



Pre-Installation Guide

For .NET 3.5

AgilePoint BPMS v5.0 R2 for .NET 3.5

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Preface

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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 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 term**, and click **Search**.

The search results display in alphabetical order by topic title.

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

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

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

Printing

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

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

Downloading Files and Sharing Links from the Documentation Library

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.

Headquarters: AgilePoint Corporation 1916C Old Middlefield Way Mountain View, CA 94043, USA

Tel: (650) 968 - 6789

Fax: (650) 968 - 6785

Email: info@agilepoint.com

Web site: www.agilepoint.com

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

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

Pre-Installation Guide for AgilePoint BPMS for .NET 3.5

Welcome to the AgilePoint Pre-Installation Guide. This document provides instructions on how to prepare your environment for AgilePoint BPMS software installation in an on-premises environment for .NET 3.5.

AgilePoint requires that you complete **all** of the instructions in this document that apply to your environment before attempting to install any components of the AgilePoint BPMS Suite. If a procedure does not apply in some environments, these are noted in the **Prerequisites** section within the topic.

You will need to track some information gathered as you complete the instructions in this document. Be sure to keep your own records as you go through the document.

Verifying System Requirements

Before installing any of the AgilePoint components, please ensure each computer meets the hardware and software requirements for your version of AgilePoint.

For more information, see [System Requirements](#).

Obtaining AgilePoint License Keys

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

Instructions

To obtain new license keys, [contact AgilePoint Customer Support](#).

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

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

Please note the following:

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

Creating Aliases for AgilePoint Server Machines

Before you install AgilePoint BPMS, ensure that your AgilePoint Server machines use aliases, rather than IP addresses. This is strictly required for environments that use multiple AgilePoint Servers in network load balancing (NLB) configurations, but for single server installations, it is highly recommended.

Instructions

1. Create aliases for the AgilePoint Servers

The physical hardware is normally abstracted using DNS or FQDN entries registered on the network.

2. To verify that the proper entries have been created and are available on the network, ping the DNS Name or FQDN and make sure that the correct IP address is returned.

Setting Up the AgilePoint Service Account

An AgilePoint solution is comprised of a number of software components that all must communicate with one another. The AgilePoint Service Account is the master administrator account for the AgilePoint system.

The following table provides the systems and permissions that are required for the AgilePoint Service Account.

Good to Know

- Because many of these systems manage user accounts independently, it is possible to set up different user accounts for different types of communication. Some customers also prefer to use different accounts for security reasons. However, to simplify account management, **AgilePoint recommends using the same credentials for all of these accounts.**
- For AgilePoint versions that use a wizard-based installer (AgilePoint BPMS v5.0 SP3 Genesis Edition and later), you must use the AgilePoint Service account for all AgilePoint systems, although you can change it after installation, if desired.

AgilePoint Service Account Permissions

System	Permissions	Notes
AgilePoint Server Machines	<ul style="list-style-type: none"> • Local administrator • ServiceLogon • Member of the following groups: <ul style="list-style-type: none"> • Administrator • Performance Monitor Users • IIS_IUSRS (Windows Server 2008 or 2012) • IIS_WPG (Windows Server 2003) • adHocAdmin • Service Principle Name (SPN) 	<ul style="list-style-type: none"> • This user account will also be used to initially login to AgilePoint Enterprise Manager. • If you are installing AgilePoint Server on a Domain Controller, this cannot be a local administrator account. • The adHocAdmin group is required for AgileReports. You may need to create this group in your environment. In most cases, AgileReports is installed on the AgilePoint Server machine. • SetSPN is required for Kerberos only. For more information, see Setting Service Principle Name (SetSPN).
Database	<ul style="list-style-type: none"> • db_owner privileges • For Oracle, this user must be able to create and modify database tables, and data. 	<p>During installation, AgilePoint requires db_owner privileges in SQL Server (or equivalent privileges in Oracle) to create the tables required on the database. For security purposes, after finishing the AgilePoint Server configuration, you can remove the</p>

