InfoPath Integration Guide

AgilePoint BPMS v5.0 R2

Document Revision r5.2.13

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Contents

Preface

Disclaimer of Warranty

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Virus-free software policy

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

● AgilePoint is built on top of Microsoft .NET framework. The pre-compiled executable is a.NET Common Language Runtime (CLR) application, not a native machine binary. As far as is known at this time, there are no viruses that infect .NET CLR executables.

● The virtual environment for the product packaging process in is fully isolated and protected, and anti-virus software is installed and running during packaging.

● The deliverable package is scanned by anti-virus software before upload to our customer download site.

Document Revision Numbers

AgilePoint documentation uses the revision number format **r*X.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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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

InfoPath Integration

This document is a user's guide and reference to the features, functionality, usage, configuration, and administration of the AgilePoint InfoPath Integration component of the AgilePoint BPMS Suite.

Usage Instructions

Once installed, the functionality of the AgilePoint InfoPath Integration component is entirely transparent to the user. It simply allows other functionality of the AgilePoint SharePoint Integration component to integrate seamlessly with the end user's browser.

Creating a Workflow-Enabled SharePoint Form Library

When creating an InfoPath form library in SharePoint by publishing the InfoPath form to SharePoint, it is recommended that the form library has the same name as the process template name.

In addition to deploying the InfoPath form from within the InfoPath client, you can also deploy the process template and InfoPath form together directly from AgilePoint Envision using the **File > Update Server > Create or Checkin, and Release Process** menu command.

Creating Custom Buttons in InfoPath

AgilePoint provides a built-in Submit & Close button for InfoPath forms. However, you can also create your own InfoPath buttons that submit the form as well as performing other functionality.

Creating a Custom Button Using a Data Connection

To create a custom button by setting up an AgilePoint data connection in InfoPath:

1. In **InfoPath**, open your **Data Connections** list, and click **Add**.

2. On the **Data Connection Wizard**, select **Create a new connection to: Submit data**, and click **Next**.

3. Under **How do you want to submit your data?** select **To the hosting environment…**, and click **Next**.

4. In the field **Enter a name for this data connection**, enter **AgilePoint**.

   Ⓘ **Note:** The name must be **AgilePoint** exactly as it is written here. This name enables the data connection.

5. Click **Finish**.

Once this setup is complete, you can create custom behavior for this button as desired.

Creating a Custom Button Using Custom Code

In InfoPath, you can create a custom button using your own custom software code. To create a custom button using code:

Submit

To create a button that will submit an InfoPath form and close the form, include the following line in your code:

```
NotifyHost("Submit&Close");
```

Cancel

To create a button that will close an InfoPath form without submitting the form, include the following line in your code:

```
NotifyHost("Close");
```

Auto Naming of InfoPath Form through Submit & Close

(!) **Note:** This feature only works if you have chosen to use the InfoPath client to show your InfoPath forms (i.e. not for browser based forms). If you are using Microsoft Office Forms Server and browser based forms, AgilePoint will use InfoPath's default naming convention for naming the form.

The **Submit & Close** button allows users to complete the form operation and submit and close the form at the same time. Users do not have to go back to the Web part to submit the form. The process will automatically move to the next step in the process once the form is submitted and closed.

This feature supports the auto-naming of the InfoPath Form through the customized **Submit & Close** button. Typically, users will be prompted for the form name when clicking the **Save** button after filling out the form. This may pose a potential issue that a form may be overwritten by mistake. AgilePoint has provided a powerful feature that can allow users to automatically save the form with a unique form name in a logical way. This not only prevents the accidental overwriting of existing forms, but also allows for the creation of form names that are logical and easier to manage.

AgilePoint provides an enhanced customized Submit & Close button embedded in the InfoPath toolbar. Users can configure their InfoPath form/views to display the customized toolbar in AgilePoint Envision.

The process of determining the auto naming of your InfoPath form depends on whether you are using the WebDAV or Soap Toolkit protocol method. WebDAV is the default method that AgilePoint uses due to some authentication limitations in Soap Toolkit. For more information, see the following Knowledge Base article:

For more information, see Customize the Document File Name when Submitting an InfoPath form to SharePoint in the Documentation Library.

Auto-naming via the WebDAV Method (recommended)

To use the WebDAV method, simply customize the scripting as desired within the InfoPath's Jscript to perform the auto naming of the InfoPath form.

Auto-naming via the AgilePoint Web Service Method

1. To use the AgilePoint Web Service method, since WebDAV is being used as the default, you must first enable the use of the APWS Web Service method within the Jscript of the InfoPath form by removing the comment tags. Also you will need to disable the WebDAV method by adding the comment tags where appropriate.

2. In AgilePoint Envision, within an InfoPath based process template where the InfoPath form has already been associated to the process template, click **File > InfoPath > InfoPath Toolbar, Auto Naming and Others**.

3. On the **InfoPath Settings** dialog box on the **Toolbar Buttons** tab, select the views of the InfoPath Form that you want to include in the customized toolbar.

4. During run time, to automatically save the form after filling out the form, instead of clicking the **Save** button to save the form, click the **Submit and Close** button.

Configuring the Auto-naming Format

Using the AgilePoint Web Service auto-naming, the form name will be saved automatically to the format of [DocLibName]-[yyyy]-[0000], where DocLibName is the name of the form library, yyyy is the year, and 0000 is a unique ID number that is generated by AgilePoint in a sequential order. For example: InfoPath-2005-0001. Once the form is saved, a message box will be displayed with the form name.

This file name will be used to reference the form throughout the process.

You can easily override this auto-naming behavior by simply saving the file first, using the standard InfoPath **Save** button (**File > Save**). The standard Save function behavior will still remain the same. Similarly, you can continue to use the Save button throughout the process, or use both the Save button and the Submit & Close button.

AgilePoint also allows you to configure the naming convention in AgilePoint Envision. To adjust the format, follow these steps:

1. Open the process template with InfoPath using AgilePoint Envision.

2. Click **File > InfoPath > InfoPath Toolbar**.

3. Click the **Naming Convention** tab. The current format will be shown.

4. You can enter a new Prefix such as PR to replace the Document library name.

5. For **Number Format**, you can select number from 3 to 10.

6. You can click on the **Ellipses** button to preview the sample file name and determine if further changes are needed.

Administrative Operations

Best Practices for Deploying InfoPath 2007 Forms

With the availability of InfoPath 2007 and Microsoft Office InfoPath 2007 Forms Server, you now have the ability to choose whether you would like to display the InfoPath forms to your end-user in the InfoPath Client or via a Web browser. The advantage of showing the InfoPath form via a Web browser is that it does not require InfoPath to be installed on the users' machine to view and work with the InfoPath form.

For more information, see http://kb.agilepoint.com/KB/KnowledgebaseArticle10346.aspx .

Enable (or disable) Client-Side Logging

AgilePoint InfoPath integration supports error logging capabilities. Once enabled, this feature writes information to a file that can be useful when troubleshooting errors relating to the AgilePoint InfoPath Integration component.

Enabling Client-Side Logging

To enable client-side logging for the AgilePoint InfoPath Integration component, please do the following

1. Create a file named "log.txt" in the [AgilePoint Integration for InfoPath installation folder]\log.txt.

2. Repeat the steps necessary to reproduce the error originally observed.

Disabling Client-Side Logging

To disable client-side logging for the AgilePoint InfoPath Integration component, please do the following

Delete the file **[AgilePoint Integration for InfoPath installation folder]\log.txt**.