



# SharePoint Integration Guide

**AgilePoint BPMS v5.0 R2**

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# Preface

## Disclaimer of Warranty

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## Virus-free software policy

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

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

## Document Revision Numbers

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AgilePoint documentation uses the revision number format **rX.Y.Z**. The letters and numbers in this revision number can be interpreted as follows:

- **r** - Indicates "revision." This helps to differentiate the document *version* numbers, which start with **v**.
- **X** - The major version number for AgilePoint BPMS to which this document refers. For example, AgilePoint releases 5.0, 5.0 SP1, and 5.5 would all have an **X** value of **5**.
- **Y** - The major document revision number. This number typically changes only when either there is a new AgilePoint release, or there are major changes to the document.
- **Z** - The minor document revision number. This number is incremented each time the document is republished.

## AgilePoint Documentation in PDF and HTML

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AgilePoint documentation is provided in both print-friendly (PDF) and web-based (HTML) formats.

### Advantages of HTML Documentation

- HTML is the **primary delivery format** for AgilePoint documentation.
- Unified, global **search** across all documentation. PDF documents allow you to search only within the context of a given PDF file.
- **All hyperlinks supported**. Links in PDFs are only supported in certain contexts.
- "One-stop shopping" for all information related to AgilePoint BPMS.
- The HTML documentation is updated more frequently than the PDF documentation. Web-based documentation is updated periodically between AgilePoint releases to address errors and omissions, but the PDF documentation is updated only at the time of a software release.

### Advantages of PDF Documentation

PDFs can be more easily **printed**, **archived**, and **transferred** (such as by FTP or email) than HTML documentation.

For more information, see [Downloading Files and Sharing Links from the Documentation Library](#) in the [Documentation Library](#).

## Opening the Documentation Library

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To open the AgilePoint Documentation Library, do the following.

### Prerequisites

You must have a valid account on the AgilePoint Support Portal.

### Instructions

1. Log on to the AgilePoint Support Portal.
2. Click **Documentation**.
3. On the **Documentation** page, click the documentation library for your AgilePoint release.
  - For AgilePoint BPMS v5.0 SP1 and higher, the web-based documentation library opens in a new tab or window in your web browser.

- For releases prior to v5.0 SP1, a download starts for a Zip file with the PDF documentation for your release.

## Finding Information in the Documentation Library

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The information in this topic will help you to locate information in the AgilePoint Documentation Library.

### Using the Table of Contents

The table of contents in the AgilePoint Documentation Library is divided by content areas. For example, the Installation section includes all the information you need to install AgilePoint BPMS. The AgilePoint API section includes information about the AgilePoint APIs.

You can use the Table of Contents to explore the AgilePoint documentation content and find the information you want.

### Searching

The web-based documentation includes a centralized search for all documentation content. To search for information:

1. In the AgilePoint Documentation Library, click the **Search** tab. In the Search box, enter **1 search term**, and click **Search**.

The search results display in alphabetical order by topic title.

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

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

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

### Printing

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

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

## Downloading Files and Sharing Links from the Documentation Library

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You can download and share files AgilePoint's documentation library as you would in any other web page. Note that if you send links to recipients, they must have a Support Portal login to view the file.

These procedures are common examples based on Internet Explorer with the Adobe Reader plug-in. Exact procedures may vary depending on your web browser, PDF viewer, and email client configuration.

## Share a Link to an HTML Topic

1. Navigate to the topic you want to share.
2. Copy the URL in the Location box in your web browser.
3. Paste the URL in an email, IM client, etc.

## Share a Link to a PDF Document

1. In Internet Explorer, navigate to the Documentation Library home page.
2. In the **PDF** column, right-click the name of the PDF file you want to share.
3. In the quick menu, click **Copy shortcut**.
4. Paste the URL in an email, IM client, etc.

## Save a Copy of a PDF Document

1. In Internet Explorer, [open the Documentation Library home page](#).
2. In the **PDF** column, click the name of the PDF file you want to share.
3. In the Adobe Reader plug-in, click **Save** button.

## Contacting AgilePoint Sales

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AgilePoint is a leading Business Process Management System (BPMS) provider created by a team of driven people who strive to incorporate the principles of relentless innovation for the benefit of our customers. Our mission is to help companies of any size attain and sustain operational success through process excellence.

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## Contacting Customer Support

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

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

# SharePoint Integration

This document describes the SharePoint Integration component of the AgilePoint BPMS Suite.

## What Is AgilePoint Integration for SharePoint?

AgilePoint for SharePoint is a powerful integration tool that extends AgilePoint's enterprise-class BPM solution to SharePoint. At the same time, AgilePoint for SharePoint maintains a clean separation that minimizes impact on the SharePoint environment and its performance specifications like stability, upgradeability and usability.

## What can AgilePoint Integration for SharePoint Do for You?

AgilePoint for SharePoint lets you realize the true potential of a SharePoint-empowered work environment. With AgilePoint for SharePoint, SharePoint can be used to enable departmental level self-sufficiency, create and maintain workflows and coordinate your enterprise-level business critical processes.

# Configuring the AgilePoint SharePoint Integration AgileConnector

This AgilePoint Server extension (AgileConnector) allows for the communication between AgilePoint Server and SharePoint. This extension is only applicable for the AgilePoint SharePoint Integration v2.

## Prerequisites

- AgilePoint Server is installed.
- The credentials for the SharePoint Impersonator account.

The SharePoint Impersonator account is determined during pre-installation. For more information, see [Creating a SharePoint Impersonator User Account](#) in the [Documentation Library](#).

## 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 **Extension** tab, click on **Add**.
2. Browse one of the following locations to open the file **Ascentn.SharePoint.AgileConnector.dll**:
  - For IIS installations, this file is located in the **bin** folder under the AgilePoint Server installation folder.
  - For Windows Service installations, this file is located in the **bin** folder under the path provided in the **Location** field in Windows Server Manager for the Windows Service instance you want to configure.
3. Change the **Name** from **AgileConnector** to **SPSIntegration**.
4. Enter the Impersonator (e.g. Administrator).
5. Click **OK**.
6. Optionally, you can click **Configure** to set the maximum thread for SharePoint access and to set the credential for SharePoint access. By default it will use the AgilePoint System User Account credential.
7. When you have finished the configuration, on the **AgilePoint Configuration** window, click **OK**.

Accept any informational messages.

If you are prompted to restart IIS or the AgilePoint Service, click **Yes**.

## Configuring the SharePoint Integration AgileConnector

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To configure the SPSIntegration extension, do the following.

### Prerequisites

- If you are using Forms Based Authentication, set this up in your SharePoint environment using the instructions from Microsoft: <http://msdn.microsoft.com/en-us/library/bb975136%28v=office.12%29.aspx>

## 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.
3. On the **Extensions** tab, select **SPSIntegration**.
4. Click **Configure**.

## Instructions

1. On the **AgileConnector for SharePoint** window, configure the following fields as required for your environment, and then click **OK**.

Field Name	Definition
Max Threads for SharePoint Access	<p><u>Definition:</u></p> <p>Specifies the maximum number of concurrent connections between AgilePoint Server and SharePoint.</p> <p><u>Allowed Values:</u></p> <p>Any integer.</p> <p><u>Default Value:</u></p> <p>10</p>
Windows Authentication	<p><u>Definition:</u></p> <p>Specifies whether, and what type, of Windows Authentication is used to connect to SharePoint.</p>
Claims Authentication	<p><u>Definition:</u></p> <p>Specifies whether to use Claims authentication, and what type of Claims authentication, to use to connect to SharePoint.</p> <p><u>Allowed Values:</u></p> <p>If this option is selected, the following types of Claims Authentication are available:</p> <ul style="list-style-type: none"> <li>• <b>Form Based Authentication</b> - Activates Forms based authentication using a custom membership provider to connect to an on-premises SharePoint environment.</li> <li>• <b>Office 365</b> - Activates Claims authentication to connect to SharePoint in an Office 365 environment. This option can be used side-by-side with on-premises SharePoint.</li> </ul>

Field Name	Definition
	<ul style="list-style-type: none"> <li> <b>Federated Authentication</b> - Activates Federated authentication to connect to SharePoint -- for example, ADFS.                     </li> </ul> <p>  <b>Note:</b> Out of the box, AgilePoint supports ADFS authentication. If you want to use your own authentication provider, see <a href="#">Federated Authentication Example</a> in the <a href="#">Documentation Library</a>.                     </p> <p> <u>Default Value:</u>                      Deselected                 </p>
Domain	<p> <u>Definition:</u>                      The authentication domain.                      This does not apply to Forms-Based Authentication.                 </p>
Username	<p>The user ID of the SharePoint authentication account.</p>
Password	<p> <u>Definition:</u>                      The password for the authentication account.                 </p> <p> <u>Allowed Values:</u>                      A valid password.                 </p> <p> <u>Default Value:</u>                      None                 </p> <p> <u>Custom Attributes:</u>                      Yes                 </p>
Fed Auth Url	<p> <u>Definition:</u>                      The URI of the federated authentication provider. This provider issues security tokens for federated authentication.                 </p> <p> <u>Allowed Values:</u>                      A valid federated authentication provider URI.                 </p> <p> <u>Default Value:</u>                      None                 </p> <p> <u>Custom Attributes:</u>                      No                 </p> <p> <u>Example:</u>                      https://fs.agilityclouds.com                 </p>

Field Name	Definition
Use UTF8 Encoding	<p><u>Definition:</u></p> <p>Specifies whether to use UTF-8 encoding when communicating with the external system.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> <li>• <b>Selected</b> - Specifies to use UTF-8 encoding.</li> <li>• <b>Deselected</b> - Specifies not to use UTF-8 encoding.</li> </ul> <p><u>Default Value:</u></p> <p>Deselected</p>
Send Notification for Suspended Processes	<p><u>Definition:</u></p> <p>Specifies whether the SPSIntegration AgileConnector sends a notification to the AgilePoint system administrator if a process instances is suspended as a result of a SharePoint Integration error.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> <li>• <b>Deselected</b> - No email notification is sent.</li> <li>• <b>Selected</b> - Sends an email notification if a process instance is suspended.</li> </ul> <p><u>Default Value:</u></p> <p>Deselected</p>

# Set up a Common AgilePoint Configuration List for Multiple Site Collections



**Note:** This configuration step is optional. If you do not complete this step, the current system behavior will remain the same, and the functionality of your AgilePoint system will be unaffected.

By default, each SharePoint site collection has its own AgilePoint Configuration List. This is recommended because it allows you the capability of connecting to different AgilePoint Servers for different SharePoint Site Collections in future. Also, things like different log folders for different SharePoint Site Collections for better tracking would be available.

In a case where you have many SharePoint Site Collections within the same SharePoint Web application and you do not want to maintain the configuration list separately, and all site collections are going to connect to same AgilePoint Server, you can define one common AgilePoint Configuration List in the SharePoint Web Application web.config file.

## Prerequisites

- AgilePoint Integration for SharePoint is fully installed.

## Navigation

1. Navigate to SharePoint Central Administration on your SharePoint site.
2. In a text editor, open the SharePoint Web Application **web.config** file.

## Instructions

1. In the SharePoint web.config, add the following key/value nodes:

```
<appSettings>
  <add key="APSettingsListName" value="AgilePoint Configuration" />
  <add key="APSettingsSiteUrl" value="[SharePoint Site URL]" />
  <add key="APSettingsWebName" value="" />
</appSettings>
```

Use the following values:

- **APSettingsListName** - The name of the AgilePoint Settings List.
- **APSettingsSiteURL** - The SharePoint Site URL that contains the common AgilePoint Configuration List. The rest of the site collections will refer to this location and list as long as the individual AgilePoint Configuration list (which is auto-created in the site collection when this feature is activated) is deactivated or removed.
- **APSettingsWebName** - If this field is left blank, this means that the AgilePoint Configuration List is located at the top-level site. A value would indicate the Sub site name.

# Add the AgilePoint Web Parts to SharePoint

To access the features of the AgilePoint SharePoint Integration, you must add the AgilePoint Web Parts to your SharePoint site. AgilePoint Web Parts are added in the same manner as other SharePoint Web Parts.

## Prerequisites

- AgilePoint Integration for SharePoint is fully installed.
- These instructions assume you are using SharePoint 2010 in a standard configuration. The exact procedure depend upon the version of SharePoint you are using and the settings in your local environment.

## Navigation

1. In SharePoint, navigate to the site page where you want to add the AgilePoint Web Part.
2. Click **Site Actions** > **Edit Page**.

## Instructions

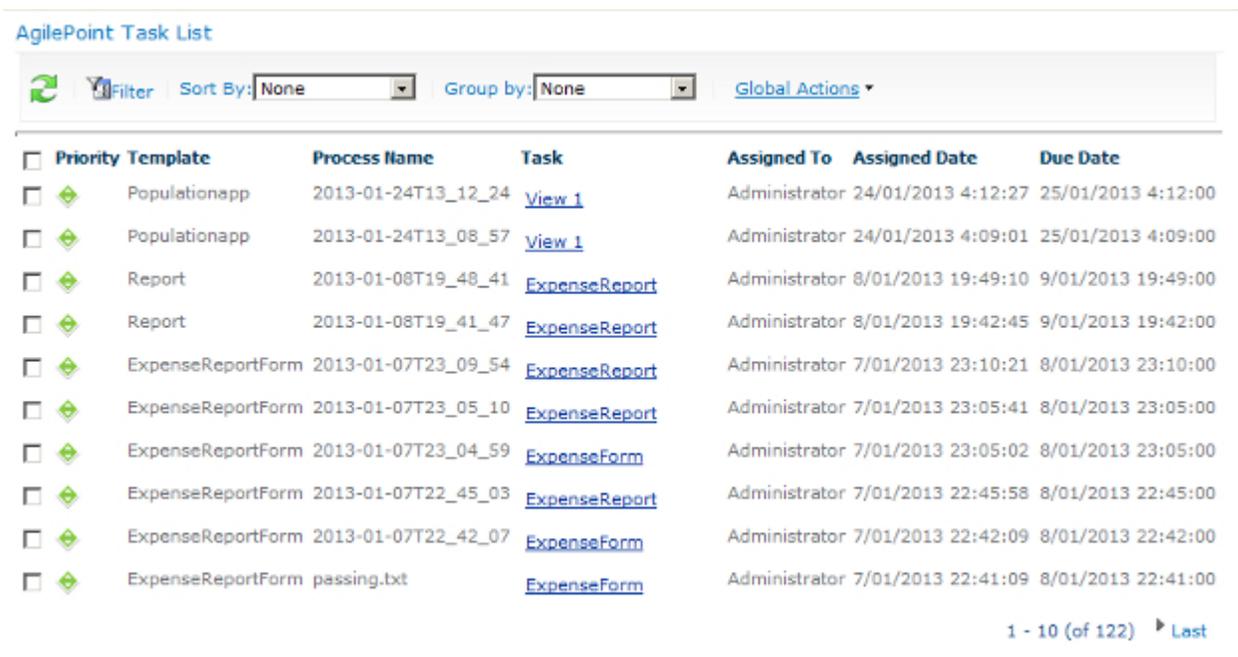
1. Click **Add a Web Part**.
2. In the **Categories** pane, click **AgilePoint**.
3. In the **Web Parts** pane, click the Web Part you want.
  - **AgilePoint Process Instance List** – Includes the list of running process instances.
  - **AgilePoint Process Model List** – Displays all process models that are deployed to AgilePoint Server.
  - **AgilePoint Task List** – Includes the AgilePoint Task List that provides a way for users to manage their tasks.
4. Click **Add**.

