List that the process model will be associated with.

| Select SharePoint List | | | | | |
|------------------------|------------|----------------|--|---|--|
| List Url : | | | | | |
| I | | | | • | |
| Search SharePoint Site | | | | | |
| | <u>O</u> K | <u>C</u> ancel | | | |

If you don't know the exact URL of the List, you can click the Search SharePoint Site link to select the List.

| Sel | ect SharePoin | t List | | |
|-----|---------------|--------------------|----------------|---------|
| | List Url : | | | |
| | | | | ▼ |
| | Site Url : | http://Demo3:8000/ | | Connect |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | <u></u> | <u>C</u> ancel | |

Type or select the SharePoint Site URL and click **Connect**. The directories available within that site appear.

| Select SharePoint List List Url : http://demo3:8000/Lists/New Employee Training | | • |
|--|----------------|---------|
| Site Url : http://Demo3:8000/ | _ | Ionnect |
| Announcements Announcements Budget Request By Smart Form Calendar Links New Employee Training QuickDemo Gaproting Metadata Smart Form Budget Request | <u>C</u> ancel | |

File > Validate Process

This option validates the contents of a process template and can be used to detect certain types of common errors, such as incorrectly connected AgileShapes. After choosing this option, the validation dialog will be displayed.

| Validate Process | |
|---|----------|
| Progress : | |
| | |
| Press button 'Validate' to start process validation | 4 |
| | |
| | _ |
| ValidateClose | |

Click Validate to begin the validation process.

If the process template contains an error, a message will appear with information about the error and Envision will also show the source of the error highlighted in the process template so that you can correct it.

| B I <u>U</u> ≣ <mark>Validate</mark> | Process | |
|---------------------------------------|--|---|
| Progress | R. | |
| Connect Manager | ion 'Dynamic connector.125' does Validate | not link to activities properly. |
| Approval | IF * Total > 5000 - | Previous Time Spa Busine Lengt |
| FO Approval | 5 | Time l Advance Application |

Note: The process model is automatically validated when you deploy the process model to AgilePoint Server.

File > Update Server > Check out Process

<u>(</u>])

This option allows you to connect to an AgilePoint Server directly from AgilePoint Envision, and then check out the currently opened process model. This prevents more than one user from updating the same process template at the same time.

| Con | Connecting to Server | | | |
|-----|----------------------|--------------------------------------|--|--|
| | Server Url : | http://localhost:81/AgilePointServer | | |
| | O Logon as cur | rent user (Administrator) | | |
| | Correct Logon as the | following user : | | |
| | -User Information | ı — | | |
| | Domain : | VSERVER7 | | |
| | Username : | Administrator | | |
| | Password : | *** | | |
| | 1 | OK Cancel | | |

If the process template has not been previously deployed to the AgilePoint Server, the command will fail.



File > Update Server > Create or Checkin, and Release Process

This option allows you to connect to an AgilePoint Server directly from AgilePoint Envision and deploy the currently opened process model to the AgilePoint Server. To successfully deploy a process template to an AgilePoint Server, the process template must be valid (i.e. no invalid AgileShape connections, etc.), and any custom AgilePoint modules (e.g. AgileParts, AgileWorks, AgileStubs, etc.) used in the process template must already be deployed to the AgilePoint Server. After selecting this option, the Connecting to Server window appears where you will first need to connect to an AgilePoint Server.

| Con | Connecting to Server | | | |
|-----|----------------------|--------------------------------------|--|--|
| | Server Url : | http://localhost:81/AgilePointServer | | |
| | O Logon as cur | rent user (Administrator) | | |
| | • Logon as the | following user : | | |
| | | 1 | | |
| | Domain : | VSERVER7 | | |
| | Username : | Administrator | | |
| | Password : | **** | | |
| | | OK Cancel | | |

You will need to specify the URL location of the AgilePoint Server, and the Windows Authentication credentials that will be used to access the AgilePoint Server. The Logon as current user option will use your own Windows user account information to access the AgilePoint Server, or you can specify the Domain, Username, and Password of a different user account (e.g. you could use the credentials of the user account that the AgilePoint Server is configured to use as the System User).

After you have successfully connected to an AgilePoint Server, you may specify a version number, comment, and release schedule for the process model.

| Update Process Template | × |
|---------------------------------------|---------------------------|
| Update Server with Process Inform | mation |
| Process Template Name : TravelRequest | Process |
| Current Version : 1.04 | New Version : 1.05 |
| Comment : | (dd.dd, eg. 10.02) |
| | |
| Release Option | |
| C Release It Later | |
| C Release Now | |
| | |
| ✓ | <u>O</u> K <u>C</u> ancel |

If you are deploying a Microsoft Info process template, you will see a dialog similar to the one below.

| Jpdate Process Template |
|--|
| Process Template Name : TravelRequest |
| Current Version : 1.0 New Version : 1.01 |
| (dd.dd, eg. 10.02) Comment : |
| |
| Release Option |
| Release Now |
| ○ Release On 6/29/2009 💌 |
| Publish InfoPath Form to SharePoint Service or SharePoint Portal |
| Service State Cancel |

The check box at the bottom of the window allows you to publish the process template's associated InfoPath form (to Microsoft SharePoint) directly from AgilePoint Envision. If you check the check box, you will see a window similar to the one below:

| File Name : | ExpenseReport.xsn |
|---------------|---|
| arePoint Forr | n Library |
| URL : | http://win2003-dev-en1/sites/AscentnFinancialSite |
| Title : | ExpenseReport_InfoPath |
| Description : | |

Enter the URL of the SharePoint site where you want this InfoPath form to be published and the Title for the Form Library name. Then click **OK** to publish the form to SharePoint. After clicking the final **OK** button (in either of the above windows), the process template will be validated. If validation succeeds, the process template will be deployed to the specified AgilePoint Server. If validation fails, the process template will not be deployed and you will need to fix any errors in the process template (and/or deploy any custom modules to the AgilePoint Server) before deploying the process template.

File > Export & Import > Save As Deploying File(xml)

This option converts your current process template to an XML file that can be used to deploy the process to an AgilePoint Server using AgilePoint Enterprise Manager (instead of using AgilePoint Envision). This method is most often used as an alternative in cases where AgilePoint Envision cannot connect to AgilePoint Server to deploy a process template. This method involves using AgilePoint Envision to convert your current process template to an XML file that can be deployed to AgilePoint Server using AgilePoint Enterprise Manager (instead of using AgilePoint Envision).

File > Export & Import > Convert To ... > Generic

This option converts your current process model's underlying process template to a Generic process template. This option is not available when working with a process model based on the Generic process template.

File > Export & Import > Convert To ... > SharePoint Document

This option converts your current process model's underlying process template to a Microsoft SPDoc process template. This option is not available when working with a process model based on the Microsoft SPDoc process template.

File > Export & Import > Convert To ... > InfoPath

This option converts your current process model's underlying process template to a Microsoft InfoPath process template. This option is not available when working with a process model based on the Microsoft InfoPath process template.

File > Export & Import > Generate Report

This option allows you to create a HTML-formatted report for a process template. The generated report can be viewed in a Web browser. After activating this command, select the folder where you want to save the report and then click **OK**. The process definition and process diagram will be converted to HTM and GIF files, and saved to the selected folder.

File > Export & Import > Import Existing Visio file

This option creates a new AgilePoint Envision Generic process model based upon an existing Microsoft Visio diagram. The Visio shapes, connectors, etc. that are imported from the Visio diagram can then be converted into AgileShapes in order to create a working process model.

File > Export & Import > Import Process Template XML

This option allows for the Process Template XML to be imported from AgilePoint Enterprise Manager 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.

File > Process Simulation

This option allows you to run a simulation of how a process model will behave at runtime.

File > Extend AgilePoint > Register AgilePart

This option registers a custom AgilePart component with AgilePoint Envision. Custom AgilePart components must be registered before they can be used in a process template. After selecting this option, the AgilePart Registration window appears.

| AgilePart Registration | | | | | | |
|------------------------|--|---|-----|----------|--|--|
| AgilePart Name | Microsoft SPS Integratio | n | | Download | | |
| Assembly | Ascentn.Workflow.SPSA PublicKeyToken=a52665 | | Add | | | |
| Methods : | Methods : Method Description | | | | | |
| | CreateFormLibrary | Create InfoPath form library. | | | | |
| | MoveFileBySpecifyFold | Move file associated with the process to speci | | | | |
| | WordDocToPDF | Convert Microsoft Word Document to PDF | | | | |
| | CopyFiles | Copy file(s) from source folder to target folde | | | | |
| | CreateFolder | Create a new folder by specifying the site url | | | | |
| | CreateSite | Create a new site in SharePoint portal | | | | |
| | UpdateInfoPathFile | Update InfoPath File in SharePoint | | | | |
| | AddLinkPortalListing | Add Document Link to Portal Listing | | | | |
| | DownloadFilesFromSP5 | Download files from SharePoint Server to loca | - | Close | | |
| | | | | | | |

To download and register an AgilePart that has already deployed to AgilePoint Server:

- 1. Click the **Download** button.
- 2. Connect to the AgilePoint Server.
- 3. Select an AgilePart that is available on the server and click **OK**.

Note: If the same AgilePart (or a previous version of the same AgilePart) was already registered, you will be prompted to overwrite it or cancel the download.

If a previous version of the assembly was already loaded into memory by AgilePoint Server, any changes to the assembly would not take effect until after AgilePoint Server is restarted. Modifying any file in the bin directory will automatically cause IIS to restart AgilePoint Server.

However, modifying the assembly will not automatically cause a restart, so if you want any DLL changes to take effect immediately, you would need to restart IIS or the AgilePoint Server.

To register an AgilePart DLL that is located on your computer's file system:

1. Click the Add button.

(!)

2. Select the appropriate DLL file and click **Open**.

Once an AgilePart assembly has been registered, the AgilePart and its methods will be displayed in the AgilePart Registration window and they can be used in process templates.

| AgilePart Name | Put name here | | • | Download |
|----------------|--|--|---|----------|
| Assembly | FTPAgilePart, Versi PublicKeyToken=9a | on=1.0.0.0, Culture=neutral, 6af6bebbdaee25 | | Add |
| Methods : | Method | Description | _ | Remove |
| | FTPUploadFile | This is a sample AgilePart that utilizes FTP pro | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

File > Extend AgilePoint > Register AgileWork

This command registers a custom AgileWork component with AgilePoint Envision. Custom AgileWork components must be registered before they can be used in a process template. After selecting this option, the registration dialog will be displayed.

| AgileWork Registration | |
|------------------------|--------|
| Registered AgileWorks | |
| | |
| | Add |
| | Remove |
| | |
| | |
| | |
| | |
| | Close |
| | |

To register an AgileWork DLL that is located on your computer's file system:

- 1. Click the **Add** button.
- 2. Select the appropriate DLL file and click **Open**.

Once an AgileWork assembly has been registered, the AgileWork and its methods will be displayed in the AgileWork Registration window and they can be used in process templates.

Registering an AgileExtender in Envision

This command registers a custom AgileExtender component with AgilePoint Envision. Custom AgileExtender components must be registered before they can be used in a process template. After selecting this option, the registration dialog will be displayed.

- 1. In Envision, click **File > Extend AgilePoint > Register AgileExtender**.
- 2. On the **AgileExtender Registration** dialog box, click **Add**.
- 3. Select the DLL file for the AgileExtender , and click **Open**.

Once an AgileExtender assembly has been registered, the AgileExtender and its methods will be displayed in the AgileExtender Registration dialog, and the methods can be used in process templates.

File > InfoPath > Publish InfoPath to SharePoint Library

This option is only available when working with a process model based on the Microsoft InfoPath process template. This command allows you to publish the InfoPath form associated with your process model to a Microsoft SharePoint Form Library directly from AgilePoint Envision.

| Pu | ıblish InfoPath t | o SharePoint Library |
|----|--------------------|----------------------|
| | InfoPath File to F | Publish |
| | File Name : | ExpenseHeport.xsn |
| | SharePoint Form | Library |
| | URL: | |
| | Title : | ExpenseReport |
| | Description : | |
| | | |
| | | OK Cancel |

File > InfoPath > InfoPath Toolbar, Auto Naming and Others

This option is only available when working with a process model based on the Microsoft InfoPath process template. This option allows you to configure various InfoPath-specific properties of your process template. The Toolbar Buttons tab allows you to configure which views (in your InfoPath form) will display the AgilePoint Toolbar. The AgilePoint Toolbar displays the **Submit and Close** button when the InfoPath form is open.

| nfoPath View AgilePoint Toolbar | | | | | |
|---------------------------------|------------------|--|--|--|--|
| | Submit | | | | |
| | Manager Approval | | | | |
| | CFO Approval | | | | |
| Controller | | | | | |
| | | | | | |

The **Naming Convention** tab allows you to configure how file names are generated for new documents in the SharePoint Form Library associated with your process template's InfoPath form.

| InfoPath Toolbar and Ot | :hers | | | | | | |
|--|--|-----------------------------|---|--|--|--|--|
| Toolbar Buttons Naming Convention Advanced | | | | | | | |
| Naming Convention of New InfoPath Form : | | | | | | | |
| Prefix : | <document library="" name=""></document> | • | | | | | |
| Date Format : | уууу | Please see tooltip for help | | | | | |
| Number Format : | 4 - | | | | | | |
| | | | | | | | |
| Sample : | | | . | | | | |
| | | | | | | | |
| | ок | Cancel | | | | | |

The Advanced tab allows you to associate your existing process template with a different InfoPath form.

| InfoPath Toolbar and Others |
|--|
| Toolbar Buttons Naming Convention Advanced |
| |
| InfoPath Form File (xsn) : |
| C:\Program Files\Ascentn Corp\AgilePoint Envision\samples\InfoPath\ExpenseReport.xsr |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| OK Cancel |
| |

File > SharePoint ... > Change Document Library

This option is only available when working with a process model based on the Microsoft SPDoc process template. This option allows you to associate your existing process template with a different SharePoint Document Library.

File > SharePoint ... > Retrieve Meta Data Schema

This option is only available when working with a process model based on the Microsoft SPDoc process template. This option allows you to retrieve information about the metadata columns of the SharePoint Document Library associated with the current process model. This option is most often used when you add a new metadata column to SharePoint and want to bind to it from an existing process template.

File > Shapes > Generic

This option displays the Generic Visio Stencil (i.e. Shapes window) containing the basic AgilePoint AgileShapes.

File > Shapes > Microsoft SPS

This option displays the **Microsoft SPS** Visio Stencil (i.e. Shapes window) containing the predefined AgilePoint AgileShapes related to Microsoft SharePoint functionality.

File > Shapes > Premier

This option displays the **Premier Extension** Visio Stencil (i.e. Shapes window) containing additional predefined AgilePoint AgileShapes. These AgileShapes are used for various purposes, including database access, database updates, Web service calls, etc.

View Menu Options

The following menu options are available from the View menu in AgilePoint Envision.

View > Process Template Properties

This option displays the Process Template Properties pane. This pane displays the design-time properties of the process or the selected AgileShape. This option is most often used if the properties window has been closed.

| Р | Process Template Properties × | | | | |
|---|-------------------------------|--------------------------|--|--|--|
| | | | | | |
| Ξ | Basic | | | | |
| | (Name) | TravelRequestProcess | | | |
| | Current Version | 1.02 | | | |
| | Description | | | | |
| | Document Reference | | | | |
| Ξ | Expected Time | 1 Week (s) | | | |
| | Business Time | False | | | |
| | Length | 1 | | | |
| | Time Unit | Week | | | |
| | Owner | Administrator | | | |
| | Previous Version | 1.01 | | | |
| Ξ | Advanced | | | | |
| | Application | SPSIntegration | | | |
| | Assembly Name | | | | |
| | Audit Level | High | | | |
| | Class Name | | | | |
| | Initiate Constraint | ParentChildProcess | | | |
| | MaximumSessionAllowed | Default | | | |
| | OnComplete | LeaveChildProcessRunning | | | |
| Ξ | Process Repository | | | | |
| | ConfigureAttachments | {Not Configured} | | | |
| | Hyperlink | | | | |

View > Email Templates Wizard

This option displays the Email Templates Wizard. The wizard allows you to create, modify, and/or delete the email notification templates that can be used within a process template.

View > Custom Process Properties

This option displays the Custom Process Properties window. This window provides a convenient way to review all of the different values used within the entire process from a single location. It also allows you to add and/ or remove custom values to the drop-down lists displayed (in the Activity Properties toolbar) next to certain AgileShape properties. Adding custom process property values provides a convenient way to easily define common values that will be used (for certain AgileShape properties) in multiple AgileShapes. For example, adding two new **WorkPerformer** values (as shown below) will cause both values to appear in the drop-down list for the Work To Perform property (as shown below) for all of the Manual and Manual with Timeout AgileShapes in the process template.

| Custom | Process Prop | perties | | | |
|--------|--------------|---------------|--------|---------|--------|
| | Apply On : | WorkPerformer | | | • |
| | Property N | ame | Туре | Dynamic | Add |
| | Zzz: | | String | No | |
| | £222 | | String | No | Remove |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | Close |
| | | | | | |



Shape Menu Options

The following menu options are available from the Shape menu in AgilePoint Envision.