System	Permissions	Notes
		<p>AgilePoint Server service account from the db_owner role in order to disallow the Create table privilege. Instead you can add this user to the db_datareader and db_datawriter role memberships. Please note that when updating the database schema in the future (e.g. for an upgrade), you will need to add this account back to the db_owner role in order for the database schema to be updated</p>
SharePoint	<ul style="list-style-type: none"> • Member of the following groups: <ul style="list-style-type: none"> • SharePoint Farm Administrators (applies to SharePoint Farm only) • Site Collection Administrators 	<p>AgilePoint recognizes that adding this user to the SharePoint Site Collection Administrators group does not follow the least-privileged account best practice. If you want to ensure you are following this best practice, ensure this account has at least have Contribute rights on each SharePoint site where Lists, Document Libraries or Form Libraries are associated to an AgilePoint Process.</p> <p>Usually, it's enough to add that this account to the [Site Collection Name] Members SharePoint Group. However, you must:</p> <ul style="list-style-type: none"> • Ensure that group has Contribute rights on SharePoint. • Ensure inheritance is not broken on sub-sites as that might prevent that Impersonator account to access those sub-sites – it would have to be added to the Members role of each of those sub-sites that break inheritance with their parent site.
Data Services Machine	<ul style="list-style-type: none"> • Local administrator • ServiceLogon 	<ul style="list-style-type: none"> • This machine may be the same as the AgilePoint Server machine.
Deployment Service Machine	<ul style="list-style-type: none"> • Local administrator • ServiceLogon 	<ul style="list-style-type: none"> • This machine may be the same as the AgilePoint Server machine.

System	Permissions	Notes
AgileForms Server Machine	<ul style="list-style-type: none"> Local administrator Application Pool Identity for the main AgileForms web application and proxy site (AFProxy). 	For more information, see Setting Up IIS .

Setting Service Principle Name (SetSPN)

A Security Principle is required to authorize Kerberos communication. This is not required for NTLM. To use Kerberos, you must grant Service Principal Name (SPN) privileges for your AgilePoint user accounts:

- AgilePoint Service Account.
- The AgilePoint System User Account (if different from the AgilePoint service account)



Note: This is one of the most common issues that occurs when installing with Kerberos authentication.

To grant SPN privileges, do the following.

Prerequisites

- These instructions do **not** apply to the following installation scenarios:
 - AgilePoint BPMS for Azure
 - Any on-premises installation not using Kerberos authentication.
- Ensure SetSPN is installed for Windows 2003.

The SetSPN command line tool is not available on a Windows 2003 Server by default. It is part of Windows Support Tools utility. Windows Support Tools can be installed from the Windows Server 2003 installation CD. For convenience, it is available for download from the following Knowledge Base article from Microsoft: <http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=7911>.

SetSPN is built into Windows Server 2008 and later. It is available if you have the Active Directory Domain Services (AD DS) server role installed. To use setspn, you must run the setspn command from an elevated command prompt.

- Log on to Windows using a domain administrator account.

Navigation

- For Windows Server 2003 - Run **Start > Programs > Support Tools > Command Prompt** to open a command prompt.
- For Windows Server 2008 or 2012 - Click **Start, right-click Command Prompt**, and then click **Run as administrator**.

Instructions

- Set a fully qualified domain name, friendly name, and DNS name on the AgilePoint Server machine so that any client can access it:

- a. To set the fully qualified domain name, execute the SetSPN command using the following syntax:

```
setspn -a http/machinename.domain.com domain\username
```

Be sure to include the domain name in the command prompt: machinename.domain.com. The machinename refers to the AgilePoint Server machine name.

- b. To set the friendly name, execute the setspn command using the following syntax:

```
setspn -a http/machinename domain\username
```

If you are unable to access the AgilePoint Server Web service pages from a machine other than the machine where AgilePoint Server is installed (e.g. Client or SharePoint machine). You should follow step a.

- c. To set the DNS Name or Alias used to abstract the physical hardware execute the setspn command using the following syntax:

```
setspn -a http/dns domain\username
```

- d. Verify whether this has been properly set by running the following command:

```
setspn -l domain\username
```

The result should list **http/machinename.domain.com**.

Creating Databases for AgilePoint

AgilePoint requires one or more databases, depending upon the AgilePoint components you install. You must create these databases on your database server.

Prerequisites

- These instructions do **not** apply to the following installation scenarios:
 - AgilePoint BPMS for Azure
- You have set up the user account for the workflow database.
For information about authentication for the database, see [Setting Up the AgilePoint Service Account](#).
- If you are using Oracle, download and install Oracle Database 11g Client (Release 1 or Release 2) that is appropriate for the system for which you are installing on (i.e. 32 bit or 64 bit).
AgileForms does not support Oracle database.