# AgilePoint Web Parts

This section is a user's guide and reference to the features, functionality, usage, configuration, and administration of the Web Parts that are included with the AgilePoint SharePoint Integration component of the AgilePoint BPMS Suite.

## AgilePoint Task List Web Part

The AgilePoint **Task List** Web Part displays any process tasks assigned to the user viewing the SharePoint site, and provides tools for managing those tasks.



### Navigation

1. In SharePoint, navigate to the Task List Web Part.

### Field Definitions

Field Name	Definition
Refresh	<p><u>Function:</u></p> <p>Refreshes the Web Part window's content. Use this button to manually refresh the Web Part window's content to see if changes have occurred.</p>

Field Name	Definition
Filter	<p><u>Function:</u></p> <p>Displays the Web Part's content based on the values entered.</p> <p>When you click the Filter button, a section is displayed with all Web Part fields. In the fields list, select the appropriate values to set the filter criteria to display the required Web Part's content.</p> <p>For example, in the Template list, if you select Budget Request, only the tasks related to Budget Request template are displayed.</p>
Sort By	<p><u>Definition:</u></p> <p>Arranges the Web Part window's content based on the field name you selected.</p> <p><u>Allowed Values:</u></p> <p>The field name you want.</p> <p><u>Default Value:</u></p> <p>None</p>
Group By	<p><u>Definition:</u></p> <p>Specifies the field name you want to group the Web Part window's content.</p> <p><u>Allowed Values:</u></p> <p>The name of your field.</p> <p><u>Default Value:</u></p> <p>None</p>
Global Actions	<p><u>Definition:</u></p> <p>Specifies an action to be performed on all selected tasks at once.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> <li>● <b>Reassign Selected Tasks</b> - Reassigns the selected tasks to another participant.</li> <li>● <b>Cancel Selected Tasks</b> - Cancels the selected tasks.</li> <li>● <b>Take Assignment for Selected Tasks</b> - Assigns the selected tasks to you.</li> </ul> <p><u>Default Value:</u></p> <p>None</p>

Field Name	Definition
Priority	<p><u>Definition:</u> Specifies the importance of a task.</p> <p><u>Allowed Values:</u> Read only.</p> <ul style="list-style-type: none"> <li>• <b>Red icon</b> - Indicates a high priority task.</li> <li>• <b>Green icon</b> - Indicates a normal priority task.</li> <li>• <b>Yellow icon</b> - Indicates a low priority task.</li> </ul>
Template	<p><u>Definition:</u> Specifies the name of the AgilePoint process template.</p> <p><u>Allowed Values:</u> Read only.</p>
Process Name	<p><u>Definition:</u> Displays the unique process instance name.</p> <p><u>Allowed Values:</u> Read only.</p>
Task	<p><u>Definition:</u> Specifies an operation to perform on an assigned task.</p> <p><u>Allowed Values:</u> Not all possible values are available for every user. It depends on your settings and the user permissions.</p> <ul style="list-style-type: none"> <li>• <b>View Process</b> - Opens the process in the Process Viewer.</li> <li>• <b>Change Priority</b> - Changes the priority of the task.</li> <li>• <b>Open [work to perform]</b> - Opens the form or view associated with the WorkToPerform property.</li> <li>• <b>Complete Task</b> - Completes the task and moves the process forward. The <b>Wait Work Performed</b> property for the task must be set to False.</li> <li>• <b>Take Assignment</b> - Assigns the task to you.  This is applicable only when the task is assigned to a pool of users.</li> </ul>

Field Name	Definition
	<ul style="list-style-type: none"> <li>• <b>Take Assignment and Complete [work to perform]</b> - Assigns the task to you, and completes it.</li> <li>• <b>Take Assignment and Open [work to perform]</b> - Assigns the task to you, and opens the task.</li> <li>• <b>Release to Pool</b> - Releases the assigned task for another user in the pool to take assignment. This is applicable only when the task is assigned to a pool of users.</li> <li>• <b>Cancel Task</b> - Cancels the task.</li> <li>• <b>Cancel Process</b> - Cancels the process.</li> <li>• <b>Reassign</b> - Reassigns the task to any other user.</li> <li>• <b>Task Rework</b> - Initiates a partial rework of any task that has already been completed.</li> <li>• <b>Create Linked Work Item</b> - Creates tasks for other participants in ad-hoc manner.</li> <li>• <b>View Description</b> - Displays content of the Description parameter of the activity as defined in Envision.</li> <li>• <b>View Conversation</b> - Opens a conversation related to the task in Yammer, if applicable.</li> <li>• <b>Goto Source</b> - Opens the source library where the task is stored.</li> </ul> <p><u>Default Value:</u> None</p>
Assigned To	<p><u>Definition:</u> Displays the participant to whom the task is assigned.</p> <p><u>Allowed Values:</u> Read only.</p>
Assigned Date	<p><u>Definition:</u> Displays the date and time the task was assigned to the participant.</p> <p><u>Allowed Values:</u> Read only.</p>
Department	<p><u>Definition:</u></p>

Field Name	Definition
	Displays the participant's department. <u>Allowed Values:</u> Read only.
Due Date	<u>Definition:</u> Displays the date and time the task is due to be completed. <u>Allowed Values:</u> Read only.

## Configuration Options - Task List Web Part

Sets up the SharePoint Task List Web Part.

The screenshot shows the configuration interface for the AgilePoint Task List web part. It features a sidebar with expandable sections: Appearance, Layout, Advanced, and AgilePoint. The main area is titled 'Type of List' and contains several configuration options:

- Type of List:** A dropdown menu currently set to 'Tasks'.
- Templates:** A text input field with a browse button (three dots).
- Groups:** A text input field.
- Departments:** A text input field.
- SharePoint Fields:** A text input field.
- Show "Complete Selected Tasks" in Global Actions:** An unchecked checkbox.

## Navigation

1. In SharePoint, navigate to the Task List Web Part.
2. On the Web Part window, click the **Arrow** button, and then click **Edit Web Part**. The Arrow button appears only when you move the pointer over the Web Part window.

The navigation for this task varies, depending upon your SharePoint version and the SharePoint settings in your local environment. For more information, see the documentation for SharePoint.

## Field Definitions

Field Name	Definition
Type of List	<p><u>Definition:</u></p> <p>Determines the scope of the tasks you want to display in the Task List Web Part.</p> <p> <b>Note:</b> Except for the default <b>Tasks</b> option, all options listed here have the potential to download a large amount of data, which can slow SharePoint performance. These options are recommended only in views or pages created for managers. They are not recommended for other users.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> <li>• <b>Tasks</b> - Displays your tasks only.</li> <li>• <b>MyDirectTeam</b> - Displays your tasks, plus the tasks for any users for whom you are listed as the Manager in AgilePoint Enterprise Manager.</li> <li>• <b>MyTeamAndSub</b> - Displays tasks for you, the members of your direct team, and the members of <i>their</i> direct teams. This is typically used by higher level managers.</li> <li>• <b>MyDepartment</b> - Displays your tasks and the tasks for everyone in your department.</li> <li>• <b>MyGroup</b> - Displays your tasks and the tasks for all members of groups for which you are the group leader in Enterprise Manager.</li> <li>• <b>MyGroupPeers</b> - Displays your tasks and the tasks for all members of all groups for which you are a member.</li> <li>• <b>AllTasks</b> - Display all the tasks for all users within the AgilePoint BPMS system.</li> </ul> <p><u>Default Value:</u></p> <p>Tasks</p>

Field Name	Definition
<p>Templates</p>	<p><u>Definition:</u></p> <p>Specifies process templates the Web Part uses to filter process instances.</p> <p><u>Allowed Values:</u></p> <p>One or more process template names.</p> <p>You can enter multiple process template names, separated by semicolons (;).</p> <p><u>Default Value:</u></p> <p>None</p>
<p>Groups</p>	<p><u>Definition:</u></p> <p>Limits the display of tasks. Only the tasks of the specified list of groups are displayed.</p> <p><u>Allowed Values:</u></p> <p>The name of your group.</p> <p>You can separate groups using semicolons.</p> <p><u>Default Value:</u></p> <p>None</p>
<p>Departments</p>	<p><u>Definition:</u></p> <p>Limits the display of tasks. Only the tasks of the specified list of departments are displayed.</p> <p><u>Allowed Values:</u></p> <p>The name of your department.</p> <p>You can separate departments using semicolons.</p> <p><u>Default Value:</u></p> <p>None</p>
<p>SharePoint Fields</p>	<p><u>Definition:</u></p> <p>Allows to display the context data of a process instance.</p> <p>To perform this, you must first publish context data into the SharePoint library using metadata fields, and then type a semicolon-separated list of column names.</p> <p><u>Allowed Values:</u></p> <p>The name of your SharePoint fields.</p> <p>You can separate list of columns using semicolons.</p>

Field Name	Definition
	<p><u>Default Value:</u></p> <p>None</p>
Show "Complete Selected Tasks" in Global Actions	<p><u>Definition:</u></p> <p>Determines whether to display the Complete Selected Tasks option in the Global Actions list that enables the user to complete a number of selected tasks at once.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> <li>• <b>Deselected</b> - Specifies not to display the Complete Selected Tasks option in the Global Actions list.</li> <li>• <b>Selected</b> - Specifies to display the Complete Selected Tasks option in the Global Actions list.</li> </ul> <p><u>Default Value:</u></p> <p>Deselected</p>
Show Multiple Dynamic Group/Roles	<p><u>Definition:</u></p> <p>Determines whether to disable querying against multiple dynamic groups or roles if a Web Part performance is slow.</p> <p>The reason is that some organizations experience slow performance while querying against multiple dynamic groups or roles. You can deselect this option to enhance the Web Part performance. The tasks for the dynamic groups or roles are not displayed in the Web Part.</p> <p>This setting is optional. Not all organizations experience this issue, and deselecting this option results in reduced functionality.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> <li>• <b>Selected</b> - Specifies to execute queries against multiple dynamic groups or roles.</li> <li>• <b>Deselected</b> - Specifies not to execute queries against multiple dynamic groups or roles.</li> </ul> <p><u>Default Value:</u></p> <p>Selected</p>
Open task by clicking the task link	<p><u>Definition:</u></p> <p>Determines whether to enable a user to open a task by clicking the hyperlinked task name.</p> <p><u>Allowed Values:</u></p>

Field Name	Definition
	<ul style="list-style-type: none"> <li>• <b>Deselected</b> - Specifies not to open a task by clicking the hyperlinked task name.</li> <li>• <b>Selected</b> - Specifies to open a task by clicking the hyperlinked task name.</li> </ul> <p><u>Default Value:</u> Deselected</p>
Show Overdue Task in Color	<p><u>Definition:</u> Determines whether the Web Part displays overdue tasks with a different color.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> <li>• <b>Deselected</b> - Disables displaying overdue tasks with a different color.</li> <li>• <b>Selected</b> - Enables displaying overdue tasks with a different color.</li> </ul> <p><u>Default Value:</u> Deselected</p>
Color for Overdue Tasks	<p><u>Definition:</u> Specifies to choose a color from the list to mark overdue tasks.</p> <p><u>Allowed Values:</u> The color you want.</p> <p><u>Default Value:</u> Red</p>
Color for Selected Task	<p><u>Definition:</u> Specifies to choose a color from the list to set the background color for the selected tasks.  Selected tasks are marked when the ID of tasks is passed using the http query string parameters. This is also applied while sending emails to include a link to task:  <code>http://mysite/default.aspx?WID=[WorkItemID]</code></p> <p><u>Allowed Values:</u> The color you want.</p> <p><u>Default Value:</u> LightBlue</p>

Field Name	Definition
Color for Tasks on Pool	<p><u>Definition:</u></p> <p>Specifies to choose a color from the list to set the background color for tasks that are assigned to a pool.</p> <p><u>Allowed Values:</u></p> <p>The color you want.</p> <p><u>Default Value:</u></p> <p>LightYellow</p>
Items Per Page	<p><u>Definition:</u></p> <p>Specifies the number of items to display on one page in the Web Part.</p> <p><u>Allowed Values:</u></p> <p>An integer.</p> <p><u>Default Value:</u></p> <p>10</p>
Max. Tasks to Retrieve	<p><u>Definition:</u></p> <p>Limits the number of tasks to be retrieved. Limiting the number of tasks to retrieve can help improve performance.</p> <p><u>Allowed Values:</u></p> <p>An integer.</p> <p>If you are using columns that retrieve data from Custom Data Sources, AgilePoint recommends limiting this number to 50 or lower.</p> <p><u>Default Value:</u></p> <p>500</p>
AgilePoint Columns	<p><u>Function:</u></p> <p>Enables you to show or hide columns on the Web Part and set the display name for columns.</p>
Apply Filter	<p><u>Definition:</u></p> <p>Specifies whether to filter items in the Task List Web Part based on column values.</p> <p>The value in the Filter Condition field performs actual filtering operation.</p> <p><u>Allowed Values:</u></p>