Shape > Actions > Page Size

This option allows you to change the size of your process template. This option is not available when you have an AgileShape selected.

| Pag | e 5ize | | | |
|-----|----------|-------|--------|--|
| | Width : | 17.00 | ÷ Inch | |
| | Height : | 11.00 | inch | |
| | | ок | Cancol | |

Help Menu Options

The following menu options are available from the Help menu in AgilePoint Envision.

Help > AgilePoint Envision Help

This command opens the Help file for AgilePoint Envision.

Process Templates

AgilePoint process templates are created using one of the special AgilePoint business process model templates built into AgilePoint Envision. These process templates are different than regular Visio templates in that they can be deployed directly to AgilePoint Server to execute the workflow process they model.

Process Template Types

The process template types in this section are available in AgilePoint Envision.

Generic Process Template

Generic is the simplest type of process template. This type of process model can be used to represent virtually any business process. However, certain specific types of business processes may be more easily modeled using one of the more specialized process template.

Microsoft InfoPath Process Template

The Microsoft InfoPath process template can be used to represent a business process where the entire process is associated with a single Microsoft SharePoint Form Library (and the Microsoft InfoPath form associated with that Form Library). Each runtime process instance will be associated with a specific copy of that InfoPath form. For this type of process model, the views of the InfoPath form are used as the user interface for any of the process' manual tasks, and user input is stored directly within the form's XML schema.

Microsoft SPDoc Process Template

The Microsoft SPDoc process template can be used to represent a business process where the entire process is associated with a specific Microsoft SharePoint Document Library. Each runtime process instance will be associated with a specific item (i.e. document) within the specified Document Library. This type of process model is typically used to create workflow solutions for document control and management. This type of process model allows the library's metadata columns to be bound directly to the process so that the documents' metadata values can be easily used within the process model.

For this type of process model, the user interfaces for any of the process' manual tasks are usually implemented as ASP.NET pages that can be placed in and accessed from the same SharePoint site that contains the Document Library.



Note: For process templates and AgileShapes that uses data from SharePoint, the first time you access SharePoint during your AgilePoint Envision user session, you must log on to SharePoint.

Microsoft SPList Process Template

The Microsoft SPList process template can be used to represent a business process where the entire process is associated with a specific Microsoft SharePoint List. Each runtime process instance will be associated with a specific list item within the specified List.

This type of process model allows the list's metadata columns to be bound directly to the process so that the lists' metadata values can be easily used within the process model. A typical usage scenario would be to initiate a process with a new list item, then use a sub process to implement forms interaction.



Note: For process templates and AgileShapes that uses data from SharePoint, the first time you access SharePoint during your AgilePoint Envision user session, you must log on to SharePoint.

AgileForms Process Template

The AgileForms process template can be used to represent a business process that uses AgileForms. To use this template, you must have the AgileForms Envision Add-On installed.

Select a Process Template Type

To begin creating an AgilePoint process, you must first select an AgilePoint process template type:

1. In Envision, click File > New > AgilePoint > [Process Model Type].



Note: For process templates and AgileShapes that uses data from SharePoint, the first time you access SharePoint during your AgilePoint Envision user session, you must log on to SharePoint.

Open an existing Process Template

To create an existing process template, start AgilePoint Envision, then use the **File > Open** menu command to open the VSD file that contains the process template.

Convert a Visio Diagram to a Process Model

To convert an existing Visio diagram into a process template:

- 1. Start AgilePoint Envision.
- 2. Create (or open) a process template.
- 3. Click File > Export & Import > Import Existing Visio file.
- 4. Select the VSD file that contains the Visio diagram you want to convert. This will import the contents of the selected Visio diagram into your process template.
- 5. Once the diagram's contents are imported, convert the Visio shapes into AgilePoint AgileShapes. Once all of the imported shapes and connectors are completely converted and integrated into the process template, you can continue to work on the process template like you would normally.

Process Template Properties

Process Template Properties Overview

The following properties are available at the process template level in AgilePoint Envision.

| Process Template Properties × | | | | | | |
|-------------------------------|-----------------------|--------------------------|--|--|--|--|
| | | | | | | |
| Ξ | Basic | | | | | |
| | (Name) | TravelRequestProcess | | | | |
| | Current Version | 1.02 | | | | |
| | Description | | | | | |
| | Document Reference | | | | | |
| Ξ | Expected Time | 1 Week (s) | | | | |
| | Business Time | False | | | | |
| | Length | 1 | | | | |
| | Time Unit | Week | | | | |
| | Owner | Administrator | | | | |
| | Previous Version | 1.01 | | | | |
| Ξ | Advanced | | | | | |
| | Application | SPSIntegration | | | | |
| | Assembly Name | | | | | |
| | Audit Level | High | | | | |
| | Class Name | | | | | |
| | Initiate Constraint | ParentChildProcess | | | | |
| | MaximumSessionAllowed | Default | | | | |
| | OnComplete | LeaveChildProcessRunning | | | | |
| Ξ | Process Repository | | | | | |
| | ConfigureAttachments | {Not Configured} | | | | |
| | Hyperlink | | | | | |

Process Template Properties

The Process Template Properties are visible when no activities are selected in the process model. A definition for each property can be found below.

| Process Template Properties X | | | | | | |
|-------------------------------|-----------------------|--------------------------|--|--|--|--|
| | | | | | | |
| ⊟ | Basic | | | | | |
| | (Name) | TravelRequestProcess | | | | |
| | Current Version | 1.02 | | | | |
| | Description | | | | | |
| | Document Reference | | | | | |
| | Expected Time | 1 Week (s) | | | | |
| | Business Time | False | | | | |
| | Length | 1 | | | | |
| | Time Unit | Week | | | | |
| | Owner | Administrator | | | | |
| | Previous Version | 1.01 | | | | |
| Ξ | Advanced | | | | | |
| | Application | SPSIntegration | | | | |
| | Assembly Name | | | | | |
| | Audit Level | High | | | | |
| | Class Name | | | | | |
| | Initiate Constraint | ParentChildProcess | | | | |
| | MaximumSessionAllowed | Default | | | | |
| | OnComplete | LeaveChildProcessRunning | | | | |
| Ξ | Process Repository | | | | | |
| | ConfigureAttachments | {Not Configured} | | | | |
| | Hyperlink | | | | | |

Design-Time Properties

(Name)

The actual name of the process template that AgilePoint retains.

Current Version

The current version of the process template. The next time the process template is deployed to AgilePoint Server, the process version will be updated.

Description

Provides a text box pop for which to enter a description for the process template.

Document Reference

A reference to a document associated with the process template.

Expected Time

The amount of time that is configured for the process to complete.

Business Time

Specifies if the expected completion time will be based on business days. This property can be set to the following specific values:

- **True** This value indicates that the expected time will be based on business days, where 5 days is equal to 1 week.
- False This value indicates that the expected time will be not be based on business days, where 7 days is equal to 1 week.

Length

The number of time units for the expected time (e.g. 1 second, minute, hour, etc.).

Time Unit

The unit of time to be used for the expected time.

Owner

A name given to the owner of the process template.

Previous Version

The previous version of the process template.

Application

The process template application type (e.g. SPSIntegration for SharePoint based process templates that will be associated with a SharePoint library or list, or a custom name given as the name of an ASP.NET application).

Assembly Name

The name of the custom assembly that the process template is associated with.

Audit Level

Default value: High

This property determines the amount of process related data that is recorded to the workflow database. This property can be set at either the Process Template Properties layer or at the individual AgileShape layer. This property allows you to control the level of granularity in terms of the amount of process related data that is recorded to the workflow database. This property can be set to the following specific values:

- **High** This value indicates that AgilePoint will record all data about the activity or process to the database.
- Low This value indicates that AgilePoint will only allow a certain amount of data to be recorded to the database. This option provides a level of control over the granularity of AgilePoint process-related data that is stored in the AgilePoint workflow database, giving some flexibility in the audit trail records by filtering out unnecessary data.

Class Name

The name of the custom class that the process template is associated with.

Initiate Constraint

The type of process model. This determines the category for which this process model is associated under the license model. If the process model is of type ChildProcess, it cannot be initiated as a stand alone process. A ParentChildProcess can be initiated as either a Parent or Child process, it counts as a Parent process.

MaximumSessionAllowed

MaximumSessionAllowed allows you to set the MaxloopAllowed at the process model level to avoid an infinite loop scenario. Now you can set the MaxLoop to a number where the engine will then mark the process as suspended. The process level MaxLoop setting overwrites the global/server level setting in the Netflow.cfg file. If this property is set to the 'Default' the process will inherit the global/server level setting in the NetFlow.cfg.

OnComplete

Determines the fate of the child process once the parent process completes. This property can be set to the following specific values:

- LeaveChildProcessRunning This value indicates that the child process will continue to run after the parent process completes.
- CancelChildProcesses This value indicates that child processes will be canceled once the parent process completes.

 InheritParentProcess - This value indicates that child processes will inherit the OnComplete properties of the parent process.

ConfigureAttachments

Allows you to attach documents at the process model level that are accessed from the process repository. For more information, see Process Repository in the Documentation Library.

Reference URL

Allows you to associate an URL at the process model level that is used in the process repository. For more information, see Process Repository in the Documentation Library.

Convert a Visio Shape to an AgileShape

When you import an existing Visio diagram or copy a regular Visio shape and paste it into a process template, you will need to convert the Visio shape(s) into one or more AgileShapes before those shapes can be a part of the Process Model.

Visio shapes larger than 1.5 inches x 1.5 inches cannot be directly converted into an AgileShape, and will need to be replaced with (rather than converted into) an AgileShape.

Visio shapes that do not represent an "activity" (e.g. flowchart shapes that represent conditional logic or decisions) cannot be directly converted into an AgileShape, and will need to be replaced with (rather than converted into) an AgileShape (see below).

- 1. Click on the shape you want to convert to select it.
- 2. Right-click the selected shape and click Convert to Activity.



3. In the Choose Activity Type window, select the type of AgileShape the shape should be converted into.

| hoose Activity Type | | | | | |
|------------------------|--|--------------|--------------|--------|---|
| Choose Activity Type : | Built-In Built-In | 🔿 Agile Part | C Agile Work | | |
| Manual | | | | | • |
| Work To Perform : | | | | | |
| | | | | | |
| Replace Shape | | | | | |
| | | | Ok | Cancel | 1 |

See Process Template AgileShapes for more information about the types of AgileShapes and how the Work To Perform property is used for each type of AgileShape.

- 4. (Optional) Check the "Replace Shape" check box if you want the converted shape to appear like the type of AgileShape you selected. Uncheck the "Replace Shape" check box if you want the converted shape to be displayed in the process model with the same graphical appearance as it had prior to conversion.
- 5. Click the OK button.
- 6. (Optional) Configure additional properties of the converted AgileShape as you would for a normal AgileShape (i.e. using the Activity Properties window).

To replace a Visio shape with an AgileShape:

- 1. Add one or more AgileShapes to your process template, and configure them as appropriate.
- 2. Change any connectors that are connected to the Visio shape so that they are now connected to the AgileShapes you just added.
- 3. Remove/delete the Visio shape from the process template.

Add an AgileShape to a Process Model

Adding an AgileShape to a Process Model is the same as adding a Visio shape to a Visio diagram. Simply click and drag an AgileShape (from a stencil in the Shapes window) onto your process template.

Remove an AgileShape from a Process Model

Removing an AgileShape from a Process Model is the same as removing a Visio shape from a Visio diagram. Simply click the AgileShape to select it, and then press the delete key.

Change an AgileShape's Display Name

To change an AgileShape display name:

1. Double-click the AgileShape, and then type a new name.
Configure AgileShape Properties

To configure the properties of an AgileShape instance, first click the AgileShape to select it. Then use the Activity Properties toolbar (shown below) to modify any of the AgileShape's configurable properties.

| A | Activity Properties × | | |
|--|-----------------------|--------------|--|
| • | <u>₽</u> 2↓ 🖻 | | |
| Ξ | Basic | | |
| | (Name) | Email.29 | |
| | (UID) | Email.29 | |
| | Description | | |
| Ξ | Notification | | |
| Ξ | DeferredTime | 0 Minute (s) | |
| | Business Time | False | |
| | Length | 0 | |
| | Unit | Minute | |
| | MailTemplate | | |
| Ξ | Advanced | | |
| | Wait All Incoming | False | |
| | | | |
| (Name) Display name of the activity | | | |

You can switch between the view using the toggle buttons (at the top of the toolbar. See Process Template AgileShapes for more information about each of the properties listed in the Activity Properties toolbar.

Connecting AgileShapes To Each Other

Connecting AgileShapes in a process template is similar to the process of connecting Visio shapes in a Visio

diagram. First you would select Visio's Connector Tool (

Some AgileShapes have Connection Points that can be used as either an In Connection Point or an Out Connection Point, while others have Connection Points that may only be used in a specific direction. For example, the Single Condition AgileShape has 2 Connection Points labeled Yes and No. These 2 Connection Points must always be used as Out Connection Points, while the unlabeled Connection Points must always be used as In Connection Points. However, you can configure which side the labeled points are positioned on by Right-Clicking and selecting **Flip Yes** or **Flip No**.

Using Swim Lanes in Envision

Swim Lanes allow for blocks to be added to the modeling canvas that belong to a particular AgilePoint group, role, or a single participant. When a manual activity is added to a Swim Lane, the AgilePoint group, role, or participant is automatically assigned based on which Swim Lane the manual activity is dropped (i.e. where Swim Lanes are tied to participant(s).



Note: This feature is only for Microsoft Visio 2007 and later.

| 🖪 Drawing2 - Micro | soft Visio | |
|--------------------|--|----------------------------------|
| i 🔛 Ele Edt Vie | и Insert Fignmet Icols Data Shape <u>Window</u> Help | Type a question for help - 9 × |
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| Shapes X | Open swim lane stendis | Activity Propertie Can select |
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| Vipe you 🔻 🔁 | | Participants |
| Goperic UPM | | Participant DEMO3/Employee |
| Prese Extension | 2 | DisplayText \$(ProcessInitiator) |
| Eventional | 5 667 51 | DEMO3)Employee |
| band | | |
| > Separator | Employee Submit | |
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| | × | |
| | 0 | |
| | 5 | |
| | 3 | |
| | | Participant(s) of the activity |
| - | * 4 | |
| | | |

Registering a custom AgileShape

Custom AgilePart and AgileWork components must be registered before they can be used in a process template. Registration requires that a .NET assembly (containing at least one AgilePart and/or AgileWork component) be imported into AgilePoint Envision.

To register a custom AgilePart:

- 1. Use the File > Extend AgilePoint > Register AgilePart menu command.
- To register a custom AgileWork:
- 1. Use the File > Extend AgilePoint > Register AgileWork menu command.

Logging on to SharePoint from a Process Template or AgileShape

For process templates and AgileShapes that uses data from SharePoint, the first time you access SharePoint during your AgilePoint Envision user session, you must link it to a SharePoint list.

Instructions

1. On the **Connect to SharePoint** dialog box, complete the fields to specify the user account you want to use to connect to SharePoint, and then click **OK**.

These credentials will be saved and used each time you open the process model.

| Connect to SharePoint | | | | |
|--|---|--|--|--|
| Connect to Sha | arePoint Site | | | |
| Windows Authentic | ation | | | |
| 0 | Current User (AP14\Administrator) Custom User | | | |
| Claims Authenticat | Claims Authentication | | | |
| | Form Based Authentication Office 365 Federated Authentication | | | |
| User Information | | | | |
| Domain: | | | | |
| Username: | Administrator@agilityclouds.com | | | |
| Password: | | | | |
| Fed Auth Url: | https://fs.agilityclouds.com | | | |
| | OK Cancel | | | |

| Field Name | Definition |
|------------------------|---|
| Windows Authentication | Definition: Specifies whether, and what type, of Windows Authentication is used to connect to SharePoint. |

| Field Name | Definition | |
|-----------------------|---|--|
| Claims Authentication | Definition: Specifies whether to use Claims authentication, and what type of Claims authentication, to use to connect to SharePoint. Allowed Values: If this option is selected, the following types of Claims Authentication are available: Form Based Authentication - Activates Forms based authentication using a custom membership provider to connect to an onpremises SharePoint environment. Office 365 - Activates Claims authentication to connect to SharePoint in an Office 365 environment. This option can be used side-byside with on-premises SharePoint. Federated Authentication - Activates Federated authentication to connect to SharePoint. Federated Authentication - Activates Federated authentication to connect to SharePoint. Mote: Out of the box, AgilePoint supports ADFS authentication. If you want to use your own authentication provider, see Federated Authentication Library. Default Value: | |
| Domain | Definition: The authentication domain. This does not apply to Forms-Based Authentication. | |
| Username | Definition: The user ID of the SharePoint authentication account. Allowed Values: A valid user name. Default Value: None Custom Attributes: No | |

| Field Name | Definition |
|--------------|--|
| Password | Definition: |
| | The password for the authentication account. |
| | Allowed Values: |
| | A valid password. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Fed Auth Url | Definition: |
| | The URI of the federated authentication provider. This provider issues security tokens for federated authentication. |
| | Allowed Values: |
| | A valid federated authentication provider URI. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| | Example: |
| | https://fs.agilityclouds.com |

Logging on to AgilePoint Server from Envision

If you need to directly access AgilePoint Server data (for example, users, groups, or roles) from a process model, the first time you access AgilePoint Server during your AgilePoint Envision user session, you must log on.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Click AgilePoint > Publish Process to Server.

