

AgilePoint Envision User's Guide

AgilePoint BPMS v5.0 R2 SP1

Document Revision r5.6.5

August 2014

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Preface

Disclaimer of Warranty

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Virus-free software policy

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

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

Document Revision Numbers

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

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

AgilePoint Documentation in PDF and HTML

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

Advantages of HTML Documentation

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

Advantages of PDF Documentation

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

For more information, see Downloading Files and Sharing Links from the Documentation Library in the Documentation Library.

Opening the Documentation Library

To open the AgilePoint Documentation Library, do the following.

Prerequisites

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

Instructions

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

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

Finding Information in the Documentation Library

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

Using the Table of Contents

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

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

Searching

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

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

   The search results display in alphabetical order by topic title.

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

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

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

Printing

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

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

Downloading Files and Sharing Links from the Documentation Library

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

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

Share a Link to an HTML Topic

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

Share a Link to a PDF Document

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

Save a Copy of a PDF Document

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

Contacting AgilePoint Sales

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

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Email: info@agilepoint.com

Web site: www.agilepoint.com

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

Contacting Customer Support

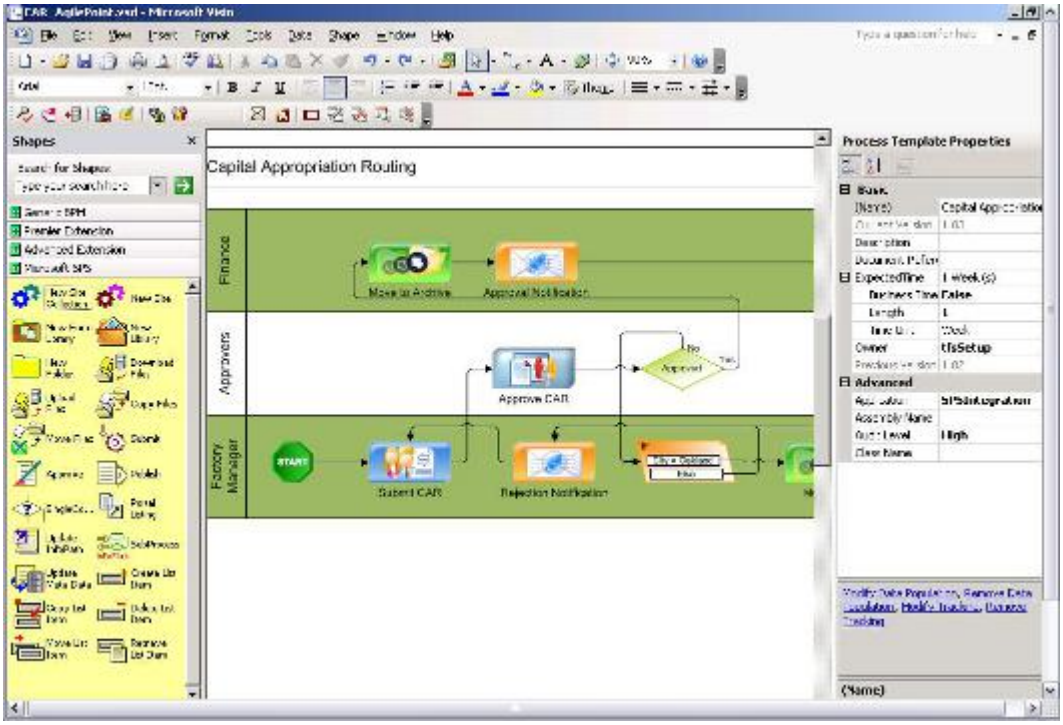
To contact AgilePoint Support, please submit a ticket on the AgilePoint Support Portal: http://support.agilepoint.com/SupportPortal/

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

AgilePoint Envision

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

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



Opening AgilePoint Envision

To open AgilePoint Envision:

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

AgileShapes

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

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

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

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

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

AgileWork - Common Setup

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

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

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

Common AgileWork Properties

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

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

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

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

Field Name	Definition
	Example: If the Length is set to 10, and the Time Unit is set to minutes, this indicates 10 minutes. For example, this is determined to determine the deferred time for an email, or to set a delay. Property Group: Basic
Time Unit	Definition: The type of time unit represented by the Time Span property. Allowed Values: • Second • Minute • Hour • Day • Week • Month Default Value: Minute Property Group: Basic

Work to Perform	Definition:
	Specifies the name of the task that appears in a participant's Task List.
	In most cases, for processes that use ASP.NET forms, this value also determines the file names for the .aspx form pages.
	For the Web Form AgileShape, this property does not determine the file names for the web form. Instead, use the Web Form URL Window.
	Allowed Values:
	The values for this property vary, depending on the type of process model you are using:
	• **Generic** - Does the following:
	  • Specifies the name that appears in the participant's Task List for this activity.
	  • If you create an ASP.NET project for this process in AgilePoint Developer, a