Field Name	Definition
	<ul style="list-style-type: none"> <li>• <b>Deselected</b> - Specifies not to filter items into the Task List.</li> <li>• <b>Selected</b> - Enables filtering for the Task List using the Filter Condition field.  This option may adversely affect the Task List performance.</li> </ul> <p><u>Default Value:</u> Deselected</p>
Filter Condition	<p><u>Function:</u> Sets the filter criteria that defines which SharePoint list data to be retrieved.</p> <p><u>Allowed Values:</u> A valid SQL query. For more information, see <a href="#">Filtering the SharePoint Task List</a> in the <a href="#">Documentation Library</a></p> <p><u>Default Value:</u> None</p> <p><u>Example:</u> For more information, see <a href="#">Filtering the SharePoint Task List</a> in the <a href="#">Documentation Library</a></p>
Pre-Processing Custom Filter	<p><u>Definition:</u> Specifies whether pre-processing custom filter is enabled on the task list. This option enables you to filter Task List results before they are processed by the Task List Web Part in order to improve Task List performance.  This advanced option supersedes the Apply Filter field used for standard Task List filtering.</p> <p> <b>Note:</b> This advanced option is required only if you want to perform pre-processing for filtering custom data columns. This is an uncommon situation.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> <li>• <b>Deselected</b> - Specifies not to apply any filter condition.</li> <li>• <b>Selected</b> - Enables the pre-processing filter condition option.</li> </ul> <p><u>Default Value:</u></p>

Field Name	Definition
	Deselected
Data Population DataBase	<p><u>Definition:</u></p> <p>Specifies the name of your data population database.</p> <p> <b>Note:</b> This advanced option is required only if you want to perform pre-processing for filtering custom data columns. This is an uncommon situation.</p> <p><u>Allowed Values:</u></p> <p>The name of your data population database.</p> <p><u>Default Value:</u></p> <p>None</p> <p><u>Example:</u></p> <p>MyDatabase</p>
Query	<p><u>Definition:</u></p> <p>Specifies a query to retrieve Task List data from the Data Population database before filtering it with the Filter Condition.</p> <p> <b>Note:</b> This advanced option is required only if you want to perform pre-processing for filtering custom data columns. This is an uncommon situation.</p> <p>Click the <b>Ellipses</b> button to open an editor window to set the query condition in the field.</p> <p><u>Allowed Values:</u></p> <p>A SQL query in the following format:</p> <pre>SELECT [process instance ID] FROM &lt;data population table&gt; WHERE &lt;condition&gt;</pre> <ul style="list-style-type: none"> <li>• <b>[process instance ID]</b> - The name of the column in the population table to which process instance id is mapped in data population configuration. The square brackets [ ] are literal, and are required.</li> <li>• <b>&lt;data population table&gt;</b> - The name of your data population database table. Do not include the angle brackets &lt; &gt;</li> <li>• <b>&lt;condition&gt;</b> - Your SQL condition. The left side of the condition statement is the name of</li> </ul>

Field Name	Definition
	<p>the database column you want to filter. Do not include the angle brackets &lt; &gt;</p> <p><u>Example:</u></p> <pre>SELECT [ProcessId] FROM PopulationTable WHERE UserRole='Manager'</pre>

## Filtering the SharePoint Task List

Use the instructions in this section to filter tasks in the SharePoint Task List web part by column. String and DateTime columns can be filtered based on values or partial values, using the following operators.

### Prerequisites

- AgilePoint SharePoint Integration.
- An AgilePoint release that includes FIX 06.0082.04. For more information, see the AgilePoint Intermediate Fixes document.

### Good to Know

- Most of the following examples show examples for the out of the box Task List columns. However, the same format applies to columns from custom data sources.
- For errors, see FilterInTaskList in the AgilePoint logs.

### Navigation

1. In SharePoint, navigate to the Task List Web Part.
2. On the Web Part window, click the **Arrow** button, and then click **Edit Web Part**. The Arrow button appears only when you move the pointer over the Web Part window.

The navigation for this task varies, depending upon your SharePoint version and the SharePoint settings in your local environment. For more information, see the documentation for SharePoint.

### Instructions

1. In the Web Part configuration options, select **Apply Filter**.
2. In the **Filter Condition** field, enter a SQL query with a condition based on the data type of the column you want to filter. See the tables in this topic for examples.

### Filter Operators for String Type Columns

Operator	Symbol	Examples
Equal to	=	<ul style="list-style-type: none"> <li>• Priority='Low'</li> <li>• Template='TemplateName'</li> <li>• Process Name='ProclInstanceName'</li> </ul>

Operator	Symbol	Examples
		<ul style="list-style-type: none"> <li>• Task='TaskName'</li> <li>• Assigned To='AssignedUserName'</li> <li>• Department='Department'</li> <li>• Status='Overdue'</li> </ul>
Not equal to	<>	<ul style="list-style-type: none"> <li>• Priority&lt;&gt;'Low'</li> <li>• Template&lt;&gt;'TemplateName'</li> <li>• Process Name&lt;&gt;'ProclInstanceName'</li> <li>• Task&lt;&gt;'TaskName'</li> <li>• Assigned To&lt;&gt;'AssignedUserName'</li> <li>• Department&lt;&gt;'Department'</li> <li>• Status&lt;&gt;'Overdue'</li> </ul>
Like	Like'...*'	<ul style="list-style-type: none"> <li>• Priority Like 'Lo*'</li> <li>• Template Like 'TemplateName*'</li> <li>• Process Name Like 'ProclInstanceNam*'</li> <li>• Task Like 'TaskNam*'</li> <li>• Assigned To Like 'AssignedUserNam*'</li> <li>• Department Like 'Departmen*'</li> <li>• Status Like 'Overdue*'</li> </ul>
Not like	Not Like'*...'	<ul style="list-style-type: none"> <li>• Priority Not Like '*ow'</li> <li>• Template Not Like '*emplateName'</li> <li>• Process Name Not Like '*roclInstanceName'</li> <li>• Task Not Like '*askName'</li> <li>• Assigned To Not Like '*ssignedUserName'</li> <li>• Department Not Like '*epartment'</li> <li>• Status Not Like '*verdue'</li> </ul>

## Filter Operators for DateTime Type Columns

Operator	Symbol	Examples	Comments
Like	Like'...*'	<ul style="list-style-type: none"> <li>Assigned Date Like 'YYYY-MM-DDTHH:MM:SS*'</li> <li>Due Date Like 'YYYY-MM-DDTHH:MM:SS*'</li> </ul>	
Not like	Not Like'*...'	<ul style="list-style-type: none"> <li>Assigned Date Not Like 'YYYY-MM-DDTHH:MM:SS*'</li> <li>Due Date Not Like 'YYYY-MM-DDTHH:MM:SS*'</li> </ul>	<ul style="list-style-type: none"> <li>The DateTime value format is "YYYY-MM-DDTHH:MM:SS", strict.</li> <li>Hour (HH) is in 24 hr format</li> </ul>
Greater than	>	<ul style="list-style-type: none"> <li>Assigned Date &gt; #YYYY-MM-DDTHH:MM:SS#</li> <li>Due Date &gt; #YYYY-MM-DDTHH:MM:SS#</li> </ul>	
Less than	<	<ul style="list-style-type: none"> <li>Assigned Date &lt; #YYYY-MM-DDTHH:MM:SS#</li> <li>Due Date &lt; #YYYY-MM-DDTHH:MM:SS#</li> </ul>	
Greater than or equal to	>=	<ul style="list-style-type: none"> <li>Assigned Date &gt;= #YYYY-MM-DDTHH:MM:SS#</li> <li>Due Date &gt;= #YYYY-MM-DDTHH:MM:SS#</li> </ul>	
Less than or equal to	<=	<ul style="list-style-type: none"> <li>Assigned Date &lt;= #YYYY-MM-DDTHH:MM:SS#</li> <li>Due Date &lt;= #YYYY-MM-DDTHH:MM:SS#</li> </ul>	
Last n days	>\${[Now,-[n]}	<ul style="list-style-type: none"> <li>Assigned Date &gt; \${[Now,-5]}</li> <li>Due Date &gt; \${[Now,-5]}</li> </ul>	You can replace 5 in the example to specify a different number of days, such as >\${[Now,-10]} for the last 10 days. The formatting displayed in these examples is strict.

## Filters for Multiple Columns

Operator	Symbol	Examples
And	And	<ul style="list-style-type: none"> <li>Employee Name='EmpName' And Employee DOJ &gt; #YYYY-MM-DDTHH:MM:SS#</li> </ul>
Or	Or	<ul style="list-style-type: none"> <li>Employee Name='EmpName' Or Employee DOJ &gt; #YYYY-MM-DDTHH:MM:SS#</li> </ul>
Nested statements	()	<ul style="list-style-type: none"> <li>(Employee Name='EmpName' And Employee DOJ &gt; #YYYY-MM-DDTHH:MM:SS#) Or (Assigned Date &gt;\${[Now],-5})   Due Date &gt;\${[Now],-5})</li> </ul>

## Setting Up Database-Side Filtering (Pre-Processing) on the SharePoint Task List Web Part

In the narrow set of circumstances described in the Prerequisites and Good to Know sections of this topic, you may want to filter custom data columns using a direct SQL query on the database, instead of using the standard Task List Filter option. This advanced feature, called Pre-Processing the Task List filter, improves performance, but it requires creating a SQL query directly to your database.

If you want to perform database-side filtering on the Task List, do the following.

### Prerequisites

- AgilePoint SharePoint Integration.
- You are filtering the Task List based on custom data columns.  
For more information, see [Filtering the SharePoint Task List](#) in the [Documentation Library](#)
- Custom data sources are set up for the Web Part.  
For more information, see [Custom Data Sources Configuration Window](#) in the [Documentation Library](#)
- Data population is configured for the custom attributes on which you want to apply pre-processing for the Task List filter. In other words, the custom attributes you want to filter must exist in your Data Population database table.  
For more information, see [Setting Up Data Population](#) in the [Documentation Library](#)
- An AgilePoint release that includes FIX 06.0108.01. For more information, see the AgilePoint Intermediate Fixes document.

### Good to Know

- If you use this feature, it supersedes task list filtering using the Apply Filter and Filter Condition fields used in the standard Task List Filtering.  
For more information, see [Filtering the SharePoint Task List](#) in the [Documentation Library](#)

- This feature is best used when you are retrieving more than 500 tasks in the Task List Web Part. Otherwise, the performance benefit may not be required.

## Navigation

1. In SharePoint, navigate to the Task List Web Part.
2. On the Web Part window, click the **Arrow** button, and then click **Edit Web Part**. The Arrow button appears only when you move the pointer over the Web Part window.

The navigation for this task varies, depending upon your SharePoint version and the SharePoint settings in your local environment. For more information, see the documentation for SharePoint.

## Instructions

1. In the **Web Part Configuration** options, enter the values in the following fields as required:

Field Name	Definition
Pre-Processing Custom Filter	<p><u>Definition:</u></p> <p>Specifies whether pre-processing custom filter is enabled on the task list. This option enables you to filter Task List results before they are processed by the Task List Web Part in order to improve Task List performance.</p> <p>This advanced option supersedes the Apply Filter field used for standard Task List filtering.</p> <p> <b>Note:</b> This advanced option is required only if you want to perform pre-processing for filtering custom data columns. This is an uncommon situation.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> <li>• <b>Deselected</b> - Specifies not to apply any filter condition.</li> <li>• <b>Selected</b> - Enables the pre-processing filter condition option.</li> </ul> <p><u>Default Value:</u></p> <p>Deselected</p>
Data Population DataBase	<p><u>Definition:</u></p> <p>Specifies the name of your data population database.</p> <p> <b>Note:</b> This advanced option is required only if you want to perform pre-processing for filtering custom data columns. This is an uncommon situation.</p> <p><u>Allowed Values:</u></p>

Field Name	Definition
	<p>The name of your data population database.</p> <p><u>Default Value:</u></p> <p>None</p> <p><u>Example:</u></p> <p>MyDatabase</p>
Query	<p><u>Definition:</u></p> <p>Specifies a query to retrieve Task List data from the Data Population database before filtering it with the Filter Condition.</p> <p> <b>Note:</b> This advanced option is required only if you want to perform pre-processing for filtering custom data columns. This is an uncommon situation.</p> <p>Click the <b>Ellipses</b> button to open an editor window to set the query condition in the field.</p> <p><u>Allowed Values:</u></p> <p>A SQL query in the following format:</p> <p>SELECT [process instance ID] FROM &lt;data population table&gt; WHERE &lt;condition&gt;</p> <ul style="list-style-type: none"> <li>• <b>[process instance ID]</b> - The name of the column in the population table to which process instance id is mapped in data population configuration. The square brackets [ ] are literal, and are required.</li> <li>• <b>&lt;data population table&gt;</b> - The name of your data population database table. Do not include the angle brackets &lt; &gt;</li> <li>• <b>&lt;condition&gt;</b> - Your SQL condition. The left side of the condition statement is the name of the database column you want to filter. Do not include the angle brackets &lt; &gt;</li> </ul> <p><u>Example:</u></p> <pre>SELECT [ProcessId] FROM PopulationTable WHERE UserRole='Manager'</pre>

## Hiding Menu Options in the SharePoint Task List

You can hide options in the SharePoint Task List menu. This is the drop-down menu associated with a task in the Task List. To hide menu options in the SharePoint Task List, do the following.

## Prerequisites

- AgilePoint SharePoint Integration.
- SharePoint Task List installed.

## Navigation

1. In SharePoint, navigate to the Task List Web Part.
2. On the Web Part window, click the **Arrow** button, and then click **Edit Web Part**. The Arrow button appears only when you move the pointer over the Web Part window.

The navigation for this task varies, depending upon your SharePoint version and the SharePoint settings in your local environment. For more information, see the documentation for SharePoint.