Good to Know

- AgilePoint recommends that you create the databases before installing your AgilePoint components. If you have not created the database before installation, you may be able to create the database during the installation process, but only under the following conditions:
 - You are installing an AgilePoint version that provides an installation wizard with the create database option for your component. This option is available for all components for AgilePoint BPMS V5.0 SP4 for .NET 4.0 and later.
 - You are installing the component on the same physical machine as your database server.
 - The user account that you are using during installation has db_owner privileges on the database server.
- Regardless of whether you create the AgilePoint database before or during AgilePoint Server installation, you need only create the database. The database tables are created automatically during installation.
- The instructions assume you are using Microsoft SQL Server . However, the concepts are similar if you are using Oracle.

Navigation

1. Ensure your SQL Server is up and running.
2. Open the SQL Server Management Studio via **Start > Programs > Microsoft SQL Server [Version] > SQL Server Management Studio**.

Instructions

Repeat the following instructions to create the databases listed in the AgilePoint Databases section, depending upon the AgilePoint components you want to install.

1. In SQL Server Management Studio, Right-click on **Databases** and select **New Database**.
2. On the **New Database** window, enter a database name.

AgilePoint Databases

Component	Database Name (Suggested but Optional)	Database Optional for Component?	Function
AgilePoint Server	AP_Workflow_DB	No	Stores process data for AgilePoint. This is the main AgilePoint database.
Data Services	AP_Data_Svcs_DB	Yes	Stores data you want to track, populate, and reuse in AgilePoint processes. It is possible to use the AgilePoint database for Data Services, but optionally you can create a separate database. After your installation is complete, if you want to use advanced mode, create a table that is named based on the application, and create the table columns based on the fields from the form. The Primary Key should be the process instance ID (type varchar 50).
Clustering Server Manager (CSM)	AP_CSMLOCK	Yes	In a network load balanced (NLB) environment, prevents attempts to shrink the database log from failing. Creating this database is an advanced configuration option.
AgileReports	AgileReportsMetaDb	No	The database for AgileReports data.
AgileForms	Site_Master	No	The main database for AgileForms data.
AgileForms	Site_Template	No	The database to store AgileForms template data.
AgileForms	Auth_Template	No	The database for AgileForms user data.

Reserving Port Numbers for AgilePoint Components

AgilePoint requires certain port numbers to be available for various AgilePoint components and services.

Prerequisites

- These instructions do **not** apply to the following installation scenarios:
 - AgilePoint BPMS for Azure

Good to Know

- Once your installation is complete, you must set up firewall rules to accommodate all of these ports.
- Some specific port numbers are required, while others are optional.
- All port numbers depend upon whether you are installing the associated AgilePoint component.

AgilePoint Port Numbers

Component	Port Number	Number Optional?	Notes
AgilePoint Server	13487	Yes	Used for WSHttp binding on all AgilePoint Server machines.
AgilePoint Server	13488	Yes	Used for TCP binding on all AgilePoint Server machines.
AgilePoint Server	13489	Yes	Used for BasicHttp binding on all AgilePoint Server machines.
Enterprise Manager	13490	Yes	Used for clients to connect to AgilePoint Enterprise Manager on the AgilePoint Server machine.
Clustering Server Manager (CSM)	13481	No	Used for AgilePoint Server instances to communicate with the Cluster Server Manager on all AgilePoint Server machines.
Deployment Service	8917	No	Used for Deployment Service communication on the Deployment Service

Component	Port Number	Number Optional?	Notes
			machine. This is typically an AgilePoint Server machine.
AgileForms	81	No	Used for AgileForms on the AgileForms Server machine.
AgileForms	55551	No	Used for AgileForms on the AgileForms Server machine.

Turning Off User Account Control (UAC)

To turn off User Account Control (UAC), do the following. This procedure must be completed on the following machines, as applicable for your installation:

- All AgilePoint Server machines.
- AgileForms Server machine.
- All AgilePoint Envision machines.
- All AgilePoint Developer machines.

Prerequisites

- These instructions apply to all installation scenarios.

Instructions

1. On each machine where an AgilePoint component is installed, turn off UAC.

The procedure for this varies based on your version of Windows. As an example, in Windows 7 do the following:

- a. Click **Start > Control Panel > User Accounts > Change User Account Control Settings**.
- b. On the slider, select **Never notify**, and click **OK**.