Field Name	Definition

	new .aspx page is created for each manual activity with the file name equivalent to the value of the Work to Perform property.
	• **SPList and SPDoc** - Specifies the name that appears in the participant's Task List for this activity.
	• **InfoPath** - Does the following:
	  • Specifies the name that appears in the participant's Task List for this activity.
	  • Specifies the view from the InfoPath form that is associated with the process model. These values are loaded from the InfoPath form.
	  It is possible to add a new work performer name. However, this is not recommended. A new name would indicate a different type of form, such as an ASP.NET form. This functionality is technically supported, but you would need to write code to implement it.
	• **AgileForms** - Specifies the name that appears in the participant's Task List for this activity.
	  The default value for this field is FormRender. It is recommended to change this value.
	Default Value:
	None, except for AgileForms process models.
	Property Group:
	Basic

Activity Entry Message (Email)	Definition: Specifies the name of an email template used to generate an automatic email notification when this AgileShape is entered at runtime. Allowed Values: • **An existing email template name** - Applies the selected, predefined template to the email. • **Add Mail Template** - Opens the Email Template Wizard, where you can add a new email template. • **None** - Specifies that no email is sent. Default Value: None

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

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

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

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

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

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

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

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

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

Field Name	Definition
	None Property Group: Lync
Configure Mobile View	Opens the Following Window: • Mobile View Configuration Window - Form Data Tab - Specifies the non-repeating data fields that appear in a task on a mobile device. • Mobile View Configuration Window - Repeating Data Tab - Specifies repeating data items to display on a mobile device. Repeating data groups are repeating parent XML nodes with child nodes. A common example would be a parent node called User, with child nodes called First Name, Last Name, Email Address, and so on. • Mobile View Configuration Window - Task Options Tab - Specifies the user input options for a task on a mobile device. Property Group: Mobile
ConfigureAttachments	Opens the Following Window: Configure Attachments Window Purpose of this Window: Specifies files to attach to an AgileShape from a process repository. Property Group: Process Repository
Reference URL	Definition: Associates a URL with an AgileShape or process model in the Process Viewer. Users can click the URL in the Process Viewer to access additional information or resources. **Note:** This functionality is not currently supported for AgileXRM. Allowed Values: Any URL. Default Value: None

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

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

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

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

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

BPMN Properties

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

Common AgileWork Tasks

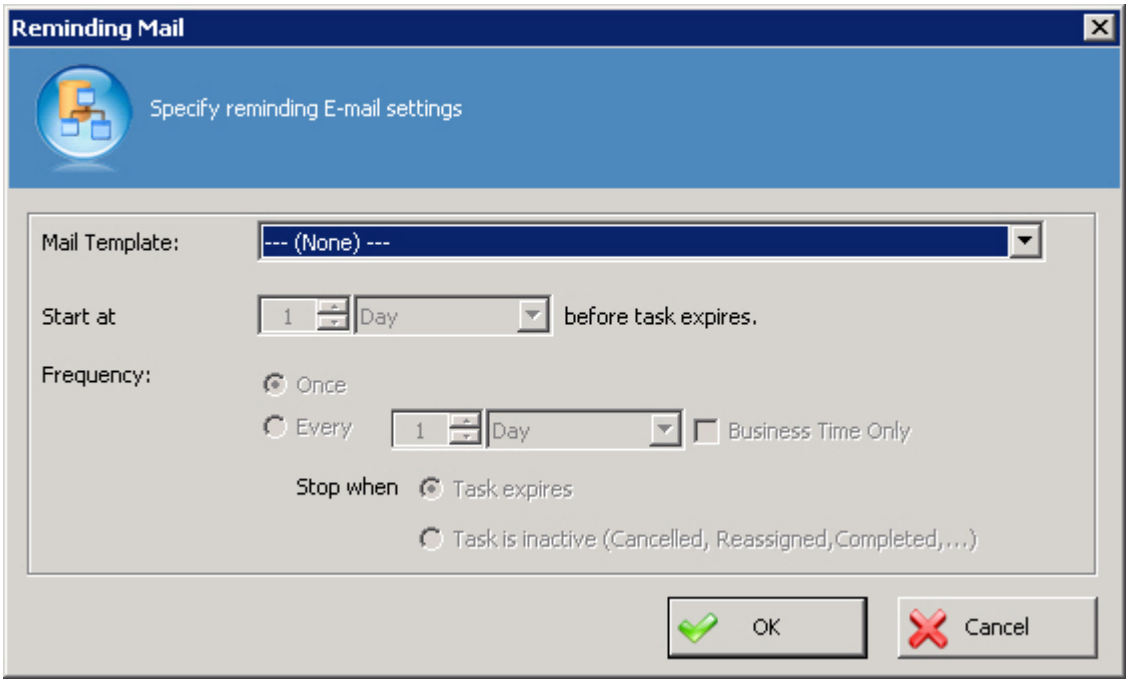
- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

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

Reminding Mail Window

Specifies the email template and schedule for a reminder email.