3. In **Data View Properties**, click **AgilePoint Columns**.
4. In the **Hide TaskList Action Menu Entry** field, click the **Ellipses** button.

## Instructions

1. In the **Text Editor** window, enter the menu item names that you do not want to display.

You must enter the names exactly as they appear in the task menu.

You can enter more than one name, separated by semicolons (;) — for example, View Process;Cancel Process.

## Adding the Task List Web Part to SharePoint

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The AgilePoint Task List Web Part for SharePoint can be placed in various locations in SharePoint. To add the AgilePoint Task List Web Part to SharePoint, do the following.

### Prerequisites

- The AgilePoint Task List Web Part interacts with one or more servers - for example, AgilePoint, SharePoint, and/or database servers - whenever they are viewed or refreshed. This interaction is necessary and unavoidable in most cases, and is part of the AgilePoint system's expected usage patterns.
- In some environments, the location for which the AgilePoint Task List Web Part is placed may have unintended effects on the system's performance. For example, in an environment where there are many thousands of SharePoint users, but only a fraction of those users interact with AgilePoint, placing the AgilePoint Task List control on an entry or Top Level site page that is frequently accessed by the entire group of SharePoint users may place additional unnecessary load on the AgilePoint system when the page is accessed by users that don't need access to the Web Part.

In such a scenario, it may be better to place the Web Part on a sub site location that is only accessed by a more appropriate group of AgilePoint users and/or that is only accessed when necessary.

You can notice errors being written to the AgilePoint Event Logs in the Event Viewer when a SharePoint site is being accessed that includes the AgilePoint Task List Web Part by a non-registered AgilePoint user.

- These instructions assume you are using SharePoint 2010 in a standard configuration. The exact procedure depend upon the version of SharePoint you are using and the settings in your local environment.

## Navigation

1. In SharePoint, navigate to the site page where you want to add the AgilePoint Web Part.
2. Click **Site Actions** > **Edit Page**.

## Instructions

1. Click **Add a Web Part**.
2. In the **Categories** pane, click **AgilePoint**.
3. In the **Web Parts** pane, click **AgilePoint Task List**.
4. Click **Add**.

## Removing an AgilePoint Web Part from SharePoint

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To remove an AgilePoint Web Part from SharePoint, do the following.

### Prerequisites

- These instructions assume you are using SharePoint 2010 in a standard configuration. The exact procedure depend upon the version of SharePoint you are using and the settings in your local environment.

### Navigation

1. In SharePoint, navigate to the site page where you want to remove the AgilePoint Web Part.
2. Click **Site Actions** > **Edit Page**.

### Instructions

1. Move the pointer over the Web Part you want to remove from the site page, and then click the **Web Part** arrow to display the list. The Arrow button appears only when you move the pointer over the Web Part window.
2. In the list, click **Delete**.

## Showing Tasks from other Virtual Servers (MOSS Web Applications)

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The AgilePoint Task List Web Part supports the ability to show tasks from multiple Virtual Servers (MOSS Web Applications). A SharePoint registry configuration is required to enable this feature.

1. Access the registry for the SharePoint machine.
2. For the ShowCrossVSTask registry entry, set the **Value data** field to **1**. This allows tasks from multiple Virtual Servers (MOSS Applications) to show in the AgilePoint Task List.

## Showing External AgilePoint Web Application Tasks

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AgilePoint provides a powerful feature that allows users to include external AgilePoint Web application tasks in the AgilePoint Task List Web Part for SharePoint. Each process model in AgilePoint Envision has an associated "Application" name (as shown below). This name is configurable from AgilePoint Envision when the process model is open and no shapes or lines are selected. It will appear in the Property List in the **Advanced**.

You can use either the Manual or WebForm AgileWork to implement the Web application tasks.

To include external Web application tasks in the AgilePoint Task List Web Part for SharePoint:

1. Choose the **Generic** process model type, and change the **Application** name to something like **MyASPNETApplication**. Where MyASPNETApplication is the name of your Web application.

The following process model template types can be used to implement the Web application tasks (i.e. Generic, Microsoft SPDdoc, Microsoft SPList).



**Note:** A list entry is required for each Web application.

2. Add a new SharePoint List Item in the AgilePoint Configuration List. Open the **AgilePoint Configuration List** for the Site Collection and click **New > AgilePoint Config Setting Item**. The **New Item** page appears.
3. In the **Application** field, type **AgilePointASPAssociation**. This is a constant.
4. In the **AP Setting Key** field, type the name of your Web application.
5. In the **AP Setting Value** field, type the URL to the Web application.
6. In the **Description** field, enter a description about the Web application.
7. Click the **Encrypted** check box if you would like to encrypt the AP Setting Value.
8. Click **OK**. The Web application pages will now be served to the user based on your Manual activity Work to Perform property (e.g. Review).

## AgilePoint Process Instance List Web Part

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The AgilePoint **Process Instance List** displays all running process instances. You can filter, sort, and group to display the required process instances.

AgilePoint Process Instance List

Filter
 Sort By: 
 Group by: 
[Global Actions](#)

<input type="checkbox"/> Template	Process Name	Status	Started Date	Process Initiator
<input type="checkbox"/> ExpenseMnagementSystem	<a href="#">ExpenseMnagementSystem-2012-11-22T00:04:49</a>	Running	22/11/2012 0:04:50	Administrator
<input type="checkbox"/> ExpenseMnagementNew	<a href="#">ExpenseMnagementNew-2012-11-21T02:12:35</a>	Running	21/11/2012 2:12:35	Administrator
<input type="checkbox"/> ExpenseMnagement	<a href="#">ExpenseMnagement-2012-11-20T23:56:23</a>	Running	20/11/2012 23:56:23	Administrator
<input type="checkbox"/> movefilesclient	<a href="#">movefilesclient-812D3A7E698E4CC699A384CD1A2079CF</a>	Running	13/10/2012 23:08:04	Administrator
<input type="checkbox"/> Envoy Mortgage	<a href="#">Envoy Mortgage-2012-07-25T02:57:07</a>	Running	25/07/2012 2:57:09	Administrator
<input type="checkbox"/> Envoy Mortgage	<a href="#">Envoy Mortgage-2012-07-25T02:39:45</a>	Running	25/07/2012 2:39:47	Administrator
<input type="checkbox"/> Vendor Approvel2	<a href="#">Vendor Approvel2-2012-06-29T03:26:26</a>	Running	29/06/2012 3:26:27	Administrator
<input type="checkbox"/> Vendor Approvel2	<a href="#">Vendor Approvel2-2012-06-29T03:17:29</a>	Running	29/06/2012 3:17:29	Administrator
<input type="checkbox"/> Vendor Approvel2	<a href="#">Vendor Approvel2-2012-06-29T03:06:18</a>	Running	29/06/2012 3:06:18	Administrator
<input type="checkbox"/> Vendor Approvel1	<a href="#">Vendor Approvel1-2012-06-29T00:40:30</a>	Running	29/06/2012 0:40:30	Administrator

1 - 10 (of 14) [Last](#)

## Navigation

1. In SharePoint, navigate to the Process Instance List Web Part.

## Field Definitions

Field Name	Definition
Refresh	<p><u>Function:</u></p> <p>Refreshes the Web Part window's content. Use this button to manually refresh the Web Part window's content to see if changes have occurred.</p>
Filter	<p><u>Function:</u></p> <p>Displays the Web Part's content based on the values entered.</p> <p>When you click the Filter button, a section is displayed with all Web Part fields. In the fields list, select the appropriate values to set the filter criteria to display the required Web Part's content.</p> <p>For example, in the Template list, if you select Budget Request, only the tasks related to Budget Request template are displayed.</p>
Sort By	<p><u>Definition:</u></p> <p>Arranges the Web Part window's content based on the field name you selected.</p>

Field Name	Definition
	<p><u>Allowed Values:</u> The field name you want.</p> <p><u>Default Value:</u> None</p>
Group By	<p><u>Definition:</u> Specifies the field name you want to group the Web Part window's content.</p> <p><u>Allowed Values:</u> The name of your field.</p> <p><u>Default Value:</u> None</p>
Global Actions	<p><u>Definition:</u> Specifies an action to be performed on all selected process instances at once.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> <li>• <b>Cancel Selected Processes</b> - Cancels the selected running process instances.</li> </ul> <p><u>Default Value:</u> None</p>
Template	<p><u>Definition:</u> Specifies the name of the AgilePoint process template.</p> <p><u>Allowed Values:</u> Read only.</p>
Process Name	<p><u>Definition:</u> Displays the unique process instance name.</p> <p><u>Allowed Values:</u> Read only.</p> <p>However, if you click the process name, the Web Part displays a list of the following actions that can be performed on the selected process:</p> <ul style="list-style-type: none"> <li>• <b>View Process</b> - Opens the Process Viewer that displays the current status of the process.</li> </ul>

Field Name	Definition
	<ul style="list-style-type: none"> <li>• <b>Cancel Process</b> - Cancels the process. This option is available only when user has the privilege to cancel a process.</li> <li>• <b>Go To Source</b> - Opens the source SharePoint list or document library.</li> <li>• <b>Go To link Item</b> - Opens the source SharePoint list or document library item.</li> </ul>
Status	<p><u>Definition:</u> Displays the status of the task.</p> <p><u>Allowed Values:</u> Read only.</p>
Started Date	<p><u>Definition:</u> Displays the date the work item started.</p> <p><u>Allowed Values:</u> Read only.</p>
Process Initiator	<p><u>Definition:</u> Specifies the user name who initiated the process.</p> <p><u>Allowed Values:</u> Read only.</p>

## Configuration Options - Process Instance List Web Part

Allows to configure the SharePoint Process Instance List Web Part.

### Navigation

1. In SharePoint, navigate to the Process Instance List Web Part.
2. On the Web Part window, click the **Arrow** button, and then click **Edit Web Part**. The Arrow button appears only when you move the pointer over the Web Part window.

The navigation for this task varies, depending upon your SharePoint version and the SharePoint settings in your local environment. For more information, see the documentation for SharePoint.

### Field Definitions

Field Name	Definition
Type of List	<p><u>Definition:</u> Determines what process instances to be retrieved.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> <li>• <b>AllProcesses</b> - All process instances are retrieved.</li> </ul>

Field Name	Definition
	<ul style="list-style-type: none"> <li>• <b>MyInitiatedProcesses</b> - The process instances initiated by the user are retrieved. This indicates that the ProcessInitiator is me.</li> <li>• <b>MyInvolvedProcesses</b> - The process instances that have some tasks assigned to the user are retrieved.</li> </ul> <p><u>Default Value:</u> MyInitiatedProcesses</p>
SharePoint Fields	<p><u>Definition:</u> Allows to display the context data of a process instance. To perform this, you must first publish context data into the SharePoint library using metadata fields, and then type a semicolon-separated list of column names.</p> <p><u>Allowed Values:</u> The name of your SharePoint fields. You can separate list of columns using semicolons.</p> <p><u>Default Value:</u> None</p>
Templates	<p><u>Definition:</u> Specifies process templates the Web Part uses to filter process instances.</p> <p><u>Allowed Values:</u> One or more process template names. You can enter multiple process template names, separated by semicolons (;).</p> <p><u>Default Value:</u> None</p>
Items Per Page	<p><u>Definition:</u> Specifies the number of items to display on one page in the Web Part.</p> <p><u>Allowed Values:</u> An integer.</p> <p><u>Default Value:</u> 10</p>

Field Name	Definition
Max. Process Instances to Retrieve	<p><u>Definition:</u></p> <p>Limits the number of process instances to be retrieved for display in the Web Part. Limiting the number of process instances to retrieve can help improve performance.</p> <p>This filter is applied before any other filters on the Web Part. Therefore, any additional filters on the Web Part results are applied only to the results limited by this setting.</p> <p><u>Allowed Values:</u></p> <p>An integer.</p> <p><u>Default Value:</u></p> <p>500</p>

## Adding the Process Instance List Web Part to SharePoint

---

To add the AgilePoint Process Instance List Web part to SharePoint, do the following.

### Prerequisites

- These instructions assume you are using SharePoint 2010 in a standard configuration. The exact procedure depend upon the version of SharePoint you are using and the settings in your local environment.

### Navigation

1. In SharePoint, navigate to the site page where you want to add the AgilePoint Web Part.
2. Click **Site Actions > Edit Page**.

### Instructions

1. Click **Add a Web Part**.
2. In the **Categories** pane, click **AgilePoint**.
3. In the **Web Parts** pane, click **AgilePoint Process Instance List**.
4. Click **Add**.

## Removing an AgilePoint Web Part from SharePoint

---

To remove an AgilePoint Web Part from SharePoint, do the following.

### Prerequisites

- These instructions assume you are using SharePoint 2010 in a standard configuration. The exact procedure depend upon the version of SharePoint you are using and the settings in your local environment.

## Navigation

1. In SharePoint, navigate to the site page where you want to remove the AgilePoint Web Part.
2. Click **Site Actions** > **Edit Page**.

## Instructions

1. Move the pointer over the Web Part you want to remove from the site page, and then click the **Web Part** arrow to display the list. The Arrow button appears only when you move the pointer over the Web Part window.
2. In the list, click **Delete**.

## Using the Process Instance List Web Part

---

By clicking on process name, the Web Part will show a menu with actions that the user can perform (e.g. if the user has privileges to cancel a process, this action will be available).

There is also a Go to Source action that opens the Form/Document library. You can perform some global actions over one or more process instances by checking the check boxes on the left and clicking on **Global Actions**.

## Performing Global Actions

---

You can perform global actions over one or more process instances. For example, you can cancel the selected running process instances all at once. Do the following.