Instructions

1. On the Connecting to Server window, complete the fields to specify the user account you want to use to connect to AgilePoint Server.

These credentials will be saved and used each time you open the process model.

Connecting to Server Window

Enables Envision to bind and authenticate to AgilePoint Server.

| Connecting to Server | | | |
|---|--|-----------|--|
| | ting to Server | | |
| Server Url: | http://apaz46601.cloudapp.net:13487/agilepoint | service 👻 | |
| Connecting to AgilePoint Server on Microsoft Azure? <u>Modify Default Setting</u> | | | |
| Logon as cu Logon as the User Information | rrent user (AP9\APAdmin) e following user: | | |
| Domain: | AP9 | | |
| Username: | APAdmin | | |
| Password: | ******* | | |
| | 🛩 ок | Cancel | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Click AgilePoint > Publish Process to Server.

| Field Name | Definition |
|-----------------------|------------------------------------|
| AgilePoint Server URL | Definition: |
| | The URL of your AgilePoint Server. |
| | Allowed Values: |
| | A valid AgilePoint Server URL. |

| Field Name | Definition |
|---|--|
| | Default Value: |
| | In AgilePoint BPMS for Azure, the default value is the value of the default AgilePoint evaluation environment. |
| | Custom Attributes: |
| | No |
| Connecting to AgilePoint Server on Microsoft Azure? | Definition: |
| | Specifies whether AgilePoint Server is running on premises or on Windows Azure. |
| Modify Proxy Factory | Opens the Following Window: |
| | Service Proxy Factory Window |
| | Purpose of this Window: |
| | Specifies the connection parameters for the Service Proxy Factory to connect to AgilePoint Server on Windows Azure. |
| Logon as current user | Authenticates using the local machine's Windows user account. If you select this option, you do not need to complete the remaining fields. |
| Logon as the following user | Authenticates using the credentials you specify. |
| Domain | Definition: |
| | The authentication domain. |
| | This does not apply to Forms-Based Authentication. |
| Username | Definition: |
| | The user ID of the AgilePoint Server authentication account. |
| | Allowed Values: |
| | A valid user name for an AgilePoint Server administrator account. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Password | The password for the authentication account. |

Service Proxy Factory Window

Specifies the connection parameters for the Service Proxy Factory to connect to AgilePoint Server on Windows Azure.

By default, you do not need to change this information. You need only change this if the assembly name or class name changes for your Service Proxy Factory custom authorization mechanism. This is not common.

| Service Proxy Factory | × | |
|---|---|--|
| Service Proxy Factory | | |
| Server Url : | | |
| http://apaz46601.cloudapp.net:13487/agilepointservice | • | |
| Assembly : | | |
| AgilePoint.Azure.ServiceProxyFactory | | |
| Class : | | |
| AgilePointServiceProxyFactory | - | |
| Configure OK Xancel | | |

Navigation

To access this window in Envision:

- 1. In AgilePoint Envision, open a process template.
- 2. Click AgilePoint > Publish Process to Server.
- 3. On the Connecting to Server window, select Connecting to AgilePoint Server on Microsoft Azure?
- 4. Click Modify Default Setting.

To access this window in AgilePoint Service Bus configuration:

- 1. On the AgilePoint Service Bus machine, click Start > AgilePoint > AgilePoint Service Bus Configuration.
- 2. Click the AgilePoint Service tab.
- 3. Click Modify Default Setting.

| Field Name | Definition |
|------------|---|
| Server URL | The URL of your AgilePoint Server. |
| Assembly | Definition: The assembly for your service proxy factory. Allowed Values: A valid assembly name Default Value: AgilePoint.Azure.ServiceProxyFactory Custom Attributes: No |
| Class | Definition: The class for your service proxy factory. Allowed Values: A valid class name Default Value: AgilePointServiceProxyFactory Custom Attributes: No |

Data Services

This section provides information and instructions about how AgilePoint Data Services is used to collect and track application data.

The Data Services includes two core components:

- **Data Population** Data Population allows you to write to a database the desired application data values. The data can then be used for reporting purposes.
- Data Tracking Data Tracking provides the functionality to set up fields in AgilePoint Envision to be monitored for changes to application data, for example you can see for a specific field on a form, the Old Value and if the data changes, the New Value. This viewpoint is provided via the AgilePoint Enterprise Manager Data Tracking tab.



Note: Ensure that you have installed and configured the AgilePoint Data Services AgileConnector.

Configure the Windows Service for Data Services

| | _ | • |
|---|----|-----|
| | | • |
| | | - 1 |
| • | а. | |
| • | | |

Note: In a NLB installation scenario, only one AgilePointDataServices Windows Service should be started.

- 1. Open [AgilePoint Data Services installation folder]\DataServicesWindowsService.exe.config, and change the following properties accordingly:
 - **DbConnectionString:** This connection string should point to the Database which contains the WF_DATA_TRACKING table where the output of the data tracking is stored.
 - TempDbConnectionString: This connection string should point to the Database which contains WF_DATA_SERVICE_TEMPDB which is populated by the AgileConnector with the before and after XML values. Set this to the same value that is configured for the AgileConnector.
 - EnableDataPopulation: Set this to true to enable Data Population.
 - EnableDataTracking: Set this to true to enable Data Tracking.
 - **TimerInterval:** This is the timer interval used by the Windows Service to check for any new entries in the Temporary database. On a production system, this can be set to a high interval like 3600 (i.e. one hour).



Note: The Database connection string and the table information for Data Population are obtained from the Process Template.

Change the Logon Credentials

Before starting the Windows Service, change the Log On credentials to Administrator (as the Local Service account which is the default used by the Windows Service does not have enough access privileges to AgilePoint Server). This can be done as follows:

- 1. Open the Services console.
- 2. Right-click on the AgilePointDataServices and open the Properties window.

3. On Log On tab, select This account, and enter the Administrator account information as follows:

| AgilePoint Server Monitor | Vatcher | Started Started | Automatic Automatic | Local System |
|---|---------|--------------------|------------------------|--|
| AgilePointDataServices | | | Automatic | .\Administrator |
| gilePointDataServices Properties (Local Con General Log On Recovery Dependencies Log on as: Local System account Alog service to interact with desktop This account Administrator Password: Confirm password: You can enable or disable this service for the bar | | imputer) | <u>Prowse</u> | Local Service Local System Local System Network Service Local System Local System .\Administrator .\Administrator Local System Local System Local System Local System Local System Local System Local System Local System |
| Hardware Profile | | Servir | | Network Servic |
| Profile 1 | | Enabl | ed | Local System |
| | | | | Local System Network Service |
| | ΟΚ | nable | <u>D</u> isable | Local System Network Servic Network Servic Administrator Local System Local System Local System Local System |

- 4. When finished, click OK.
- 5. Start the Windows Service.

Modify the Enterprise Manager web.config

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

```
<add key="DataTrackingConnectionString"
value="<Connection string>" />
```

Add a valid connection string depending on your database that is used for data tracking.

Example:

```
<add key="DataTrackingConnectionString"
```

```
value="server=[hostname];database=AgilePointTracking;trusted_connection=true"
/>
```

The web.config file for Enterprise Manager can be located at: C:\<AgilePointServer>\EnterpriseManager

Enabling the DataService AgileConnector

To enable the DataService AgileConnector, do the following.

Good to Know

• To support multiple applications, you can configure multiple AgileConnectors, or list multiple applications within the Application Filter of one AgileConnector.

Navigation

- 1. On the AgilePoint Server machine, click Start > All Programs > AgilePoint > AgilePoint Configuration.
- 2. On the AgilePoint Server Configuration Tool window, click the Extensions tab.

Instructions

- 1. On the **Extensions** tab, click **Add**.
- 2. Click the Ellipses button next to the Assembly field to browse the assembly [AgilePoint Server installation folder] \bin\Ascentn.AgileConnector.DataService.dll.

Note the following:

- The **Name** field appears with the default AgileConnector name. Do not change this value.
- The Impersonator field must be blank.
- 3. Click Configure.
- 4. On the Data Service Configuration window, complete the following fields as required.

| Field Name | Definition |
|--------------------|--|
| Application Filter | Definition: Filters the process template based on the process model type or name. |
| | Allowed Values: |
| | SPSIntegration - Uses only process models created using InfoPath, SPList and SPDoc process templates. |
| | AgileForms - Uses only process models created using AgileForms process templates. |
| | MyApplication - Uses only process models created using Generic process templates — usually ASP.NET applications. |
| | Custom application name - Uses only process models with a custom application name specified in the process template. |

| Field Name | Definition |
|-------------------|--|
| | Multiple application names must be separated with a semicolon (;). |
| | Default Value: |
| | MyApplication |
| Connection String | Definition: |
| | Specifies the connection string to be used to connect to the Data Tracking database. |
| | Allowed Values: |
| | A valid connection string. |
| | Default Value: |
| | Data Source=.;Integrated Security=SSPI;Initial Catalog=AgilePointTracking |
| | Example: |
| | Data Source=mydomain;Integrated Security=SSPI;Initial Catalog=AgilePointTracking |

Data Population

Data Population allows you to write to a database (SQL or Oracle) the desired application data values. The data can then be used for reporting purposes.

Setting Up Data Population

To set up Data Population, do the following.

Prerequisites

- For Data Population, the data tracking database that is created should include table columns based on the fields from the form.
- The primary key must be the process instance ID.

Navigation

- 1. In **Envision**, open a process model.
- 2. In the Process Model Properties pane, click Data Population.

Instructions

1. On the Connecting to Server window, select the Logon type and click OK.

The Data Population Configuration window appears. This windows allows you to select either a **Basic** or **Advanced** way of configuring the repository and setting up the mapping for data population.



- 2. Select one of the following:
- Basic Suitable only for development environments where the data source resides on the same machine as the AgilePoint Envision client.
- Advanced Suitable for environments where the data source resides on a separate machine from the AgilePoint Envision client.

If you selected the **Basic** option, the Data Service Configuration window appears.

| Data Service Cor | figuration | | | × |
|---|------------------|----------|----------------|---|
| Data Source - Database : | master | | . | |
| Target Table : | Population Table | | | |
| Data Fields — | | | | _ |
| ☐ prefix ☑ givenName ☐ middleName ☑ surname | 2 | | | |
| unia ✓ singleName ☐ line1 ☐ line2 ☐ line3 | | | | |
| line4 | | | • | |
| | | <u> </u> | <u>C</u> ancel | |

- 1. Click the **Ellipses** button to populate the database list with all the databases on the server.
- 2. (Optional) Change the Target Table name if desired.
- 3. Select the Data Fields from the forms schema for which to populate data to the database.
- 4. Click Finish.

If you selected the **Advanced** option, the Configuration Repository window appears.

| Configure Repository | | × |
|--|--------------------|---|
| Repository: | | |
| Microsoft SQL Server | | |
| Database connection string | | |
| server=localhost;database=BudgetRequest;trusted_connection=yes | Co <u>n</u> figure | |
| | | |
| Application table names | | |
| ItemDetails | Retrieve | |
| SupplierDetails | | |
| | | |
| | | |
| , Runtime Database connection string | | |
| | Con <u>f</u> igure | |
| · · · · · · · · · · · · · · · · · · · | | |
| <u>DK.</u> | | |
| | | |

- 1. In the **Repository** field, select either Microsoft SQL Server or Oracle to write the data to a database, or SharePoint list to write the data to a SharePoint list.
- 2. Do one of the following:
- If you have chose to write the data to a database:
- 1. Click the **Configure** button to configure the database connection details.
- 2. Click the Retrieve button to retrieve the database table names.
- 3. (Optional) In the **Runtime Database connection string** field, enter the database connection string that will be used at runtime.
- 4. Click OK.
- If you have chosen to write data to a SharePoint list:
- 1. In the Site URL field, enter the SharePoint Site URL for the list and click the green arrow to sync with the list.
- In the List Name field, select the list(s) name(s) for which to populate data. Also select the Primary Key to be used for each list.
- 3. (Optional) In the **Runtime Server URL** field, enter the SharePoint site URL that will be used at runtime.

4. Click **OK**. The Schema Mapper window appears.

Note: If the selected tables have more than one foreign key reference, an error message is displayed, also if the selection does not contain a master table that is referenced by a detail table, a warning message is displayed. The Repository dialog closes and opens the Schema mapper. If a selected table does not contain a primary key field, an error will be shown.

| ProcessId PurchaseOrder PurchaseInfo PONumber OrderDate DeliveryAddress TotalAmount Status PurchaseDescription ManagerApproval Comments ItemDetais ItemId | DataPopulation PurchaseDetails OrderDate DeliveryAddress TotalAmount PurchaseDescription ManagerApproval - ManagerComments - ProcessId PONumber PONUMBER P |
|---|---|
| Deta Conversion Custom Data Conversion | Repository |

The left window pane shows the form's Schema, the right side shows the database structure.

- 5. Map the fields accordingly from the form's schema on the left to the database fields (and all the attributes on the right). To map an element to the processId drag and drop as usual to the respective field, while mapping to a processed, the right element must be of type string, else it will give an error message.
- 6. You will see the connection lines appear as shown above. The connection lines may show different colors based on the compatibility of the data types as follows:
 - **Green** The data type matches.
 - Blue The data type does not match, the system will handle the conversion.
 - **Red** The data type does not match, custom data conversion is required. In this case, click the Add button and add the custom mapping code as necessary to handle the data conversion.

Note: At any point of time, you can change the Repository Configuration by clicking the **Repository...** button to reopen the Configure Repository window. On successful configuration of the repository, the right tree view will be refreshed to load the modified Data Population schema, and restores the mappings that are still valid.



Note: If the children of a recurring element are mapped, then compulsorily map the recurring elements also for proper result. If you do not map the recurring element, but map its children, and if the source XML contains multiple entries, the destination XML after transformation will contain only one element and hence it will create only one entry in the detail table.

7. After the mapping is complete, click **OK** to save the mapping and close. At runtime, the database or SharePoint List is populated with the values of the form fields.

Mapping Custom Attributes to Multiple Tables

The following instructions are a use case for mapping custom attributes to multiple tables.

- 1. Create a Generic AgilePoint application without a schema.
- 2. Add a couple of Update Custom Attribute activities to change the Custom Attribute values. Add a Delay shape in between to observe the changes. The AgilePoint process will look something like this:



- Click the Data Population link to open the Configure Repository dialog. Select the Database as Repository and set the Database connection string and click the Connect button to display the list of tables present in the specified database.
- 4. Select the tables that are required and set the Runtime address string (optional), then click OK.



Note: All the detail tables are hidden (i.e. not displayed) in the Application table names list box. This is because Detail tables are not supported for custom attribute mapping.

5. In the **Custom Attributes Mapping** window, enter the attribute name in the **AttributeName** column and select the **FieldName** to which the attribute has to be mapped.

Note: All the primary key fields must be mapped to an attribute compulsorily or selected in the Process Id list box, else an error message will be displayed. An attribute can be mapped to more than one field (i.e. One to Many mapping is allowed).

| Re Re Re | quest.Comments quest.DateNeeded quest.Department quest.Group1 | | |
|----------------|--|------------------------------|-------------------|
| Re Re | quest.ManagerApproval quest.RefNo | | |
| ius | tom Attributes : | (FieldWare | Add |
| AL. | attributel | BudgetRequest. Manager | Berroue |
| | attribute2 | BudgetRequest.Controller | Demoure All |
| | attribute2 | Request.SpecialJustification | Kenove <u>M</u> i |
| _ | attribute3 | Request.Requester | |
| | at the ibut of | Request.RequesterEnail | |
| | accribuce4 | | |

Data Tracking

Use this procedure to set up the Data Tracking.



Note: This feature only supports InfoPath and ASP.NET based process models where a schema is associated.

1. Click the Modify Tracking link in the Process Templates Properties pane.

The Attributes Tracking Dialog appears.

- 2. The **Conditional Data Tracking** field can be used to enable conditional data tracking and would take an expression (e.g. enter \${ to bring up the list of friendly names, select Amount and type >500 to track the data only if the Amount is greater than 500).
- 3. In the Attributes to be tracked box, select the fields for which to track from the schema.

This information is then provided via the AgilePoint Enterprise Manager Data Tracking tab.

Messages and Notifications

You can send notifications from a manual activity (AgileWork) using email, Lync, Yammer, or SMS. You define message templates that can be reused for any activity within a process. For some types of messages, you can also allow replies that can interact with a process. This is most commonly used for approvals.

You can send multiple types of notifications for the same activity. For example, you might want to send messages to certain participants via Lync, and others via Yammer. You may want to send a task assignment to mobile devices via SMS, but send reminders via email.

This section provides information about setting up notifications and messages, creating message templates, and working with variables in messages and notifications.

Message Template Windows

This section describes the windows used to create messages and notifications for various messaging technologies in AgilePoint Envision.