Navigation

1. In AgilePoint Envision, open a process template.

2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. On the **Reminder Email** field, click the **Ellipses** button.

Field Definitions

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

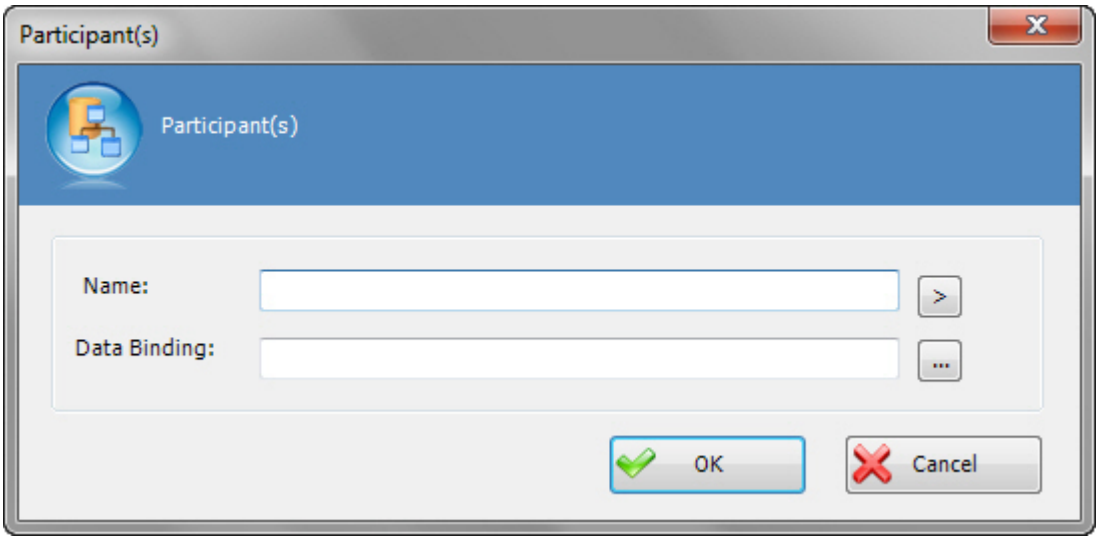
Field Name	Definition
Business Time Only	Definition: Determines whether the time span represents actual time, or business hours only. Allowed Values: • **True** - The time span represents a span of business hours only. For example, 5 days of business time might be equivalent to 7 days of actual time.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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Participants Window

Specifies the participants for an activity.



Navigation

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

Field Definitions

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

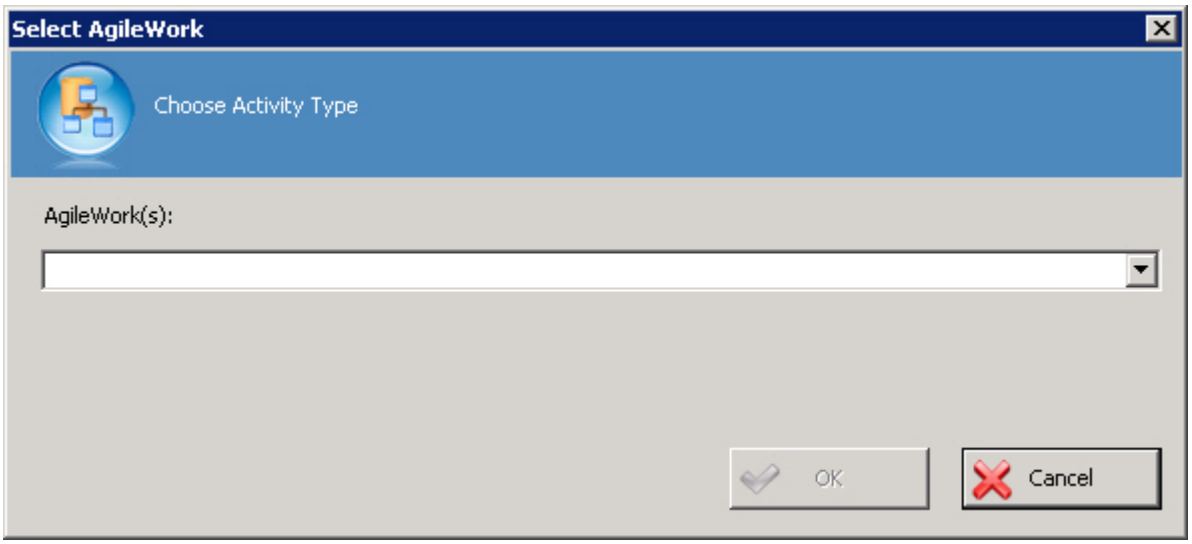
Field Name	Definition
	• **SharePoint Group** - For information, see Selecting a SharePoint Group Participant To specify multiple participants, separate the user names with a semicolon (;). Default Value: None Custom Attributes: Yes
Data Binding	Definition: Specifies a data field (such as a schema element or custom attribute) used to evaluate the condition. For more information, see Data Binding. **Note:** On the Participants window, this field is not available for Generic process models. Allowed Values: A valid data binding expression. This could be a custom attribute name or an xpath to a schema element. Default Value: None Custom Attributes: Yes