### Navigation

1. In SharePoint, navigate to the Process Instance List Web Part.

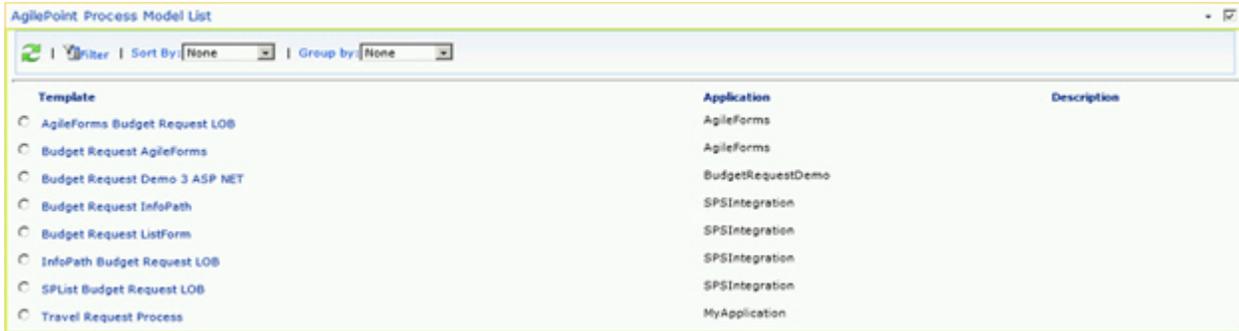
### Instructions

1. To cancel the running process instances all at once, select the check boxes on the left for the process instances you want.
2. Click **Global Actions**, and then select **Cancel Selected Processes**.

## AgilePoint Process Model List Window

---

The AgilePoint **Process Template List** displays all process templates deployed on the AgilePoint Server.



## Navigation

1. In SharePoint, navigate to the Process Model List Web Part.

## Field Definitions

Field Name	Definition
Refresh	<p><u>Function:</u></p> <p>Refreshes the Web Part window's content. Use this button to manually refresh the Web Part window's content to see if changes have occurred.</p>
Filter	<p><u>Function:</u></p> <p>Displays the Web Part's content based on the values entered.</p> <p>When you click the Filter button, a section is displayed with all Web Part fields. In the fields list, select the appropriate values to set the filter criteria to display the required Web Part's content.</p> <p>For example, in the Template list, if you select Budget Request, only the tasks related to Budget Request template are displayed.</p>
Sort By	<p><u>Definition:</u></p> <p>Arranges the Web Part window's content based on the field name you selected.</p> <p><u>Allowed Values:</u></p> <p>The field name you want.</p> <p><u>Default Value:</u></p> <p>None</p>
Group By	<p><u>Definition:</u></p>

Field Name	Definition
	<p>Specifies the field name you want to group the Web Part window's content.</p> <p><u>Allowed Values:</u> The name of your field.</p> <p><u>Default Value:</u> None</p>
<p>Template</p>	<p><u>Definition:</u> Specifies the name of the AgilePoint process template deployed on the AgilePoint Server.</p> <p><u>Allowed Values:</u> Read only.</p> <p>However, if you click the process template name, the Web Part displays a list of the following actions that can be performed on the selected process template:</p> <ul style="list-style-type: none"> <li>• <b>Initiate New Process</b> - Initiates a new process.  If you have a process template associated to more than one SharePoint library, or if you have more than one content type associated with the SharePoint library, you can choose the correct option for each library or content type from the action menu.</li> <li>• <b>View Process Model</b> - Displays the process model of the selected process template on a Process Viewer page.</li> </ul>
<p>Applications</p>	<p><u>Definition:</u> Displays the application name associated with the process template.</p> <p><u>Allowed Values:</u> Read only.</p>
<p>Description</p>	<p><u>Definition:</u> Displays the optional free text description about the process template deployed on the AgilePoint Server.</p> <p><u>Allowed Values:</u> Read only.</p>

## Configuration Options - Process Model List Web Part

Sets up the SharePoint Process Model List Web Part.

### Navigation

1. In SharePoint, navigate to the Process Model List Web Part.
2. On the Web Part window, click the **Arrow** button, and then click **Edit Web Part**. The Arrow button appears only when you move the pointer over the Web Part window.

The navigation for this task varies, depending upon your SharePoint version and the SharePoint settings in your local environment. For more information, see the documentation for SharePoint.

### Field Definitions

Field Name	Definition
Type of List	<p><u>Definition:</u></p> <p>Determines the process templates to be retrieved.</p> <p><u>Allowed Values:</u></p>

Field Name	Definition
	<ul style="list-style-type: none"> <li>• <b>ProcessTemplates</b> - Retrieves all process templates, or a list of process templates specified in the Templates field.</li> <li>• <b>ProcessTemplatesByRole</b> - Retrieves process templates that apply to the SharePoint user's AgilePoint role.</li> </ul> <p><u>Default Value:</u> ProcessTemplates</p>
Templates	<p><u>Definition:</u> Specifies process templates the Web Part uses to filter process instances.</p> <p><u>Allowed Values:</u> One or more process template names. You can enter multiple process template names, separated by semicolons (;).</p> <p><u>Default Value:</u> None</p>
Items Per Page	<p><u>Definition:</u> Specifies the number of items to display on one page in the Web Part.</p> <p><u>Allowed Values:</u> An integer.</p> <p><u>Default Value:</u> 10</p>
Template Column Display Name	<p><u>Definition:</u> Sets the name of the column that displays the process template names.</p> <p><u>Allowed Values:</u> The process template column's name you want.</p> <p><u>Default Value:</u> None</p>

## Adding the Process Model List Web Part to SharePoint

To add the AgilePoint Process Model List Web Part to SharePoint, do the following.

## Prerequisites

- These instructions assume you are using SharePoint 2010 in a standard configuration. The exact procedure depend upon the version of SharePoint you are using and the settings in your local environment.

## Navigation

1. In SharePoint, navigate to the site page where you want to add the AgilePoint Web Part.
2. Click **Site Actions > Edit Page**.

## Instructions

1. Click **Add a Web Part**.
2. In the **Categories** pane, click **AgilePoint**.
3. In the **Web Parts** pane, click **AgilePoint Process Model List**.
4. Click **Add**.

## Removing an AgilePoint Web Part from SharePoint

---

To remove an AgilePoint Web Part from SharePoint, do the following.

### Prerequisites

- These instructions assume you are using SharePoint 2010 in a standard configuration. The exact procedure depend upon the version of SharePoint you are using and the settings in your local environment.

### Navigation

1. In SharePoint, navigate to the site page where you want to remove the AgilePoint Web Part.
2. Click **Site Actions > Edit Page**.

### Instructions

1. Move the pointer over the Web Part you want to remove from the site page, and then click the **Web Part** arrow to display the list. The Arrow button appears only when you move the pointer over the Web Part window.
2. In the list, click **Delete**.

## Using the Process Model List Web Part

---

By clicking on a process template name, the Web Part will show dynamically the actions that can be performed on the selected process template. If you have a process template bound to more than one SharePoint Library, or if you have more than one content type associated with the SharePoint Library, you can choose the correct option for each library or content type from the action menu.

## ListForm Web Part

---

The AgilePoint **ListForm** Web Part allows you to use a SharePoint List as the form UI for manual tasks. This feature provides an easy way of building forms with different views based on a SharePoint List. A simple configuration window allows you to determine how fields on the form are displayed to the end-user (e.g. Editable, Locked, or Hidden). This drastically simplifies the effort and time required to build UI forms and therefore, building processes has become even easier for business users.

The only requirement to use AgilePoint ListForm is that the Web Part is deployed and activated on the SharePoint site where AgilePoint ListForm will be used.

On SharePoint, the ListForm Web Part operates in the background, managing the display settings (show/hide, enable/disable) for ListForms that are defined in an AgilePoint process. The ListForm Web Part is not visible to the end user.

For more information, see [ListForm](#) in the [Documentation Library](#).

# Process Launcher

A SharePoint Library, List, or Content Type can be associated to an AgilePoint Process Model using the standard SharePoint approach. The AgilePoint Process Launcher allows you to easily workflow-enable regular SharePoint Libraries, Lists, and Content Types. It allows you to specify which process template will be invoked when a process is initiated within a specific SharePoint Form Library, List, or Content Type.

The following procedure explains how to workflow-enable a Form Library in SharePoint. Note that the procedure is similar for Document Libraries and Content Types. For Content Types, access the content type you want (**Site Settings > Site Content Type Gallery**), and modify the workflow settings as you would for a Form Library or List.

To workflow-enable a SharePoint Form Library, do the following.

## Prerequisites

- To perform this action, a SharePoint user must have Contribute privileges on both the library and the AgilePoint Configuration List. (The user can also complete the procedure by logging on using the SPImpersonater account.)

## Navigation



**Note:** The navigation for this task varies, depending upon your SharePoint version and the SharePoint settings in your local environment. For more information, see the documentation for SharePoint

1. Within the SharePoint Form Library, click **Settings > Form Library Settings**.
2. Click **Workflow settings**.

## Instructions

1. In the SharePoint workflow settings, select **AgilePoint Process Launcher**, and check the **Start this workflow when a new item is created check box**.
2. Select a process from the **AgilePoint Process Model** list and select the desired version from the **Select Process Model Version** list box.
3. After selecting the version of the AgilePoint Process Model, it will show the **Process Model** image. Click on **Submit** to complete the SharePoint entity, AgilePoint process association.
4. Upload a new document to the library. If you have checked the check box **Start this workflow when a new item is created** in Step 3, it will trigger the associated AgilePoint process when an item is created or uploaded to the library. Refresh the page and you will see the **In Progress** link below the process name column.
5. If **Start this workflow when a new item is created** was not checked at the time of creating the workflow association, you can start the workflow manually. Click on the drop down button next to the list item.
6. Click **Workflows**.
7. Click the AgilePoint Process that you want to trigger for this item.



**Note:** There may be multiple workflows associated to the library.

8. When clicking on the **In Progress** link of the item, it will show the AgilePoint workflow status page.

9. The assigned user can take an action by clicking on the task name in the **AgilePoint Task List**.
10. Once the process completes, it shows as **Completed** status.

# Process Viewer

The Process Viewer is a web page that displays the current status of a process instance using a visual display. The following functionality is available in the Process Viewer:

- The ability to complete a task.
- A green border identifies an active task, a red border identifies an overdue task.
- The **View Yammer Conversation** option provides the ability to open a Yammer conversation, if one is available.

# Manual Task Sample Pages

Several Web pages are provided that implement generic user interfaces for several typical Manual activities. These Web pages correspond to the special Manual AgileShapes built-in to AgilePoint Envision in the Microsoft SPS stencil (e.g. Approve, Complete, Publish, and Submit). These pages are selected using the **Work To Perform** property for a Manual activity.

For more information, see [AgileWork - Common Setup](#) in the [Documentation Library](#).

# Customizing and Extending Web Parts

This section describes options for modifying AgilePoint Web Parts. These features mainly use standard SharePoint functionality that is also supported by the AgilePoint Web Parts.

## Basic Web Part Modifications

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You can use common SharePoint functionality to modify AgilePoint Web Parts.

## Modifying Web Part Display Properties

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1. On the Web Part, click the drop-down arrow and select **Modify My (Shared) Web Part**. The page displays in edit mode.
2. Modify the Web Part as desired and click **Apply**.

## Personalizing Web Parts

---

Personalization is a standard SharePoint functionality which permits each user of a site to personalize the pages and the elements in them that he/she has access to. These Web Parts are designed to permit personalization. This permits a user to configure the Web Parts including Filters, Sort By and Group By settings and these settings will persist for the user. To personalize an element, it first needs to have the corresponding AllowPersonalization property for that element set to true (If not present, you need to add it). For example the Welcome page (Default.aspx) of a top level site in a Publishing site collection has this property set to false for all Web Part Zones, meaning that, in order to enable Personalization, it is first necessary to set it to true using SharePoint Designer.

Once this is done, it is possible to personalize a page similar to any SharePoint page. See the SharePoint documentation from Microsoft for detailed instructions.

## Setting Up Web Part Connections

---

The Web Parts can be connected with other Web Parts using standard SharePoint connections. In addition, the Process Template Web Part can act as a provider for the Process Instance Web Part.

You can also use the Standard SharePoint Filter Web Parts. For example, you can use the Text Filter Web Part to filter the Task List Web Part by Task Name. For details, see the SharePoint documentation from Microsoft.

To set up the Web Part connections, do the following.

### Prerequisites

- These instructions assume you are using SharePoint 2010 in a standard configuration. The exact procedure depend upon the version of SharePoint you are using and the settings in your local environment.

### Navigation

1. In SharePoint, navigate to the AgilePoint Web Part you want. For example, **Site Actions > Edit Page**.

## Instructions

1. On the Web Part window, click the **Arrow** button, and then click **Connections > [Type of connection you want] > [Web Part to be connected to the current one]**.

The following type of Web Part connections are supported to connect the current Web Part to another Web Part:

Type of Web Part Connection	Definition
Send Row of Data To	Passes the selected row of data from the current Web Part to the other Web Part.
Get Parameters From	Fetches the selected data from the other Web Part to the current Web Part.
Get Filter Values From	Fetches the selected filter values from the other Web Part to the current Web Part.

2. On the **Choose Connection** window, under the **Choose Connection** tab, select the connection type, and then click **Configure**:

Field Name	Definition
Connection Type	<p><u>Definition:</u></p> <p>Determines the type of connection you want. You can fetch values for a column that you want to filter or data you want to use.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> <li>• <b>Get Filter Values From</b></li> <li>• <b>Get Parameters From</b></li> </ul> <p><u>Default Value:</u></p> <p>Get Filter Values From</p>

3. On the **Choose Connection** window, under the **Configure Connection** tab, complete the fields, and then click **Finish**:

Field Name	Definition
Provider Field Name	<p><u>Definition:</u></p> <p>Determines the column name of the other Web Part to fetch the data.</p> <p><u>Allowed Values:</u></p> <p>The name of your column.</p> <p><u>Default Value:</u></p>

Field Name	Definition
	Assigned To - The value depends on the other Web Part column names.
Consumer Field Name	<p><u>Definition:</u></p> <p>Determines the column name of the current Web Part you want to display the data retrieved from the another Web Part.</p> <p><u>Allowed Values:</u></p> <p>The name of your column.</p> <p><u>Default Value:</u></p> <p>None</p>

## Customizing a Process Name

To customize a process name for InfoPath processes, do the following.