Email Template Wizard

Specifies the content of an email template. An email template determines recipients, subject, body, and other aspects of an automated email template sent from AgilePoint.

| | Renove Rename Plactors Priority: Pagn | Format | Default | - |
|------------------------|---|----------------------------|---------|---|
| mail Settings Name: | CF0Approval • | Get Global Template: | 1 | |
| To: CC: | \${TaskParticipantUsername} | | | |
| Subject: Content: | Left to Right Right to Left Review Job Position - \${/pd:myFields/pd:Title} | | | |
| | | | 640 | |
| | Department: \${/pdmyFields/pdDepartment} | | 60 | ŕ |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
 - Activity Entry Message (Email)
 - Reminder Message (Email)
 - Task Completed Message (Email)
 - Task Reassigned Message (Email)
- 5. On the Email Template Wizard, do one of the following:
 - To modify an existing email template, in the Name list, select the name of the template you want to modify.
 - To create a new email template:
 - 1. Click New.
 - 2. On the New Name window, enter the name you want to identify your email template.

3. Click OK.

| Field Name | Definition |
|------------|---|
| New | <u>Function:</u> Opens the New Name window, where you can enter the name of the message template. |
| | <u>Allowed Values:</u> Free text in text format. |
| | <u>Default Value:</u> None |
| | <u>Custom Attributes:</u> No |
| Rename | <u>Function:</u> Opens the New Name window, where you can change the name of the message template. <u>Allowed Values:</u> A single line of text. Default Value: |
| | None Custom Attributes: No |
| Remove | <u>Function:</u> Deletes the message template from the Name list. |
| Name | Definition: Specifies the Email Template you want to modify. <u>Allowed Values:</u> A single line of text. <u>Default Value:</u> An email template, if one exists. |
| From | Definition: |

| Field Name | Definition |
|------------|---|
| | Specifies the recipients in the From field of an Email Notification. |
| | Allowed Values: |
| | A semicolon-delineated list of valid email addresses. |
| | If process attributes are used, domain\username is converted automatically to a valid email format. |
| | <u>Default Value:</u> |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | me@mydomain.com; \${ProcessInitiator}; \${ProcessParticipantUserNames} |
| То | Definition: |
| | Specifies the recipients in the To field of an Email Notification. |
| | Allowed Values: |
| | A semicolon-delineated list of valid email addresses. |
| | If process attributes are used, domain\username is converted automatically to a valid email format. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | me@mydomain.com; \${ProcessInitiator}; \${ProcessParticipantUserNames} |
| СС | Definition: |
| | Specifies the recipients in the CC field of an Email Notification. |
| | Allowed Values: |
| | A semicolon-delineated list of valid email addresses. |

| Field Name | Definition |
|-------------------------|---|
| | If process attributes are used, domain\username is converted automatically to a valid email format. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | me@mydomain.com; \${ProcessInitiator}; \${ProcessParticipantUserNames} |
| Subject | Definition: |
| | Specifies the subject line of an email notification. |
| | Allowed Values: |
| | A single line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | \${ActivityName} in \${ProcessName} is complete |
| Multi-language List (+) | Definition: |
| | Specifies an additional language for which you can define the content of an email. |
| | Allowed Values: |
| | A list of languages. |
| | Example: |
| | af-ZA |
| | sq-AL |
| | am-ET |
| Priority | Definition: |
| | Specifies the priority setting for an email notification. |
| | Allowed Values: |
| | • High |
| | Normal |

| Field Name | Definition |
|-----------------------------|--|
| | Low <u>Default Value:</u> Normal |
| Format | <u>Definition:</u> Specifies the display format for an email. <u>Allowed Values:</u> HTML - Displays the email in HTML format. Text - Displays the email in text-only format. <u>Default</u> - Displays the email in your organization's default format. This is set by your AgilePoint system administrator. Typically this is HTML. <u>Default Value:</u> Default |
| Left to Right/Right to Left | <u>Definition:</u> Specifies the alignment of text in the content section of an email. <u>Allowed Values:</u> Left to Right Right to Left <u>Default Value:</u> Left to Right |
| Content | Definition: Specifies the content of the body of an email. Allowed Values: Rich text in HTML format, or free text in text format. Default Value: None Custom Attributes: Yes |
| Attachments | <u>Definition:</u> Specifies one or more files you want to include in an email. |

| Field Name | Definition |
|------------|---|
| | Allowed Values: |
| | The full path and file name for the attachments you want to include. Lists are separated by semicolons. |
| | Note: The file that you would like to attach must reside on the local machine. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | C:\My Documents\sample1.doc; \${HomeDirectory}\sample2.doc; \${AttachDoc} |

Custom Mail Template Macro Window

A custom macro is used to simplify the data entry task when constructing an email notification by using a single attribute name (or macro) to refer to a combination of process attributes. Custom macros are stored in the process attribute list with a "*" for easy identification and can be reused when constructing additional email notification templates in the future.

| Custom | n Mail Template Macro | | × |
|--------|---------------------------------|-----------------------------|--------------|
| 6 | Custom Mail Template Macro | | |
| Name | e: Macro: (type '\${' to show p | orimary macros) | |
| | Name / | Definition | |
| | Full Name | \${TaskParticipantFullName} | |
| | User Name | \${TaskParticipantUsername} | 🚽 Add |
| | | | Remove |
| | | | ලෙRemove All |
| | | | 🔀 Close |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
 - Activity Entry Message (Email)
 - Reminder Message (Email)
 - Task Completed Message (Email)
 - Task Reassigned Message (Email)
- 5. On the Email Template Wizard, do one of the following:
 - To modify an existing email template, in the Name list, select the name of the template you want to modify.
 - To create a new email template:
 - 1. Click New.
 - 2. On the New Name window, enter the name you want to identify your email template.
 - 3. Click OK.
- 6. Click Macro.

| Field Name | Definition |
|------------|---|
| Name | Definition: Specifies a name for your macro. <u>Allowed Values:</u> A single line of text. <u>Default Value:</u> None |
| Macro | Definition: Specifies your custom macro <u>Allowed Values:</u> A single line of text. You can enter \${ to show a list of the built-in (primary) macros. Default Value: |

| Field Name | Definition |
|------------|--|
| | None |
| Definition | Definition: Displays the description of your custom macro to the list. Allowed Values: A valid custom macro. Default Value: None |
| Add | Function: Adds your custom macro to the list. |
| Remove All | <u>Function:</u> Deletes all rows in the list. |

Lync Template Wizard

Specifies the content of the Lync template. The Lync template determines message, name, and response of an automated Lync template sent from AgilePoint.

| ync Template Wizard | | |
|---|---------------------------------|----------|
| Lync Template Wizard | | |
| Lync Template Settings | | Actions |
| Message | | S New |
| Name : Lync Assigned Notification | | |
| Message : The task has been Assigned/Reassigned/Completed/Cancelled/Overdue TaskID=\${TaskId} Please click here \${TaskLink} to open task. You can also respond back with Keywords '\${TaskApproveKey} \${TaskId}' to approve, '\${TaskRejectKey} \${TaskI' to reject} | | |
| Rename | | |
| The Message to send to Lync. | | |
| Complete the Assigned, Reassigned Or Overdue task by Responding the Lync Message | | |
| Key Word | XPath | 🖌 Ok |
| ApproveRequest | /pd.myFields/pd:ManagerApproval | |
| ▶ RejectRequest | /pd.myFields/pd:ManagerApproval | V Carrel |
| | | |

Navigation

1. In AgilePoint Envision, open a process template.

- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. In one of the following fields, click **Add Lync Template**. The specific fields that display vary, depending upon the AgileShape you are using:
 - Reminder Message
 - Task Assigned Message
 - Task Cancelled Message
 - Task Completed Message
 - Task Reassigned Message
- 5. On the Lync Template Wizard, do one of the following:
 - To modify an existing Lync template, in the Name list, select the name of the template you want to modify.
 - To create a new Lync template:
 - 1. Click New.
 - 2. On the New Name window, enter the name you want to identify your Lync template.
 - 3. Click OK.

| Field Name | Definition |
|------------|---|
| Name | Definition: Specifies the message template you want to modify. Allowed Values: A single line of text. Default Value: A message template, if one exists. |
| Message | Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes |
| New | Function: |

| Field Name | Definition |
|--|---|
| | Opens the New Name window, where you can enter the name of the message template. |
| | Allowed Values: |
| | Free text in text format. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Remove | Function: |
| | Deletes the message template from the Name list. |
| Rename | Function: |
| | Opens the New Name window, where you can change the name of the message template. |
| | Allowed Values: |
| | A single line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Schema | Opens the Following Window: |
| | Select XPath from Attributes Window |
| | Purpose of this Window: |
| | Enables you to select a schema node from the XML schema for your process. |
| | To activate the Schema button, select the row you want. |
| Complete the Assigned, Reassigned Or Overdue task by Responding the Lync Message | Definition: |
| | Completes a task using a response to the automated message. |
| | The message must come from the same message technology as the outgoing message. For example, the user must use Lync to respond to a Lync message. |
| Key Word | Definition: |

| Field Name | Definition |
|------------|---|
| | A value which, when entered in a message response, sets the Xpath node to True or False. This is typically used for approve/reject functionality. |
| | Allowed Values: |
| | A text string. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| XPath | Definition: |
| | Specifies a schema node whose value is set when the keyword is entered in the message response. This is typically used for approve/reject functionality. The keyword determines the value that is set. |
| | Allowed Values: |
| | An XPath to a schema node that represents a Boolean value. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | /pd:myFields/pd:ApproveReject |

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.

| Select XPath from Attributes | × |
|------------------------------|---|
| Select XPath from Attributes | |
| Schema Process Attributes | |
| myFields | |
| XPath: DataType: | |
| 🥪 OK 🔀 Cancel | |

Prerequisites

• The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Navigate to the appropriate stencil.
- 3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
- 4. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 5. On the respective field/configuration window, do one of the following, as appropriate:
 - Type the characters \${ in the property box.
 - Click the **Ellipses** button.
 - Click the **Schema** button.

| Field Name | Definition |
|--------------------|---|
| Schema | Definition: Displays the XML metadata associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the XML node you want to use. |
| XPath | Definition: Displays the XPath of the selected node. <u>Allowed Values:</u> Read only. <u>Example:</u> /pd:my/pd:empName |
| DataType | <u>Definition:</u> Displays the data type of the selected node. <u>Allowed Values:</u> Read only. |
| Process Attributes | <u>Definition:</u> Displays the process attributes associated with the process in a tree-view structure. <u>Allowed Values:</u> Read only. Click to select the process attribute you want to use. |
| ОК | <u>Function:</u> Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: First, you must select the metadata or attribute you want, and then click OK. You can select only one metadata or attribute at a time. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Yammer Template Wizard

Specifies the content of a message template for a message sent using Yammer template.

| Y Yammer Template Wizard | |
|---|-----------------------|
| Yammer Template Settings | Actions |
| Message | |
| Name : Yammer Assigned Notification | ▼ New |
| The task has been Assigned/Reassigned/Completed/Cancelled/Over Please click here \${TaskLink} to open the task. Message : | tue TaskID-\$(TaskID) |
| Attachments : | x Schema |
| The Message and Attachments to send to Yammer. | 🛩 ок |
| Post Message To: | Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 4. In one of the following fields, click **Add Yammer Template**. The specific fields that display vary, depending upon the AgileShape you are using:
 - Reminder Message
 - Task Assigned Message
 - Task Cancelled Message
 - Task Completed Message
 - Task Reassigned Message
- 5. On the Yammer Template Wizard, do one of the following:
 - To modify an existing Yammer template, in the Name list, select the name of the template you want to modify.
 - To create a new Yammer template:

- 1. Click New.
- 2. On the New Name window, enter the name you want to identify your Yammer template.
- 3. Click OK.

| Field Name | Definition |
|-------------|--|
| Name | Definition: Specifies the message template you want to modify. <u>Allowed Values:</u> A single line of text. <u>Default Value:</u> A message template, if one exists. |
| Message | Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes |
| Attachments | Definition: Specifies files you want to include in your message. Allowed Values: The full path and file name for the attachments you want to include. Default Value: None Custom Attributes: Yes Example: C:\My Documents\sample1.doc; \${HomeDirectory}\sample2.doc |

| Field Name | Definition | | |
|-----------------|--|--|--|
| Post Message To | <u>Definition:</u> Specifies to whom you want to send the message. <u>Allowed Values:</u> Task Participants - Sends the message to the Yammer accounts of the participants for the AgileWork. Yammer Group - Sends the message to a specified Yammer group. <u>Default Value:</u> Task Participants <u>Custom Attributes:</u> No | | |
| New | <u>Function:</u> Opens the New Name window, where you can enter the name of the message template. <u>Allowed Values:</u> Free text in text format. <u>Default Value:</u> None <u>Custom Attributes:</u> No | | |
| Remove | <u>Function:</u> Deletes the message template from the Name list. | | |
| Rename | Function: Opens the New Name window, where you can change the name of the message template. Allowed Values: A single line of text. Default Value: None Custom Attributes: No | | |

| Field Name | Definition | | |
|------------|---|--|--|
| Schema | Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want. | | |

SMS Template Wizard

Specifies the content of an SMS template. An SMS template determines name, message, and response of an automated SMS template sent from AgilePoint.

| 15 Tem | nplate Wizard SMS Template Wizard | | | |
|--------|---|--|----------|--|
| SMS Te | emplate Settings | | Actions | |
| Messa | age | | - New | |
| Nan | me : SMS Task Assigned N | SMS Task Assigned Notification | | |
| Mes | age : The task has been Assigned/Reassigned/Completed/Cancelled/Overdue TaskID=\${TaskID} Please click here \${TaskLink} to open task. You can also respond back with Keywords '\${TaskApproveKey} \${TaskId}' to approve, '\${TaskRejectKey} | | | |
| | The Message to send | as SMS. | Rename | |
| Com | nplete the Assigned, Reassign | ed Or Overdue task by Responding the SMS Message | Schema | |
| | Key Word | XPath | 🖌 😔 Ok | |
| | ApproveRequest | /pd.myFields/pd:ManagerApproval | | |
| + | RejectRequest | /pd.myFields/pd:ManagerApproval | Second 1 | |
| | | | | |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 4. In one of the following fields, click **Add SMS Template**. The specific fields that display vary, depending upon the AgileShape you are using:
 - Reminder Message
 - Task Assigned Message
 - Task Cancelled Message
- Task Completed Message
- Task Reassigned Message
- 5. On the SMS Template Wizard, do one of the following:
 - To modify an existing SMS template, in the Name list, select the name of the template you want to modify.
 - To create a new SMS template:
 - 1. Click New.
 - 2. On the New Name window, enter the name you want to identify your SMS template.
 - 3. Click OK.

Field Definitions

| Field Name | Definition |
|------------|--|
| Name | Definition: Specifies the message template you want to modify. <u>Allowed Values:</u> A single line of text. <u>Default Value:</u> A message template, if one exists. |
| Message | Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes |
| New | <u>Function:</u> Opens the New Name window, where you can enter the name of the message template. <u>Allowed Values:</u> Free text in text format. <u>Default Value:</u> None |

| Field Name | Definition |
|---|---|
| | Custom Attributes: |
| | No |
| Remove | Function: |
| | Deletes the message template from the Name list. |
| Rename | Function: |
| | Opens the New Name window, where you can change the name of the message template. |
| | Allowed Values: |
| | A single line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | No |
| Schema | Opens the Following Window: |
| | Select XPath from Attributes Window |
| | Purpose of this Window: |
| | Enables you to select a schema node from the XML schema for your process. |
| | To activate the Schema button, select the row you want. |
| Complete the Assigned, Reassigned Or Overdue task | Definition: |
| by Responding the SMS Message | Completes a task using a response to the automated message. |
| | The message must come from the same message technology as the outgoing message. For example, the user must use Lync to respond to a Lync message. |
| Key Word | Definition: |
| | A value which, when entered in a message response, sets the Xpath node to True or False. This is typically used for approve/reject functionality. |
| | Allowed Values: |
| | A text string. |
| | Default Value: |

| Field Name | Definition |
|------------|---|
| | None |
| | Custom Attributes: |
| | Yes |
| XPath | Definition: |
| | Specifies a schema node whose value is set when the keyword is entered in the message response. This is typically used for approve/reject functionality. The keyword determines the value that is set. |
| | Allowed Values: |
| | An XPath to a schema node that represents a Boolean value. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | /pd:myFields/pd:ApproveReject |

Reminding Mail Window

Specifies the email template and schedule for a reminder email.

| Reminding Mail | × |
|----------------|---|
| Specify | reminding E-mail settings |
| Mail Template: | (None) |
| Start at | 1 Day before task expires. |
| Frequency: | © Once |
| | C Every 1 🚍 Day 🔽 🗖 Business Time Only |
| | Stop when 💿 Task expires |
| | C Task is inactive (Cancelled, Reassigned,Completed,) |
| | 🥪 OK 🔀 Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. On the Reminder Email field, click the Ellipses button.