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Set Context Properties Window - AgileWork

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



Prerequisites

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

Navigation

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

Field Definitions

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

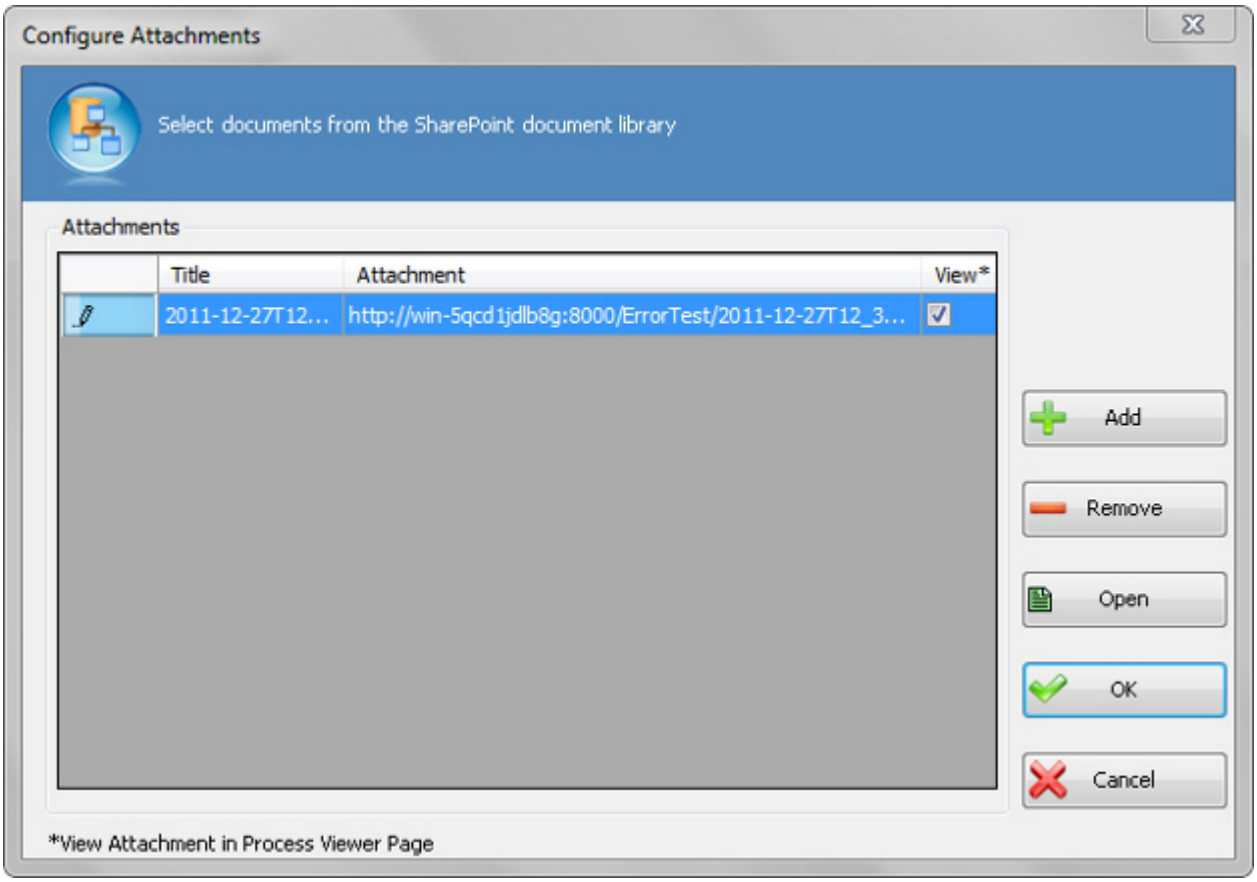
Common Configuration Tasks

- Data Binding

- Using Process Attributes

Configure Attachments Window

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



Prerequisites

- Set up an AgilePoint process repository in SharePoint.