2. Restart the machine.

Verifying NLB Configuration and Functionality

The AgilePoint BPMS Suite can be installed in an NLB environment. If you are planning an NLB environment installation, verify that the NLB environment is configured properly.

Prerequisites

- These instructions do **not** apply to the following installation scenarios:
 - AgilePoint BPMS for Azure
 - Single server (non-NLB) environment
 - AgilePoint BPMS Genesis Edition

Instructions

1. Ensure your NLB is configured properly.

If AgilePoint Server needs to be installed on a Web site other than the default Port 80 site, make sure all the Web sites are mirror images of each other including the Port numbers.

For more information, see:

- [Enabling and configuring Network Load Balancing for Windows Server 2003](#)
- [Network Load Balancing Deployment Guide for Windows Server 2008, 2008 R2, or 2012](#)

2. On AgilePoint Servers in an NLB environment, double loopback check must be disabled for the AgilePoint Server machines.

For more information, see [401 Error when Connecting to SharePoint](#).

Creating Web Sites for AgilePoint Components

AgilePoint requires one or more web sites to be created in IIS, depending upon the components you are installing.

If you are using AgilePoint's wizard-based automated installers for AgilePoint Genesis, AgilePoint BPMS v5.0 SP4 for .NET 4.0 or later, you have the option of allowing the installers to create these web sites for you.

However, some installers do not offer this functionality, and some organizations prefer to create their own web sites. Instructions are provided in the web based Documentation Library for these scenarios.

Prerequisites

- These instructions do **not** apply to the following installation scenarios:
 - AgilePoint BPMS for Azure
 - You want to allow the wizard-based installers to set up your web sites for you.

AgilePoint Web Sites

The following AgilePoint components require web sites. For most, the name and port number are optional.

Component	Web Site Name	Port
Enterprise Manager	Optional	Optional
AgileReports	Same as Enterprise Manager	Same as Enterprise Manager
AgileForms	Optional	Optional
AgileForms Proxy	AFPProxy	55551

More Information

- [Creating Web Sites in Windows Server 2003](#)
- [Creating Web Sites in Windows Server 2008 or 2012](#)
- [Setting Up the AgileForms Server Machine](#)

Setting Up IIS

On the AgilePoint Server machine, complete the following procedures to ensure IIS is set up to support AgilePoint.

Verifying the IIS 6 Management Compatibility Role Service

To Verify the IIS 6 Management Compatibility Role Service, do the following.

This is required for all web applications, but needs to be completed only once per machine where the web applications are running.

Prerequisites

- These instructions do **not** apply to the following installation scenarios:
 - AgilePoint BPMS for Azure
 - Windows Server 2003

Good to Know

- The instructions in this topic describe the procedure in Windows Server 2008. These instructions vary slightly for Windows Server 2008 and 2012, but the concepts are the same.

Navigation

1. On the AgilePoint Server machine, open **Windows Server Manager**.

Instructions

1. In **Windows Server Manager**, click **Roles > Add Roles**, and select the roles Application Server and Web Server (IIS).
2. Click **Roles > Web Server (IIS) > Add Role Services**, and ensure the Role Service for **IIS 6 Management Compatibility** (and its children) is added.

Verifying IIS Configuration

To ensure IIS is configured, do the following.

Prerequisites

- These instructions do **not** apply to the following installation scenarios:
 - AgilePoint BPMS for Azure
 - IIS 6 in your environment.

Navigation

1. Open **IIS Manager**.
2. Click **Web Server Extensions**.

Instructions

1. On the Web Server Extensions, verify the ASP.NET version is **Allowed**.
2. In the **Extensions** list, verify the **.asmx**, **.aspx**, and **.asax** extensions appear. If these file extensions are not in the list, IIS is not configured properly for .NET. Contact your System Administrator for assistance.
3. Next, verify the **Executable Path** for the .asmx, aspx, and asax points to the correct DLL. To do so, click on the extension in the list and click **Edit**. Verify that the Executable path points to the isapi DLL for the correct .NET version for your installation.

Resetting IIS

Prerequisites

- These instructions do **not** apply to the following installation scenarios:
 - AgilePoint BPMS for Azure
 - Oracle database

Instructions

1. On the AgilePoint Server machine, reset IIS.

Setting Up the SharePoint Machine

Please ensure the following items are installed and configured properly on the SharePoint machine.