Field Definitions

| Field Name | Definition |
|--------------------------------|--|
| Mail Template | <u>Definition:</u> Specifies the name of an email template used to generate an automatic reminder email notification when based on a schedule at runtime. <u>Allowed Values:</u> <u>An existing email template name - Applies the selected, predefined template to the email.</u> <u>None - Specifies that no email is sent.</u> <u>Default Value:</u> None |
| Start at _ before task expires | Definition: |

| Field Name | Definition |
|--------------------|---|
| | Specifies a start time for the reminder, relative to the value of the Time Span for the activity. |
| | Allowed Values: |
| | A number of minutes, hours, days, or weeks. |
| | Default Value: |
| | 1 Day |
| Frequency | Definition: |
| | Specifies the frequency to send a reminder email. |
| | Allowed Values: |
| | Once - Specifies to send the reminder email only one time. |
| | • Every - Specifies the frequency to send repeated reminder emails. You can specify a number of minutes, hours, days, or weeks, whether to use business time and whether to stop sending the reminders after the task expires, or after it is inactive for some other reason. |
| | Default Value: |
| | Once |
| Business Time Only | Definition: Determines whether the time span represents |
| | |
| | True - The time span represents a span of business hours only. For example, 5 days of business time might be equivalent to 7 days of actual time. 8 hours of business time might be equivalent to 24 hours of actual time. |
| | False - The time span represents actual time. It is unaffected by any business time configuration settings. |
| | Default Value: |
| | Deselected |
| | Example: |
| | The Business Time property is set to True, and business hours are configured as 9 a.m. to 5 p.m. A Manual AgileShape with a Time Span of 6 business hours is entered at 4 p.m. on Tuesday, |

| Field Name | Definition |
|------------|---|
| | then the activity must be completed by 2 p.m. on Wednesday. |

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Creating Messages and Notifications

This section describes how to create and modify messages and notifications for AgilePoint processes.

Creating a Notification Message

To create a notification message, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. Select the message type you want. Not all message types are available from all message channels.
 - Task Assigned (Message Channel)
 - Task Reassigned (Message Channel)
 - Task Completed (Message Channel)
 - Task Cancelled (Message Channel)
 - Reminder Message (Message Channel)
 - Activity Entry Message (Message Channel)

Instructions

- 1. On the message Template Wizard window, click New.
- 2. In the **Name** field, enter a name for your message template.
- 3. In the **Message** field, enter the text for your message.
- 4. Complete any additional fields as required on the following window, as appropriate for your message type.
 - Email Template Wizard
 - Lync Template Wizard
 - Yammer Template Wizard
 - SMS Template Wizard

AgilePoint BPMS v5.0 R2

More Information

- Using Variables in Notification Messages
- Creating Message Responses
- Working with Links in the Email Template Wizard
- Setting Up Email Templates in Multiple Languages

Creating a Reminder Email Notification

To create a reminder email notification, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 4. On the Reminder Email field, click the Ellipses button.

- 1. Select an email template to generate your reminder email notifications.
- 2. Complete the following fields as required.

| Field Name | Definition |
|--------------------------------|---|
| Start at _ before task expires | Definition: Specifies a start time for the reminder, relative to the value of the Time Span for the activity. Allowed Values: A number of minutes, hours, days, or weeks. Default Value: 1 Day |
| Frequency | <u>Definition:</u> Specifies the frequency to send a reminder email. <u>Allowed Values:</u> Once - Specifies to send the reminder email only one time. Every - Specifies the frequency to send repeated reminder emails. You can specify a number of minutes, hours, days, or weeks, whether to use business time and whether |

| Field Name | Definition |
|--------------------|---|
| | to stop sending the reminders after the task expires, or after it is inactive for some other reason. |
| | Default Value: |
| | Once |
| Business Time Only | Definition: Determines whether the time span represents actual time, or business hours only. Allowed Values: • True - The time span represents a span of business hours only. |
| | business hours only. For example, 5 days of business time might be equivalent to 7 days of actual time. 8 hours of business time might be equivalent to 24 hours of actual time. False - The time span represents actual |
| | time. It is unaffected by any business time configuration settings. |
| | Default Value: |
| | Deselected |
| | Example: |
| | The Business Time property is set to True, and business hours are configured as 9 a.m. to 5 p.m. A Manual AgileShape with a Time Span of 6 business hours is entered at 4 p.m. on Tuesday, then the activity must be completed by 2 p.m. on Wednesday. |

More Information

- Reminding Mail Window
- Email Template Wizard

Setting Up Email Templates in Multiple Languages

To configure an email template in an alternate language, do the following.

Prerequisites

• You must specify a language for each user.

For more information, see Add or Edit User Information Window.

Good to Know

- When the process sends an email, AgilePoint Server attempts to match each recipient's default language, as defined in Enterprise Manager, with an email template in their language.
- If a recipient's language does not match one of your alternate language email templates, the user receives the email in the default language email template.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
 - Activity Entry Message (Email)
 - Reminder Message (Email)
 - Task Completed Message (Email)
 - Task Reassigned Message (Email)
- 5. On the Email Template Wizard, do one of the following:
 - To modify an existing email template, in the Name list, select the name of the template you want to modify.
 - To create a new email template:
 - 1. Click New.
 - 2. On the New Name window, enter the name you want to identify your email template.
 - 3. Click OK.

- 1. On the **Email Template Wizard**, in the **Multi-language List (+)**, select the language for which you want to define an email template.
- 2. Click the tab for the language you selected.
- 3. On the Email Template Wizard, complete the following fields as required.

| Field Name | Definition |
|-----------------------------|---|
| Left to Right/Right to Left | <u>Definition:</u> Specifies the alignment of text in the content section of an email. <u>Allowed Values:</u> Left to Right Right to Left |

| Field Name | Definition |
|-------------|---|
| | Default Value: |
| | Left to Right |
| Subject | Definition: |
| | Specifies the subject line of an email notification. |
| | Allowed Values: |
| | A single line of text. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | \${ActivityName} in \${ProcessName} is complete |
| Content | Definition: |
| | Specifies the content of the body of an email. |
| | Allowed Values: |
| | Rich text in HTML format, or free text in text format. |
| | Default Value: |
| | None |
| | Custom Attributes: |
| | Yes |
| Attachments | Definition: |
| | Specifies one or more files you want to include in an email. |
| | Allowed Values: |
| | The full path and file name for the attachments you want to include. Lists are separated by semicolons. |
| | Note: The file that you would like to attach must reside on the local machine. |
| | Default Value: |
| | None |

| Field Name | Definition |
|------------|--|
| | Custom Attributes: |
| | Yes |
| | Example: |
| | C:\My Documents\sample1.doc; \${HomeDirectory}\sample2.doc; \${AttachDoc} |

More Information

- Email Template Wizard
- Creating a Notification Message

Creating Message Responses

This section describes how to create and modify message responses using various messaging technologies. You can use responses to complete a task, or for approve/reject functionality.

Creating Email Templates for Approvals

You can create an email template for the Activity Entry Email that participants will use to indicate approvals.

Create a Text-Based Approval Email Template

You can create an email template for the Activity Entry Email that participants will use to approve a request using a text-only format.

Prerequisites

 Some mobile devices do not allow you to edit text in the replies. For more information, see Email Approval on Mobile Devices

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
 - Activity Entry Message (Email)
 - Reminder Message (Email)
 - Task Completed Message (Email)
 - Task Reassigned Message (Email)

- 5. On the Email Template Wizard, do one of the following:
 - To modify an existing email template, in the Name list, select the name of the template you want to modify.
 - To create a new email template:
 - 1. Click New.
 - 2. On the New Name window, enter the name you want to identify your email template.
 - 3. Click OK.

Instructions

- 1. On the Email Template Wizard, complete the fields, with the exception of the email body, as required.
- 2. Complete the body field using the following guidelines. Note the following information:
 - *Xpath-Node* represents a valid Xpath node for example, {/pd:MyFields/pd:Approval}
 - **Value** represents the value you want to pass when the user selects this option. A common usage is True or False. The action that is selected with the X will be processed along with any information in the remarks section.

Use the following example as a guide.

| Email Templates Wizard | | | |
|--|---|--|--|
| Mail 1 | emplate Wizard | | |
| Actions New. | <u>Barnove</u> Regame Macro Settings Priority: High Tormat: Html | | |
| Email Settings Name: From: To: CC: | Approval Mail Get Global Templates | | |
| BCC: Default Subject: | | | |
| COREIX | Times New Roman II II III III IIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII | | |
| Attachments: | | | |
| | 🥪 OK 🔀 Cancel | | |

• Approved or rejected options:

Note that the terms used in the email can follow the format approved/rejected, or yes/no.

| Approval Keywords | Rejection Keywords | |
|--|--|--|
| {Approve [] = { <i>Xpath-Node</i> }= <i>Value</i> } | {Reject [] = { <i>Xpath-Node</i> }= <i>Value</i> } | |
| {Approved [] = { <i>Xpath-Node</i> }= <i>Value</i> } | {Rejected [] = {Xpath-Node}=Value} | |
| {Yes [] = {Xpath-Node}=Value} | {No[] = {Xpath-Node}=Value} | |

• {Remarks [] = {*Xpath-Node*}}

Note: The Remarks should be entered between the [] in Remarks [].

Create an HTML-Based Approval Email Template

You can create an HTML-based email template for the Activity Entry Email that participants will use to approve a request. To create an HTML-based email templates for approval, do the following.

Prerequisites

- HTML-based approval templates work only with mobile or web-based email. This functionality does not work with the Outlook client application for Windows.
- Some mobile devices do not allow you to edit text in the replies. For more information, see Email Approval on Mobile Devices

| Email Templates | Wizard |
|-----------------|---|
| Mail 1 | Template Wizard |
| Actions New. | <u>Remove</u> Rename Macro Priority: High Y Format: Default Y |
| Email Settings | |
| Name: | ApprovalTemplate Get Global Templates |
| From: | (ProcessInitiator) |
| To: | \$(Approver) |
| cc: | |
| BCC: | |
| Default 1 | + · x |
| | G Laft to Dialet C Dialet to Laft |
| Chine I | Letto kight Kightto Lett |
| Subject: p | Email-Approval Ver:\${ProcessTemplateVersion} |
| Content: | Times New Roman 🔄 12 💌 B I U 🛕 扫 田 津 課 目 主 注 目 🗕 😞 🗢 |
| | ^ |
| | Amount Information: |
| | Approval information: |
| | C Approved |
| | C Rejected |
| | Remarks: Test Remark |
| | Please don't remove or edit the information below this line. |
| | |
| | Taskid: \$(TaskiD) |
| | |
| | |
| | |
| | |
| Attachments: | |
| | and are 1 the sum |
| | V OK X Cancel |

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
 - Activity Entry Message (Email)
 - Reminder Message (Email)
 - Task Completed Message (Email)
 - Task Reassigned Message (Email)
- 5. On the Email Template Wizard, do one of the following:
 - To modify an existing email template, in the Name list, select the name of the template you want to modify.
 - To create a new email template:
 - 1. Click New.
 - 2. On the New Name window, enter the name you want to identify your email template.
 - 3. Click OK.

- 1. In the Email Templates Wizard, click the HTML code button (< >).
- 2. In the email body, paste the following HTML code.

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
<HTML><HEAD><TITLE></TITLE></Pre>
<META http-equiv=Content-Type content="text/html; charset=utf-8">
<META content="MSHTML 6.00.6001.18319" name=GENERATOR>
  </META></HEAD>
<BODY bgColor=#ffffff>
<STYLE type=text/css>
<!--
p.one
{border-left-color:#397dd0;
border-bottom-color:#397dd0;
margin-left:50px;
width:500px;
border-top-style:solid;
border-top-color:#397dd0;
border-right-style:solid;
border-left-style:solid;
height:225px;
border-right-color:#397dd0;
border-bottom-style:solid}
-->
</STYLE>
<P class=one style="WIDTH: 444px;</pre>
  HEIGHT: 257px"><BR>
<TABLE name="ApprovalInfo">
<COLGROUP width=25></COLGROUP>
<TBODY>
<TR>
<TD></TD>
<TH><SPAN style="FONT-FAMILY: Arial Narrow">
  Approval Information:</SPAN></TH></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">
   <INPUT type=radio
   name={/pd:myFields/pd:Approved}> Approved</INPUT>
   </SPAN></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">
   <INPUT type=radio name={/pd:myFields/pd:Approved}>
   Rejected</SPAN></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">Remarks:
  </SPAN><INPUT
style="WIDTH: 250px" size=25 value="Test Remark"
name={/pd:myFields/pd:Remarks}></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">Please
  don't remove or edit the information below this line.
  </SPAN></TD></TR>
<TR>
```