### Instructions

1. Modify the code in the script.js file to customize the process name for InfoPath Client processes.
  - a. Open the file [\[AgilePoint Envision installation folder\]\InfoPath\script.js](#).
  - b. Replace the code `dav.FileName = fileName;` code with the following code:

```
// Submit new form using InfoPath WebDAV Adapter
function CreateInfoPathFormByWebDAV(webdavAdapterName, fileName)
{
    var obj = new ActiveXObject("AgilePointInfoPath.Integration");
    var saveLocation = obj.GetDefaultSaveLocation();

    var dav = XDocument.DataAdapters(webdavAdapterName);
    dav.FolderURL = saveLocation;

    if (dav.FileName.toLowerCase() == "form.xml")
    {
        dav.FileName = fileName;
    }
    dav.Submit();

    XDocument.UI.Alert("InfoPath form has been submitted successfully.\n\nDocument Name : " + fileName);
}
```

2. In the InfoPath form, modify the data connection for Submit:
  - a. In InfoPath, open an InfoPath form you want.
  - b. Open **Data Connection Wizard**. You can access the Data Connection Wizard via: **File > Info > Submit Options > SharePoint Library > Manage**.
  - c. On the **Data Connection Wizard**, click **Modify**.

- d. In the **Form Name** field, click the **Function** button, and then insert a formula in the following format:

```
<Formula name>("_!_",<Field name 1,"-",<Field name 2,"_!_",now())
```

In this format, anything between the combination of the Underscore Exclamation Underscore delimiters (`_!_`) becomes the process name in the Web Parts. The `now()` function is concatenated outside the delimiters to ensure that the file names are unique.

**Example:**

```
<concat>("_!_",<EmpName,"-",<EmpDeptt>,"_!_",now())
```

In this example, **EmpName-EmpDeptt** becomes the process name in the Web Parts. The current date is added to the process name to ensure that the file name is unique.

## Custom Data Sources for Web Parts

---

AgilePoint SharePoint Integration supports displaying data from a custom data source on the Task List or Process Instance List SharePoint Web Parts.

Out of the box, AgilePoint provides custom data source configurations for SharePoint lists and custom attributes available on AgilePoint Server. However, you can also custom code your own custom data source configuration using the integration tools AgilePoint provides.

## Deploying a Custom Data Source

---

To publish a custom data source for use with AgilePoint, do the following.



**Note:** You do not need to complete this step if you are using a SharePoint list or custom attribute available on AgilePoint Server as your custom data source.

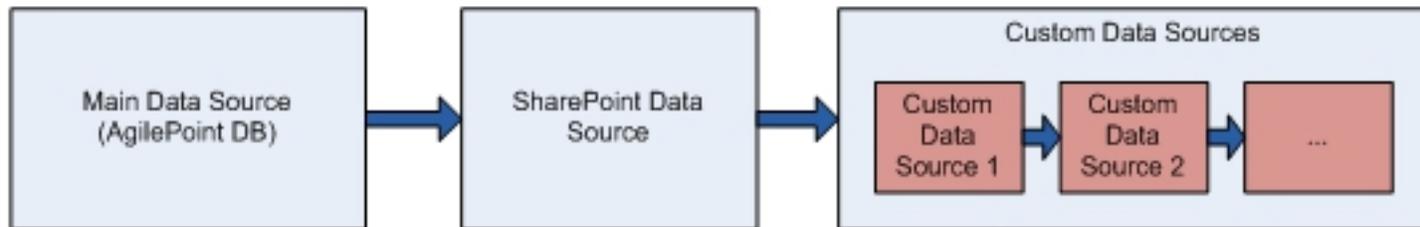
### Instructions

1. Create an assembly with a class that implements the `IWebPartDataSource` interface. This class should contain your custom logic to get data from external Data Source. The assembly should be strongly named.

The following specifications describe the interface:

- **Pi ids** parameter - Contains all process instance IDs the Web Part will render. This is useful if you want to filter your queries to external data source based on process instance ID. In fact, AgilePoint strongly recommends you use this parameter to optimize the performance, based on this diagram:

## WebParts Data Source execution Pipeline



A Process Instance Id collection is passed from Main Data Source to next one. If main Data Source is filtered, the Process Instance Id collection will only contain the ids that match with that filter. Each Data Source applies its own filters, and modify the process instance id collection, so next Data Source only have to get data for filtered Process instance ids

- **Fields** parameter: - An array of NameValues. Contains the fields that are configured for rendering on Web Part results. The name property of NameValue is the internal name of the field, and the value is the display name of the field.
  - **Filters** parameter - An array of NameValues. Contains the filters for the data source. The Name property of NameValue is the internal name of the field, and the value is the value of the filter.
  - **ConfigData** parameter - Is an array of NameValues. It contains configuration data for the data source.
  - **Return type** - You must return a DataTable with your custom data. This DataTable should contain a column named ProcessInstanceID. This column is essential to merge with the main data source.
  - **GetRequiredParameters** method - This method enables you to specify what parameters are needed to configure the data source. On configuration-time, those parameters will be rendered on Data Source Parameters configuration grid.
2. Deploy the assembly to the GAC.

## Setting Up a Custom Data Source

You can use custom data sources in the SharePoint Task List and Process Instance List Web Parts. To configure the custom data sources in one of these Web Parts, do the following.

### Navigation

1. On your SharePoint site, navigate to the AgilePoint Configuration list. For example, **View All Site Content > AgilePoint Configuration**.

The navigation for this task varies, depending upon your SharePoint version and the SharePoint settings in your local environment. For more information, see the documentation for SharePoint

2. On the **AgilePoint Configuration** list, click **New > AgilePoint Config Setting Item**.

## Instructions

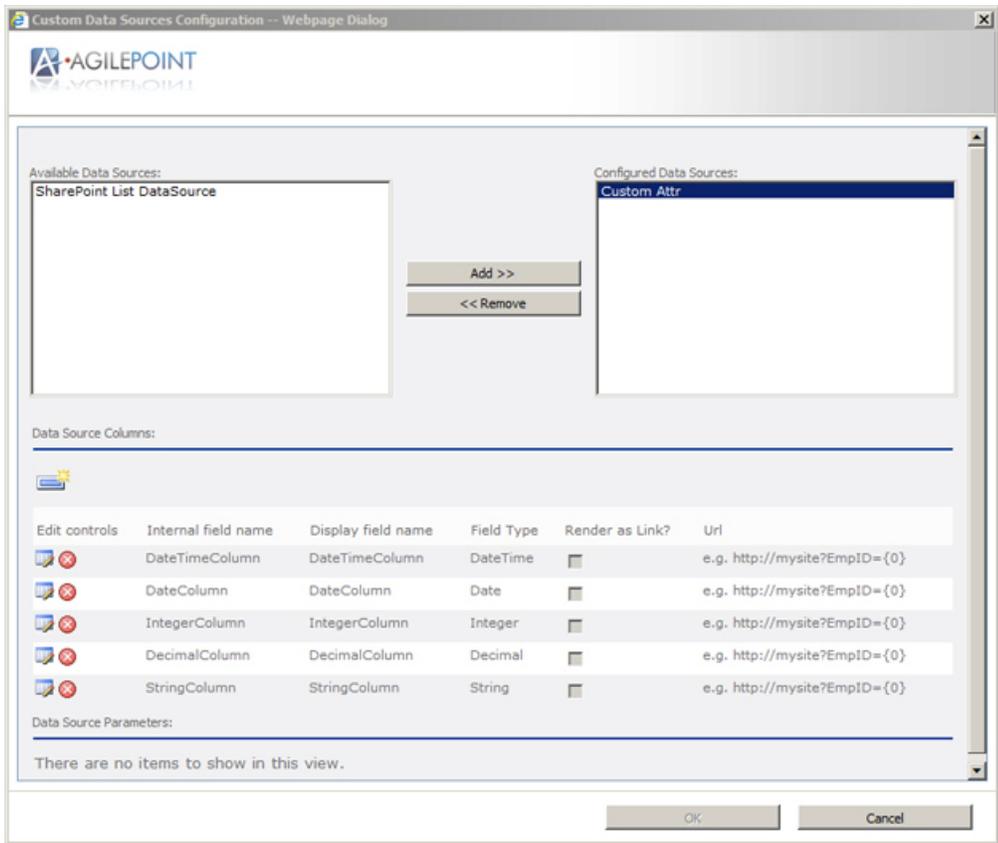
1. On the **AgilePoint Configuration: New Item** page, Modify the values in the following fields as required:

Field Name	Definition
Application	Enter <b>CustomDataSources</b> .
AP Setting Key	<p>The exact name of the custom data source. For the data sources provided by AgilePoint, the names must be precisely as follows:</p> <ul style="list-style-type: none"> <li>• <b>SharePoint List</b> - SharePoint List DataSource</li> <li>• <b>Custom Attribute</b> - Custom Attr</li> </ul>
AP Setting Value	<p>The assembly information for your custom data source. The following are examples of the information required for the data sources provided by AgilePoint:</p> <ul style="list-style-type: none"> <li>• <b>SharePoint List</b> - AgilePoint.SharePoint.CustomDataSources.SharePointListDat AgilePoint.SharePoint.CustomDataSources, Version=1.0.0.0, Culture=neutral, PublicKeyToken=b7c6f89c2c983acd</li> <li>• <b>Custom Attribute</b> - AgilePoint.SharePoint.CustomDataSources.CustomAttributesD AgilePoint.SharePoint.CustomDataSources, Version=1.0.0.0, Culture=neutral, PublicKeyToken=b7c6f89c2c983acd</li> </ul>
Description	An optional free text description of the data source.
Encrypted	Leave unselected.

2. Click **OK**.

## Custom Data Sources Configuration Window

Sets up custom data sources for a Web Part. Custom data sources enable you to populate columns in the Web Part from a data source of your choice, such as a SharePoint list or a database.



## Navigation

1. In SharePoint, navigate to the Task List or Process Instance List Web Part.
2. On the Web Part window, click the **Arrow** button, and then click **Edit Web Part**. The Arrow button appears only when you move the pointer over the Web Part window.

The navigation for this task varies, depending upon your SharePoint version and the SharePoint settings in your local environment. For more information, see the documentation for SharePoint.

3. In the Web Part properties, click **Data Sources**.

## Field Definitions

Field Name	Definition
Available Data Sources	<p><u>Definition:</u></p> <p>Displays the data sources that have been <a href="#">set up in the AgilePoint Configuration List</a>, and are available for the Web Part.</p> <p><u>Allowed Values:</u></p> <p>A list of preconfigured data sources.</p>

Field Name	Definition
Configured Data Sources	<p><u>Definition:</u></p> <p>Specifies the data sources that are active for the selected column.</p> <p><u>Allowed Values:</u></p> <p>A list of preconfigured data sources.</p> <p><u>Default Value:</u></p> <p>None</p>
Add	<p><u>Function:</u></p> <p>Moves the selected data source item from the Available Data Sources box to the Configured Data Sources box.</p> <p>For more information, see <a href="#">Adding a Custom Data Source</a> in the <a href="#">Documentation Library</a></p>
Remove	<p><u>Function:</u></p> <p>Moves the selected data source item from the Configured Data Sources box to the Available Data Sources box.</p> <p>For more information, see <a href="#">Removing a Custom Data Source</a> in the <a href="#">Documentation Library</a></p>
Internal field name	<p><u>Definition:</u></p> <p>Specifies the internal name for the SharePoint custom column. The internal name acts as an identifier for the data you want to display from the data source. The column's internal name is not visible to the SharePoint users.</p> <p><u>Allowed Values:</u></p> <p>An internal SharePoint custom column name.</p> <p><u>Default Value:</u></p> <p>Type Internal field name - Indicates that you have to type the internal SharePoint column name. In itself, this is not a valid value.</p>
Display field name	<p><u>Definition:</u></p> <p>Specifies the SharePoint custom column's name you want to appear in the SharePoint list.</p> <p><u>Allowed Values:</u></p> <p>A SharePoint custom column name.</p>

Field Name	Definition
	<p><u>Default Value:</u></p> <p>Type Display field name - Indicates that you have to type the SharePoint custom column name you want to display in the SharePoint list. In itself, this is not a valid value.</p>
Field Type	<p><u>Definition:</u></p> <p>Specifies the data type for the custom data column. The values in this field determine how the data is displayed in the Web Part.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> <li>• <b>DateTime</b> - Sorted according to DateTime format.</li> <li>• <b>Date</b> - Sorted according to DateTime format.</li> <li>• <b>Integer</b> - Sorted numerically.</li> <li>• <b>Decimal</b> - Sorted numerically.</li> <li>• <b>Currency</b> - Sorted numerically.</li> <li>• <b>String</b> - Sorted alphabetically. Only String fields can be rendered as a link.</li> </ul>
Render as Link	<p><u>Definition:</u></p> <p>Determines whether the custom column is displayed as a hyperlink in the SharePoint list.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> <li>• <b>Deselected</b> - The custom column is not displayed as a hyperlink in the SharePoint list.</li> <li>• <b>Selected</b> - The custom column is displayed as a hyperlink in the SharePoint list.</li> </ul> <p>You must specify the URL for the link.</p> <p> <b>Note:</b> For column data to render as a link the data type must be String or blank. If Render as Link is selected and any other data type is selected, the Render as Link option is ignored.</p> <p><u>Default Value:</u></p> <p>Deselected</p>
Url	<p><u>Definition:</u></p> <p>Allows you to enter a URL for the link if the custom column's value is to be rendered as a link.</p>

Field Name	Definition
	<p><u>Allowed Values:</u></p> <p>A valid URL.</p> <p>This URL can include one or more custom attributes.</p> <p><u>Default Value:</u></p> <p>http://mysite?EmpID={0}</p> <p>This value indicates you must specify the URL in the given format. In itself, this is not a valid value.</p> <p><u>Example:</u></p> <ul style="list-style-type: none"> <li>• http://{SharePointListUrl}/</li> <li>• http://{MySharePointServer}:{MyPort}/ \$MySharePointList</li> </ul>
Update	<p><u>Function:</u></p> <p>Allows you to save the modifications or values entered, as appropriate:</p> <ul style="list-style-type: none"> <li>• <b>Data Source Columns</b> - Allows you to save the custom column values entered.</li> </ul> <p>When you click the Update button, the Add Item, Edit, and Delete buttons are available to add a new custom column, modify or delete the values entered.</p> <ul style="list-style-type: none"> <li>• <b>Data Source Parameters</b> - Allows you to save the URL entered for the SharePoint list. You can update the URL value only for the SharePoint list data sources.</li> </ul> <p>The options in the Data Source Parameters section are visible only when a SharePoint list data source is selected in the Configured Data Sources list.</p>
Add Item	<p><u>Function:</u></p> <p>Allows you to add a custom column.</p> <p>For more information, see <a href="#">Adding a Custom Column to a SharePoint Web Part</a> in the <a href="#">Documentation Library</a></p>
Edit	<p><u>Function:</u></p> <p>Allows you to modify or enter the values as appropriate:</p> <ul style="list-style-type: none"> <li>• <b>Data Source Columns</b> - Allows you to modify a custom column values for the SharePoint Web Part.</li> </ul>

Field Name	Definition
	<p>For more information, see <a href="#">Editing a Custom Column in a SharePoint Web Part</a> in the <a href="#">Documentation Library</a></p> <ul style="list-style-type: none"> <li>• <b>Data Source Parameters</b> - Displays a Value box to provide the URL for the SharePoint list. You can set the URL value only for the SharePoint list data sources.</li> </ul> <p>The options in the Data Source Parameters section are visible only when a SharePoint list data source is selected in the Configured Data Sources list.</p> <p>When you click the Edit button, the Update and Cancel buttons are available to save or cancel the modifications.</p>
Delete	<p><u>Function:</u></p> <p>Allows you to delete the SharePoint custom column.</p>
Value	<p><u>Definition:</u></p> <p>Specifies the URL of the SharePoint list you want to use as your custom data source.</p> <p><u>Allowed Values:</u></p> <p>A valid SharePoint list URL.</p> <p>The options in the Data Source Parameters section are visible only when a SharePoint list data source is selected in the Configured Data Sources list.</p> <p><u>Default Value:</u></p> <p>None</p>

## Adding a Custom Data Source

To add a custom data source to the Web Part, do the following.

