



AGILEXRM FULL INSTALLATION GUIDE

Table of Contents

1.	Introduction	4
1.1	Disclaimer of warranty	4
2.	Installation Options	5
2.1	Platform Selection (x64 or x86)	6
3.	Pre-Installation Checklist	7
3.1	Local Admin Group user	7
3.2	Copy Installation Files Locally	7
3.3	Turn off User Account Control (UAC)	7
3.4	Create Service Account in Active Directory	7
3.5	Add Service Account to CRM	7
3.6	Windows Server 2008 R2 Roles	8
3.7	License Serial Keys	9
3.7.1	AgileXRM License	9
4.	Process Server Installation	10
4.1	AgilePoint Server Installation	11
4.1.1	Preparation steps	11
4.1.2	Installation steps	12
4.1.3	Configuration steps	14
4.2	Enterprise Manager Installation	17
4.2.1	Preparation steps	17
4.2.2	Installation Steps	17
4.2.3	Configuration steps	19
4.3	AgilePoint Service Pack 3 Installation	23
4.3.1	Preparation Steps	23
4.3.2	Installation Steps	23
4.4	AgilePoint Server Component Installation	25
4.4.1	Preparation steps	25
4.4.2	Installation steps	25
4.4.3	Configuration steps	26
5.	Process Manager Installation	35
5.1	Preparation steps	35
5.2	Installation steps	35
5.3	Configuration steps	36
5.4	Verification steps	37
6.	Form Server (ALF) Installation	38
6.1	Preparation steps	38
6.2	Installation steps	39
7.	AgileDialogs Installation	40

7.1	Preparation steps	40
7.2	Installation steps	40
7.3	Configuration steps	41
8.	AgileMonitor Installation	43
8.1	Preparation steps	43
8.2	Installation steps	43
8.3	Configuration steps	44
8.4	Verification steps	45
9.	CRM Integration Component Installation	46
9.1	Preparation steps	46
9.2	Installation steps	46
9.2.1	Import Solutions Manually	47
9.3	Configuration steps	49
9.3.1	Set Admin URL	50
9.3.2	Enable Entities	51
9.3.3	Enable Activities	51
9.3.4	Activate Power Users	52
9.3.5	Activate Standard Users	53
10.	Process Modeler Installation	54
10.1	Envision Installation	55
10.1.1	Installation steps	55
10.1.2	Post-Installation steps	57
10.2	AgilePoint Service Pack 3 Installation	58
10.2.1	Installation steps	58
10.3	AgileXRM Envision Component Installation	59
10.3.1	Installation steps	59
10.4	Verification steps	60
11.	SharePoint Integration Component Installation	61
11.1	Preparation steps	61
11.2	Installation steps	62
11.2.1	In the machine where this component is installed	62
11.2.2	Installation for a Single SharePoint WFE Server	63
11.2.3	Installation for multiple SharePoint WFE Servers	64
11.3	Configuration steps	65
12.	Developer SDK Installation	68
13.	Documentation Installation	70

AgileXRM Full Installation Guide

1. Introduction

This document provides instructions on how to prepare for and perform the software installation of AgileXRM 2011, which consists of the following components:

- Process Server and its components
- Process Manager Server
- Form Engine Server
- AgileDialogs Server
- AgileMonitor Server
- CRM Integration Component
- Process Modeler and its components
- SharePoint Integration Component
- SDK
- Documentation



NOTE: This document is only for **Non-HA** (Non-High Availability) Installations. HA Installations are carried out by AgilePoint Expert Services.

1.1 Disclaimer of warranty

AgilePoint Inc. makes no representations or warranties, either express or implied, by or with respect to anything in this document, and shall not be liable for any implied warranties of merchantability or fitness for a particular purpose or for any indirect, special or consequential damages.

Copyright © 2012, AgilePoint Inc. All rights reserved.

GOVERNMENT RIGHTS LEGEND: Use, duplication or disclosure by the U.S. Government is subject to restrictions set forth in the applicable AgilePoint Inc. license agreement and as provided in DFARS 227.7202-1(a) and 227.7202-3(a) (1995), DFARS 252.227-7013(c)(1)(ii) (Oct 1988), FAR 12.212(a) (1995), FAR 52.227-19, or FAR 52.227-14, as applicable.

'AgilePoint Inc.' and all its products are trademarks of AgilePoint Inc.. References to other companies and their products use trademarks owned by the respective companies and are for reference purposes only.

2. Installation Options



- **Verify System Requirements**



NOTE: Before installing, please verify that the system requirements are met as defined in the **AgileXRM System Requirements** document. This document is accessible from the first page of the installer.

- **New installation Quick Installer**

When the objective is to have an environment up and running quickly, the Quick Installer can be used. Quick Installer is also the installer of choice for the AgileXRM Community Edition (ACE).

The Quick Installer can be used to install AgileXRM on the same machine as the Dynamics CRM 2011 machine, if one of the following applies:

- Dynamics CRM 2011 and SQL Server are installed on one single machine (or VM) – like in Microsoft’s PartnerSource Dynamics CRM 2011 VM
- Dynamics CRM 2011 and SQL Server are on two separate machines

There is an optional AgileXRM SharePoint Component as well. It is recommended to select this option in the Quick Installer and install it, to appreciate the full power of AgileXRM. If SharePoint is installed on the same machine as Dynamics CRM 2011 machine, then the Quick Installer can automatically install and configure this component on there.

If any of the following applies, please use the Full Installer instead:

- Need to install AgileXRM on a server different to the Dynamics CRM server
- Need to install different AgileXRM components on separate machines or in a load-balanced farm
- Dynamics CRM is installed on multiple servers
- SharePoint is a multi-server Farm (not a single server)
- Need a High Availability installation

- **New Installation Full Installer**

The rest of the document details the use of the Full Installer.

- **Update existing installation**

Execute this on every machine where an AgileXRM component is installed to automatically update the software to this version.

2.1 Platform Selection (x64 or x86)

All the components are available for 64-bit Windows but only the following components have a 32-bit version:

----- AgileXRM 2011 components for 32-bit Windows -----
Process Modeler for Visio 2007/2010...
SharePoint Integration
Developer SDK
Documentation

The rest of the guide assumes installation on a 64-bit Windows.



3. Pre-Installation Checklist

3.1 Local Admin Group user



WARNING: Make sure the user you use to do the installation, is in the Local Administrators group of the machine.

3.2 Copy Installation Files Locally

Copy the install files to each machine before installing.



WARNING: Make sure that the installation files are located on one of the computer's local drives in a short path (like C:\tmp\12111). If you attempt to install when the installation file(s) are located on a network drive (or some other remote location), the setup application may fail to run with an error message similar to the following:

An exception 'System.Security.Policy.PolicyException' has occurred in Setup.

If you install from a long path (like user's Desktop) installation may fail.

3.3 Turn off User Account Control (UAC)



WARNING: On Windows 7, Windows Vista and Windows Server 2008 (and R2) machines, for the duration of the installation, **turn off UAC and reboot the machine**, otherwise certain install steps will fail. UAC can be turned back on after the installation is completed.

3.4 Create Service Account in Active Directory



NOTE: It is recommended to create a Service Account for use by the different AgileXRM components. In this guide we have created an account called AD2008R2\AP SVC which will be used throughout the document.

NOTE: Managed Service Accounts (MSAs) are not currently supported.

3.5 Add Service Account to CRM

1. Add the AgilePoint Service Account (e.g. AD2008R2\AP SVC) to the CRM Organizations that you want to use with AgileXRM
2. Add the Roles **System Administrator** and **Delegate** to this User



TIP: If you do not want to give this user the *System Administrator* Role in CRM, then instead of adding the two Roles above, you can do the following:

1. Give the user a Role with minimal permissions (ask Support for details)
2. Add this Service Account to the **PrivUserGroup** for the corresponding Organization in Active Directory and do an **IISRESET** on the CRM Server

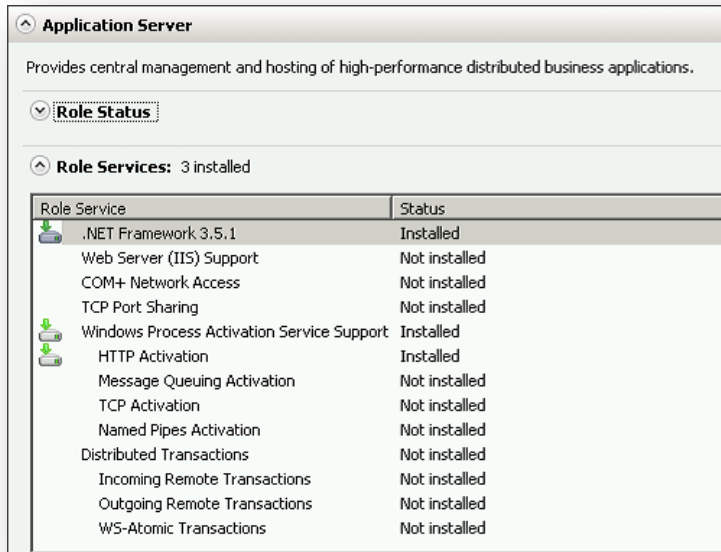
3.6 Windows Server 2008 R2 Roles

The AgileXRM Server components need the following Roles added to Windows 2008 R2 to work.

Web Server (IIS) Role

Web Server (IIS)	
Provides a reliable, manageable, and scalable Web application infrastructure.	
Role Status	
Role Services: 28 installed	
Role Service	Status
Web Server	Installed
Common HTTP Features	Installed
Static Content	Installed
Default Document	Installed
Directory Browsing	Installed
HTTP Errors	Installed
HTTP Redirection	Installed
WebDAV Publishing	Not installed
Application Development	Installed
ASP.NET	Installed
.NET Extensibility	Installed
ASP	Not installed
CGI	Not installed
ISAPI Extensions	Installed
ISAPI Filters	Installed
Server Side Includes	Not installed
Health and Diagnostics	Installed
HTTP Logging	Installed
Logging Tools	Not installed
Request Monitor	Installed
Tracing	Not installed
Custom Logging	Not installed
ODBC Logging	Not installed
Security	Installed
Basic Authentication	Installed
Windows Authentication	Installed
Digest Authentication	Not installed
Client Certificate Mapping Authentication	Not installed
IIS Client Certificate Mapping Authentication	Not installed
URL Authorization	Not installed
Request Filtering	Installed
IP and Domain Restrictions	Not installed
Performance	Installed
Static Content Compression	Installed
Dynamic Content Compression	Not installed
Management Tools	Installed
IIS Management Console	Installed
IIS Management Scripts and Tools	Not installed
Management Service	Not installed
IIS 6 Management Compatibility	Installed
IIS 6 Metabase Compatibility	Installed
IIS 6 WMI Compatibility	Installed
IIS 6 Scripting Tools	Installed
IIS 6 Management Console	Installed
FTP Server	Not installed
FTP Service	Not installed
FTP Extensibility	Not installed
IIS Hostable Web Core	Not installed

Application Server Role



3.7 License Serial Keys

You should have received the following License Keys from AgilePoint Inc.:

1. AgilePoint Server License
2. Envision License

3.7.1 AgileXRM License

This License file is generated after installing AgileXRM. See Section [4.4.3.7](#)

4. Process Server Installation

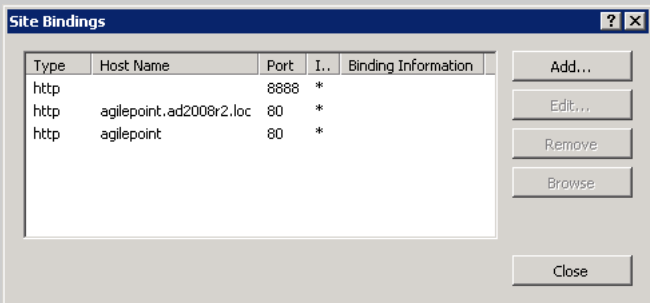



The following should be installed in this order:

1. AgilePoint Server
2. Enterprise Manager
3. AgilePoint Service Pack 3
4. AgileXRM AP Server Components

4.1 AgilePoint Server Installation

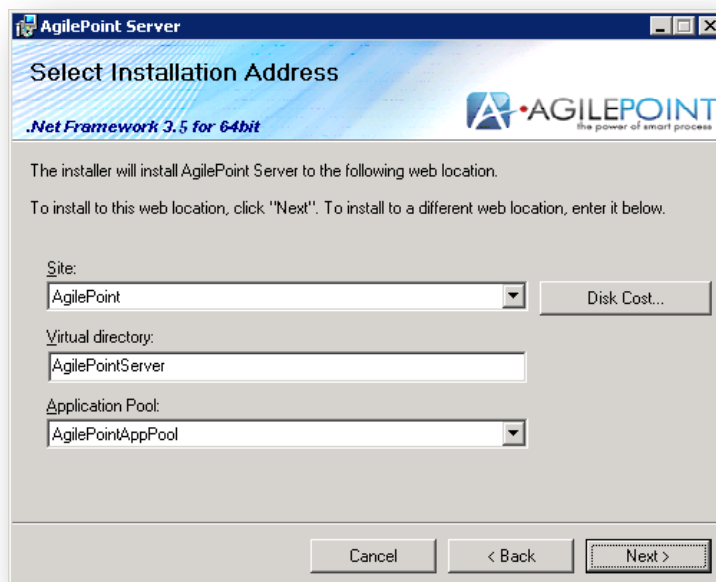
4.1.1 Preparation steps

Create Application Pool	Create a new Application Pool. e.g. Name =AgilePointAppPool: .NET Framework = v2.0 Managed Pipeline Mode =Integrated
Change App Pool Settings	Use the Service Account Identity and disable recycling: Process Model → Identity =AD2008R2\APSV Process Model → Idle time-out (minutes) =0 Recycling → Disable Overlapped Recycle =True Recycling → Regular Time Interval (minutes) =0
Create new Web Site	Create a new web site: e.g. Name =AgilePoint Path =C:\AgilePoint Application Pool =AgilePointAppPool Bindings : Port =80, HostHeader =agilepoint Port =80, HostHeader =agilepoint.ad2008r2.loc Port =8888, HostHeader =(empty) <div></div> <div><div>NOTE: It is recommended to use a <i>HostHeader</i> even if you are installing only one AgilePoint Server, since this allows simple scaling to multiple servers in the future. Make sure to do the following:<ul style="list-style-type: none">○ Add the <i>HostHeader</i> (e.g. <i>agilepoint</i>) to your DNS (A-Record – not CNAME)○ Add the <i>HostHeader</i> and its FQDN (e.g. <i>agilepoint</i> and <i>agilepoint.ad2008r2.loc</i>) to IE Intranet Zone (on all machines from which this server will be accessed)○ Disable Loopback Check in Registry (See http://support.microsoft.com/kb/896861 and make sure to Reboot afterwards)</div></div>
Create an empty Database	In SQL Server, create an empty Database and make the Service Account the Owner: e.g. Database Name =AgilePointDB Owner =AD2008R2\APSV

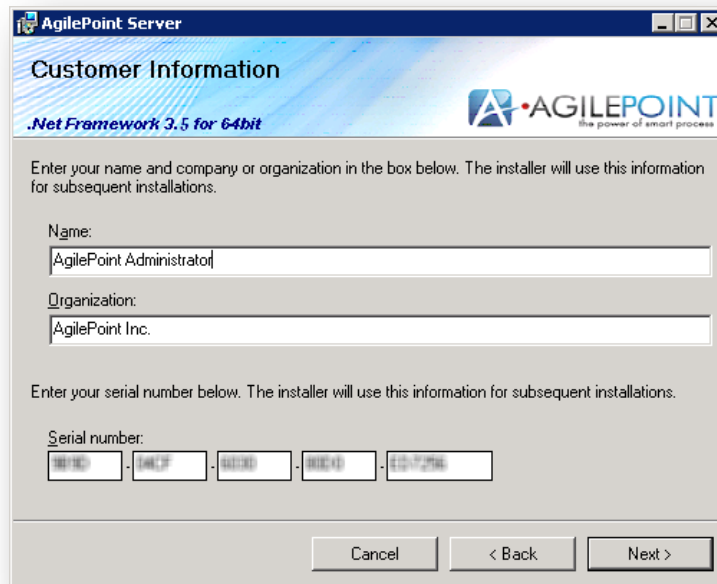
4.1.2 Installation steps



1. Click the link for **AgilePoint Server**
2. Click **Next** in the AgilePoint Server window
3. Again, click **Next** in the AgilePoint Server window
4. Click the **I Agree** radio button after reading the license agreement. Then click **Next**
5. Select the AgilePoint Server **Site** for which you would like to install AgilePoint Server and in the **Application Pool** list, select the application pool you want to use, and click **Next**



6. Enter your information and License Key (Serial number). Then click **Next**



The image shows a Windows-style dialog box titled "AgilePoint Server". The main heading is "Customer Information". Below the heading, it says ".Net Framework 3.5 for 64bit". The AgilePoint logo is in the top right corner. The dialog box contains two sections for user input. The first section is for "Name" and "Organization", with instructions: "Enter your name and company or organization in the box below. The installer will use this information for subsequent installations." The "Name" field contains "AgilePoint Administrator" and the "Organization" field contains "AgilePoint Inc.". The second section is for the "Serial number", with instructions: "Enter your serial number below. The installer will use this information for subsequent installations." The serial number is entered as "0000-1A0F-0000-0000-00000000". At the bottom of the dialog box are three buttons: "Cancel", "< Back", and "Next >".