```
<TD></TD>

<TD></TD>

<TD><SPAN style="FONT-FAMILY: Arial Narrow">

<HR>

</SPAN></TD></TR>

<TD></TD>

<TD></TD>

<TD><SPAN style="FONT-FAMILY: Arial Narrow">

TaskId: ${TaskID}</SPAN></TD>

</TR>

</TR>

<TR></TR>

<TR></TR>

</TR>

</TBODY>

</TABLE></P></BODY></HTML>
```

3. Complete the fields on the Email Template Wizard as required.

Email Approval on Mobile Devices

If an approver is using a mobile device, he or she cannot use the standard email approval methods because it is not possible to edit email histories on many mobile email applications.

As an alternative to the standard text or HTML email approval methods, an approver can reply to the approval email with one of the following keywords as the **first word in the email body**.

| Approval Keywords | Rejection Keywords |
|-------------------|--------------------|
| Approve | Reject |
| Approved | Rejected |
| Yes | No |

Remarks are not supported using this method.

Setting Up Responses Using Lync

To Set Up Responses, do the following.

Prerequisites

• Create the message to which you want the participant to reply.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 4. In one of the following fields, click **Add Lync Template**. The specific fields that display vary, depending upon the AgileShape you are using:
 - Reminder Message
 - Task Assigned Message

- Task Cancelled Message
- Task Completed Message
- Task Reassigned Message
- 5. On the Lync Template Wizard, do one of the following:
 - To modify an existing Lync template, in the Name list, select the name of the template you want to modify.
 - To create a new Lync template:
 - 1. Click New.
 - 2. On the New Name window, enter the name you want to identify your Lync template.
 - 3. Click OK.

- 1. Select Complete the Assigned, Reassigned Or Overdue task by Responding the Lync Message.
- 2. Complete the following field.

| Field Name | Definition | |
|------------|--|--|
| Key Word | Definition: | |
| | A value which, when entered in a message response, sets the Xpath node to True or False. This is typically used for approve/reject functionality. | |
| | Allowed Values: | |
| | A text string. | |
| | Default Value: | |
| | None | |
| | Custom Attributes: | |
| | Yes | |
| XPath | Definition: | |
| | Specifies a schema node whose value is set when the keyword is entered in the message response. This is typically used for approve/reject functionality. The keyword determines the value that is set. | |
| | Allowed Values: | |
| | An XPath to a schema node that represents a Boolean value. | |
| | Default Value: | |
| | None | |

| Field Name | Definition |
|------------|-------------------------------|
| | Custom Attributes: |
| | Yes |
| | Example: |
| | /pd:myFields/pd:ApproveReject |

Setting Up Responses Using SMS

To Set Up Responses, do the following.

Prerequisites

• Create the message to which you want the participant to reply.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 4. In one of the following fields, click **Add SMS Template**. The specific fields that display vary, depending upon the AgileShape you are using:
 - Reminder Message
 - Task Assigned Message
 - Task Cancelled Message
 - Task Completed Message
 - Task Reassigned Message
- 5. On the SMS Template Wizard, do one of the following:
 - To modify an existing SMS template, in the Name list, select the name of the template you want to modify.
 - To create a new SMS template:
 - 1. Click New.
 - 2. On the New Name window, enter the name you want to identify your SMS template.
 - 3. Click OK.

- 1. Select Complete the Assigned, Reassigned Or Overdue task by Responding the Lync Message.
- 2. Complete the following field.

| Field Name | Definition |
|------------|---|
| Key Word | Definition: A value which, when entered in a message response, sets the Xpath node to True or False. This is typically used for approve/reject functionality. Allowed Values: A text string. Default Value: None Custom Attributes: Yes |
| XPath | Definition: Specifies a schema node whose value is set when the keyword is entered in the message response. This is typically used for approve/reject functionality. The keyword determines the value that is set. Allowed Values: An XPath to a schema node that represents a Boolean value. Default Value: None Custom Attributes: Yes Example: /pd:myFields/pd:ApproveReject |

Using Variables in Notification Messages

You can use several types of variables in notification messages:

- Process attributes
- XML schema elements from a process model or form
- Custom macros (email notifications only)
- SharePoint or InfoPath metadata

To use variables in a message template, do the following.

Good to Know

 The process attributes TaskCode and TaskLink are supported. For more information, see Common Process Attributes

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. Select the message type you want. Not all message types are available from all message channels.
 - Task Assigned (Message Channel)
 - Task Reassigned (Message Channel)
 - Task Completed (Message Channel)
 - Task Cancelled (Message Channel)
 - Reminder Message (Message Channel)
 - Activity Entry Message (Message Channel)

Instructions

1. Place your cursor in the **Message** field.

For email messages, you can also use the To, Form, Cc, Bcc, Subject, or Attachment field.

- 2. Do one of the following:
 - To use an XML schema element, drag a schema node from the list of **Select Xpath from XML Schema** window.

For email messages this window appears automatically when your cursor is in a field that accepts process attributes. For other message types, you must click **Schema** to see this window.

- To use a process attribute, do the following:
 - 1. Enter \${.
 - 2. Select your attribute from the context menu.
- To use SharePoint list column in an SPDoc or SPList process model, do the following:
 - 1. Enter \${.
 - 2. On the context menu, click <XML Schema>
 - 3. On the Select SharePoint Library Column Window, select your element.
- To use a custom macro in an email message, do the following:
 - 1. Click Macro.
 - 2. Complete the select or create your macro on the Custom Mail Template Macro Window.

Creating a Custom Macro

A custom macro is used to simplify the data entry task when constructing an email notification by using a single attribute name (or macro) to refer to a combination of process attributes. Custom macros are stored in the process attribute list with a "*" for easy identification and can be reused when constructing additional email notification templates in the future.

To create a custom macro, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the Design Tasks pane, click Show Properties.
- 4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
 - Activity Entry Message (Email)
 - Reminder Message (Email)
 - Task Completed Message (Email)
 - Task Reassigned Message (Email)
- 5. On the Email Template Wizard, do one of the following:
 - To modify an existing email template, in the Name list, select the name of the template you want to modify.
 - To create a new email template:
 - 1. Click New.
 - 2. On the New Name window, enter the name you want to identify your email template.
 - 3. Click OK.
- 6. Click Macro.

Instructions

- 1. On the Custom Mail Template Macro window, in the Name field, enter a name of the macro.
- 2. In the Macro field, do one of the following:
 - Enter your custom macro name.
 - Enter \${ to show a list of the built-in (primary) macros, and the select from the list.
- 3. Click Add.

More Information

Custom Mail Template Macro Window

Working with Links in the Email Template Wizard

The rich text controls for the Email Template Wizard come from a third-party vendor and use typical, industrystandard behavior. When creating or editing a hyperlink that includes a custom attribute, if no protocol is present in the URL field, the control adds the default prefix **about:** to the URL.

| Hyperlin | k Information | OK |
|----------|-----------------------------|---------|
| Type: | (other) 👻 | Cancel |
| URL: | about:\${MyCustomAttribute} | Calicer |

This prefix is not visible until the email template has been saved, but it appears in the process at runtime.

Creating a Hyperlink in an Email Template

To create a hyperlink in an email template, do the following.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. Drag any AgileWork, and drop it on the Process Model.
- 3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
- 4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
 - Activity Entry Message (Email)
 - Reminder Message (Email)
 - Task Completed Message (Email)
 - Task Reassigned Message (Email)
- 5. On the Email Template Wizard, do one of the following:
 - To modify an existing email template, in the Name list, select the name of the template you want to modify.
 - To create a new email template:
 - 1. Click New.
 - 2. On the New Name window, enter the name you want to identify your email template.
 - 3. Click OK.

Instructions

1. On the Email Template Wizard window, select the text you want to be hyperlink.

3. On the **Hyperlink** window, you want to complete the following fields as required:

| Field Name | Definition | |
|------------|--|--|
| Туре | Definition: Specifies the protocol type. | |
| | Allowed Values: | |
| | • file: | |
| | • ftp: | |
| | • http: | |
| | • https: | |
| | • emailto: | |
| | ● news: | |
| | • telnet: | |
| | (other) - Specifies a protocol that is not in the list. | |
| | If you select (other), you must specify your protocol in the URL field. | |
| | Default Value: | |
| | http: | |
| URL | Definition: | |
| | Specifies your URL. | |
| | Allowed Values: | |
| | A valid URL. | |
| | If you are using a custom attribute to store your URL, it is recommended that you do not store the protocol, or Type, within the custom attribute. Instead, use the Type field to define the protocol, and the custom attribute to represent the remainder of the URL. | |
| | If you do not follow this best practice, and you have a custom attribute with a URL that includes the protocol, in certain cases the default Type prefix about: is added automatically when the URL is modified. In this situation, if you modify the URL, you must manually remove the about: prefix. | |
| | For more information, see Why Do URLs in Email Templates Appear with the Prefix "about:"? in the Documentation Library. | |

| Field Name | Definition |
|------------|---|
| | Default Value: |
| | http:// |
| | Custom Attributes: |
| | Yes |
| | Example: |
| | http://agilepoint.com |
| | http://\${MyServer}/ |

4. Click OK.

Modifying a Hyperlink in an Email Template

To modify a hyperlink in an email template, do the following.

Prerequisites

In the existing email template, the URL uses the custom attribute.

Good to Know

• If you are using the custom attribute in your URL, and there is no protocol specified in the URL field, in certain cases the **about:** prefix is added when modify the email URL.

As a best practice, AgilePoint recommends if you are using a custom attribute with no specified protocol, you follow this procedure each time you modify the URL.

Navigation

- 1. In AgilePoint Envision, open a process template.
- 2. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
 - Activity Entry Message (Email)
 - Reminder Message (Email)
 - Task Completed Message (Email)
 - Task Reassigned Message (Email)
- 3. On the **Email Template Wizard**, in the **Name** list, select your email template.
- 4. Select your URL, and click the Hyperlink button.

- 1. On the Hyperlink window, modify the URL as required in the URL field.
- 2. Click **OK**.
- 3. On the Email Template Wizard window, Click OK.

- 4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
 - Activity Entry Message (Email)
 - Reminder Message (Email)
 - Task Completed Message (Email)
 - Task Reassigned Message (Email)
- 5. On the **Email Template Wizard**, in the **Name** list, select your email template.
- 6. Select your **URL**, and click the **Hyperlink** button.
- 7. In the URL field, delete the prefix about:.
- 8. Click **OK**.

Process Repository

Process Repository enhances collaboration and process documentation where you store the .vsd file to a SharePoint Document Library, and also attach documents or a URL hyperlink to any AgilePart or AgileWork. Also supported is the ability to attach process documentation at the process level. SharePoint is used as the process repository where all artifacts of a process can be accessed.

In order to utilize the Process Repository functionality, first verify that the AgilePointProcessRepository template is available in SharePoint.

Verify the Process Repository Template Exists

To verify the existing process repository, do the following.

Instructions

- 1. On the SharePoint site, click Site Actions > Create.
- 2. Verify that AgilePointProcessRepository is available under the Libraries section.



Note: Your SharePoint site administrator may have given this template a unique name.

You will use this template to create the process repository in SharePoint. If the site template is not shown in the list, your SharePoint site administrator will need to deploy the ProcessRepository.stp template file.

3. If the process repository is not available, you must add it. For more information, see Deploying a SharePoint Site Template File.

Set Up a Process Repository

To setup Process Repository in SharePoint:

1. Create a new SharePoint library and select the AgilePointProcessRepository template type.



Note: Your SharePoint site administrator may have given this template a unique name.

- 2. Name the new library AgilePointProcessRepository or give it a desired name.
- 3. The AgilePointProcessRepository library is now created for you, you will use this repository to publish the .vsd (AgilePoint Process Model) for collaboration, and also access the process documentation.
- 4. AgilePoint Envision allows you to attach documents or a hyperlink at the process model level, and/or at the activity level (i.e. AgileParts and AgileWorks). The documents are to be stored in a SharePoint document library. If you would like to attach documents to the process, create a document library in SharePoint (e.g. Travel Request Process Documentation) to store the process documentation.

Setup Process Discovery in AgilePoint Envision

AgilePoint Envision allows you to attach documents or a hyperlink at the process model level, and/or at the activity level (i.e. AgileParts and AgileWorks).

Associate Process Documentation at the Process Model Level

- 1. Ensure that no activities are selected and the Process Template properties are visible.
- 2. In the **ProcessRepository** section, click the ConfigureAttachments property and click the **ellipses** button to open the Configure Attachments window. The Configure Attachments window appears.
- 3. Click Add > SharePoint Document Library. The Get SharePoint Document Library window appears.



Note: Other document repositories may be supported in a future release.

- 4. In the SharePoint Server URL, type in the SharePoint URL and click Get Doc Lib.
- 5. Check the Windows Authentication check box to allow the OS to authenticate you in SharePoint or provide alternative credentials in the text boxes provided to connect to SharePoint. Once connected, the Document Libraries are populated in the list.
- 6. Select the Document Library where your documents are stored, select the document and click OK.

| t SharePoint Document Library | | | | |
|---|---------------------|---|-------------------|--|
| Select docume | ants from the Share | Point document library | | |
| Connect SharePoint | | | | |
| SharePoint Server Url: | http://mysite.com | /ResearchLib/Forms/AllItems.aspx 👻 | 📂 Get Doc Library | |
| Domain: | WIN-5QCD 1JDLB | | | |
| User Name: | Administrator | Administrator | | |
| Password: | | | | |
| Windows Authentic | ation 📄 Use F | form Based Authentication 👘 Use Form Office 365 | | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter | n E | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_45_01.xml 2011-12-27T12_45_01.xml | | |
| LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | | 4 111 | ✓ OK K Cancel | |

7. The Configure Attachments window appears and the document now shows in the list of attachments. To add another document click **Add**. To remove a document click the document and click **Remove**. To open the document select the document and click **Open**.

Select the check box in the View column to enable the attachment to be viewed directly from the process model diagram.

| onfigure | Attachments | | X |
|-----------|------------------------|---|--------------------|
| <u>F</u> | Select documents f | rom the SharePoint document library | |
| Attachn | nents | | |
| | Title | Attachment | View* |
| 1 | 2011-12-27T12 | http://win-5qcd1jdlb8g:8000/ErrorTest/2011-12-27T12_3 | |
| | | | Add Remove Open OK |
| *View Att | tachment in Process Vi | ewer Page | Cancel |

You can also add a hyperlink to any online artifact by right-clicking and pasting the URL into the **Reference URL** property.

| - | Process Repository | |
|---|-----------------------|-------------------------------|
| | Configure Attachments | {Configured} |
| | Reference URL | http://www.departments.dsu.ec |

Associate Process Documentation at the Activity Level

- 1. In a process model, click an AgilePart or AgileWork for which you would like to associate process documentation.
- 2. In the **ProcessRepository** section, click the **ConfigureAttachments** property and click the **ellipses** button to open the Configure Attachments window. The Configure Attachments window appears.
- 3. Click Add > SharePoint Document Library. The Get SharePoint Document Library window appears.



Note: Other document repositories may be supported in a future release.

4. In the SharePoint Server URL, type in the SharePoint URL and click Get Doc Lib.

- 5. Check the Windows Authentication to allow the OS to authenticate you in SharePoint or provide alternative credentials in the text boxes provided to connect to SharePoint. Once connected, the Document Libraries are populated in the list.
- 6. Select the Document Library where your documents are stored, select the document and click **OK**.

| Connect ChareDeint | | | |
|---|------------------|--|-----------------|
| SharePoint Server Ltd | http://mysite.co | nn Decearchi in /Eorme /Alliteme acov | - Get Doc Libra |
| SharePoint Server on. | Incommiscence | | |
| Domain: | WIN-5QCD 1JDU | B8G | |
| User Name: | Administrator | | |
| Password: | | | |
| Windows Authentica | ation 🔲 Use | Form Based Authentication Use Form Office 365 | |
| | | | |
| | | | |
| Select a Document Lib | rary | Select a document | |
| Select a Document Lib | rary | Select a document | |
| Select a Document Lib Document Library DeleteDocumentTest | rary | Select a document Name Form 1.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib | rary | Select a document Name Form1.xml 2011-12-27T12_30_56.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest | rary | Select a document Name Form1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter | mary | Select a document Name Form1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_43_0.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib | mary | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_43_0.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery | arary | Select a document Name Form1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_45_01.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery Master Page Gallery | mary | Select a document Name Form1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_43_0.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocument ib | mary E | Select a document Name Form1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_43_0.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates | xary | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_43_0.xml 2011-12-27T12_45_01.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents | mary | Select a document Name Form1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_43_0.xml | ✓ OK |

7. The Configure Attachments window appears and the document now shows in the list of attachments. To add another document, click **Add**. To remove a document click the document and click **Remove**. To open the document select the document and click **Open**.

Select the check box in the **View** column to enable the attachment to be viewed directly from the process model diagram.

Process Repository

| SharePoint Document | t Library | | |
|--|----------------------|---|------------------|
| Select docume | ents from the ShareF | Point document library | |
| Connect SharePoint | | | 1 |
| SharePoint Server Url: | http://mysite.com/ | /ResearchLib/Forms/AllItems.aspx 👻 | 📂 Get Doc Librar |
| Domain: | WIN-5QCD1JDLB8 | IG | |
| User Neres | Administrator | | |
| Oser Marile: | | | |
| Password: | | | |
| Vindows Authentica | ation 📃 Use Fo | orm Based Authentication 🛛 🕅 Use Form Office 365 | |
| | | | |
| | | | |
| Select a Document Lib | brary | Select a document | |
| Select a Document Lib | orary | Select a document | |
| Select a Document Lib Document Library DeleteDocumentTest | orary | Select a document Name Form 1.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib | prary | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest ErrorTest | brary | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter | prary | Select a document Name Enrn 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_45_01.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib | prary | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_43_40.xml 2011-12-27T12_45_01.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery | prary | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_45_01.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate | n E | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_45_01.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib | prary | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_43_0.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates | prary | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_45_01.xml | |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents | n E | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_45_01.xml | ✓ ОК |