Navigation

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

Field Definitions

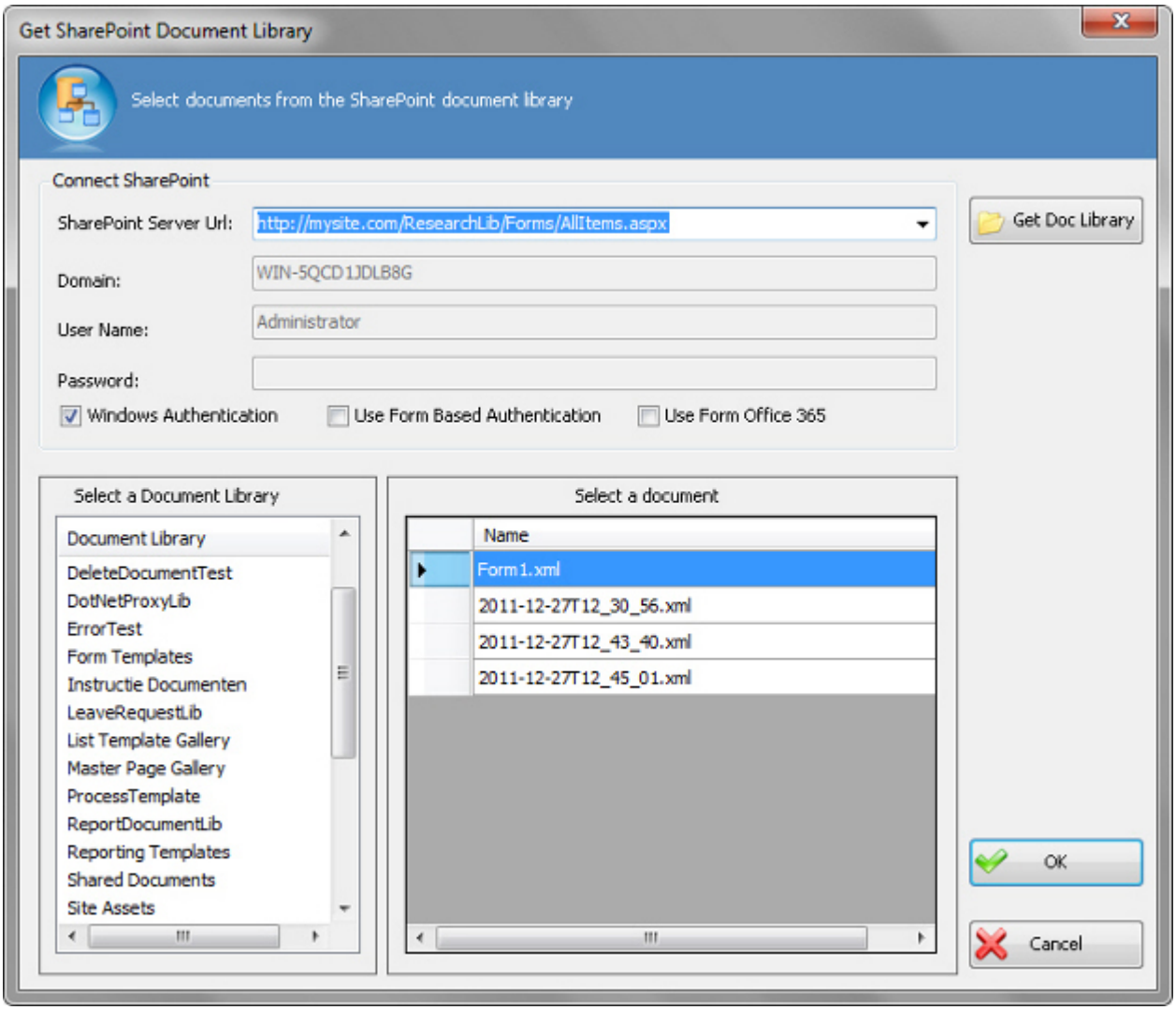
Field Name	Definition
Add	Opens the Following Window: Get SharePoint Document Library Window Purpose of this Window: Specifies files to attach to an AgileShape from a process repository.
Remove	Function: Removes a document from the Attachments list.
Open	Function: Opens a document in the Attachments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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Get SharePoint Document Library Window

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



Prerequisites

- Set up an AgilePoint process repository in SharePoint.