### Navigation

1. In SharePoint, navigate to the Task List or Process Instance List Web Part.
2. On the Web Part window, click the **Arrow** button, and then click **Edit Web Part**. The Arrow button appears only when you move the pointer over the Web Part window.

The navigation for this task varies, depending upon your SharePoint version and the SharePoint settings in your local environment. For more information, see the documentation for SharePoint.

3. In the Web Part properties, click **Data Sources**.

## Instructions

1. On the [Custom Data Sources Configuration Window](#) window, select the item you want in the **Available Sources** list, and click **Add**.

## Removing a Custom Data Source

---

To remove a custom data source from a SharePoint Web Part, do the following.

### Navigation

1. In SharePoint, navigate to the Task List or Process Instance List Web Part.
2. On the Web Part window, click the **Arrow** button, and then click **Edit Web Part**. The Arrow button appears only when you move the pointer over the Web Part window.

The navigation for this task varies, depending upon your SharePoint version and the SharePoint settings in your local environment. For more information, see the documentation for SharePoint.

3. In the Web Part properties, click **Data Sources**.

### Instructions

1. On the [Custom Data Sources Configuration Window](#) window in the **Configured Data Sources** list, select the item you want.
2. Click **Remove**.

## Adding a Custom Column to a SharePoint Web Part

---

To add a custom column to a SharePoint Web Part, do the following.

### Navigation

1. In SharePoint, navigate to the Task List or Process Instance List Web Part.
2. On the Web Part window, click the **Arrow** button, and then click **Edit Web Part**. The Arrow button appears only when you move the pointer over the Web Part window.

The navigation for this task varies, depending upon your SharePoint version and the SharePoint settings in your local environment. For more information, see the documentation for SharePoint.

3. In the Web Part properties, click **Data Sources**.

### Instructions

1. On the [Custom Data Sources Configuration Window](#) window in the **Configured Data Sources** list, select the item you want.
2. Click the **Add** button ().  
The Add button is represented by a small icon of a document with a plus sign.
3. Modify the values in the following fields as required:

Field Name	Definition
Internal field name	An identifier for the data you want to display from the data source. SharePoint users do not see this text.
Display field name	The column name you want to appear in the SharePoint list.
Render as Link?	When selected, specifies that the column appears in the SharePoint list as a hyperlink.  For column data to render as a link the data type must be String or blank. If Render as Link is selected and any other data type is selected, the Render as Link option is ignored.
Url	If a column value is rendered as a link, specifies the URL for the link.

4. Click the Update button ()

## Limiting Rows with Custom Data Columns

If you use custom columns from custom data sources for the Task List and Process Instance List Web Parts, AgilePoint recommends limiting the number of rows that display in the Web Parts.

### Navigation

1. In SharePoint, navigate to the Task List or Process Instance List Web Part.
2. On the Web Part window, click the **Arrow** button, and then click **Edit Web Part**. The Arrow button appears only when you move the pointer over the Web Part window.

The navigation for this task varies, depending upon your SharePoint version and the SharePoint settings in your local environment. For more information, see the documentation for SharePoint.

### Instructions

1. In the Web Part properties, change the value of the following property to **50** or lower.

Field Name	Definition
Max. Tasks to Retrieve	This property limits the number of tasks to retrieve. Limiting the number of tasks to retrieve can help improve performance.  If you are using columns that retrieve data from Custom Data Sources, AgilePoint recommends limiting this number to 50 or lower.

## Editing a Custom Column in a SharePoint Web Part

---

To edit a custom column in a SharePoint Web Part, do the following.

### Navigation

1. In SharePoint, navigate to the Task List or Process Instance List Web Part.
2. On the Web Part window, click the **Arrow** button, and then click **Edit Web Part**. The Arrow button appears only when you move the pointer over the Web Part window.

The navigation for this task varies, depending upon your SharePoint version and the SharePoint settings in your local environment. For more information, see the documentation for SharePoint.

3. In the Web Part properties, click **Data Sources**.

### Instructions

1. On the [Custom Data Sources Configuration Window](#) window, under **Data Source Columns**, click the **Edit**



button ( ) for the item you want.

2. Modify the values in the following fields as required:

Field Name	Definition
Internal field name	An identifier for the data you want to display from the data source. SharePoint users do not see this text.
Display field name	The column name you want to appear in the SharePoint list.
Render as Link?	When selected, specifies that the column appears in the SharePoint list as a hyperlink.  For column data to render as a link the data type must be String or blank. If Render as Link is selected and any other data type is selected, the Render as Link option is ignored.
Url	If a column value is rendered as a link, specifies the URL for the link.

3. Click the Update button (  ).

## Removing a Custom Column from a SharePoint Web Part

---

To remove a custom column from a SharePoint Web Part, do the following.

### Navigation

1. In SharePoint, navigate to the Task List or Process Instance List Web Part.
2. On the Web Part window, click the **Arrow** button, and then click **Edit Web Part**. The Arrow button appears only when you move the pointer over the Web Part window.

The navigation for this task varies, depending upon your SharePoint version and the SharePoint settings in your local environment. For more information, see the documentation for SharePoint.

3. In the Web Part properties, click **Data Sources**.

### Instructions

1. On the [Custom Data Sources Configuration Window](#) window, click the **Delete** button () for the item you want.

## Modifying the URL for a SharePoint List Custom Data Source

---

If you are using a SharePoint list as a custom data source, you must provide the URL for the list. To specify the SharePoint list URL, do the following.

### Navigation

1. In SharePoint, navigate to the Task List or Process Instance List Web Part.
2. On the Web Part window, click the **Arrow** button, and then click **Edit Web Part**. The Arrow button appears only when you move the pointer over the Web Part window.

The navigation for this task varies, depending upon your SharePoint version and the SharePoint settings in your local environment. For more information, see the documentation for SharePoint.

3. In the Web Part properties, click **Data Sources**.

### Instructions

1. On the [Custom Data Sources Configuration Window](#) window, under **Data Source Parameters**, click the **Edit** button () for the **List Url** item.

2. Modify the values in the following fields as required:

Field Name	Definition
Value	Specifies the URL of the SharePoint list that you want to use as your custom data source.

3. Click the Update button ()

## Extending AgilePoint Web Parts

---

You can extend the AgilePoint Task List Web Part and AgilePoint Process Instance List Web Part to include custom actions. This is supported at the item level, as well as at the global level.

### Custom Actions

---

This section provides instructions for adding Custom Actions in the AgilePoint Task List and AgilePoint Process Instance List Web Parts. This is supported at the item level as well as at the global level. Many times there is a requirement where apart from the built in task actions you need additional actions depending on some situation, in that case, Custom Actions can be added. These Custom Actions can be easily added as a plug-in and when configured, these custom actions will be available in the Web Parts along with other built in actions.

### Custom Task Actions in the AgilePoint Task List Web Part

The following are the steps to design and configure Custom Actions:

1. Code the Custom Actions.

The user defined custom class needs to be derived from `ICustomTaskListActions` and needs to implement the `AddCustomActions` method.

Sample:

```
public class CustomTaskListActions : ICustomTaskListActions
{
    public StringBuilder AddCustomActions(StringBuilder sb, WFManualWorkItem wi,
string currentUser)
    {
        string formRenderUrl = "FormRender.aspx";
        try
        {
            formRenderUrl =
ConfigurationSettings.AppSettings["FormRenderURL"].ToString();
        }
        catch
        { }
        if (wi.UserID.ToLower() == currentUser && (wi.Status ==
WFManualWorkItem.ASSIGNED || wi.Status == WFManualWorkItem.OVERDUE) && wi.Name
== "FormRender")
        {
            sb.Append(AddMenuItem("Fill in", "window.open('" + formRenderUrl + "?WID=" +
wi.WorkItemID + "'", "_layouts/images/edit.gif"));
        }

        return sb;
    }

    private string AddMenuItem(string text, string actionUrl, string imageUrl)
    {
        if (imageUrl == null || imageUrl == string.Empty)
        {
            imageUrl = "/_layouts/AP/Image/warn16.gif";
        }
    }
}
```

```

        string menuHtml = "<ie:menuitem id=\"" + Guid.NewGuid().ToString() + "\"
        type=\"option\" iconSrc=\"" + imageUrl + "\" onMenuClick=\"" + actionUrl + "\"
        text=\"" + text + "\" title=\"" + text + "\" menuGroupId=\""2147483647\"></
        ie:menuitem>";
        return menuHtml;
    }
}

```

The AddCustomActions method takes three input parameters:

- Stringbuilder
- WFManualWorkItem
- Currentuser

WFManualWorkItem is the WorkItem for which the task needs to perform the action.

2. The custom Assembly should have a strong name.
3. Drop the custom Assembly in the GAC as well as the bin directory of the SharePoint Web application.

### Configuring the Custom Action within the Task List Web Part

There are two different ways for which you can bind your custom Assembly to the AgilePoint Task List:

- Registering the custom Assembly in the GAC:

Add a new setting in the appSettings node where the key is "CustomAgilePointTaskActions" and the value is "Class name, Assembly name" Sample:

```

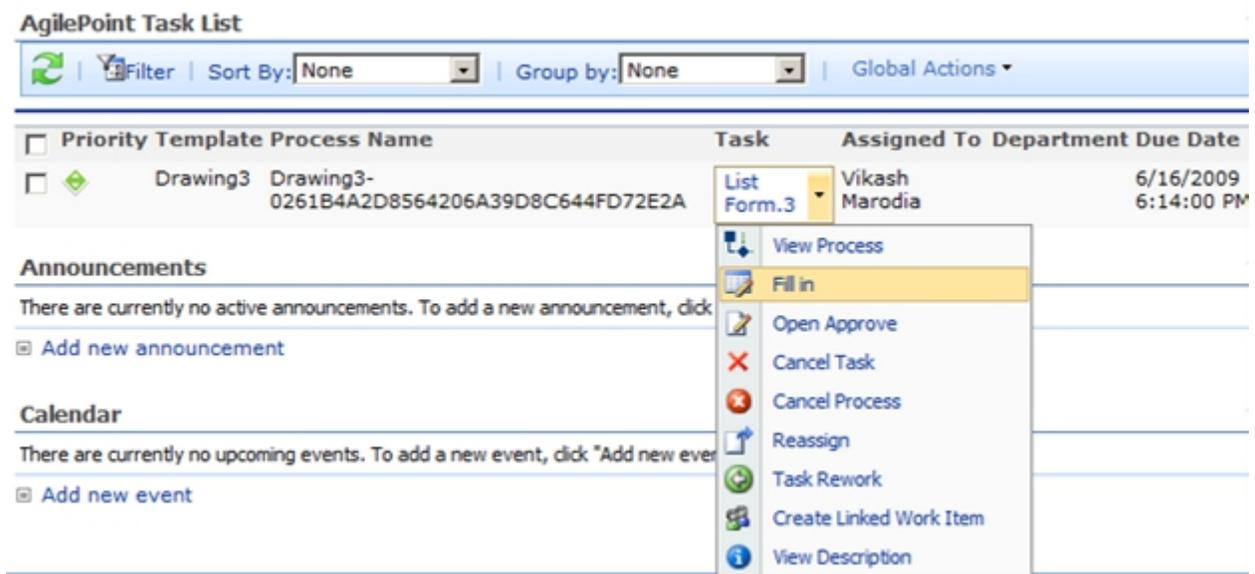
<add key="CustomAgilePointTaskActions"
value="SPCustomAction.CustomTaskListActions,SPCustomAction" />

```

- Registering the custom Assembly in the AgilePoint Configuration List:

Add a new entry in the AgilePoint Configuration List with the name as CustomAgilePointTaskActions, where the value is class name, assembly name

Once the custom Assembly is properly registered, it will be available in your task list as shown below:



## Global Actions in the AgilePoint Task List Web Part

Global Actions are similar to Custom Task Actions, except for the following differences:

1. Derive the Custom Global Actions class from `ICustomTaskListGlobalActions`, and the `AddCustomActions` method accepts `WFManualWorkItem[]` instead of `WFManualWorkItem`.
2. During the configuration, you need to use the key "CustomAgilePointGlobalTaskActions" instead of "CustomAgilePointTaskActions" in the `web.config` and AgilePoint Configuration List.