7. The installer is now ready to install the application. Click **Next** to install
8. Once the Installation Complete message is displayed, click **Close** to complete the installation
9. If you see a *Setup has completed. Would you like to reboot now?* message, click **Yes**

4.1.3 Configuration steps



NOTE: Come back to this step after the following steps are completed:

- 4.2 Enterprise Manager Installation
- 4.3 AgilePoint Service Pack 3 Installation

1. Click **Start > All Programs > AgilePoint > AgilePoint Server Configuration** to open the configuration tool.



NOTE: The first time you run the **AgilePoint Server Configuration** utility, you will be asked to activate the product. If you are prompted to activate your product, you will need to activate **AgilePoint Server** before you continue:

The first screenshot shows the 'AgilePoint Server Activation Wizard' window. It has a title bar and a header with the AgilePoint logo. The main text says: 'Thank you for installing AgilePoint Server. You must activate your installation to fully enable all the features. This wizard will guide you through the product activation process. Please refer to Installation Guide for more details.' Below this is a 'Serial Number' field containing '0000-00CF-0000-0000-0000' and a note '(AAAA-BBBB-CCCC-DDDD or AAAA-BBBB-CCCC-DDDD-EEEEEE)'. There are two radio buttons: 'Activate by using Internet' (selected) and 'Activate manually'. At the bottom right are 'Next' and 'Cancel' buttons.

The second screenshot shows the same window after activation. The 'Serial Number' field is now empty. Below the text is a 'Progress' bar that is filled. Below the bar is the message 'Product has been activated successfully.' in red. At the bottom right is a 'Finish' button.

2. The **System** tab allows you to specify the identity and authentication information for the *AgilePoint System User*, and the maximum number of threads that AgilePoint will be able to use at runtime while handling workflow requests. The Notification area allows you to specify the default values for certain email notification settings
 - Check the *Active Directory* check box and enter the domain *User Name* and *Password* for the Service Account. Then press the **Test** button, and the **Connect** button to make sure credentials are correct.
 - Enter the *Thread Pool Size* which should be set to the number of threads that the physical hardware will support. A value of 50 is usually optimal.

- Configure the *Notification* settings as appropriate for your environment
 - Enter the *SMTP Server*
 - Enter the SMTP email address for the default *Email Sender* (i.e. the From address on AgilePoint email notifications)
 - Enter the *System User Email*. System notifications are sent to this email address, if the AgilePoint Server encounters operational errors (Exceptions).
NOTE: It is recommended that the System User Email be directed to a Distribution List that will be supporting the AgilePoint Server.
 - Click the **Test** button to check parameters are set correctly

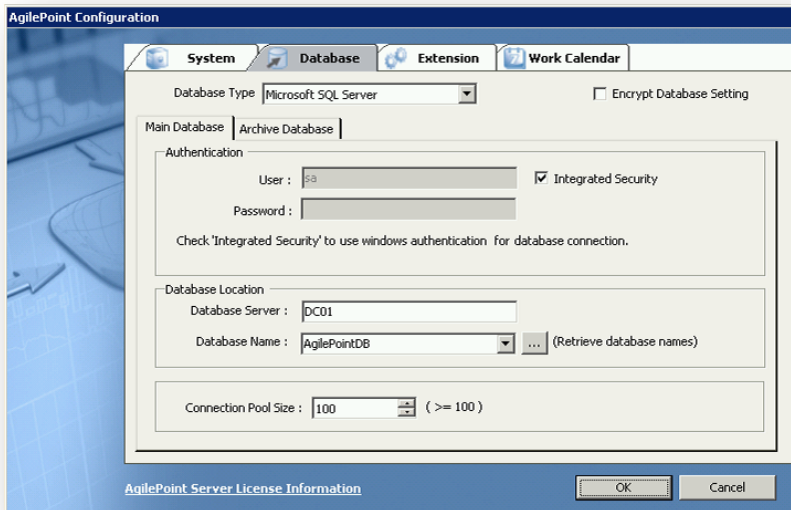


NOTE: By default, AgilePoint Server uses anonymous SMTP. To configure your SMTP server to require authentication, do the following.

- In a text editor, open the AgilePoint Server configuration file **netflow.cfg** from the following location:
[AgilePoint Server Installation Dir]\netflow.cfg
- In **netflow.cfg** in the notification node, enter the email address and password in the **smtpService** attribute as follows:

```
<notification
  mode="true"
  format="text"
  smtpService="BuiltIn::[email account],[password]"
  mailServer="smtp.sbcglobal.yahoo.com"
  sender="NETSVR2@agilepoint.com"
  sysadm="adminuser@agilepoint.com" />
```

- Click the **Database** tab and configure the settings as appropriate for your environment.



- Do one of the following:
 - Check the Integrated Security check box to use Windows Authentication and the Application Pool Identity of AgilePoint Server (e.g. AD2008R2\APSV) to authenticate to the database.
 - If using SQL Authentication, enter the SQL user account and password.
 - Enter the *Database Server* and enter the AgilePoint *Database Name* or click the *Ellipses* button to retrieve the database names and select the AgilePoint Database. The AgilePoint *System User* is used to connect to the database during configuration. Therefore, the AgilePoint *System User* must have *db_owner* privileges on the AgilePoint Database.
 - The *Connection Pool Size* must be a minimum of 100 and should be at least 2 times the *Thread Pool Size* configured on the System tab.
- (Optional) Click the **Work Calendar** tab, and configure the settings as appropriate for your environment. This configuration is used in processes for duration assignment or due date.
 - Click OK to complete the configuration. You should see a message saying *AgilePoint has been configured successfully*.



NOTE: The AgilePoint Server configuration is stored in the **netflow.cfg** file in the root directory of the AgilePointServer virtual directory.

- Invoke the creation of the AgilePoint Database Schema
 - Open IIS and view the AgilePointServer Virtual Directory. **Browse** the *Workflow.asmx* file. This creates the AgilePoint Database schema.
 - Go to the AgilePointServer\Log directory and check the recently created log file and make sure there are no errors.

4.2 Enterprise Manager Installation

4.2.1 Preparation steps



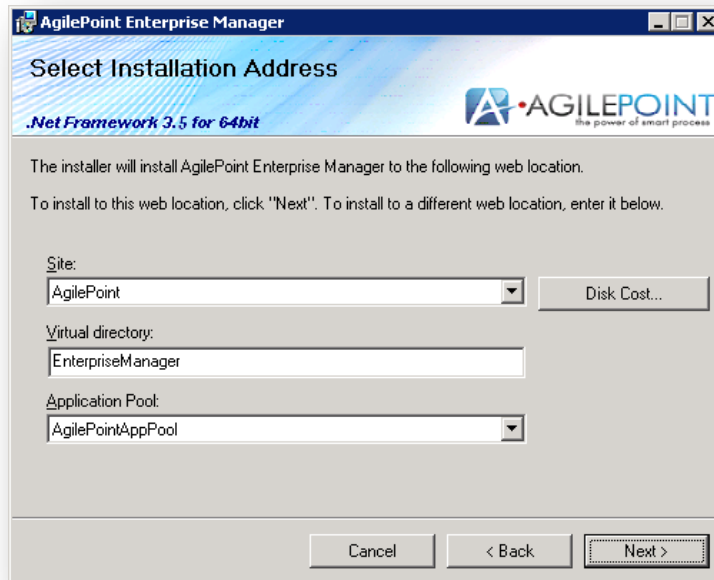
NOTE: Make sure AgilePoint Server is already installed, as described in section 4.1, before installing this component.

4.2.2 Installation Steps



1. Click the link for **AgilePoint Enterprise Manager**
2. Click **Next** in the AgilePoint Enterprise Manager window.

3. Select the **Site** for which you would like to install AgilePoint Enterprise Manager. It is recommended to use the same site where you installed AgilePoint Server. In the *Application Pool* field, select the application pool you want to use; and click **Next**:

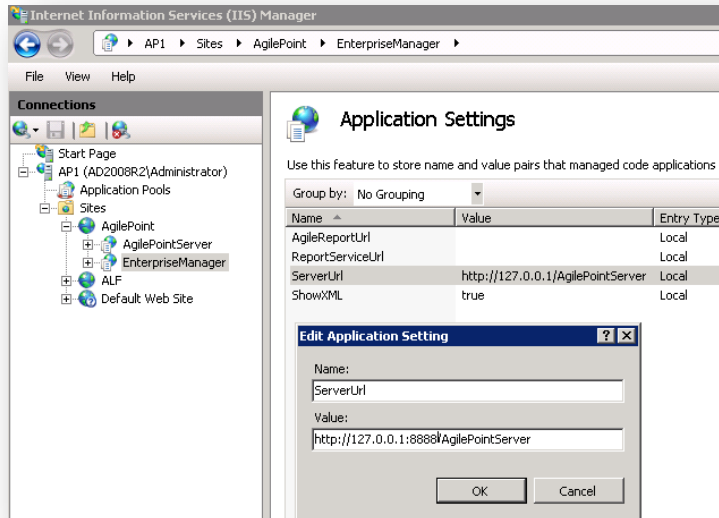


4. The installer is now ready to install AgilePoint Enterprise Manager. Click **Next** to install.
5. In the **Report Configuration** window, click **OK** button.
6. Once the Installation Complete message is displayed, click **Close**.

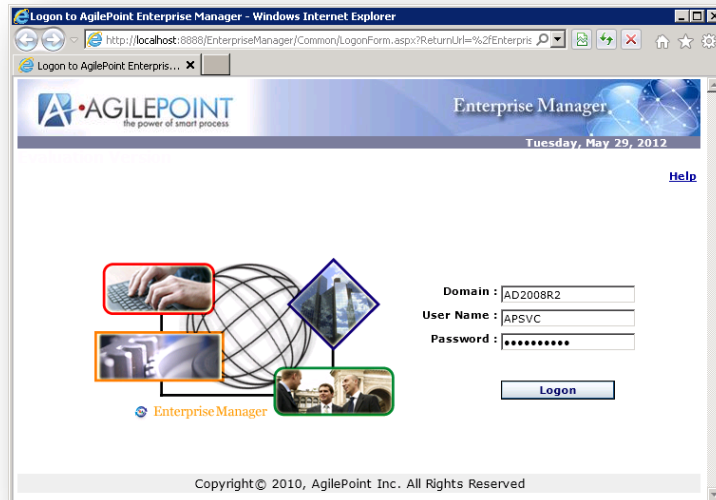
4.2.3 Configuration steps

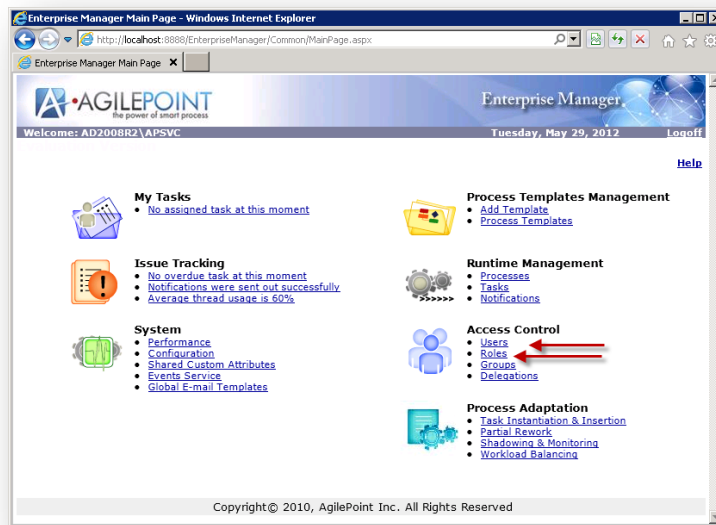
1. In IIS→Sites→AgilePoint→Enterprise Manager→ASP.NET (Application Settings)

Set **ServerUrl** to point to local AgilePoint Server (e.g. `http://127.0.0.1:8888/AgilePointServer`)



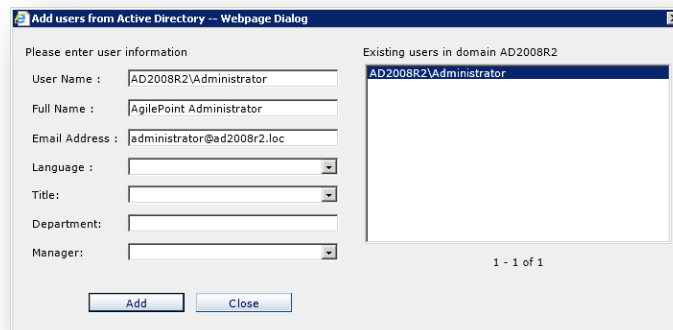
2. Browse to the default page of Enterprise Manager and Logon with the AgilePoint Service Account:





3. Add a user as Administrator for AgilePoint:

- Click **Users** → **Add from Active Directory**
- Set **Logon Username** to the user you are looking for (e.g. Administrator) and click **OK**
- In **Existing users in domain**, select the admin user (e.g. AD2008R2\Administrator) and click the **Add** then **Close** buttons



4. Create a user with this name: **AGILEXRM\AgilePointSystem**
 - Click **Add** link, set the **User Name** and **Full Name** and click **OK**

Please enter user information

User Name : AGILEXRM\AgilePointSystem Domain\Username

Full Name : Wait For Event user

Email Address : e.g., john@tusca.com

Language :

Title :

Department :

Manager :

OK Cancel

5. Change the Administrator Role to have full power and add AgilePoint Administrator to that Role:
 - Go back to the main page of Enterprise Manager and click **Roles**
 - The Administrator Role is already selected. Click **Edit Role** link **select all permissions** and click **OK**

Please enter role information

Role Name : Administrators

Description : Administrators have complete access to maintain system

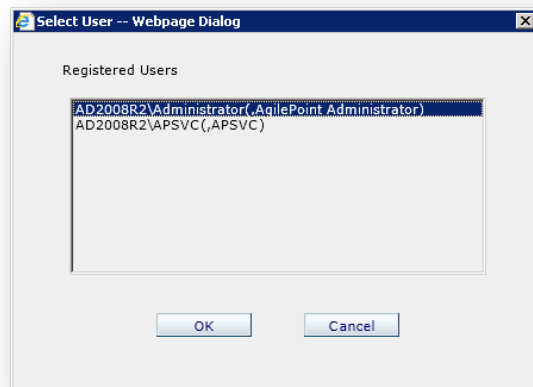
Rights :

- ☒ Register and modify the user information
- ☒ Unregister a user
- ☒ Add and modify the role information
- ☒ Remove a role
- ☒ Add and modify the group information
- ☒ Remove a group
- ☒ Modify/View the system configuration
- ☒ Add a process template
- ☒ Checkin and checkout a process template

OK Cancel

- Click on the **Administrators** Role link to see the users in this Role

- Click **Add User(s) as Member** link and select the recently added AgilePoint Administrator and click **OK**



- You can now close Enterprise Manager

4.3 AgilePoint Service Pack 3 Installation



WARNING: If after applying a Service Pack, one of the components is reinstalled (or repaired); you need to re-apply the Service Pack.