Creating a SharePoint Web Application

Determine which SharePoint web application will be used for the AgilePoint Integration. If a SharePoint web application to be used for the AgilePoint Integration is not already created, you will need to create one.

To create a new SharePoint web application, do the following.

Prerequisites

- These instructions apply only if you plan to install SharePoint Integration. This is an optional component that is not available for all versions of AgilePoint BPMS.

Navigation

1. From the **SharePoint Central Administration** page, click the **Application Management** tab.

Instructions

1. In the **SharePoint Web Application Management** section, click the **Create or extend Web application** link.
2. Click the **Create a new Web application** link. The **Create New Web Application** page appears.
3. In the **IIS Web Site** section, it is recommended to select the **Create a new IIS web site** option and use the default **Port** number and **Path**. If necessary, specify a **Host Header** name.
4. In the **Security Configuration** section, select either **NTLM** or **Kerberos** depending on your preferred network authentication mode.
5. In the **Load Balanced URL** section, accept the default values.
6. In the **Application Pool** section, it is recommended to create a new unique application pool for this Web site. When entering a security account, use a different local administrator account (not the AgilePoint System User account).



Note: You can choose not to use a local administrator account. However, this requires additional configuration. For more information, see [Providing Access to the Event Log](#).

7. In the **Reset Internet Information Services** section, accept the default value.
8. In the **Database Name and Authentication** section, accept the default values.
9. Click **OK**. The **Application Created** page appears.
10. Click the **Create Site Collection** link.
11. Complete the fields as desired. For the Site Collection Administrator, it is recommended to not use the same name that was used as the Identity account for the application pool.
12. After the Top-Level site is created, click **OK**.

Providing Access to the Event Log

For AgilePoint to write to Windows Event Log, the application pool identity of the SharePoint web application must have access to the appropriate registry keys. If you choose not to provide local administrator access for this account, you must enable this permission manually.

Prerequisites

- AgilePoint SharePoint Integration v2 is installed in your environment.
- The application pool identity for your SharePoint web application is not a local administrator.

Navigation

1. Click **Start > Run**.
2. In the **Open** field, type **regedit**.
3. Click **OK**.

Instructions

1. In the **Registry**, create the following node:

```
HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\eventlog\AgilePoint
```

2. Right-click each of the following nodes to add the application pool identity user account for your SharePoint web application. Set the **Permissions to Full Control**:

```
HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\eventlog\
```

```
HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\eventlog\AgilePoint
```

```
HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\eventlog\Application
```

```
HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\eventlog\Security
```

Disabling Double Loopback Check

If user-friendly URLs are used on the SharePoint site, then double loopback check needs to be disabled for the SharePoint server machine.

Prerequisites

- These instructions apply only if you plan to install SharePoint Integration. This is an optional component that is not available for all versions of AgilePoint BPMS.
- User-friendly URLs are used on the SharePoint site.

More Information

Please refer to the following Microsoft Knowledge Base article for more information:

<http://support.microsoft.com/kb/896861>

Verifying the SharePoint configuration

To verify the SharePoint is installed and configured appropriately, do the following.

Prerequisites

- These instructions apply only if you plan to install SharePoint Integration. This is an optional component that is not available for all versions of AgilePoint BPMS.

Instructions

1. Browse a SharePoint page from the following locations:
 - The SharePoint machine.
 - The AgilePoint Server machine.
 - Client machines.

Obtaining SMTP Server Information

AgilePoint Server uses SMTP to send email alerts and notifications. AgilePoint uses anonymous SMTP by default.

Prerequisites

- These instructions do **not** apply to the following installation scenarios:
 - AgilePoint BPMS for Azure

Instructions

1. Collect the following information:

Field Name	Definition
SMTP Server	<p><u>Definition:</u></p> <p>The URL for your SMTP email server.</p> <p><u>Allowed Values:</u></p> <p>A valid SMTP server URL.</p>
Administrator Email	<p><u>Definition:</u></p> <p>The email address for your SMTP server administrator.</p> <p>This email address will be used to send email notifications to participants in AgilePoint processes. You can change this email address after installation if desired.</p> <p><u>Allowed Values:</u></p> <p>A valid SMTP server administrator email address.</p>