### Change Priority

This section provides information for a Global Action called Change Priority in the AgilePoint Task List Web Part. It allows the user to adjust the priority setting of tasks in the AgilePoint Task List Web Part.

Download the attached project files.

Extract the files, and drop the dll in GAC and bin directory of the SharePoint Web application. Also copy the file [\[SharePoint server extensions folder\]\TEMPLATE\LAYOUTS\API\ChangePriority.aspx](#).

Add an entry in the `web.config` or AgilePoint Configuration List as shown below: `web.config`:

```
<appSettings>
  <add key="CustomAgilePointGlobalTaskActions"
    value="MyPrivate.CustomAction.GlobalCustomActionExtender,
    MyPrivate.CustomAction.ChangePriority" />
</appSettings>
```

-Or-

AgilePoint Configuration List:

- **Application** - CustomAgilePointGlobalTaskActions
- **AP Setting Key** - CustomAgilePointGlobalTaskActions
- **AP Setting Value** - MyPrivate.CustomAction.GlobalCustomActionExtender,MyPrivate.CustomAction.ChangePriority

## Downloads

[ChangePriority.zip](#)

## Custom Actions in the AgilePoint Process Instance List Web Part

This section provides the steps to design and configure Custom Actions in the AgilePoint Process Instance List Web Part:

1. Add a reference to `Ascentn.SharePoint.Common.v2.dll`.
2. Code the Custom Actions.

The user defined custom class needs to be derived from `ICustomProcessInstanceAction` and needs to implement the `AddCustomActions` method.

Sample:

```
using Ascentn.SharePoint.Common;
public class CustomTaskListActions : ICustomProcessInstanceAction
{
  public StringBuilder AddCustomActions(StringBuilder sb, string piid, string
  currentUser)
```

```

    {
        int count = 0;
        string formRenderUrl = "FormRender.aspx";
        formRenderUrl = formRenderUrl + "?PIID=" + piid;
        sb.Append(AddMenuItem(count.ToString(), "window.open('" + formRenderUrl +
            "')",
            "_layouts/images/edit.gif"));
        return sb;
    }

    private string AddMenuItem(string text, string actionUrl, string imageUrl)
    {
        if (imageUrl == null || imageUrl == string.Empty)
        {
            imageUrl = "/_layouts/AP/Image/warn16.gif";
        }
        string menuHtml = "<ie:menuitem id=\"" + Guid.NewGuid().ToString() + "\"
            type=\"option\" iconSrc=\"" +
            imageUrl + "\" onMenuClick=\"" + actionUrl + ";\" text=\"" +
            text +
            "\" title=\"" +
            menuHtml += text + "\" menuGroupId=\"2147483647\"></ie:menuitem>";
        return menuHtml;
    }
}

```

3. Build and drop the assembly in the GAC and the bin directory of the SharePoint Web application.
4. Configure the Custom Action in the AgilePoint Process Instance List Web Part:

This can be done in two ways:

- Registering the custom assembly in the GAC. Add a new setting in the appSettings node with the key as "CustomProcessInstanceAction" and the value as "Class name, Assembly name".

For example:

```
<add key="CustomAgilePointTaskActions"
    value="SPCustomAction.CustomTaskListActions,SPCustomAction" />
```

- Registering the Custom Assembly in the AgilePoint Configuration List.

Add a new item in the AgilePoint Configuration List where the Application name is CustomProcessInstanceAction and the AP Setting Value is class name, assembly name

### Custom Global Actions in the AgilePoint Process Instance List Web Part

Global Actions are similar to Custom Actions in the AgilePoint Process Instance List except for the following differences:

1. You need to derive your custom Global Actions class from:
  - ICustomProcessInstanceGlobalAction, the AddCustomActions method accepts string[] PIIDs instead of string PIID.
2. During configuration, you need to use the key "CustomProcessInstanceGlobalAction" instead of "CustomProcessInstanceAction" in the web.config and the AgilePoint Configuration List.

# SPDoc Metadata Binding

In SPDoc based process templates, you can access the values of custom SharePoint Document Library's metadata columns entered by the user when a document is uploaded. This data can then be used in your process - for example, to determine the workflow in your process, or to display information in an email notification.

To bind the SharePoint data with a SPDoc process, do the following.

## Prerequisites

- A SharePoint column:
  1. In SharePoint, navigate to the Document Library.
  2. Under the **Library** tab, click **Create Column**, and then complete the fields to create a column, such as column name and column data type. For example, a column named Department.

## Navigation

1. In Envision, open a **Microsoft SPDoc** 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](#), click the **Ellipses** button.

## Instructions

1. To bind the SharePoint data with the process, on the [Select SharePoint Library Column Window](#), select the **Show All** check box.
2. Select the column for data binding, and then click **OK**.

Now, when you upload a document in the document library, this field is displayed and you can enter a value in the text field provided.

Then, a new process is initiated, and the process retrieves the value of the metadata from the SharePoint column - Department in this example, and routes the process as designed based on the column's value entered by the user - the department name in this example.

# Localization

If the AgilePoint database locale is different from the SharePoint machine locale, you must add a new string value - APDBCulture - in the SharePoint machine registry.

To add a new string value in the SharePoint machine registry, do the following.

## Navigation

1. Click **Start > Run**.
2. In the **Open** field, type **regedit**.
3. Click **OK**.
4. In the **Registry Editor** window, navigate to the registry for the SharePoint machine:  
HKEY\_LOCAL\_MACHINE/SOFTWARE/Ascentn/SharePoint

## Instructions

1. Under the **HKEY\_LOCAL\_MACHINE/SOFTWARE/Ascentn/SharePoint** node, add a new string value:  
**APDBCulture**.

The value of the APDBCulture is the localization code for the locale used in the AgilePoint database. For example, en-US, ar-SA.

# Performing Document Locking

In SharePoint, document locking can be performed through the CheckOut and CheckIn functionality. To perform the document locking, do the following.

## 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**.

## Instructions

1. Similar to the [Rename AgilePart](#), implement a CheckIn/CheckOut AgilePart that handles the document locking and releasing mechanism.

The following are some code snippets of using the SharePoint SDK to implement the CheckOut and CheckIn operation:

```
public void CheckOut()
{
    SPWeb web = new SPSite("http://virtual:101/sites/s1/s1/a37").OpenWeb();
    SPFile file = web.GetFile("http://virtual:101/sites/s1/s1/a37/cdl1/
test.htm");
    file.CheckOut();
    Console.WriteLine("Checked Out");
}
public void CheckIn()
{
    SPWeb web = new SPSite("http://virtual:101/sites/s1/s1/a37").OpenWeb();
    SPFile file = web.GetFile("http://virtual:101/sites/s1/s1/a37/cdl1/
test.htm");
    file.CheckIn("This is the check in comment by console app.");
    Console.WriteLine("Checked In");
}
```

# Enable or Disable Debug Mode

AgilePoint SharePoint Integration supports an optional Debug mode. When enabled, this feature causes additional information to be logged to the AgilePoint SharePoint Integration log files. This mode can cause a large amount of data to be written to the logs, so it is not recommended to enable this all the time. However, when troubleshooting possible problems, it is very useful to enable this feature because the additional information in the logs makes analyzing the system's behavior much easier.

## Navigation

1. Open the SharePoint Configuration Manager.

## Instructions

1. To log additional information to the AgilePoint SharePoint Integration log files, enable the **Debug** logging setting.

# Checking the AgilePoint SharePoint Integration Log Files

AgilePoint SharePoint Integration creates and maintains log files to store certain informational, warning, and/or error messages about the server and the workflow engine. These log files are created automatically.

## Prerequisites

- To access the FTP location, the Impersonator user must have write permission on FTP server.

## Navigation

1. In SharePoint, open the **AgilePoint Configuration List** .

## Instructions

1. To access the logs, simply view the relevant files using a text editor.

The location of the log files comes from the AgilePoint Configuration List in SharePoint, for example C:\NewSPLog. You can give the FTP location also, for example <ftp://netsvr1/AgilePontSharePoint/Log>.

Some of the log files are only created when additional [Debug mode logging is enabled](#).

2. You can provide switches for logging. The following are the available switches:

- All
- Info
- Debug
- Error
- None

You can give multiple switches separating by a comma (,). For example, Debug, error, Info.

# (v1 Only) SharePoint Configuration Manager

The SharePoint Configuration Manager utility allows you to configure the AgilePoint SharePoint configuration settings.

## Impersonation

The Impersonation tab allows you to enter the domain-qualified username and password of the AgilePoint user account that SharePoint should use to interact with AgilePoint Server at run time.



**Note:** This user should have access rights to both AgilePoint and SharePoint.



**Note:** Be sure to click **Apply** to commit your changes.

## System Setting

The **Log** group box on the **System Setting** tab allows you to turn on/off different types of logging.



**Note:** Be sure to click **Apply** to commit your changes.

Once data is available, AgilePoint will create the necessary folders to store the data. **Error** logging is fixed to always log, and is the most important type of logging for troubleshooting and is generally what is requested by Ascentn Support if issues surface. It is optional to turn on/off **Information** and **Debug** logging. The **Information** log provides sequential session descriptions. The **Debug** log provides information about the flow and status of activities. Be sure to purge these directories periodically to avoid using unnecessary disc space.

Below is an example of what the log files record.

```

Debug:
01/21/2008 11:10:20 <<< ConfigSetting deserializing successfully.(id=0).
01/21/2008 11:10:23 <<< ConfigSetting deserializing started....
01/21/2008 11:10:23 <<< Total 0 AgileLookProfiles, 0 are restored successfully.
Total 0 DocLibBindings, 0 are restored successfully.
Total 0 GenericListBinding, 0 are restored successfully.
Total 0 Sections, 0 are restored successfully.
01/21/2008 11:10:23 <<< ConfigSetting deserializing successfully.(id=0).
01/21/2008 11:10:26 <<< ConfigSetting deserializing started....

Informational:
07/25/2007 18:14:57 <<< Ascentn.SharePoint.Common has been initialized
successfully. (Assembly version = Ascentn.SharePoint.Common, Version=4.0.0.1,
Culture=neutral, PublicKeyToken=2f06ef94bac0a40f)
07/25/2007 18:14:57 <<< Ascentn.SharePoint.Common has been initialized
successfully. (Assembly version = Ascentn.SharePoint.Common, Version=4.0.0.1,
Culture=neutral, PublicKeyToken=2f06ef94bac0a40f)
07/25/2007 18:14:57 <<< Ascentn.SharePoint.Common has been initialized
successfully. (Assembly version = Ascentn.SharePoint.Common, Version=4.0.0.1,
Culture=neutral, PublicKeyToken=2f06ef94bac0a40f)

```

```

07/25/2007 18:34:56 <<< Ascentn.SharePoint.Common has been initialized
successfully. (Assembly version = Ascentn.SharePoint.Common, Version=4.0.0.1,
Culture=neutral, PublicKeyToken=2f06ef94bac0a40f)
07/25/2007 18:34:56 <<< Ascentn.SharePoint.Common has been initialized
successfully. (Assembly version = Ascentn.SharePoint.Common, Version=4.0.0.1,
Culture=neutral, PublicKeyToken=2f06ef94bac0a40f)
07/25/2007 18:34:56 <<< Ascentn.SharePoint.Common has been initialized
successfully. (Assembly version =
Error:
01/21/2008 10:57:09 <<< FillCache ()
    Exception (Type=ThreadAbortException)
    Error = Thread was being aborted.
    CallStack =      at System.Array.Copy(Array sourceArray, Int32 sourceIndex,
Array destinationArray, Int32 destinationIndex, Int32 length, Boolean reliable)
    at System.Array.CopyTo(Array array, Int32 index)
    at System.Collections.ArrayList.InsertRange(Int32 index, ICollection c)
    at System.Collections.ArrayList.AddRange(ICollection c)
    at System.DirectoryServices.PropertyValueCollection.PopulateList ()
    at System.DirectoryServices.PropertyValueCollection..ctor(DirectoryEntry entry,
String propertyName)
    at System.DirectoryServices.PropertyCollection.get_Item(String propertyName)
    at Microsoft.SharePoint.Administration.SPWebSite.get_ServerComment ()
    at
Microsoft.SharePoint.Administration.SPVirtualServer.InitializeIisComponents (SPWebSite
iisInstance)
    at Microsoft.SharePoint.Administration.SPVirtualServer..ctor (SPWebSite
iisInstance)
    at Microsoft.SharePoint.Administration.SPVirtualServerCollection.Undirty ()
    at Microsoft.SharePoint.Administration.SPVirtualServerCollection..ctor ()
    at Microsoft.SharePoint.Administration.SPGlobalAdmin.get_VirtualServers ()
    at Ascentn.SharePoint.Common.SPSVirtualServerCache.FindSPVirtualServerByID (Guid
virtualServerId)
    at l..ctor (DboSPSVirtualServer A 0)
    at Ascentn.SharePoint.Common.SPSVirtualServerCache.a ()

```

The "Default Event Handler" group box on the System Setting tab displays the class that is invoked for the SharePoint Event Handling. This information is exposed to provide the option to implement customized event handling.

## Database

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This window allows you to select the AgilePoint SharePoint Integration database and specify the authentication information.



**Note:** Be sure to click **Apply** to commit your changes.

## SharePoint Web Applications

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This window allows you to select from a list of SharePoint Web Applications and enable/disable each of the SharePoint Web Applications as desired. Detailed information about each SharePoint Web Application is displayed when the SharePoint Web Application is highlighted in the list.

This window also allows you to view and edit the SharePoint Configuration Settings XML. To view/edit the SharePoint Configuration Settings XML, click the **Edit** button. This window provides the functionality to export

the SharePoint Configuration Settings XML to the XML editor of your choice by clicking the **Export** button. When done editing the XML, click the **Import** button and import the changes.

Clicking the **Show all Virtual Servers** button allows you to view a list of all Virtual Servers on the physical machine.

## **(v1 Only) Creating a workflow-enabled SharePoint Site**

With the AgilePoint SharePoint Integration, you can deploy your process templates to AgilePoint Server and then create your own sites and libraries to associate with these process templates. After you install the AgilePoint SharePoint Integration, your SharePoint has the features needed to create AgilePoint enhanced sites and libraries.