4.3.1 Preparation Steps



NOTE: Make sure the following components are already installed and working, before applying the Service Pack:

- [4.1 AgilePoint Server Installation](#)
- [4.2 Enterprise Manager Installation](#)

4.3.2 Installation Steps

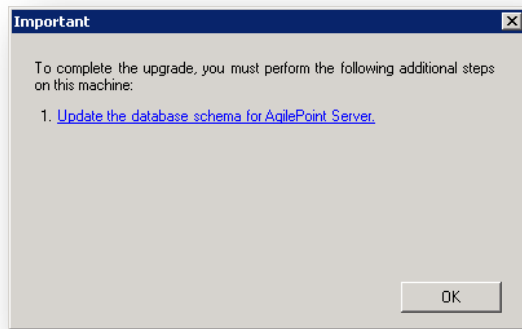


1. Click the link for **AgilePoint Service Pack 3**
2. Set the **I have reviewed...** checkbox and click **Apply**



NOTE: Please ignore the documentation links in this window as they apply to AgilePoint BPMS and not AgileXRM.

3. After a few minutes the following window will appear:



WARNING: Make sure you apply the schema changes to the database by following these two steps; otherwise the environment is in an unsupported state.

- Click **Start > All Programs > AgilePoint > AgilePoint Server Configuration** to open the tool
 - Click **OK**, and if asked to **Restart IIS**, select **Yes**
4. Click **OK** and then **Close** to conclude applying the Service Pack

4.4 AgilePoint Server Component Installation

4.4.1 Preparation steps

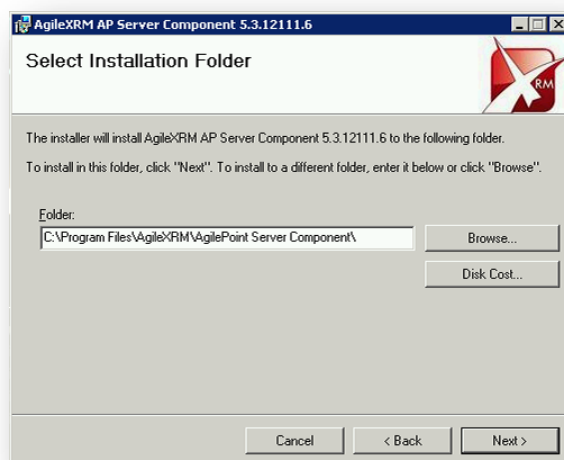


WARNING: This component should be installed in the same machine as where Process Server (AgilePoint Server) is installed. So AgilePoint Server should already be installed, activated and running and AgilePoint Service Pack 3 applied before installing this component.

4.4.2 Installation steps



1. Click the link for **AgileXRM AP Server Component**
2. Click **Next** in the Welcome page
3. (Optional) Set the Installation Folder directory and click **Next**
(default is C:\Program Files\AgileXRM\AgilePoint Server Component\)



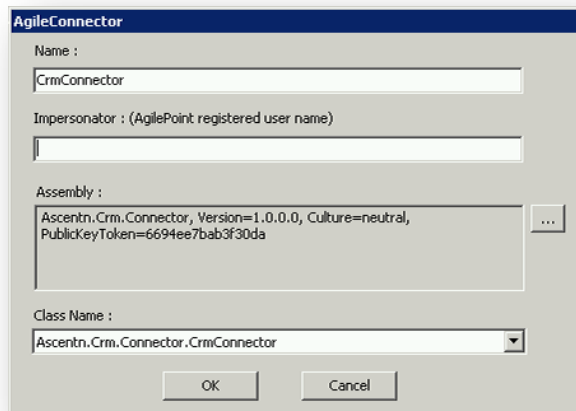
4. Click **Next** in the Confirm page to start installing and click **Close** when finished

4.4.3 Configuration steps

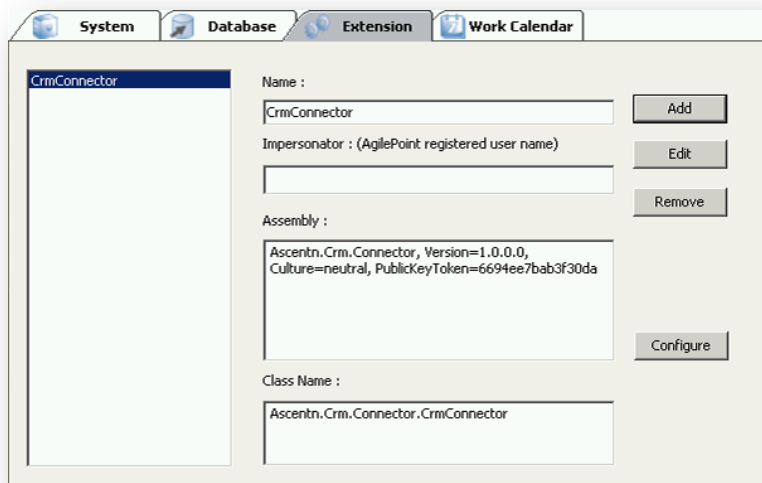
Open the **AgilePoint Server Configuration** tool and go to the **Extension** tab.

4.4.3.1 Add CRM Connector

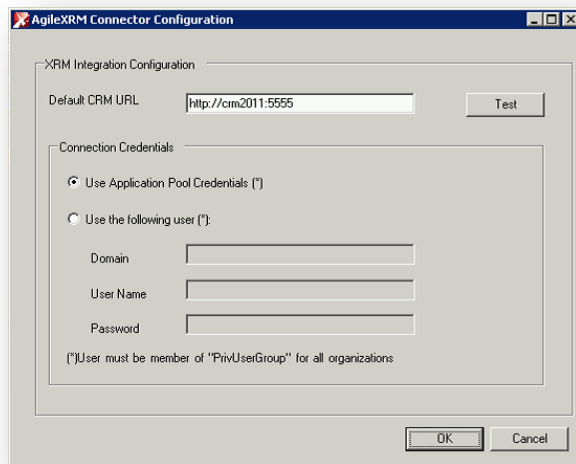
1. Click the **Add** button
2. Click the **ellipsis (...)** button and select the **CRM Connector** (Ascentn.Crm.Connector.dll) from the `C:\AgilePoint\AgilePointServer\bin` directory and click the **Open** button.
3. Change the **Name** to *CrmConnector* and click **OK**



4. Click **Configure** button to change the Connector parameters:




5. Set the **Default CRM URL** (without the OrgName in the URL) and select the **Credentials** option, click **Test** and then **OK**:



4.4.3.2 Add Process Viewer impersonator

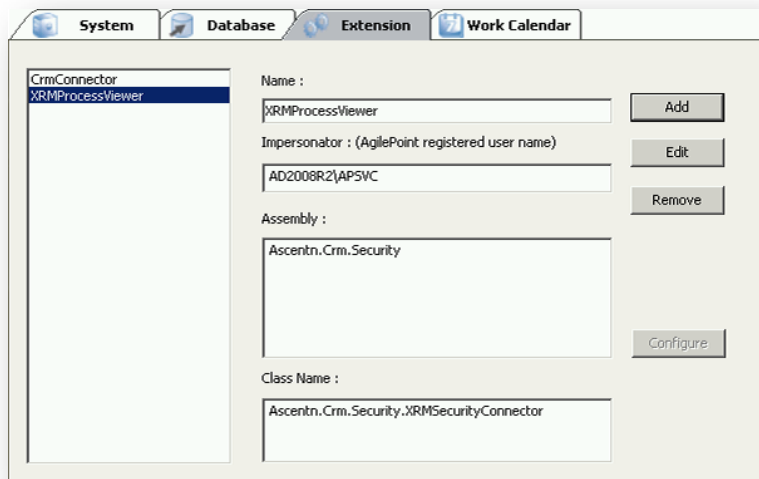
1. Click the **Add** button
2. Click the **ellipsis (...)** button and select the **Security Connector** (Ascentn.Crm.Security.dll) from the C:\AgilePoint\AgilePointServer\bin directory and click the **Open** button.
3. Change the **Name** to *XRMProcessViewer*, set **Impersonator** to Service Account (e.g. AD2008R2\AP SVC) and click **OK**



The AgileConnector dialog box is shown with the following fields and values:

- Name :** XRMProcessViewer
- Impersonator : (AgilePoint registered user name)** AD2008R2\AP SVC
- Assembly :** Ascentn.Crm.Security (with an ellipsis button to the right)
- Class Name :** Ascentn.Crm.Security.XRMSecurityConnector (selected from a dropdown menu)

Buttons at the bottom: OK, Cancel.

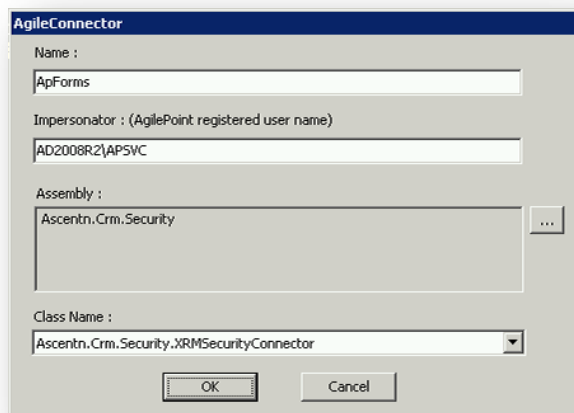


The Extension tab in the configuration window shows a list of connectors on the left and configuration fields on the right:

- Left List:** CrmConnector, XRMProcessViewer (selected)
- Right Fields:**
 - Name :** XRMProcessViewer
 - Impersonator : (AgilePoint registered user name)** AD2008R2\AP SVC
 - Assembly :** Ascentn.Crm.Security
 - Class Name :** Ascentn.Crm.Security.XRMSecurityConnector
- Buttons:** Add, Edit, Remove, Configure.

4.4.3.3 Add AgileLightForms impersonator

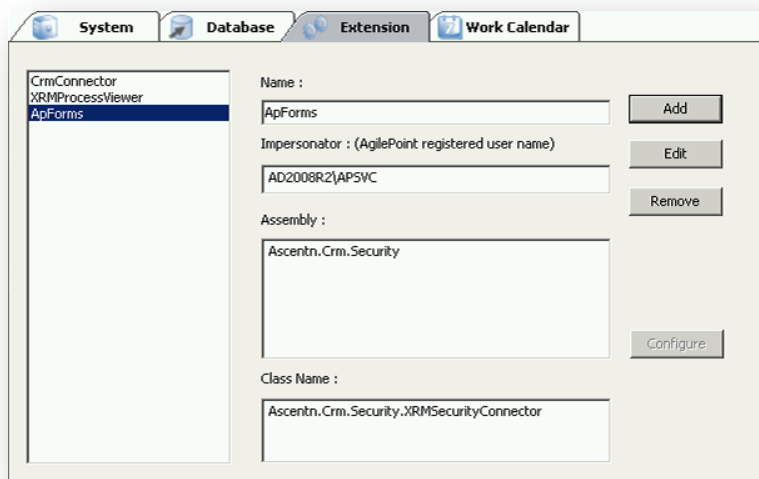
1. Click the **Add** button
2. Click the **ellipsis (...)** button and select the **Security Connector** (Ascentn.Crm.Security.dll) from the C:\AgilePoint\AgilePointServer\bin directory and click the **Open** button
3. Change the **Name** to *ApForms*, set **Impersonator** to Service Account (e.g. AD2008R2\AP SVC) and click **OK**



The AgileConnector dialog box is shown with the following fields and values:

- Name :** ApForms
- Impersonator : (AgilePoint registered user name)** AD2008R2\AP SVC
- Assembly :** Ascentn.Crm.Security (with an ellipsis button to the right)
- Class Name :** Ascentn.Crm.Security.XRMSecurityConnector (selected from a dropdown menu)

Buttons at the bottom: OK, Cancel.