Navigation

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

Field Definitions

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

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

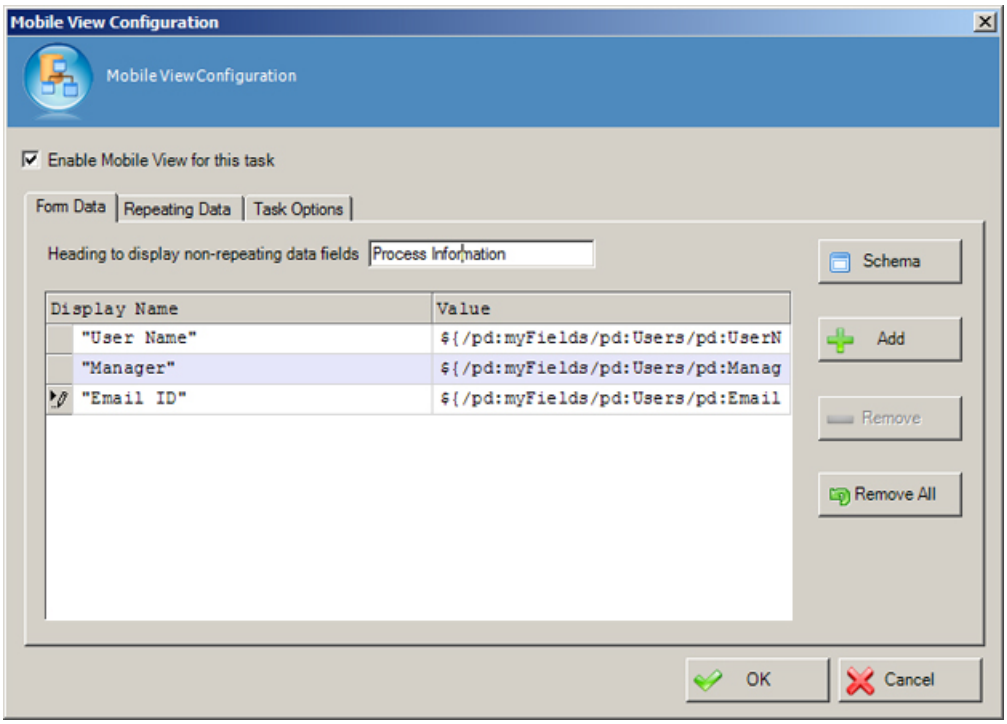
Field Name	Definition
	It is possible to use Office 365 and Forms authentication together. Default Value: Deselected
Document Library	Function: Displays a list of document libraries on the selected SharePoint site. Select a document library to display the list of stored documents.
Name	Function: Displays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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Mobile View Configuration Window - Form Data Tab

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



Prerequisites

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

Navigation

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

Field Definitions

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

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

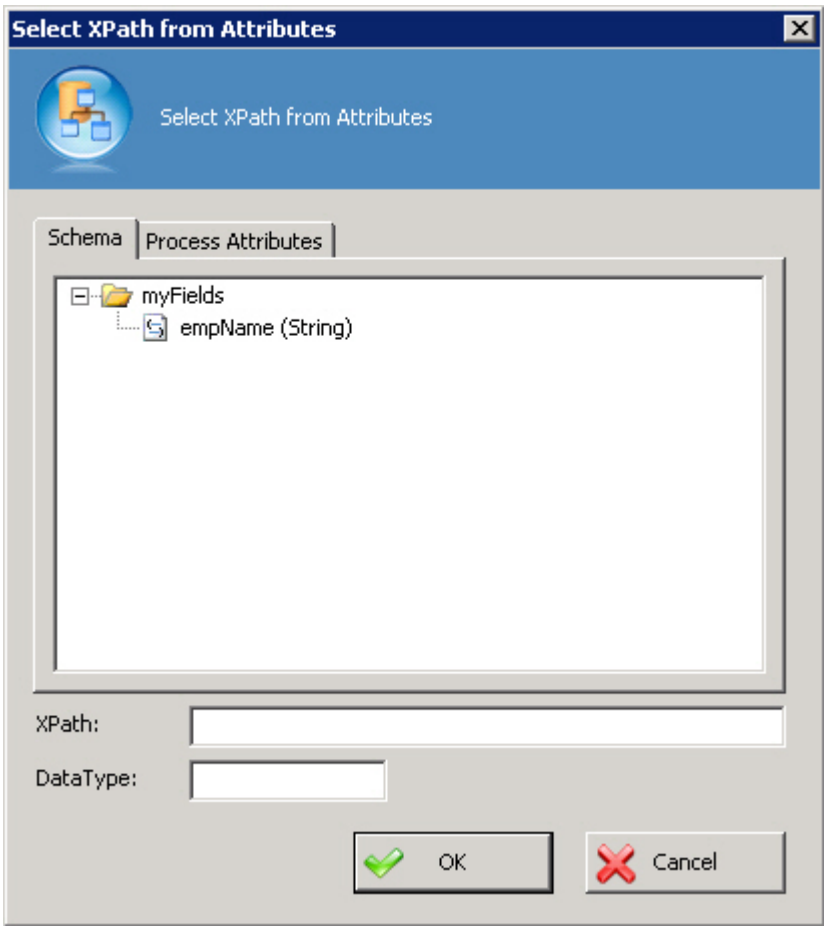
Field Name	Definition
	An Xpath or a custom attribute. Default Value: None Custom Attributes: Yes Example: In the following example, the display name is Participant, and the value is Lily Allen: • Participant: Lily Allen
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