| Select a Document Lib Document Library DeleteDocumentTest DotNetProxyLib ErrorTest Form Templates Instructie Documenter LeaveRequestLib List Template Gallery Master Page Gallery ProcessTemplate ReportDocumentLib Reporting Templates Shared Documents Site Assets | prary | Select a document Name Form 1.xml 2011-12-27T12_30_56.xml 2011-12-27T12_43_40.xml 2011-12-27T12_45_01.xml | € ОК |

You can also add a hyperlink to any online artifact by right-clicking and pasting the URL into the **Reference URL** property.

| Configure A | Attachments | | X |
|-------------|----------------------|---|-----------------|
| <u></u> | Select documents f | rom the SharePoint document library | |
| Attachm | Title | Attachment View | <i>,</i> * |
| J | 2011-12-27T12 | http://win-5qcd1jdlb8g:8000/ErrorTest/2011-12-27T12_3 📝 | |
| | | | Add Remove Open |
| *View Off | achment in Drocess V | iewer Page | Cancel |

Publish Process Documentation to SharePoint

This section provides information about the publishing the process documentation to SharePoint.

- 1. Click File > Update Server > Publish Process Documentation to SharePoint. The SharePoint Process Repository window appears.
- 2. Enter the SharePoint Site URL and click Connect.
- 3. Select the SharePoint Document Library and click Show Folder Tree.
- 4. Select the SharePoint document repository, or click **Add Folder** to add a folder to use as the process repository and click **OK**. The Process Repository Information window appears.

| Process Repository Info | rmation |
|--------------------------|---|
| Select the Sh | arePoint column properties |
| Process Template Prope | erties |
| Process Template Title: | TravelRequestProcess |
| Relative FolderUrl: | AgilePointProcessRepository |
| - SharePoint Column Prop | perties |
| User/Owner: | DEMO3\bill |
| Role: | AgilePoint Demo Site Owners |
| Description: | This is preliminary documentation for the Travel Request process. |
| Comments: | The next review session will be Tuesday. |
| | |

The information entered in this window will be shown as metadata columns in the SharePoint process repository.

- 5. Click the **User/Owner** ellipses button and select the SharePoint user that is the manager or owner of this process.
- 6. Click the **Role** ellipses button and select the SharePoint role associated with the User/Owner.
- 7. Enter a description for this process and any comments and click **OK**. The process model .vsd and associated document(s) are now published to the SharePoint process repository.

| AglePo Agil | Int Demo Site > AgilePointP ePointProcessR | epository | | | | | | | | | |
|----------------|---|--------------------|-------------------------|----|--------------|-----------------------------------|---|--|---------|-------------|-----|
| New | Upload Actions | Settings * | | | | | | View: | All Doo | cuments | ٠ |
| Туре | Name | Modified | Modified By | 1D | ProcessOwner | ProcessRole | ProcessDescription | ProcessCon | ments | Application | |
| 2 | TraveRequestProcess \$ NEW | 6/22/2009 11:54 AM | DEMO3 Vidministrator | 4 | DEMO3(bill | AgliePoint Demo Site Owners | This is preliminary documenation for the Travel Request process. | The next re session all Tuesday. | be | SPSIntegra | not |

Also you can see that the document association appears in the process model.



You can remove the document association text from showing in the process model, by right-clicking the activity and selecting **Hide Properties**. You can also view the document from the Envision process model by right-clicking the attachment and clicking the attachment.

| START | Submit Travel Re Submit Activity U | equest | pprove Travel Request | | STOP |
|-------|---------------------------------------|--------|------------------------------|---|------|
| | | 0 | | _ | |
| | | 3 | Submit Activity Use Case.one | | |
| | | Ж | Cu <u>t</u> | | |
| | | Đ | ⊆ору | | |
| | | 2 | Paste | | |
| | | | Format | F | |
| | | | Data | ۲ | |
| | | | Shap <u>e</u> | ۲ | |
| | | 0 | Help | | |

Open the Process Repository in SharePoint

Once the AgilePoint Process Repository has been setup in AgilePoint Envision and in SharePoint, you can now open the process repository in SharePoint.

1. Open the AgilePoint Process Repository SharePoint library.

| ApleFe Agil | ePointProcessR | epository | | | - | | | | |
|----------------|--------------------------|----------------------------|--------------------------|----|---------------|----------------------------------|--|---|----------------|
| New | Upped Actions | Settings • | | | | | | Now: All Doc | suments • |
| Type | Name | Podried | @Modified By | 10 | EnoreestOwner | PronessRole | Process learnphon | Process Comments | Application |
| 瀏 | TrankRequestProcess 114M | <i>в/22/2</i> 009 11:54 ом | DEMOS Melministration | 4 | DHMC (Sijali | Agil-Hant Domo Sile Owners | these preliminary documentation for the Travel Request process. | the next review accion will be Tuesday. | NPNintegration |

2. In the Type column, click the Internet icon. The Process Discovery page appears.



- 3. Click the document attachment name (e.g. Submit Activity Use Case.one) to open the document.
- 4. From the SharePoint process repository library, click the **Process Name** drop-down and notice that all the general SharePoint options are available for associating workflows, Check Out, etc.

| AgilePointProcessRept | silory | y - Wind | int areat | ternet Explorer | | | | | | | | _ £ |
|---|-------------------|---------------------------------|------------------------------------|-------------------------------|-----------|--------------------|-------------------------|----|--------------|-----------------------------------|--|--|
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| Wary All Site Content | | | Nev | • Upload • J | Actions * | Settings * | | | | | | View AIL |
| Documents | | | Туре | Name | | Nodified | @Hodited By | 1D | ProcessOwner | ProcessRole | ProcessDescription | ProcessComment |
| Shared Documents AglePointProcessReposits TravelRequestProcessDoc | y Seveniaris | ation | Ð | Travel loguest Proc | salers. | 6/22/2009 11:51 AV | DEMOS Volministrator | 1 | ремоз/рії | AgildPaint Demo Site Owners | This is preliminary documentation for the Travel Request | The next review session will be Tuesday. |
| Lists | | View Pr | oper ices | | _ | _ | | | | | process. | |
| • Calender • Tasks • Travel Request | 100 140 140 | Edit Pro Manage Edit in P | operites e Perniss Nicrosoft | ions . Office SharePoint D | ugna | | | | | | | |
| Discussions | × | Delete | | | | | | | | | | |
| Team Deceasion | | Send T | 6 | | | | | | | | | |
| Sites | Ga | Ored: (| Out | | | | | | | | | |
| People and Groups | 0 | Unpubli | ish this v | craion | | | | | | | | |
| E Recycle Bin | 5 | Version | history | | | | | | | | | |
| | 6 | Workfie | ows | | | | | | | | | |
| | | NetN | le | | | | | | | | | |
Edit Stencil Images

This section provides information and instructions about how to create and edit AgilePoint related stencils and their shapes in Visio, as well as how to associate shapes to AgilePoint activities. AgilePoint comes with several built-in activities that already have their own graphics and icons. You may want to substitute in your own images, or implement new stencils and shapes for your custom AgilePoint activities (e.g. AgileParts and AgileWorks). AgilePoint Envision provides you a way to customize the stencils and shapes and associate them with AgilePoint activities.



Note: Microsoft Visio Help also provides some information about editing stencil images. Access Microsoft Visio Help by clicking **Help** > **Microsoft Office Visio Help**.

Create and Save a New Stencil

This option allows you to create a new stencil. A stencil contains a group of shapes that you can drag and drop to construct your process model. The easiest way to do this is to copy an existing AgilePoint stencil as a base and work from that.

- 1. In Windows Explorer navigate to [AgilePoint Envision solution files folder].
- 2. Make a copy of the Generic.vss file and place it in the same folder.
- 3. Give the copy a descriptive name for the new stencil (e.g. IT Assets Group 1).
- 4. Open AgilePoint Envision, click the Shapes button and click IT Assets Group 1.
- 5. The stencil appears as **Generic BPM** in the stencil pane. Rename it by right-clicking on the stencil title and clicking **Edit Stencil**. The Stencil opens in edit mode.
- 6. Right-click again and click **Properties**.
- 7. In the Title field, type a name for the new stencil (e.g. IT Assets Group 1) and click OK.
- 8. Delete the existing icons in the new stencil so that you have a clean slate and save the stencil by clicking on the **Save** button next to the stencil. Saving as Visio 2002 will ensure backward compatibility.

Create a New Master Icon

This part provides information for adding a new master icon to a stencil that can represent a custom AgileShape.

1. Close AgilePoint Envision and leave MS Visio open as shown below.

| 💽 Mic | rosof | t Visio | | | | | | | | | | | = 🗆 🗵 |
|---------------|-------|---------|---------|--------|---------|----------------|---------|----------------|----------|-------|--------|----------|------------|
| E <u>F</u> ie | Edit | View | Insert | Format | Tools | Data | ≦hape | <u>W</u> indow | Help | | Type a | question | for help 🔹 |
| 10. | 1 | 81ê | 0.14 | 91261 | la (15. | $\times \in$ |) - 🚚 | + " | 1 A | - 🔊 | 100% | - 0 | |
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- 2. Click File > Open.
- 3. Navigate to the [AgilePoint Envision solution files folder] where the VSS files are stored, and open the new stencil (i.e. IT Assets Group 1).
- 4. Right-click in the new stencil pane and click **New Master**.
- 5. Give the new master a descriptive name (e.g. Procurement Algorithm). It is recommended to choose **Normal** (32 x 32) for the icon size and to leave the behavior check boxes unchecked.

| New Master | |
|----------------------|------------------------------------|
| Properties | |
| <u>N</u> ame: | Procurement Algorithm |
| Prompt: | |
| <u>I</u> con size: | Normal (32 × 32) |
| <u>A</u> lign master | name: O Left O Center O Right |
| Search —— | |
| <u>K</u> eywords: | |
| Behavior — | |
| 🔲 <u>M</u> atch ma | aster by name on drop |
| 🗖 Generate | icon automatically from shape data |
| 2 | OK Cancel |

- 6. Click **OK**.
- 7. Right-click on the **Procurement Algorithm** activity in the stencil pane and click **Edit Master** > **Edit Icon Image**.



Note: Icons are generally created by your computer graphics design department. It is recommended to use 32-bit icon images. You can either draw one by hand or copy and paste an existing icon.

8. Either draw an icon pixel by pixel, or simply copy and existing icon and paste it here.



9. When finished, close the icon window.

Associate a Master Shape with the Icon Image

This option allows you to add a master shape that represents an AgilePoint activity on the drawing canvas.

- 1. Right-click on the icon image in the stencil pane and click Edit Master > Edit Master Shape.
- 2. Click Insert > Picture > From File.
- 3. Browse and select the image file (.bmp, .gif, jpg, etc.) to add. Proceed directly to the next step to finalize the shape.

Finalize the Shape

This option allows you to associate the stencil shape you just created with a custom AgilePart or AgileWork assembly.

- Click Tools > Macro > ThisDocument > FinalizeShape. The Choose Activity Type window appears. Here are all the built in AgileShapes and custom AgileParts and AgileWorks that have been registered in AgilePoint Envision.
- 2. Select either **AgilePart** or **AgileWork** depending on the type of custom activity, choose the name from the list and click **OK**.

Edit an Icon Image on a Stencil

This option allows you to manually edit the icon image that displays in the stencil pane that represents an AgilePoint activity.

- 1. In AgilePoint Envision, open the stencil that includes the icon image for which you would like to edit.
- 2. Right-click the Stencil title (e.g. Generic) and select Edit Stencil. The Stencil appears in Edit mode.

| Shapes | × | | | |
|---|-------------------------------|--|--|--|
| Search for Shapes: Type your search here | | | | |
| 🖽 Generic BPM 🛛 🌸 | Edit Stencil | | | |
| 🔿 Start 🛛 🞘 🔙 | <u>S</u> ave | | | |
| © Procedure क | Save <u>A</u> s Properties | | | |
| မိုဂ္ဂ ^O Manual With T | View | | | |
| MultipleC之 | Float <u>W</u> indow | | | |
| Email D | <u>⊂lose</u> | | | |
| D-And | | | | |
| AgileWork 🕕 Stop | | | | |

3. Right-click the icon image in the stencil pane and select **Edit Master** > **Edit Icon Image**. The image file will be displayed and you can modify the icon as needed.

Edit Master Shape

- 1. To edit the shape itself including the label and properties of the shape, right mouse on the icon in the stencil pane and select Edit Master > Edit Master Shape. The shape image will be displayed.
- 2. Right-click the shape image and select Show ShapeSheet (you must be in the developer mode to do this).
- 3. In the **ShapeSheet**, look for the **LockGroup** property and change the value from 1 to **0** to unlock the group.

| E Generic BPM | | | | | | | Upda |
|--|--|-------------------------|----------------------------------|--|----------|----------------------------------|-------|
| 1 SAP Integration | | | | | | (UID) | Upda |
| COD | on A | | | | | Description | |
| | effa. | | | | | Time Span | 10 Mi |
| Undate Crea | te Item | | | | | Business Time | False |
| Create Br.Pit Enter X-Ref | | | | ~ | (M Di | (Name) Display name of the ac | |
| Create Br/Plt Enter | rX-Ref ≚ rocess Ter | nplate:Update Record < | SHAPE> | 2 | | | |
| Create Br/Bit Enter | rx-Ref ≚ rocess Ter | nplate:Update Record < | SHAPE> | LockTextEdit | 0 | | |
| Create Br/Plt_Enter | rx-Ref ≚ rocess Ter 0 | nplate:Update Record <1 | SHAPE> | Lock/TextEdit Lock/VbEdit | 0 | | |
| Create Br./Plt Enter | rx-Ref ocess Ter 0 0 0 0 | nplate:Update Record <1 | SHAPE> shape | LockTextEdit LockVtxEdit LockCrop | 0 | | |
| Create Br/Plt Fote Drawing1:Pr LockWeight LockHeight LockAspect LockMoveX | ocess Ter ocess Ter 0 0 0 0 | nplate:Update Record <1 | SHAPE> state te ct 0 | LockTextEdit LockVtxEdit LockCrop LockGroup | 0 0 1 | | |

- 4. Right-click the shape image again and select **Shape** > **Ungroup**.
- 5. Now you can edit the image including the text in the image.

Custom Configured Stencils (My Stencil)

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

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

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

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

Create an AgileShape with Preconfigured Properties

- 1. In AgilePoint Envision, open a process model of any type.
- 2. Open the stencil named My Stencil.
- 3. Drag and drop an AgileShape to the process model.
- 4. Modify the shape's properties as desired.
- 5. Drag the configured shape from the process model to **My Stencil**. You can create your own stencil or use an existing stencil. If you use an existing stencil, you will need to make it editable when prompted. When you drop the shape on the stencil, the **Edit Master Properties** dialog box appears.
- 6. On the Edit Master Properties dialog box, complete the following fields as desired:
 - Name The name that appears below your shape in the stencil and by default in the process model.
 - Tooltip Description The name that appears for the shape in the pop-up tooltip in a stencil.
 - Allow everyone to edit properties Selected means that the shape's properties are editable by anyone. Deselected means that the shape cannot be edited, except by the creator.
- 7. Click OK.

Modify an AgileShape with Preconfigured Properties

To modify a customized AgileShape, do the following.



Note: You must have permissions to modify the AgileShape properties.



Note: This procedure creates a copy of the preconfigured AgileShape you started with. You cannot modify the original.

1. In AgilePoint Envision, open a process model of any type.

- 2. Open **My Stencil** with the customized AgileShape.
- 3. Drag and drop the customized shape to the process model.
- 4. Follow the instructions in Creating a Customized AgileShape.
- 5. Drag the modified shape from the process model back to a stencil.

BPMN

This section describes how to use Business Process Model Notation (BPMN) with AgilePoint Envision.

Adding or Modifying BPMN Properties for an AgileShape

Each AgileShape includes an optional set of properties for the BPMN standard. These are the same properties included with the AgileShape's associated BPMN shape in Visio.

To add or modify the BPMN properties for an AgileShape, do the following.

Prerequisites

• A process model with one or more AgileShapes.

Navigation

- 1. In Envision, open your process model.
- 2. Select the AgileShape you want to work with.
- 3. If the Design Tasks menu is not displayed in right pane, click **Design Tasks**.

Instructions

- 1. In Envision, on the Design Tasks menu, click BPMN.
- 2. In the BPMN properties list, complete the property values as required.

Field Definitions

| Field Name | Definition |
|---------------------|---|
| AdHoc | This specifies whether the sub-process is ad hoc. |
| From | The source of the assignment. |
| Assignments | An expression that determines the assignments for an activity. |
| То | The destination of the assignment. |
| Assign Time | Specifies at what point during an activity the assignment occurs. |
| Categories | Categories for purposes such as reporting and analysis. |
| Completion Quantity | The number of tokens that will be generated down the sequence flow. |

| Field Name | Definition |
|---------------------|--|
| Correlation | The correlation set. |
| Documentation | Documentation for the object. |
| Event Type | The type of event. |
| Exclusive Type | The exclusive type for the gateway. |
| Expression Body | A mathematical expression. |
| Expression Language | A language that defines the syntax for the expression. |
| Gateway Type | Specifies the behavior of the gateway. |
| IORules | An expression that defines the relationship between one input set and one output set. |
| IsForCompensation | Specifies whether or not a compensation can be performed after the process has completed normally. |
| Loop Туре | The loop type. |
| Marker Visible | Specifies whether a marker is visible in the gateway. |
| Name | The property name. |
| Performers | The human resources that will be performing the task. |
| Properties | Properties for use within the processing of the activity. |
| Start Quantity | The number of tokens that must arrive from a single sequence flow before the activity can begin. |
| Status | The status of an activity. |
| SubProcess Type | The sub-process type. |
| Task Type | The task type. |
| Trigger | The trigger type. |
| Туре | The property type. |

More Information

For more information about BPMN or BPMN attributes, visit the web site of the Object Management Group at bpmn.org.

Converting an AgilePoint Process Model to BPMN

You can convert an AgilePoint process model to use the look and feel of a BPMN process model. For example, a process model that looks like this:



Would be converted to look like this:



To convert a standard AgilePoint process model to BPMN notation, do the following.

Prerequisites

• A process model that is complete and saved with the AgileShapes and the behavior you want defined.

Navigation

1. In Envision, open your completed process model.

Instructions

1. In Envision, click AgilePoint > Miscellaneous > Convert to BPMN.

The icons for your AgileShapes are converted to their BPMN counterparts, so the process model follows the visual standards for a BPMN process.



Note: If you add new AgileShapes to the process, repeat this procedure to convert those AgileShapes to the BPMN visual standard.

Data Binding

AgilePoint allows you to bind to XML Schema or SharePoint Document Library metadata.

XML Schema Support for ASP.NET Applications

For ASP.NET applications, this feature enables the creation and manipulation of XML Data Schema within AgilePoint Envision. An AgilePoint Developer created XML Data Schema file can also be imported into AgilePoint Envision.

Schema XML Binding

In InfoPath or ASP.NET based process templates, you can access all or part of the values stored in the schema of the form to determine the routing of your process, or to display information in an email notification. To access the InfoPath XML Schema within an email template, type \${ and select <XML Schema>. If outside an email template, such as in a Multiple Condition Activity, you can simply define the columns within the Data Binding field. You can also construct the process attribute syntax manually to access a specific section or element of the XML. This is accomplished by specifying an XPath expression \${XPathExpression} (in place of a custom attribute name). Below are a few examples that can be used:

- \$/*
- \$//*
- \$/exp:expenseReport
- \${/exp:expenseReport/exp:startDate}

In InfoPath or ASP.NET based process instances, you can access all or part of the form's XML. Using the special \$/ attribute contains the XML of the entire form. By specifying an XPath expression \$/{XPathExpression} (in place of a custom attribute name), you can access a specific section or element of the XML e.g.: \$/*, \$//*, \$/ exp:expenseReport, \${/exp:expenseReport/exp:startDate}.

To access an InfoPath Form's XML Schema or SPDoc metadata:

1. Type \${ in the body of the email template to bring up the list of available process attributes.

| *AccountInfo | * |
|------------------------------|---|
| <xml schema=""></xml> | |
| ActivityName | |
| ActivityParticipantFullNames | |
| ActivityParticipantUserNames | |
| CurrentDate | |
| HomeDirectory | ▼ |

2. Select **<XML Schema>** from the list. The InfoPath DataSource window appears.

| nfoPath DataSource | | |
|---|----|--------|
| cashAdvance (Double) endDate (DateTime) expenseCode (String) notes purpose (String) | | |