The main application window is shown with the **Extension** tab selected. The left pane lists the following extensions:

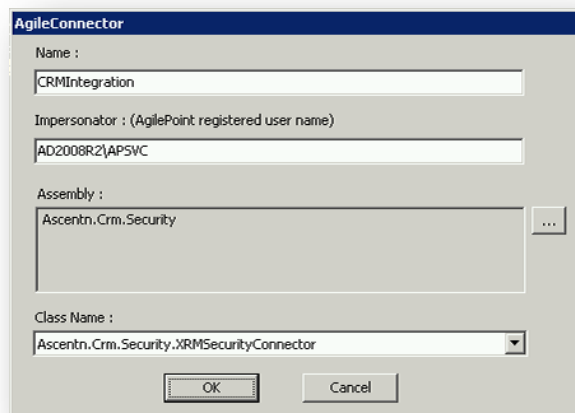
- CrmConnector
- XRMProcessViewer
- ApForms (selected)

The right pane shows the configuration for the selected extension (ApForms):

- Name :** ApForms (with an **Add** button)
- Impersonator : (AgilePoint registered user name)** AD2008R2\AP SVC (with **Edit** and **Remove** buttons)
- Assembly :** Ascentn.Crm.Security (with a **Configure** button)
- Class Name :** Ascentn.Crm.Security.XRMSecurityConnector

4.4.3.4 Add CRM Integration impersonator

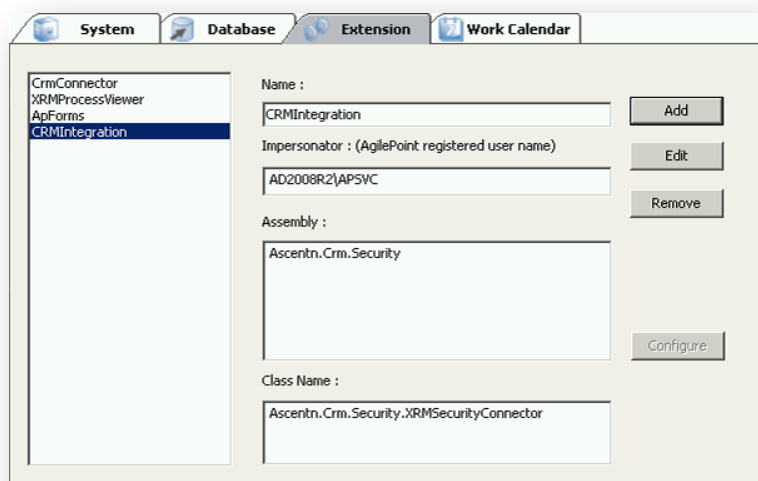
1. Click the **Add** button
2. Click the **ellipsis (...)** button and select the **Security Connector** (Ascentn.Crm.Security.dll) from the C:\AgilePoint\AgilePointServer\bin directory and click the **Open** button
3. Change the **Name** to *CRMIntegration*, set **Impersonator** to Service Account (e.g. AD2008R2\AP SVC) and click **OK**



The AgileConnector dialog box is shown with the following fields and values:

- Name :** CRMIntegration
- Impersonator : (AgilePoint registered user name)** AD2008R2\AP SVC
- Assembly :** Ascentn.Crm.Security (with an ellipsis button to the right)
- Class Name :** Ascentn.Crm.Security.XRMSecurityConnector (selected from a dropdown menu)

Buttons at the bottom: OK, Cancel.



The main application window has tabs for System, Database, Extension, and Work Calendar. The Extension tab is active, showing a list of extensions on the left and configuration fields on the right.

Extension List:

- CrmConnector
- XRMProcessViewer
- ApForms
- CRMIntegration** (selected)

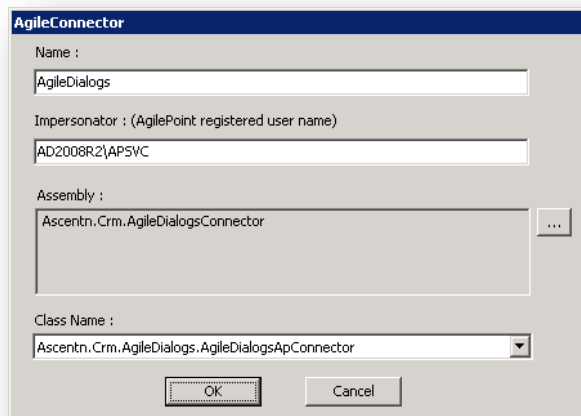
Configuration Fields:

- Name :** CRMIntegration (with an Add button)
- Impersonator : (AgilePoint registered user name)** AD2008R2\AP SVC (with Edit and Remove buttons)
- Assembly :** Ascentn.Crm.Security (with a Configure button)
- Class Name :** Ascentn.Crm.Security.XRMSecurityConnector

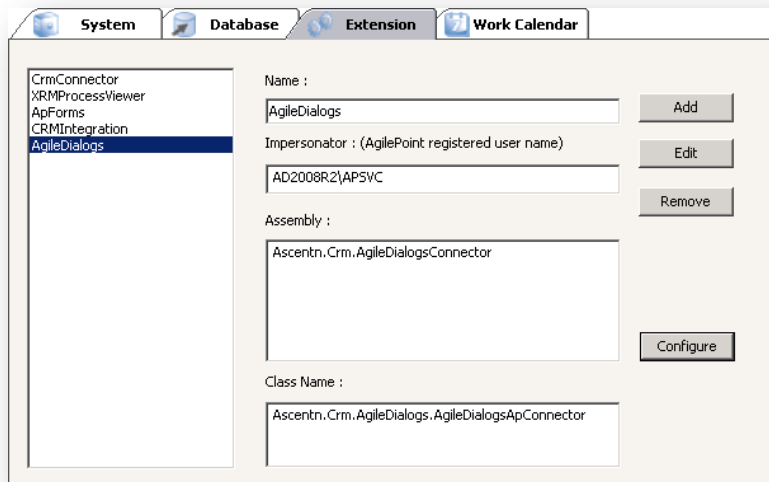
4.4.3.5 Add AgileDialogs Connector

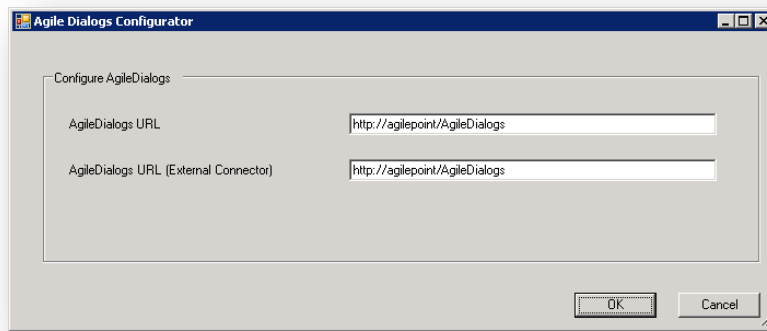
This Connector is used only to make the AgileDialogs Task and External AgileDialog Task shapes work correctly. It is not used for any other purpose regarding AgileDialogs.

1. Click the **Add** button
2. Click the **ellipsis (...)** button and select the **AgileDialogs Connector** (Ascentn.Crm.AgileDialogsConnector.dll) from the C:\AgilePoint\AgilePointServer\bin directory and click the **Open** button
3. Change the **Name** to *AgileDialogs*, set **Impersonator** to Service Account (e.g. AD2008R2\AP SVC) and click **OK**



4. Click the **Configure** button, set the **URLs** and click **OK**





5. Click **OK**

4.4.3.6 Add AgileDialogs Stored Procedure

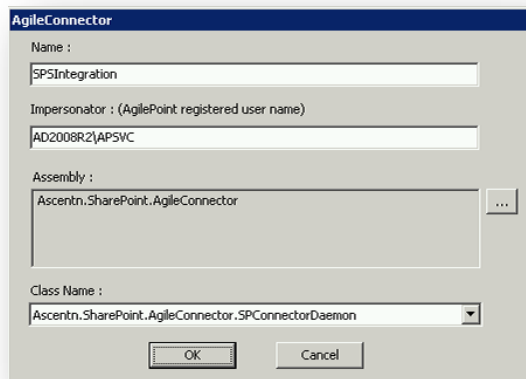
You need to execute the SQL statement in the following file against the AgilePoint Database:

`C:\Program Files\AgileXRM\AgilePoint Server Component\Tools\AgileDialogsStoreProcedures.sql`

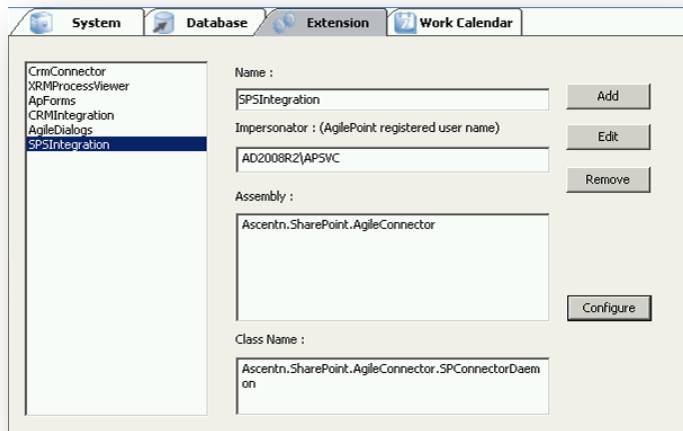
4.4.3.7 Add SharePoint Connector

This AgilePoint Server extension (AgileConnector) allows for the communication between AgilePoint Server and SharePoint.

1. Click the **Add** button
2. Click the **ellipsis (...)** button and select the **SharePoint Connector** (Ascentn.SharePoint.AgileConnector.dll) from the C:\AgilePoint\AgilePointServer\bin directory and click the **Open** button
3. Change the **Name** to *SPSIntegration*, set **Impersonator** to Service Account (e.g. AD2008R2\AP SVC) and click **OK**:



4. 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.



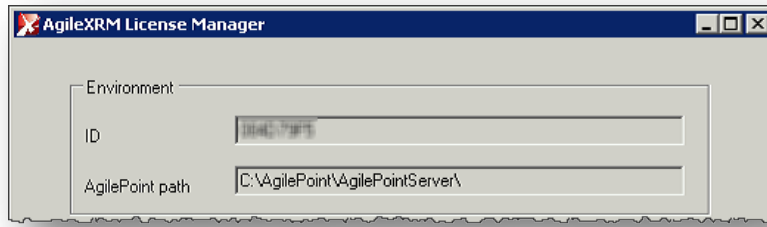
5. Click **OK** and **OK** again to close Configuration window
6. Click **Yes** to restart IIS

4.4.3.8 Adding AgileXRM License file

The **AgileCRMLicense.dat** file is created by AgilePoint Inc. based on the **Machine ID** and should be copied to the root of the AgilePoint Server directory, after which, the Application Pool of AgilePoint server needs to be Recycled.

To view the Machine ID:

1. Click on **AgileXRMLicenseManagerTool.exe** (usually in C:\AgilePoint\AgilePointServer\Tools)
2. Note down the **Environment ID** value and send it to AgilePoint Support to receive the License file



5. Process Manager Installation

5.1 Preparation steps

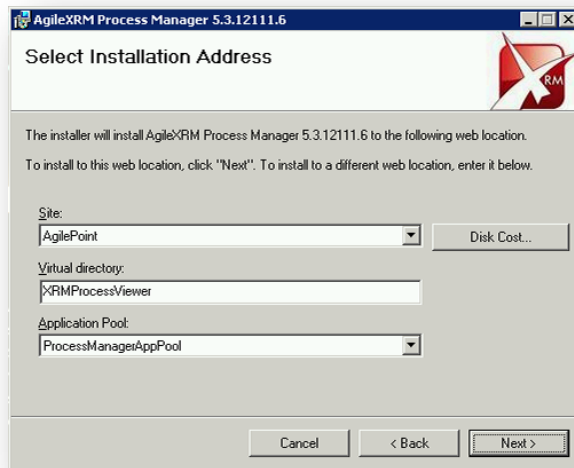
Create Application Pool	Create an application pool e.g. Name =ProcessManagerAppPool Identity =AD2008R2\APSV .NET Framework =v4.0 Managed Pipeline Mode =Integrated
Change App Pool Settings	Use the Service Account Identity and disable recycling: Process Model → Identity =AD2008R2\APSV Process Model → Idle time-out (minutes) =0 Recycling → Disable Overlapped Recycle =True Recycling → Regular Time Interval (minutes) =0
Choose Web Site	Process Manager can be installed under the AgilePoint web site or a new Web site. Recommendation: Install under the AgilePoint web site
Enable IIS for Silverlight	(Not required for Windows Server 2008 R2) If not already enabled, enable IIS according to instructions in this site: http://learn.iis.net/page.aspx/262/configuring-iis-for-silverlight-applications/

5.2 Installation steps



1. Click the link for **Process Manager**
2. Click **Next** in the Welcome page

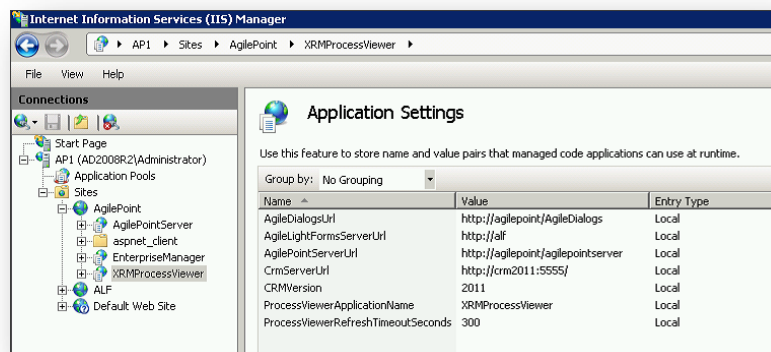
3. Select the **Web Site** and **Application Pool** and click **Next**:



4. Click **Next** in the Confirm page to start installing and click **Close** when finished

5.3 Configuration steps

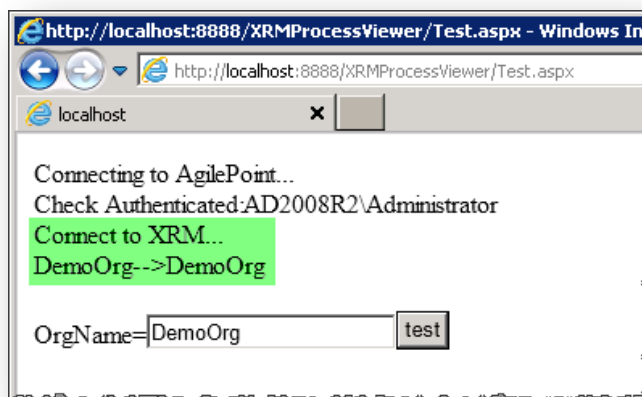
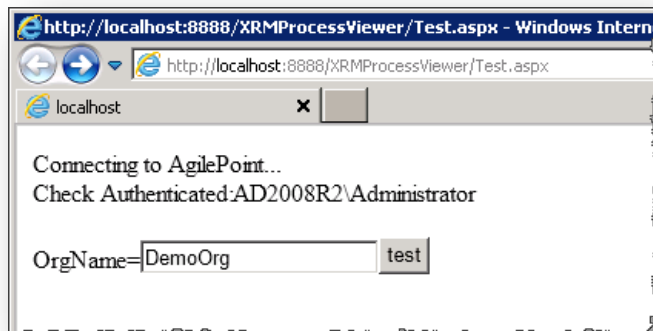
- Open **IIS→Sites→AgilePoint→XRMProcessViewer→ASP.NET (Application Settings)**
 - Set **AgileDialogsUrl** to AgileDialogs Server (e.g. <http://agilepoint/AgileDialogs>)
 - Set **AgileLightFormsServerUrl** to ALF Server (e.g. <http://alf>)
 - Set **AgilePointServerUrl** to AgilePoint Server (e.g. <http://agilepoint/agilepointserver>)
 - Set **CrmServerUrl** to CRM Server (e.g. <http://crm2011:5555/>)
 - Set **ProcessViewerRefreshTimeoutSeconds** to 300 (seconds)
After this amount of time, the Process Viewer stops refreshing automatically and shows the process instance defocused.
 - Leave other keys with default values



WARNING: Do not use *localhost* in the URLs even if the server is on the same machine.

5.4 Verification steps

1. In IIS→Sites→AgilePoint→XRMPProcessViewer→Content View
2. Browse **Test.aspx** file
3. Type the **CRM Org name** in the field and click **test** button



TIP: If Service Account is not added to CRM Org or does not have the correct Roles (See Section 3.5), then the Test page will throw an *Org Not Found* exception.