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



Prerequisites

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

Navigation

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

Field Definitions

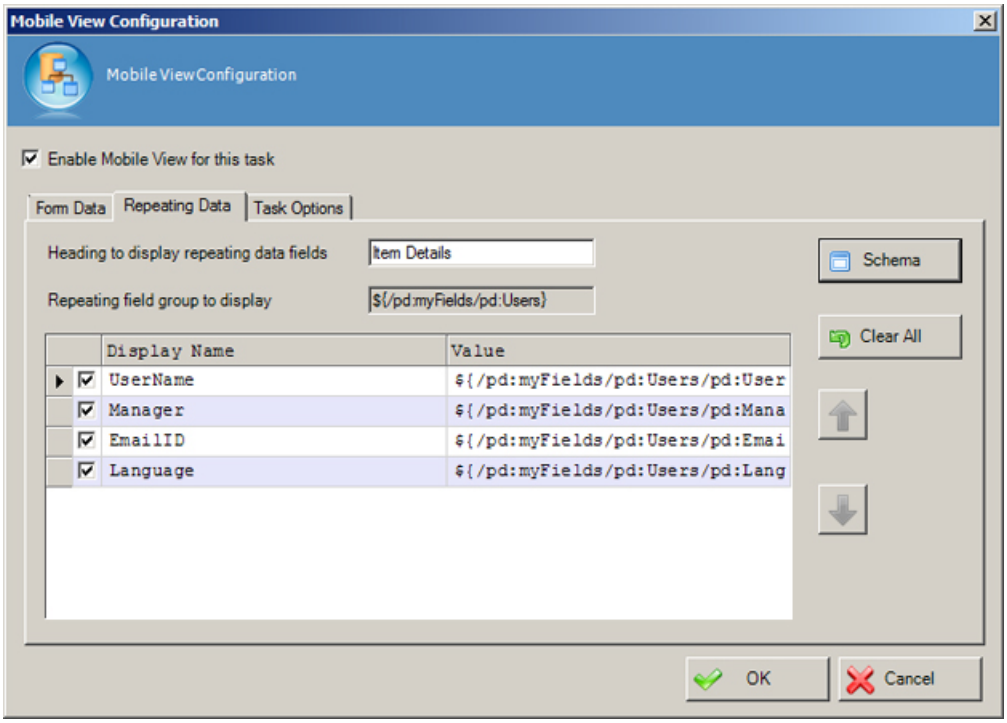
Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Mobile View Configuration Window - Repeating Data Tab

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



Prerequisites

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

Navigation

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

Field Definitions

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

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

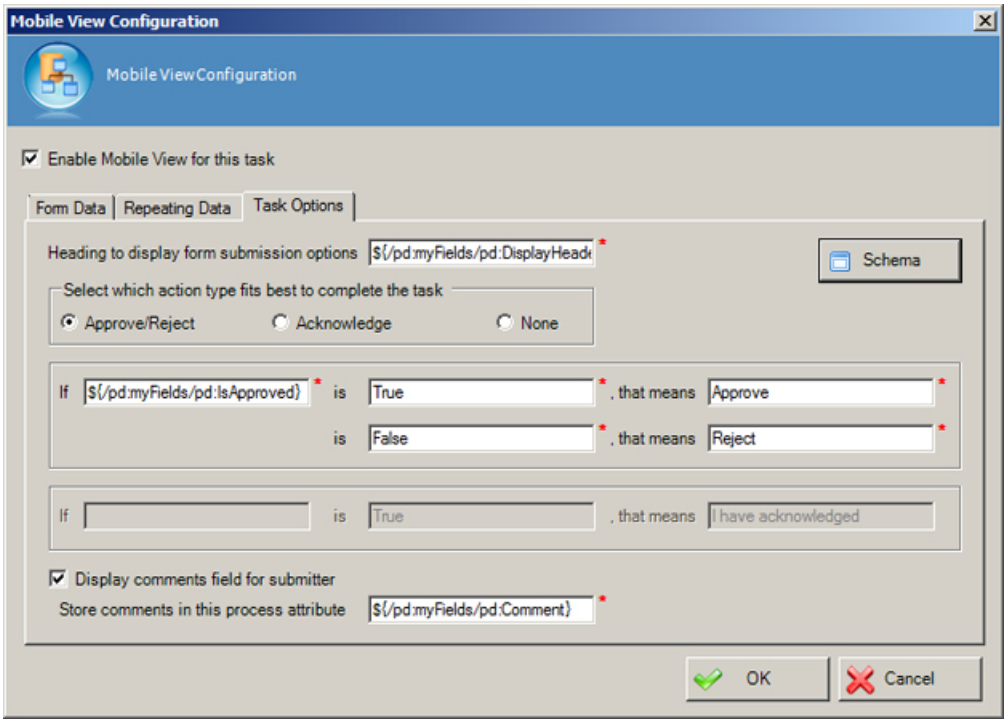
Field Name	Definition
Up Arrow	Function: Moves the selected field one row up in the list.
Down Arrow	Function: Moves the selected field one row down in the list.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Mobile View Configuration Window - Task Options Tab