| - reportDate (DateTime) - signatures - startDate (DateTime) - subTotal (Double) | | |
| im total (Double) ⊡∵cfo | | • |
| | OK | Cancel |

SPDoc Metadata Binding

In SPDoc based process templates, you can access the values of a SharePoint Document Library's metadata columns. This data can then be used in your process (e.g. to determine the workflow in your process, or to display information in an email notification). To access the metadata column(s) within an email template, type \${ and select <XML Schema>. If outside an email template, such as in a Multiple Condition Activity, you can simply define the columns within the Data Binding field. The Show All check box allows you to see a complete list of metadata columns to choose from.

| ittp://demo3:8000/Fina | ancial Control Docu | iment | | | ОК |
|------------------------|---------------------|---------------------|---------------------|---|--------|
| DisplayName 🗠 | DataType | InternalName | Name | | Cancel |
| Category | String | Category | Category | | |
| Check In Comment | String | _CheckinComment | _CheckinComment | | |
| Content Type | String | ContentType | ContentType | | |
| Content Type ID | String | ContentTypeId | ContentTypeId | | |
| Copy Source | String | _CopySource | _CopySource | | |
| Division | String | Division | Division | | |
| Edit Menu Table End | String | _EditMenuTableEnd | _EditMenuTableEnd | | |
| Edit Menu Table Start | String | _EditMenuTableStart | _EditMenuTableStart | | |
| Effective Permissions | String | PermMask | PermMask | - | |

For SPDoc, the Select SharePoint Document Library Column window appears.

| Select SharePoint Document Library Column | X |
|--|--------|
| Document Library Url : | |
| http://Virtual:8080/sites/AscentnFinancialSite/Financial Control Doc Lib | OK |
| Division (Division, String) Subject (Subject, String) | Cancel |
| I Show All | |

- 1. Select the data column for which you would like to associate.
- 2. Click **OK**. The association is shown below.

| E-mail Templates Wizard | | | | | | |
|-------------------------|--|--|--|--|--|--|
| Name : | | | | | | |
| manie . | Approval New | | | | | |
| From : | (ActivityParticipantFullNames) (It takes system setting if it is blank) Remove | | | | | |
| To : | Priority : High | | | | | |
| CC : | Format: Default | | | | | |
| Subject : | Please Approve \$(TaskID): of Process \$(ProcessName) Maro | | | | | |
| Content : | © Left to Right © Right to Left | | | | | |
| | Please approve \$(TaskName). The amount of the request is \${/exp:expenseReport/exp:total) If you reject this request, please provide an explanation. Thanks, \${SystemUserName} | | | | | |
| Attachments : | | | | | | |
| | OK Cancel | | | | | |

Process Attributes

This section provides detailed information on the features, functionality, purpose, and intended usage of the process attributes included in the AgilePoint BPMS Suite. AgilePoint Process Models typically contain many process related attributes which can be very useful when working with AgileShapes. Instead of creating your own mechanism to manage or access these attributes, AgilePoint has built-in functionality giving you direct access to this information without having to use code. In AgilePoint, you can access process attributes within the AgileShapes. Process Modelers can simply specify the process attributes to be used in the properties of the AgileShapes making the values associated to these attributes available automatically.

Below is a list of pre-defined process attributes that can be used when building AgilePoint process models. When writing code, a different approach is necessary for accessing process attributes. For the case of writing code, most of the Predefined Process Attributes mentioned below are actually the properties of classes. For example, you may get the process instance information such as process instance name, due date, etc from the properties of the WFProcessInstance class. The available classes and properties are listed in our Web Service API and AgilePoint SDK (APSDK) documentation.

When using process attributes, different syntax may need to be used. For example, outside of an email template, you may use \$AttributeName, whereas inside an email template, you may use \${AttributeName}.

Common Process Attributes

| Name | Description |
|------------------------------|---|
| ActivityName | Name of the activity. |
| | Common Usage: Can be used in an email template to specify the name of the activity that has been assigned to a participant. |
| ActivityParticipantFullNames | The full names of the activity's participants. |
| | Common Usage: Can be used in the body of an email template to display the full names of the activity's participants. |
| ActivityParticipantUserNames | The user names of the activity's participants. Specific to manual activities. |
| | Common Usage: Can be used in the body of an email template to display the system names of the activity's participants. The ActivityParticipantUserNames attribute uses a comma as the string's delimiter. Since the To and CC fields of an email template only recognize semicolon as the delimiter for specifying multiple recipients, the ActivityParticipantUserNames macro cannot |

This topic provides a list of common process attributes for AgilePoint.

| Name | Description |
|--------------------------|--|
| | currently be used in the To or CC field of an email template when there are multiple participants for the activity. |
| CurrentDate | The current date. |
| | Common Usage: Can be used to update date fields in an InfoPath form or to set date fields in a database. It can also be used anywhere that you want the date to be shown. |
| HomeDirectory | The path for which AgilePoint Server is installed. |
| | Common Usage: Can be used in the Attachments field of an email template to construct a path to files on the AgilePoint Server. |
| ParentProcessID | The unique ID of the parent process. |
| | Common Usage: Can be used in an email template to notify the Admin user that there is an error in the parent process. |
| ProcessID | The unique ID of a process. |
| | Common Usage: Can be used in the body of an email template to provide the Administrator user with the identification code assigned to the process instance. |
| ProcessInitiator | The user who initiated the process. |
| | Common Usage: Can be used in the To field of an email template to send an Activity Exit Email notification to the person who initiated the process, letting them know that the process is complete. It can also be used in the Participant property of a Manual Activity. |
| ProcessInitiatorLocation | The location (IP address) of the user who initiated the process. |
| | Common Usage: Can be used in the body of an email template to specify the IP address of the Process Initiator. |
| ProcessInstanceID | The unique ID of a process instance. |
| | Common Usage: Can be used in the body of an email template to provide the Administrator user with the identification code assigned to the process instance. |
| ProcessInstanceName | The name of the process instance. |

| Name | Description |
|-----------------------------|--|
| | Common Usage: Can be used in an email template to notify the Administrator user that there is an error in a specific instance of a process. |
| ProcessName | Name of the activity. |
| | Common Usage: Can be used in an email template to notify the Administrator user that there is an error in a specific instance of a process. |
| ProcessParticipantFullNames | The full names of the process's participants. |
| | Specific to manual activities. |
| | Common Usage: Can be used in the body of an email template to display the full names of the process participants. |
| ProcessParticipantUserNames | The user names of the process's participants. |
| | Specific to manual activities. |
| | Common Usage: Can be used in the To field of an email template to send an email notification to the process's participants letting them know there has been a change in the process. |
| ProcessStartedDate | The start date of the process. |
| | Common Usage: Can be used in the body of an email template to display the date for which the process started. |
| ProcessTemplateID | The unique ID of the process template. |
| | Common Usage: Can be used in the body of an email template to specify the unique identification code of the process template. |
| ProcessTemplateName | The name of the process template. |
| | Common Usage: Can be used in the body of an email template when referring to the name of the process template. |
| ProcessTemplateReportFile | The name of the report associated with a process template. |
| | Common Usage: Can be used to attach the process template report file in an email template. |
| ProcessTemplateVersion | The version of the process template. |
| | Common Usage: Can be used in the body of an email template to specify the version of the process template. |
| Session | The task session ID. |

| Name | Description |
|-------------------------------|--|
| | Can only be used in email templates associated with Activity Entry Email. |
| | Common Usage: Can be used to refer to a specific session or occurrence of a task when a process is in a loop. The Session ID is updated each time the process loops. See TaskID. |
| SourceTaskParticipantFullName | The full name of the task's participant associated with the original task (i.e. reassigned). |
| | Specific to manual activities. |
| | Common Usage: Can be used in the body of an email template to display the full name(s) of the task's participants. |
| SourceTaskParticipantUserName | The user name of the task's participant for the original task (i.e. reassigned). |
| | Specific to manual activities. |
| | Common Usage: Can be used in the To field of an email template to send an email notification to the activity's participants letting them know an activity has been assigned to them. |
| SystemUserEmailAddress | The email address of the system user. |
| | Common Usage: Can be used in the From , To , and CC fields of an email template. |
| SystemUserName | The name of the system user. |
| | Common Usage: Can be used in the body of an email template to display the name of the system user. |
| TaskAssignedDate | The date the task was assigned. |
| | Common Usage: Can be used in an incoming or Activity Exit Email template notifying a participant of the date for which a task has been assigned. |
| TaskCode | The unique code of the task. |
| | Common Usage: Can be used in Lync, SMS, and Yammer template associated with the Task Assigned Message to specify the unique code of the task that has been assigned. |
| TaskDueDate | The due date of the task. |
| | Common Usage: Can be used in an incoming or Activity Exit Email template notifying a participant of the date for which a task is due. |
| TaskID | The unique ID of the task. |

| Name | Description |
|-------------------------|---|
| | Can only be used in email templates associated with Activity Entry Email. |
| | Common Usage: Can be used in an email template associated with an Activity Entry Email to specify the unique ID of the task that has been assigned. See Session. |
| TaskName | The name of the task. |
| | Can only be used in email templates associated with Activity Entry Email. |
| | Common Usage: Can be used in an email template associated with an Activity Entry Email to specify the name of the task that has been assigned. |
| TaskParticipantFullName | The full name of the task's participant. |
| | Common Usage: Can be used in the body of an email template to display the full name(s) of the task's participants. |
| TaskParticipantUserName | The user name of the task's participant. |
| | Common Usage: Can be used in the To field of an email template to send a re-assigning email to the task's participants letting them know a task has been re-assigned. 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. |
| TaskLink | The link of the task. |
| | Common Usage: Can be used in the Message field of the Lync and SMS template to send the message with a link to open the task. |
| Version | The version of the process template. |
| | Common Usage: Can be used in the body of an email template to display the version of the process template. |
| WorkItemID | The unique ID of the work item. |
| | Common Usage: Can be used in the body of an email template to display the unique ID of a work item. |

Process Attributes for SharePoint

The following is a list of process attributes that are specific to the SharePoint and InfoPath integrations.

The following process attributes are used for MS SPDoc and MS InfoPath based process templates.

| Name | Description |
|----------------------------|---|
| AllParticipantCommentsHtml | The entire history of the information entered by the Participant in the "Comment" field of the SharePoint task page. |
| | Common Usage: Can be used in an email template to display the entire history of comments entered by the participant in the Comment field. |
| DocLibPath | The relative path of the document library (e.g. Testemail). |
| | Common Usage: Can be used in an email template when specifying the path to a document library in your SharePoint Portal Server. |
| DocName | The name of the document (e.g. Testemail-2005-0036.xml). |
| | Common Usage: Can be used in an email template when specifying the name of an InfoPath form. |
| DocUrl | The full document path (e.g. http://pearl:8084/ sites/AgilePointFinancialSite/Testemail/ Testemail-2005-0036.xml). |
| | Common Usage: Can be used in an email template when specifying the path to a document on your SharePoint Portal Server. |
| LastParticipantCommentHtml | The most recent comment entered by the participant in the Comment field of the SharePoint task page. |
| | Common Usage: Can be used in an email template to display the most recent comment entered by the participant in the Comment field. |
| SitePath | The relative path of the site (e.g. /sites/ AgilePointFinancialSite). |
| | Common Usage: Can be used in an email template when specifying the path to a document library in SharePoint. |
| SPServer | The SharePoint URL (e.g. http://pearl:8084). |
| | Common Usage: Can be used in body of an email template to build a link to an item on your SharePoint Portal Server. |

Process Attributes for AgileXRM

The following is a list of process attributes that are specific to AgileXRM processes.

| Name | Description |
|------------------|--|
| CrmBeld | The ID of the record of the main entity. |
| CrmBeType | The relative path of the document library (for example, Testemail). |
| organizationname | The name of the CRM organization that the process record belongs to. |

Built-In Macros

The following is a list of macros you can use as process attributes.

| Name | Description |
|-----------------------|--|
| \$GROUP() | \$GROUP(ValidGroupNameInAgilePoint) |
| | Where you can obtain the ValidGroupNameInAgilePoint from InfoPath binding like \$GROUP(\${/my:myFields/my:groupname}), or you can supply the group name directly like \$GROUP(Group ABC). |
| \$ROLE() | \$ROLE(ValidRoleNameInAgilePoint) |
| | Where you can obtain the ValidRoleNameinAgilePoint from InfoPath binding like \$ROLE(\${/my:myFields / my:rolename}), or you can supply the role name directly like \$ROLE(Role XYZ). |
| \$MANAGER() | \$MANAGER(UserName) |
| | Returns the manager of the specified UserName, i.e. UserName is the subordinate. You can obtain the subordinate UserName from InfoPath binding like \$MANAGER(\${/my:myFields/my:username}), or you can supply the username directly like \$MANAGER(DOMAIN\john). |
| \$XMLREPEATING2HTML() | This macro accepts as a parameter an XPath expression indicating the location of a repeating data section of an InfoPath form. To refer to a literal XML string from an Xpath, add a tilde (~) at the end of the path. When used in an email template, this macro will include an HTML table (containing the repeating |

| Name | Description |
|------|---|
| | data from the InfoPath form) in the generated email notification. |
| | The following example shows an Xpath with the tilde: |
| | \$XMLREPEATING2HTML(\${/exp:expenseReport/ exp:items~}) |
| | Common Usage: Can be used in the body of an email template to display data from an InfoPath form. |

Manage Process Attributes

You can define custom attributes in your process by selecting them from a common reference point in a dialog box, rather than typing the exact name in the data binding field. This additional setup step declares your attributes in a common location in the process template, but it can save you time and effort if you want to use many custom attributes in your process.

- 1. Declare your custom attributes for use throughout the process template:
 - a. In AgilePoint Envision, open a process template, and select the process template to display its properties in the right pane.
 - b. Below the properties box, click the Manage Process Attributes link.

| | - Horniec | Modellype | | | | |
|---|---|---|--|--|--|--|
| | Administrator | Owner | | | | |
| | /ersion | Previous Version | | | | |
| | d | 🗆 Advanced | | | | |
| - | | Annehansen | | | | |
| Modify Schema, XPath Picker, <u>Remove</u> Schema, Data Population, <u>Data Tracking</u> , <u>Manage Process Attributes</u> | | | | | | |
| | | | | | | |
| | ma, <u>XPath Picker, Remove</u> ta Population, Data Tracking, tess Attributes | <u>Iodify Schema, XPat</u> chema, <u>Data Popula</u> Ianage Process Attri | | | | |

c. In the Manage Custom Attributes window, click Add.

| Cust | om Attributes Editor | | | | | X |
|------|----------------------|--------------|-----|---|------------|------------------|
| | Manage Custom | Attributes | | | | |
| At | tribute Name 🛛 🛆 | Attribute Ty | ype | | | 🐥 👍 |
| | Attribute2 | Int32 | | | | |
| | ConnecttionDB | String | | | | - <u>R</u> emove |
| 2 | TestAttr | String | | | | |
| | ParticipantName | String | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | ~ | OK | Second V |
| | | | | ~ | <u>O</u> K | |

- d. In the Attribute Name column, enter the name of the attribute you want to create.
- e. In the Attribute Type column, select the data type for the attribute.
- f. When you have finished adding all attributes you want to create, click OK.
- 2. Select the custom attributes you want to use:
 - a. Drag any AgileShape that uses data binding onto your process template for example, the **Participants** property in a **Manual** activity.
 - b. Select the shape you added. In the property where you want to use the custom attribute, click the appropriate field to open the schema binding dialog box. (From the previous example, for a **Manual** activity, in the **Participants** list, click **Add Participant**.)
 - c. In the **Data Binding** field, click the **Ellipses** (...) button.
 - d. On the Select XPath from XML Schema dialog box, click the Process Attributes tab.

| Select XPath from XML Schema | × |
|--|-----|
| Select XPath from Xml Schema | |
| Schema Process Attributes Custom Attribute Collection Image: ConnecttionDB(String) Image: ConnecttionDB(String) Image: ConnecttionDB(String) Image: ConnecttionDB(String) Image: ConnecttionDB(String) Image: Connecttor DB(String) Image: Connecttor DB(String) Image: Connectt | cel |
| XPath: DataType: | |

e. In the Custom Attribute Collection list, select the attribute you want to use, and click OK.

How Do I Modify the Value of a Shared Custom Process Attribute?

Applies To

• AgilePoint Envision v4.0 or later

Summary

I have defined a shared custom process attribute called "Something" in Enterprise Manager. I've set the value of the shared custom process attribute in Enterprise Manager. I now want to use a Managed Code C# Snippet to dynamically change the value of the shared custom process attribute "Something". What is the syntax to update the value of the shared custom process attribute "Something"?

To dynamically update the shared custom process attribute "Something" at run time, the following syntax can be used within the Managed Code C# Snippet AgilePart.



Using XPath to Retrieve Inner XML String from Custom Attributes

Description

The user has a need to refer to an XML string within AgilePoint custom attributes. However, when using Xpath as a reference, the XML structure is ignored and is returned as plain text.

Applies To

AgilePoint users with processes that refer to strings of XML code in the custom attributes.

Resolution

To refer to a literal XML string from an Xpath, add a tilde (~) at the end of the path. Adding the tilde returns the inner XML for the element the Xpath refers to. The following example shows an Xpath with the tilde:

\$XMLREPEATING2HTML(\${/exp:expenseReport/exp:items~})

Applying Process Attributes

Process attributes can be initialized, updated, and/or retrieved directly from within the process model. For example, the Single Condition and Multiple Condition AgileShapes allow you to route the process flow based on whether the current value(s) of specified process attributes match criteria defined by the process modeler from within AgilePoint Envision.

Furthermore, several built-in AgileShapes allow the process modeler to initialize and/or modify the value(s) of one or more process attributes. For example, the C# Snippet AgileShape allows the process modeler to initialize and/or modify the value(s) of one or more process attributes to a value derived by executing a specified fragment of C# code at run time. This allows even non-developers to update the values of process attributes to values as simple as a literal value (e.g. a number, date, or string). With very minimal training, it also allows for more complex and dynamic functionality such as increasing a numeric attribute's value by 1, setting a date attribute to the current time, etc.

As another example, the SubProcess AgileShape allows the modeler to specify values for "initial attributes" that will be pre-initialized for the sub process instance that will be created at run time. Other AgileShapes also

provide ways for non-developers to configure process attributes, and custom AgileShapes allow you to add virtually any type of additional "data field" configuration capabilities you may require directly into the process modeling environment.