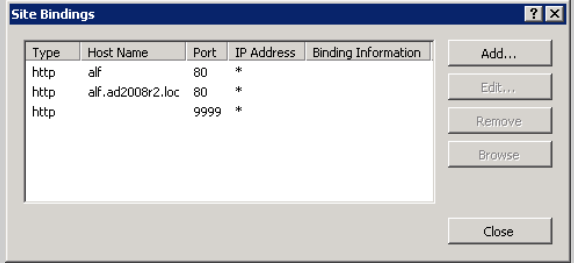
6. Form Server (ALF) Installation

6.1 Preparation steps



WARNING: ALF can only be installed on a top level Web Site.

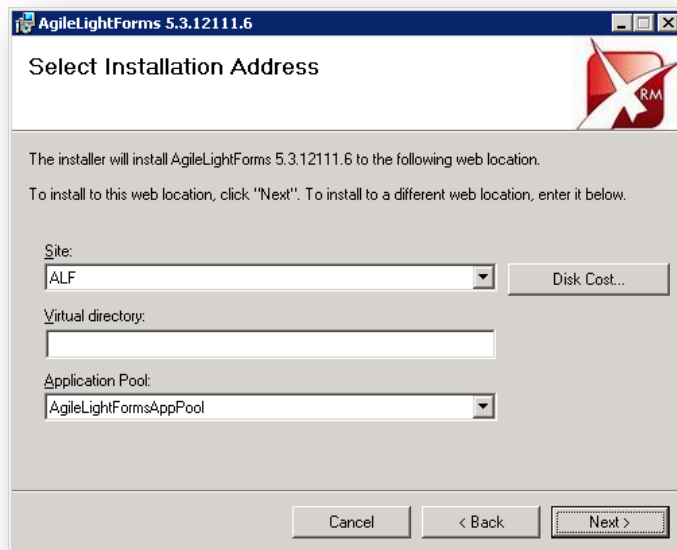
It cannot be installed in a Virtual Directory under a Web Site.

Create Application Pool	Create an application pool: e.g. Name =AgileLightFormsAppPool Identity =AD2008R2\APSV .NET Framework = v4.0 Managed Pipeline Mode =Integrated
Change App Pool Settings	Use the Service Account Identity and disable recycling: Process Model → Identity =AD2008R2\APSV Process Model → Idle time-out (minutes) =0 Recycling → Disable Overlapped Recycle =True Recycling → Regular Time Interval (minutes) =0
Create new Web Site	<p>Create a new web site for ALF Server: e.g. Name=ALF Path=C:\ALF Application Pool=AgileLightFormsAppPool Bindings: Port=80, HostHeader=alf Port=80, HostHeader=alf.ad2008r2.loc Port=9999, HostHeader=(empty)</p>  <p>NOTE: It is recommended to use a <i>HostHeader</i> even if you are installing only one ALF Server, since this allows simple scaling to multiple servers in the future. Make sure to do the following:</p> <ul style="list-style-type: none"> ○ Add the <i>HostHeader</i> (e.g. <i>alf</i>) to your DNS (A Record – not CNAME) ○ Add the <i>HostHeader</i> and its FQDN (e.g. <i>alf</i> and <i>alf.ad2008r2.loc</i>) to IE Intranet Zone (on all machines from which this server will be accessed) ○ Disable Loopback Check in Registry (See http://support.microsoft.com/kb/896861 and make sure to Reboot afterwards)
Enable IIS for Silverlight	(Not required for Windows Server 2008 R2) If required, enable IIS according to instructions in this site: http://learn.iis.net/page.aspx/262/configuring-iis-for-silverlight-applications/

6.2 Installation steps



1. Click the link for **Form Server (ALF)**
2. Click **Next** in the Welcome page
3. Select the Web **Site** and **Application Pool** and click **Next**:
Note: Leave Virtual Directory field blank.



4. Click **Next** in the Confirm page to start installing and click **Close** when finished

7. AgileDialogs Installation

NOTE: To setup AgileDialogs for External Users or Anonymous Users, please contact Support.

7.1 Preparation steps

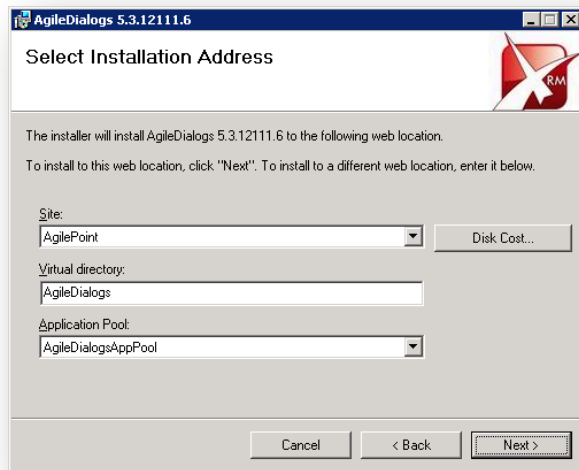
Create Application Pool	Create an application pool: e.g. Name =AgileDialogsAppPool Identity =AD2008R2\APSV .NET Framework = v4.0 Managed Pipeline Mode =Integrated
Change App Pool Settings	Use the Service Account Identity and disable recycling: Process Model → Identity =AD2008R2\APSV Process Model → Idle time-out (minutes) =0 Recycling → Disable Overlapped Recycle =True Recycling → Regular Time Interval (minutes) =0
Choose Web Site	AgileDialogs can be installed under the AgilePoint web site or a new Web site. Recommendation: Install under the AgilePoint web site
Enable IIS for Silverlight	(Not required for Windows Server 2008 R2) If not already enabled, enable IIS according to instructions in this site: http://learn.iis.net/page.aspx/262/configuring-iis-for-silverlight-applications/

7.2 Installation steps



1. Click the link for **AgileDialogs**
2. Click **Next** in the Welcome page

3. Select the Web **Site** and **Application Pool** and click **Next**:



4. Click **Next** in the Confirm page to start installing and click **Close** when finished

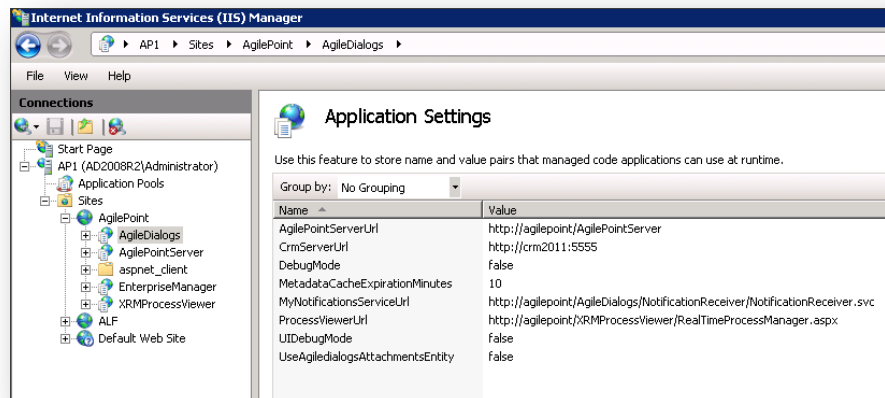
7.3 Configuration steps



NOTE: Please make sure the AgileDialogs Connector is installed and configured as described in Section [4.4.3.5](#) and [4.4.3.6](#)

1. Open **IIS→Sites→AgilePoint→AgileDialogs→ASP.NET (Application Settings)**
 - Set **AgilePointServerUrl** to AgilePoint Server (e.g. `http://agilepoint/agilepointserver`)
 - Set **CrmServerUrl** to CRM Server (e.g. `http://crm2011:5555/`)
 - Set **DebugMode** to *false* environments (For future enhancements)
 - Set **MyNotificationsServiceUrl** to this service in AgileDialogs Server (e.g. `http://agilepoint/AgileDialogs/NotificationReceiver/NotificationReceiver.svc`)
 - Set **ProcessViewerUrl** to this page in Process Manager Server (e.g. `http://agilepoint/XRMProcessViewer/RealTimeProcessManager.aspx`)

- Leave other keys with default values



8. AgileMonitor Installation

8.1 Preparation steps

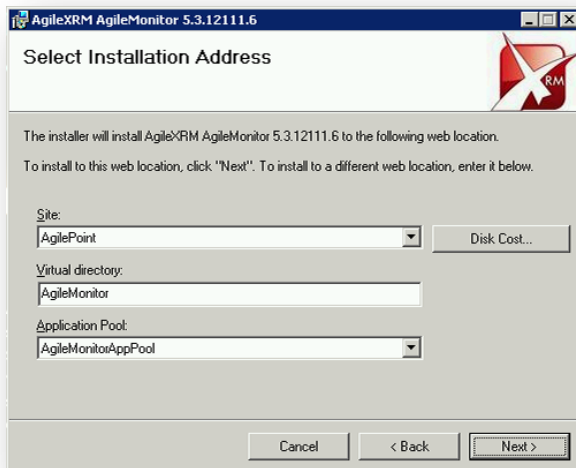
Create Application Pool	Create an application pool: e.g. Name =AgileMonitorAppPool Identity =AD2008R2\APSV .NET Framework = v4.0 Managed Pipeline Mode =Integrated
Change App Pool Settings	Use the Service Account Identity and disable recycling: Process Model → Identity =AD2008R2\APSV Process Model → Idle time-out (minutes) =0 Recycling → Disable Overlapped Recycle =True Recycling → Regular Time Interval (minutes) =0
Choose Web Site	AgileMonitor can be installed under the AgilePoint web site or a new Web site. Recommendation: Install under the AgilePoint web site
Enable IIS for Silverlight	(Not required for Windows Server 2008 R2) If not already enabled, enable IIS according to instructions in this site: http://learn.iis.net/page.aspx/262/configuring-iis-for-silverlight-applications/

8.2 Installation steps



1. Click the link for **AgileMonitor**
2. Click **Next** in the Welcome page

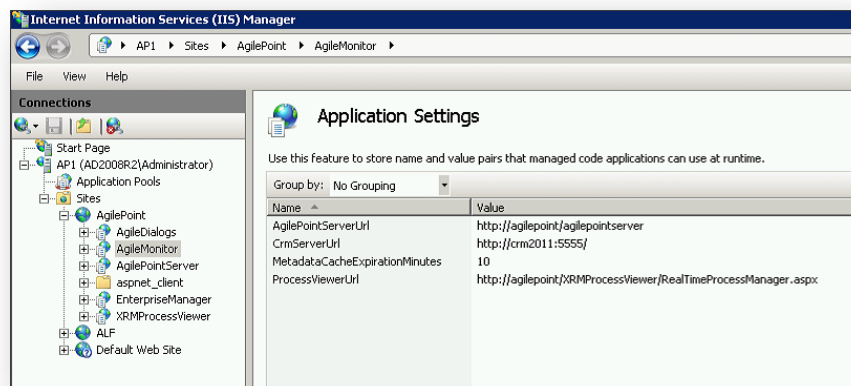
3. Select the **Web Site** and **Application Pool** and click **Next**:



4. Click **Next** in the Confirm page to start installing and click **Close** when finished

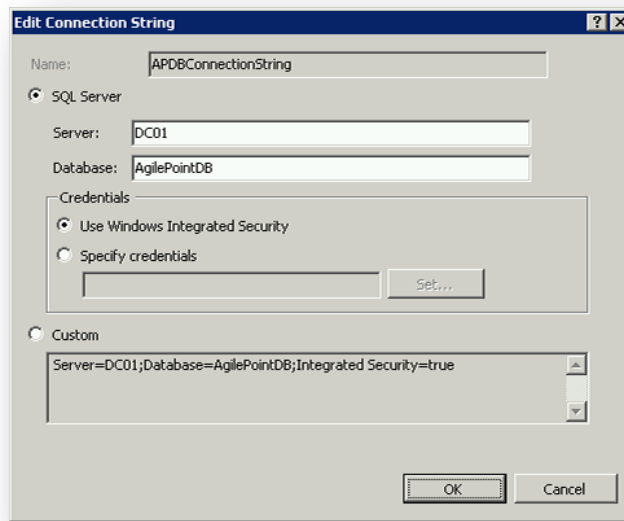
8.3 Configuration steps

1. Open **IIS→Sites→AgilePoint→AgileMonitor→ASP.NET (Application Settings)**
 - Set **AgilePointServerUrl** to AgilePoint Server (e.g. `http://agilepoint/agilepointserver`)
 - Set **CrmServerUrl** to CRM Server (e.g. `http://crm2011:5555/`)
 - Set **ProcessViewerUrl** to this page in Process Manager Server (e.g. `http://agilepoint/XRMProcessViewer/RealTimeProcessManager.aspx`)
 - Leave other keys with default values

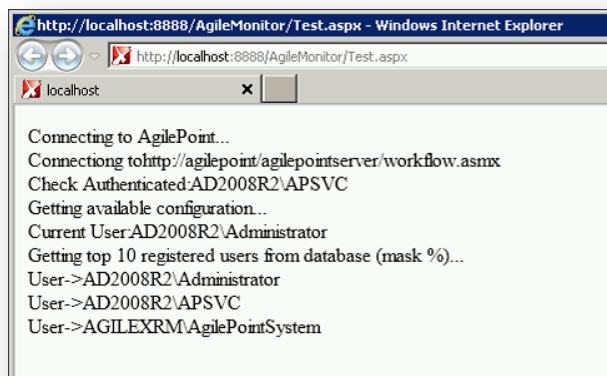


2. Open IIS→Sites→AgilePoint→AgileMonitor→ASP.NET (Connection Strings)

- Double-click **APDBConnectionString** and point to AgilePoint Database and click **OK**

**8.4 Verification steps**

1. In IIS→Sites→AgilePoint→AgileMonitor→Content View
2. Browse **Test.aspx** file
3. The following should be shown



9. CRM Integration Component Installation

9.1 Preparation steps



TIP: The installer for this component simply extracts the CRM 2011 Solution files to the corresponding Program Files directory. It does not actually install anything in CRM 2011, therefore it not necessary to install this on the CRM Server itself. It is recommended to install it on the AgileXRM Server and manually add the extracted CRM 2011 Solution files (.zip) to CRM, as described further below. The CRM Solution files can also be found under the `Installers\x64` directory where the Setup files were extracted.



NOTE: From the CRM Server, make sure you can successfully access the following service (<http://agilepoint/agilepointserver/workflow.aspx>) using Internet Explorer. If you are asked for credentials, then add **AgilePoint Server URL** to the **Intranet Zone**.



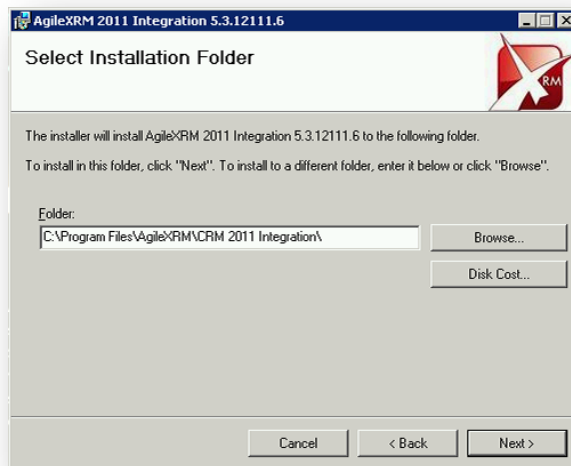
WARNING: The user installing this component should be a Deployment Administrator. Use the CRM Deployment Manager Tool to verify this. Otherwise Import Solution step will fail.

9.2 Installation steps



1. Click the link for **Dynamics CRM 2011 Integration**
2. Click **Next** in the Welcome page

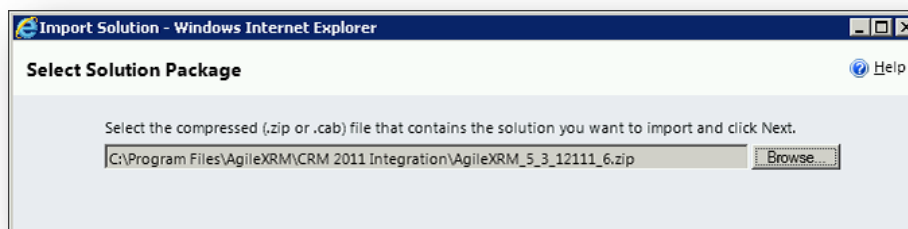
3. Set the installation directory and click **Next**:
(Default is C:\Program Files\AgileXRM\CRM 2011 Integration\)



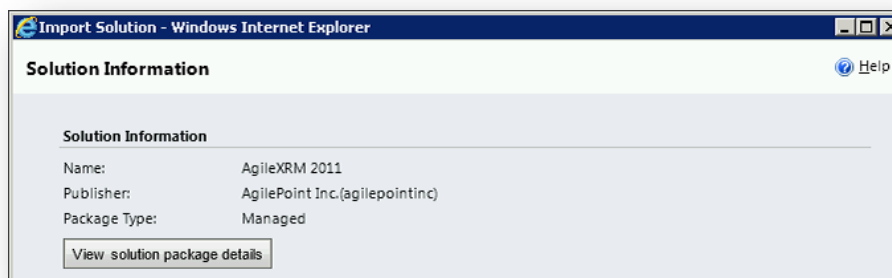
4. Click **Next** in the Confirm page to start installing and click **Close** when finished

9.2.1 Import Solutions Manually

1. In the CRM Org you want to use with AgileXRM, go to **Settings→Customization→Solutions→Import**
2. Select the file C:\Program Files\AgileXRM\CRM 2011 Integration\AgileXRM_5_3_12111_6.zip and click **Next**:



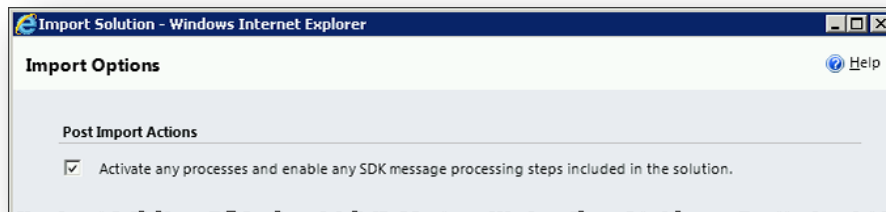
3. On the *Solution Information* page, click **Next**:



- On the *Import Options* page, select the “**Activate...**” checkbox and click **Next**:



WARNING: It is very important to select the checkbox; otherwise the solution will not work correctly.

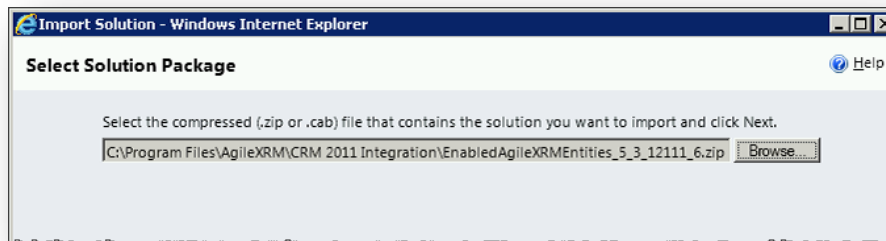


- On the *Importing Solution* summary page, check there are no errors and click **Close**.

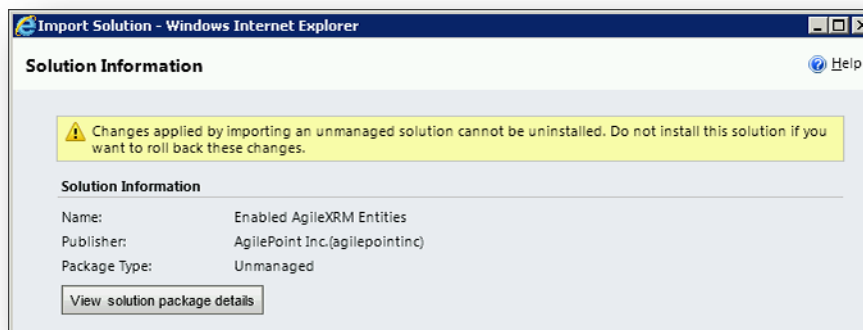
The following steps are for **Development environments only**:

- In the CRM Org you want to use with AgileXRM, go to **Settings→Customization→Solutions→Import**
- Select the file

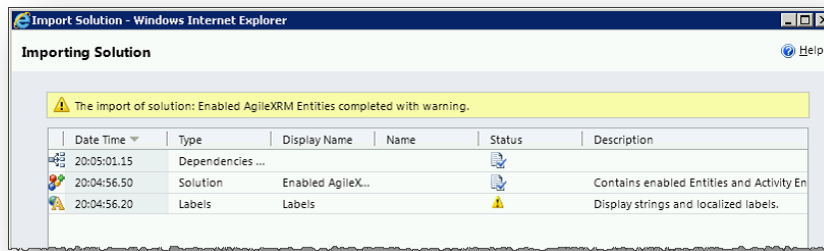
C:\Program Files\AgileXRM\CRM 2011 Integration\EnabledAgileXRMEntities_5_3_12111_6.zip and click **Next**:



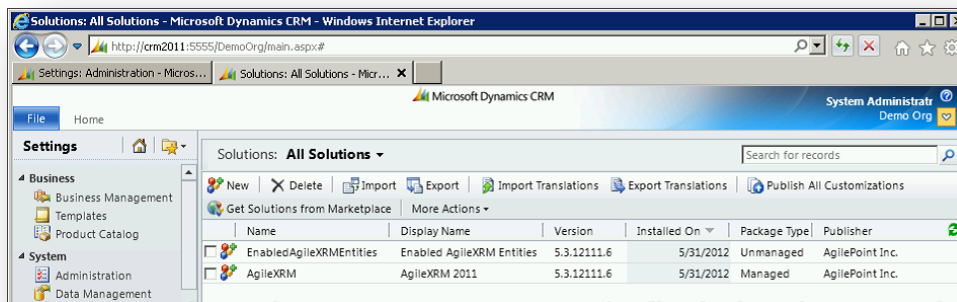
- On the *Solution Information* page, click **Next**:



4. On the *Importing Solution* summary page, check there are no errors (the Warning shown below is acceptable) and click **Publish All Customizations** and then **Close**



This is what it should look like (in DEV environments):



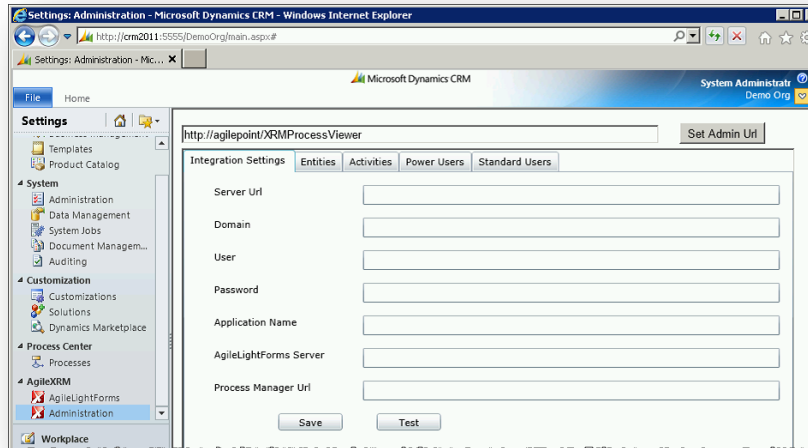
9.3 Configuration steps



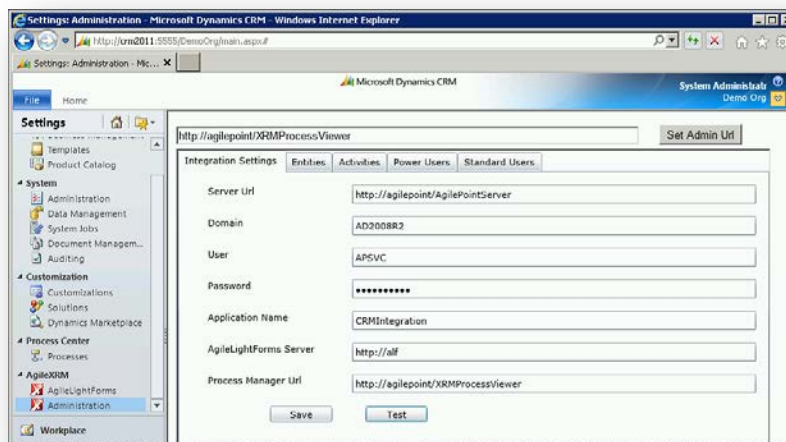
NOTE: Confirm that the Service Account created in Section 3.4 is added to your CRM Organization as described in Section 3.5.

9.3.1 Set Admin URL

1. Go to **CRM→Settings→AgileXRM→Administration**
2. Enter the URL to the Process Manager Server (e.g. <http://agilepoint/XRMPProcessViewer>) without the ending slash '/' and click **Set Admin URL** button:



3. Fill in the parameters:
 - **Server Url**= AgilePoint Server URL (e.g. <http://agilepoint/AgilePointServer>)
 - **Domain**= Domain Name (e.g. AD2008R2)
 - **User**= AgilePoint Service Account (e.g. APSVC)
 - **Password**= AgilePoint Service Account password
 - **Application Name**=*CRMIntegration* (this should match the name set in Section 0)
 - **AgileLightForms Server**=ALF Server URL (e.g. <http://alf>)
 - **Process Manager Url**= e.g. <http://agilepoint/XRMPProcessViewer>

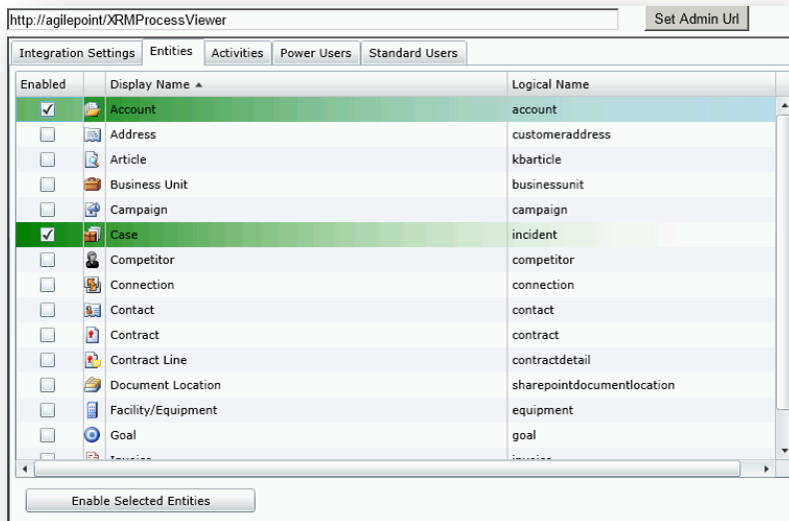


- Click **Test** button and then click **OK**
- Click the **Save** button, then click **OK**

9.3.2 Enable Entities

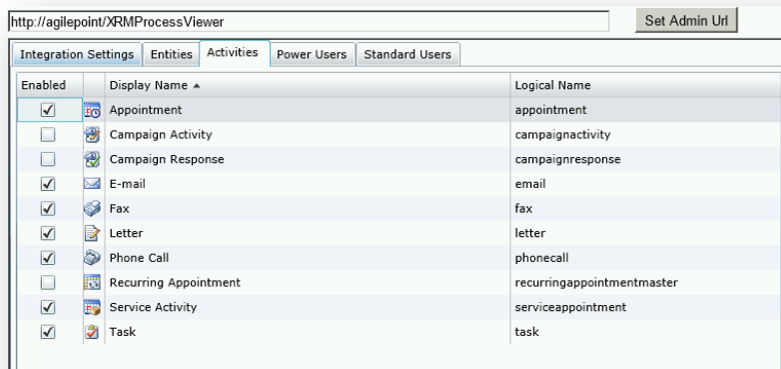
Select all the Entities that are going to be used as Main Entity in business processes, making them visible from within the Envision Process Modeler, and click the Enable action. This action can be done at any time, for instance, after creating a custom entity that will be used as Main Entity in a process.

Select the entities and click **Enable Selected Entities**:



9.3.3 Enable Activities

Out of the box, most common CRM Activities are enabled. You can select other activity types and enable them for use in Processes.



9.3.4 Activate Power Users

Those CRM users for whom you want to create an Activity for, need to be activated in this tab. Use the Search functionality to locate the users, select them and click **Activate Selected Users**.

The screenshot shows the 'Power Users' tab in the XRMProcessViewer application. The address bar displays 'http://agilepoint/XRMProcessViewer'. The interface includes a 'Set Admin Url' button and tabs for 'Integration Settings', 'Entities', 'Activities', 'Power Users', and 'Standard Users'. A search bar with a 'Search Users' button is present. Below is a table of users:

Activated	User Name	Full Name
<input type="checkbox"/>	AD2008R2\APSV	AgilePoint Service
<input type="checkbox"/>	AD2008R2\akira	Akari Yakamoto
<input type="checkbox"/>	AD2008R2\alex	Alex Chang
<input type="checkbox"/>	AD2008R2\ana	Ana Smith
<input type="checkbox"/>	AD2008R2\dauid	David Jones
<input type="checkbox"/>	AD2008R2\maria	Maria Perez
<input checked="" type="checkbox"/>	AD2008R2\Administratr	System Administratr

An 'Activate Selected Users' button is located at the bottom of the window.



WARNING: The total number of users activated should not exceed the licensed number of AgileXRM Power Users. Otherwise, no user can complete an Activity.



TIP: Power Users can later be deactivated using the same mechanism. Select the activated users and click the **Deactivate Selected Users** button.

9.3.5 Activate Standard Users

For those users in your company that are not CRM Users, but are involved in the business processes, you need to activate them in this tab.

1. Use the Search functionality to locate the users, select them and click **Activate Selected Users**.

Activated	User Name	Full Name
<input type="checkbox"/>	AD2008R2\APSV	AgilePoint Service
<input checked="" type="checkbox"/>	AD2008R2\akira	Akira Yakamoto
<input checked="" type="checkbox"/>	AD2008R2\alex	Alex Chang
<input checked="" type="checkbox"/>	AD2008R2\ana	Ana Smith
<input type="checkbox"/>	AD2008R2\crmappsvc	crmappsvc
<input type="checkbox"/>	AD2008R2\crmasyncsvc	crmasyncsvc
<input type="checkbox"/>	AD2008R2\crmdeploysvc	crmdeploysvc
<input type="checkbox"/>	AD2008R2\crmsandboxsvc	crmsandboxsvc
<input checked="" type="checkbox"/>	AD2008R2\david	David Jones
<input checked="" type="checkbox"/>	AD2008R2\maria	Maria Perez
<input type="checkbox"/>	AD2008R2\SPSVC	SPSVC
<input type="checkbox"/>	AD2008R2\sqlreport	sqlreport



TIP: Standard Users can later be deactivated using the same mechanism. Select the activated users and click the **Deactivate Selected Users** button.

2. Add Role(s) to User. Select a user and click the **Add Role** button, select the **Business Unit** and **Role** and click **OK**.

10. Process Modeler Installation



WARNING: These components are installed where **Microsoft Visio** is installed, which should be already **activated**. Make sure Visio is not running before starting installation of these components.



Select if installing on a 64-bit version of Visio or a 32-bit one:



The following should be installed in this order:

- Envision
- AgilePoint Service Pack 3
- AgileXRM Envision Component

10.1 Envision Installation



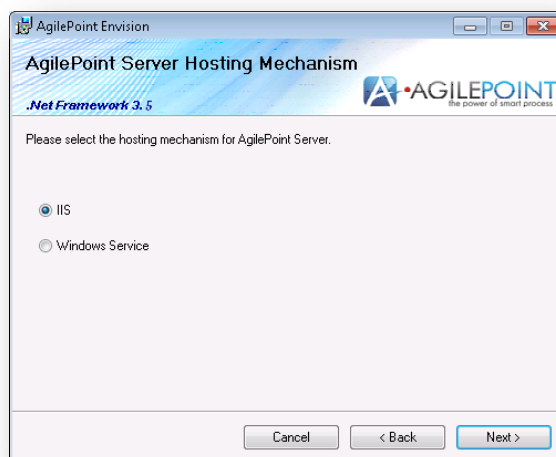
NOTE: Make sure the following prerequisites are met:

- **.NET Framework 3.5** is already installed
- Visio option **.NET Programmability Support** is selected
- **Windows Identity Foundation (WIF)** is already installed
(<http://www.microsoft.com/en-us/download/details.aspx?id=17331>)

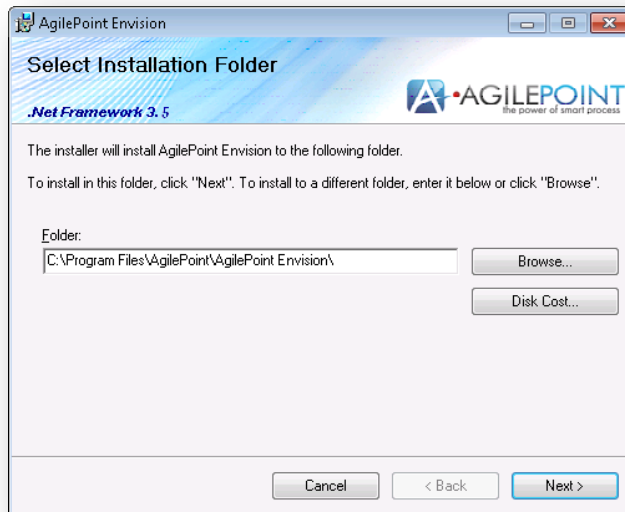
10.1.1 Installation steps



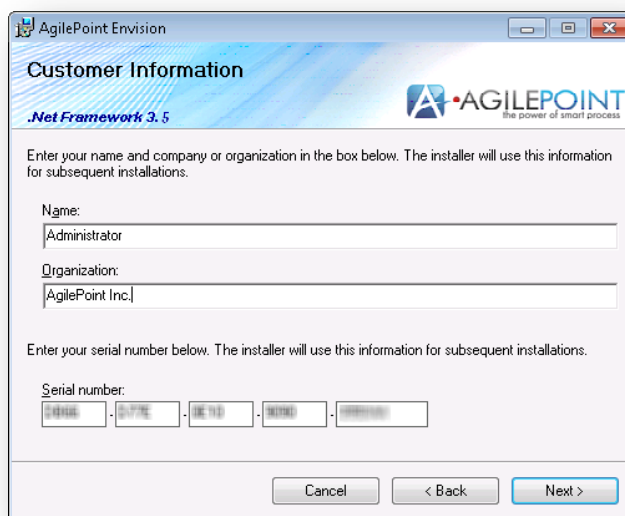
1. Click the link for **AgilePoint Envision**
2. Click **Next** in the AgilePoint Envision window
3. Again, click **Next** in the AgilePoint Envision window
4. Click the **I Agree** radio button after reading the license agreement. Then click **Next**
5. Select **IIS** and click Next:



6. Select the installation directory and click **Next**:



7. Enter your information and License Key (Serial number). Then click **Next**:



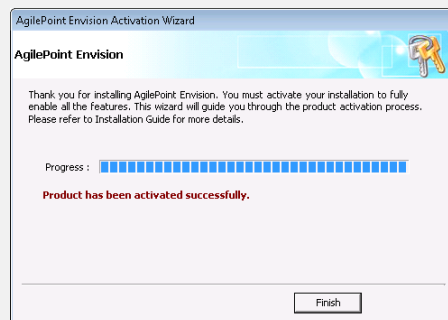
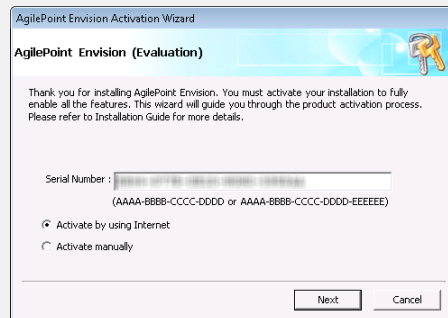
8. The installer is now ready to install the application. Click **Next** to install
9. Once the Installation Complete message is displayed, click **Close** to complete the installation
10. If you see a *Setup has completed. Would you like to reboot now?* message, click **Yes**

10.1.2 Post-Installation steps

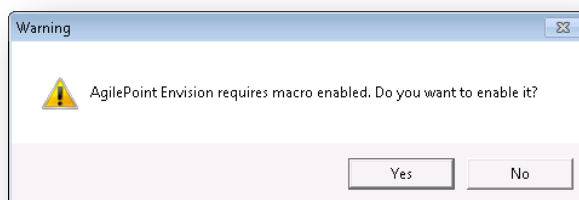
1. Click **Start > All Programs > AgilePoint > AgilePoint Envision**



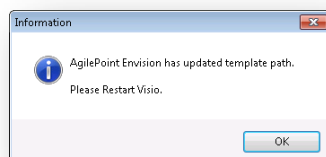
NOTE: The first time you run the **AgilePoint Envision**, you will be asked to activate the product. If you are prompted to activate your product, you will need to activate **AgilePoint Envision** before you continue:



2. Enable Macros by selecting **Yes**:



3. Click **OK** and close Visio and restart Envision:



NOTE: This window maybe behind the Visio window. Select it from the TaskBar to bring it to the foreground.

10.2 AgilePoint Service Pack 3 Installation



WARNING: If after applying a Service Pack, one of the components is reinstalled (or repaired), you need to re-apply the Service Pack.

10.2.1 Installation steps



1. Click the link for **AgilePoint Service Pack 3**
2. Set the **I have reviewed...** checkbox and click **Apply**



NOTE: Please ignore the documentation links in this window as they apply to AgilePoint BPMS and not AgileXRM.

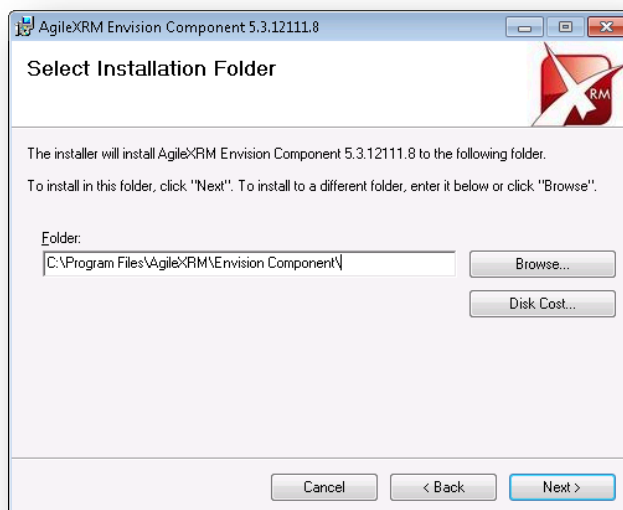
3. Click **Close** to conclude applying the Service Pack

10.3 AgileXRM Envision Component Installation

10.3.1 Installation steps



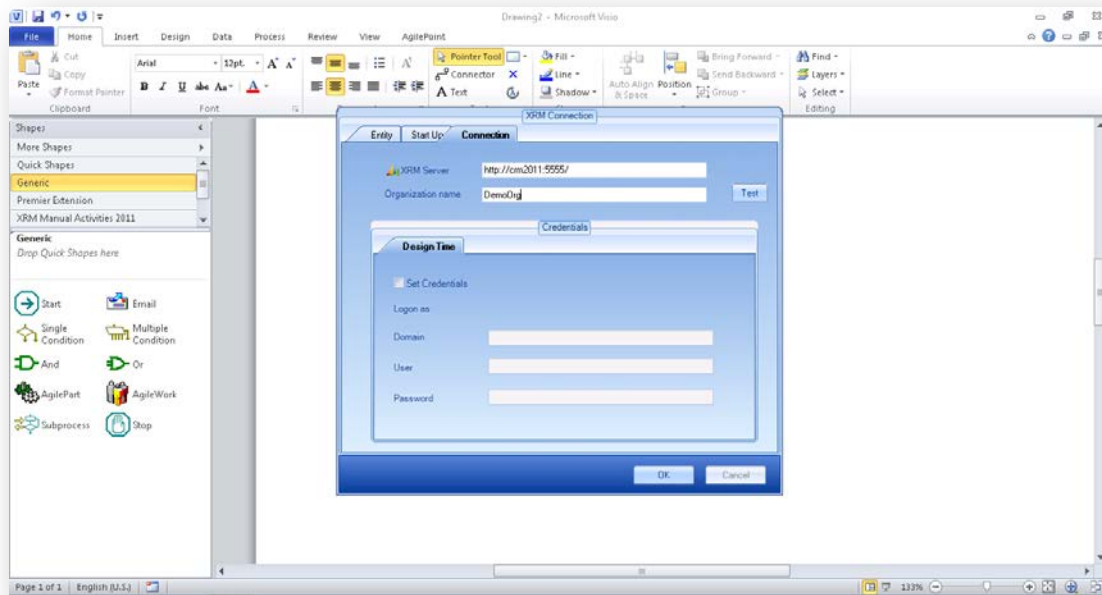
1. Click the link for **AgileXRM Envision Component**
2. Click **Next** in the Welcome page
3. Set the installation directory and click **Next**:
(Default is C:\Program Files\AgileXRM\Envision Component\)



4. Click **Next** in the Confirm page to start installing and click **Close** when finished

10.4 Verification steps

1. Open Envision by going to **Start → All Programs → AgilePoint → AgilePoint Envision**
2. Go to **File → New... → AgilePoint Templates → AgileXRM 2011 → Create**
3. The following should appear, set connection values and click **OK**:



11. SharePoint Integration Component Installation

This component allows exposing Tasks, Processes and Dialogs to SharePoint Users.

11.1 Preparation steps



WARNING: The SharePoint solutions in this component cannot coexist with standard AgilePoint Solutions in the same SharePoint Farm as they use the same Solution and Feature IDs. **DO NOT INSTALL** on a SharePoint Farm where AgilePoint BPMS Solutions are already present.



TIP: The installer for this component simply extracts the SharePoint Solution files to the corresponding Program Files directory. It does not actually install anything in SharePoint, therefore it not necessary to install this on the SharePoint Server(s). It is recommended to install it on the AgileXRM Server and then copy the extracted files across to a SharePoint Server and deploy the solutions files (.wsp) to SharePoint as described further below.



NOTE: From the SharePoint Server(s), make sure you can successfully access the following service (<http://agilepoint/agilepointserver/workflow.aspx>) using Internet Explorer. If you are asked for credentials, then add **AgilePoint Server URL** to the **Intranet Zone**.



NOTE: In the SharePoint Server, make sure the path to **stsadm.exe** is added to the **PATH** environment variable before installing. Normally this is:

- **SharePoint 2010:**
`C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\BIN`
- **SharePoint 2007:**
`C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\BIN`

Also carry out the installation with a user who is Farm Administrator.



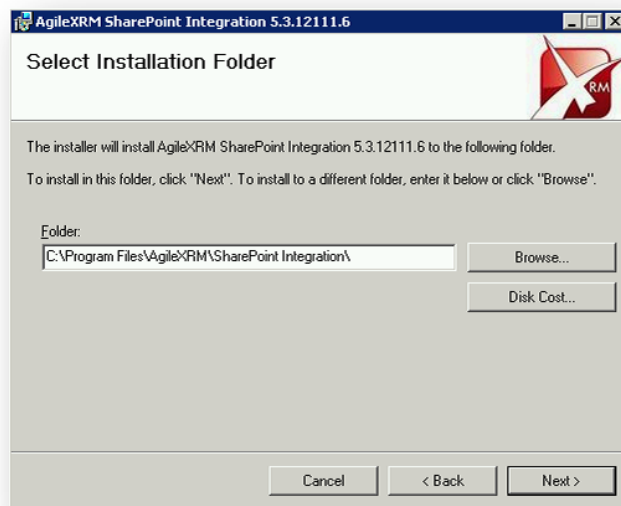
NOTE: Make sure the SharePoint Connector is added as described in Section [4.4.3.6](#)

11.2 Installation steps

11.2.1 In the machine where this component is installed



1. Click the link for **SharePoint Integration**
2. Click **Next** in the Welcome page
3. Set the installation directory and click **Next**:
(Default is C:\Program Files\AgileXRM\SharePoint Integration\)



4. Click **Next** in the Confirm page to start installing and click **Close** when finished

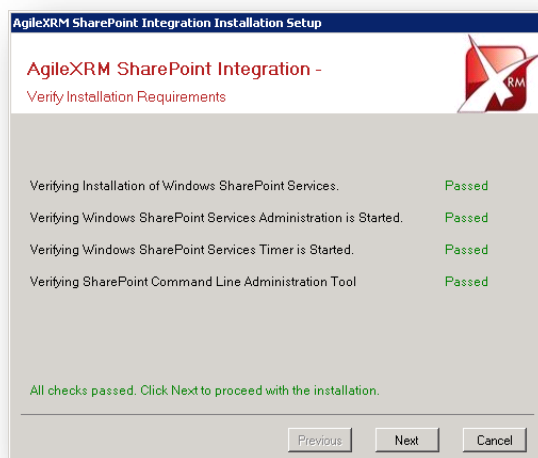
5. Copy the content of the directory where this component was installed to temp directory in a SharePoint Server
(e.g., copy this directory C:\Program Files\AgileXRM\SharePoint Integration)



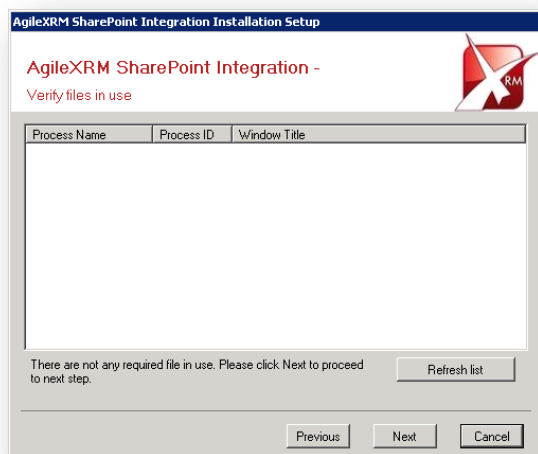
WARNING: The installation tool can only be used when there is only ONE SharePoint WFE Server. If there is more than 1 WFE Server, see Section 11.2.3 for instructions.

11.2.2 Installation for a Single SharePoint WFE Server

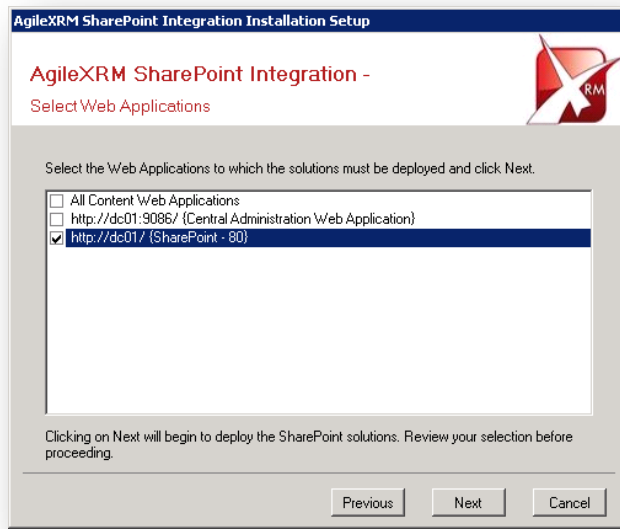
1. Run the executable called `AgilePoint.Crm.SharePointInstaller.exe`
2. Make sure all verification steps are *Passed* and click **Next**:



3. In the file in use page, make sure there are no application locking essential files. If so, close them and **Refresh list** until the **Next** button becomes available:



4. Select a Web Application in the next page and click **Next**:



5. On the *Perform Deployment* page make sure there are no errors in the log window and click **Close** to conclude the installation.

11.2.3 Installation for multiple SharePoint WFE Servers

You cannot use the installation tool shown in the previous section to install on multiple servers because of the asynchronous nature of the SharePoint Timer service. In this case, you need to use standard SharePoint administration mechanisms to *Add*, *Deploy* these Solutions and *Activate* their Features.

1. To **Add Solutions** to a SharePoint Farm, use the following commands:

```
stsadm -o addsolution -filename AgileXRM.SharePoint.SettingsList.wsp
stsadm -o addsolution -filename AgileXRM.SharePoint.WebParts.wsp
```

2. To **Deploy Solutions** to a desired Web Application, use the following commands:

```
stsadm -o deploysolution -name AgileXRM.SharePoint.SettingsList.wsp -immediate -allowgacdeployment -url http://dc01
stsadm -o deploysolution -name AgileXRM.SharePoint.WebParts.wsp -immediate -allowgacdeployment -url http://dc01
```



IMPORTANT: Wait until both solutions are deployed to the Web App in ALL SharePoint WFE Servers. You can ensure if this is completed by checking the existence of these 2 directories here in each WFE Server:

```
C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\TEMPLATE\FEATURES
    AgilePointSettingsListFeature
    AgilePointWebParts
```



WARNING: Due to an anomaly in SharePoint 2010, activating the SettingsList feature via the GUI (Site Actions→Site Settings→Site collection features→Activate) does not function correctly. Instead, use the command line method shown below.

3. To **Activate Features** in a desired Site Collection, use the following commands:

```
stsadm -o activatefeature -name AgilePointSettingsListFeature -url http://dc01
stsadm -o activatefeature -name AgilePointWebParts -url http://dc01
```

4. To **Complete** the deployment, use the following command:

```
stsadm -o copyappbincontent
```

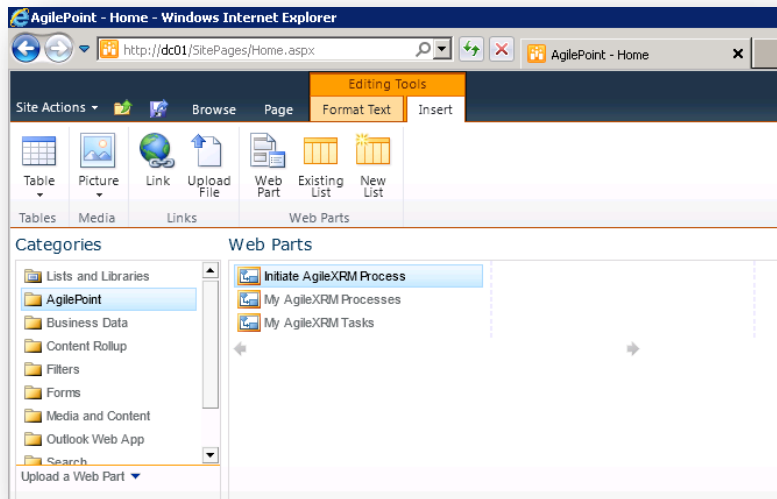
11.3 Configuration steps

There is a new SharePoint List in the Site Collection you enabled called AgilePoint Configuration. You need to update the Values for the parameters in this list as shown below. Remember that a Site Collection can only connect to one CRM Organization.

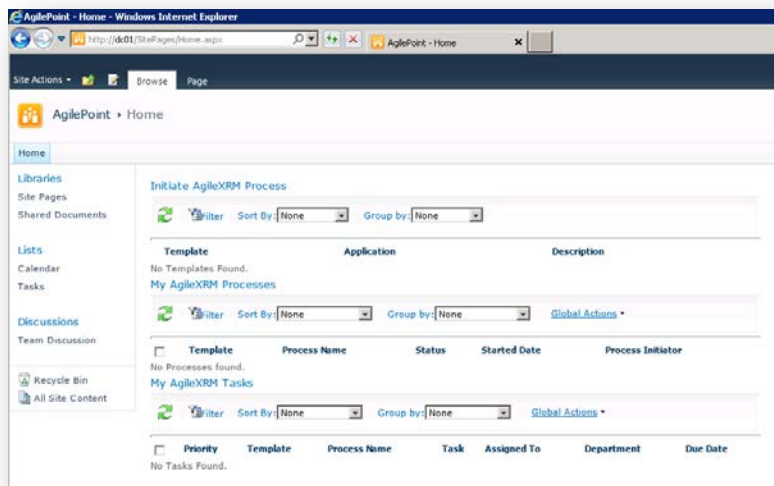
1. In the SharePoint site, go to **All Site Content** → **AgilePoint Configuration**
2. Set values for the following keys:
 - **ServerUrl**=URL of AgilePoint Server (e.g. <http://agilepoint/AgilePointServer>)
 - **ImpersonatorDomain**=AgilePoint Service Account's Domain (e.g. *AD2008R2*)
 - **ImpersonatorUser**= AgilePoint Service Account LogonID (e.g. *AP SVC*)
 - **ImpersonatorPass**= AgilePoint Service Account's Password
 - **ImpersonatorApplicationName**=Same as name set in Section 4.4.3.4 (e.g. *CRMIntegration*)
 - **Log**=Where log files will be created (e.g. *C:\SPIntegrationLog*) – Give **Read/Write permissions** to **Everyone** on this directory
 - **AgileLightFormsServerUrl**=ALF Server URL (e.g. <http://alf>)
 - **CRMServerUrl**=(e.g. <http://crm2011>)
 - **Domain**=Domain of user with sys admin permissions in CRM (normally AgilePoint Service Account e.g. *AD2008R2*)
 - **User**=LogonID of user with sys admin permissions in CRM (normally AgilePoint Service Account e.g. *AP SVC*)
 - **Password**=Password of user with sys admin permissions in CRM (normally AgilePoint Service Account)
 - **OrganizationName**=CRM Org Name (e.g. *DemoOrg*)
 - **ProcessManagerUrl**=(e.g. <http://agilepoint/XRMProcessViewer>)
 - **AgileDialogsUrl**=(e.g. <http://agilepoint/AgileDialogs>)

List Tools			
AD2008R2\administrator			
Site Actions	Browse	Items	List
New Item	New Folder	View Item	Edit Item
Version History	Item Permissions	Delete Item	Attach File
Workflows	Approve/Reject	I Like It	Tags & Notes
New	Manage	Actions	Workflows
Tags and Notes			
Libraries			
Site Pages			
Shared Documents			
Lists			
Calendar			
Tasks			
Discussions			
Team Discussion			
Recycle Bin			
All Site Content			
AP Setting Key	Application	AP Setting Value	
ServerUrl	AgilePoint	http://agilepoint/AgilePointServer	
ImpersonatorDomain	AgilePoint	AD2008R2	
ImpersonatorUser	AgilePoint	AP SVC	
ImpersonatorPass	AgilePoint	A8A3D5D836B2B8A0C5C653CE854CCC3	
ImpersonatorApplicationName	AgilePoint	CRMIntegration	
Log	AgilePoint	C:\SPIntegrationLog	
LogSwitch	AgilePoint	All	
AgileLightFormsServerUrl	AgileXRM	http://alf	
CRMServerUrl	AgileXRM	http://crm2011	
Domain	AgileXRM	AD2008R2	
User	AgileXRM	AP SVC	
Password	AgileXRM	B2A8F7C00EDB5DB75999D6D2797B418	
OrganizationName	AgileXRM	DemoOrg	
OpenTasksInNewWindow	AgilePoint	False	
AgileXRM	AgilePointASPAssociation		
AgileDialogsUrl	AgileXRM	http://agilepoint/AgileDialogs	

3. Go to the desired page in your site and click **Edit** to add the 3 AgilePoint WebParts:



4. **Save & Close** the Page:



12. Developer SDK Installation



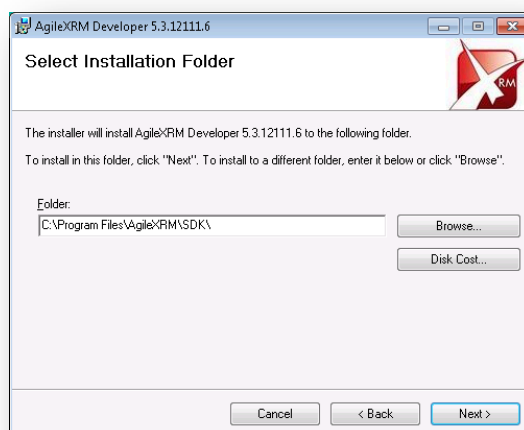
WARNING: These components are installed where Microsoft Visual Studio is installed. Make sure VS is not running before starting installation of this component.



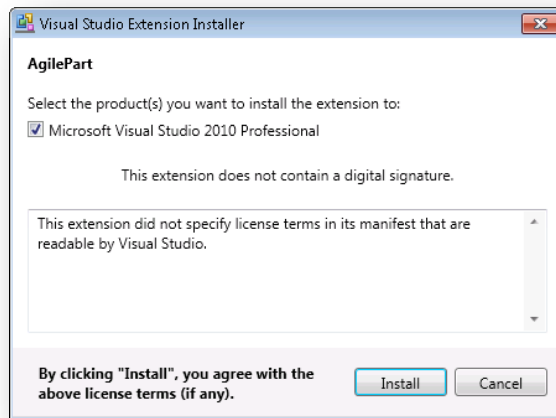
TIP: The installer for this component simply extracts the Visual Studio Extension Installer files to the corresponding Program Files directory. It does not actually install anything in Visual Studio. They need to be installed manually as described below.



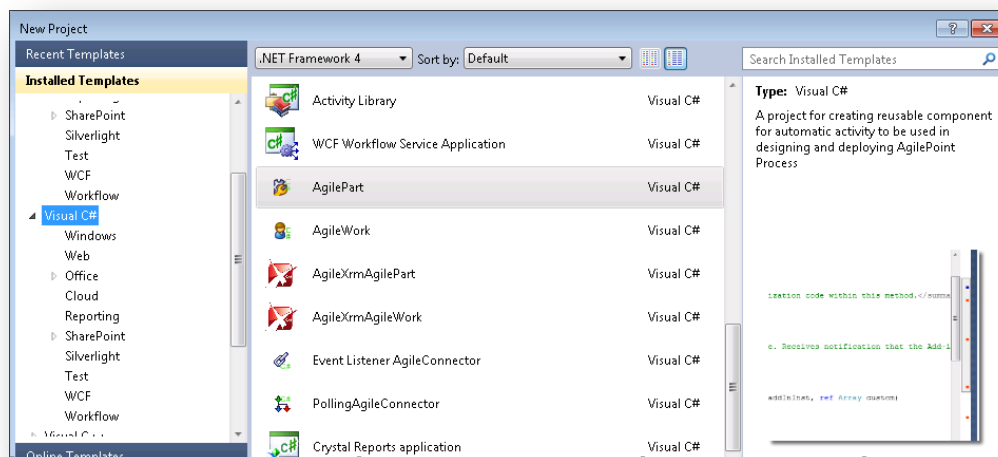
1. Click the link for **Developer SDK**
2. Click **Next** in the Welcome page
3. Set the installation directory and click **Next:**
(Default is C:\Program Files\AgileXRM\SDK\)



4. Click **Next** in the Confirm page to start installing and click **Close** when finished
5. Go to the installation folder and double-click on each of the 6 install (.vsix) files and click **Install**:



6. You can create projects based on these templates under **New Project**→**Visual C#**:



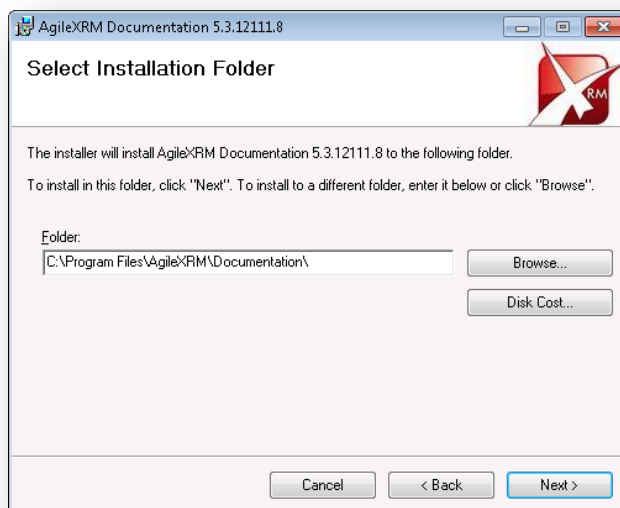
13. Documentation Installation



NOTE: You need a recent version of **Acrobat PDF Reader** to read the documentation, as all the documents are in one PDF Portfolio.



1. Click the link for **Documentation**
2. Click **Next** in the Welcome page
3. Set the installation directory and click **Next**:
(Default is C:\Program Files\AgileXRM\Documentation\)



4. Click **Next** in the Confirm page to start installing and click **Close** when finished
5. Open the documentation file from **Start→AgileXRM→AgileXRM Documentation**