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



Prerequisites

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

Navigation

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

Field Definitions

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

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

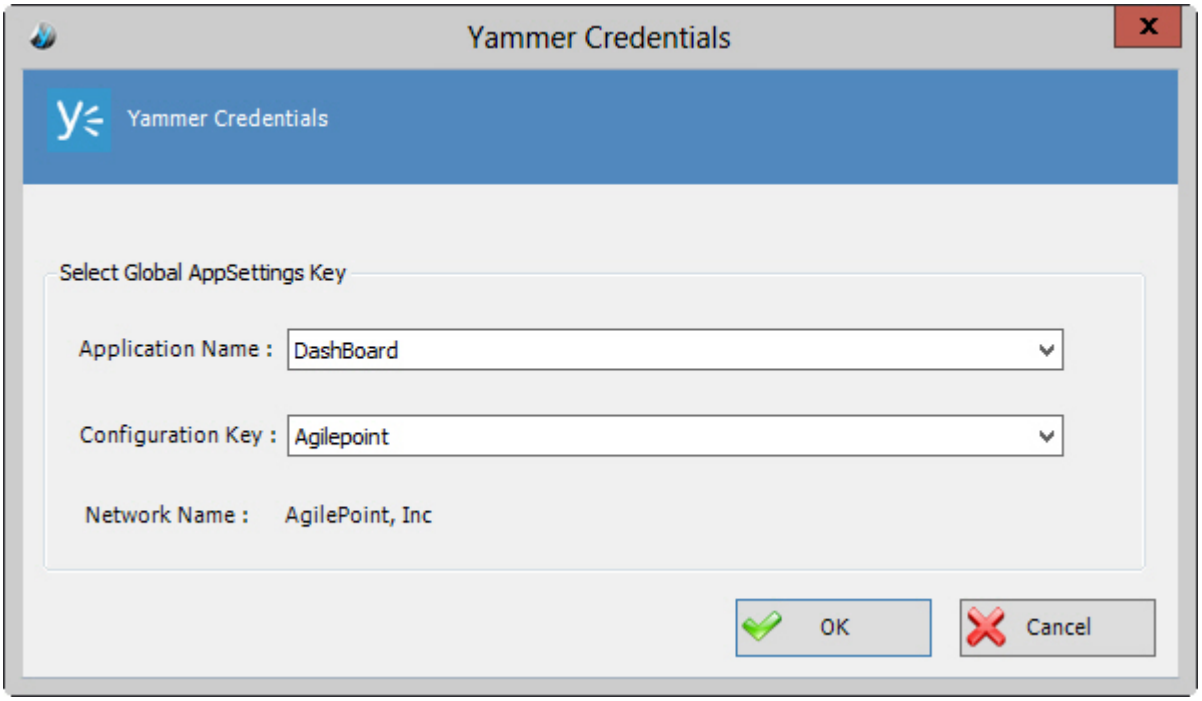
Field Name	Definition
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want.
Display comments field for submitter	Definition: Specifies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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Yammer Credentials Window

Specifies the unique identifiers for the Yammer application.



Prerequisites

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

Navigation

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

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

Field Definitions

Field Name	Definition
Access Token Name	Definition: Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces. Default Value: None Custom Attributes: No

Instructions

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

Associating a Form with an AgileWork

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

Navigation

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

Instructions

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

Field Name	Definition
Work to Perform	Definition: Specifies the name of the task that appears in a participant's Task List. In most cases, for processes that use ASP.NET forms, this value also determines the file names for the .aspx form pages.

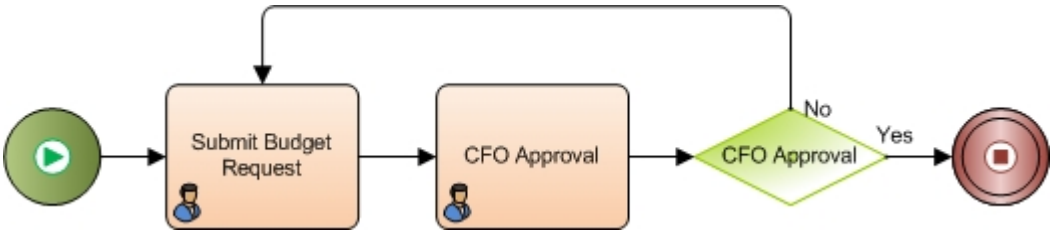
Field Name	Definition

	For the Web Form AgileShape, this property does not determine the file names for the web form. Instead, use the Web Form URL Window.
	
	Allowed Values:
	
	The values for this property vary, depending on the type of process model you are using:
	
	• **Generic** - Does the following:
	  • Specifies the name that appears in the participant's Task List for this activity.
	  • If you create an ASP.NET project for this process in AgilePoint Developer, a new .aspx page is created for each manual activity with the file name equivalent to the value of the Work to Perform property.
	• **SPList and SPDoc** - Specifies the name that appears in the participant's Task List for this activity.
	• **InfoPath** - Does the following:
	  • Specifies the name that appears in the participant's Task List for this activity.
	  • Specifies the view from the InfoPath form that is associated with the process model. These values are loaded from the InfoPath form.
	  It is possible to add a new work performer name. However, this is not recommended. A new name would indicate a different type of form, such as an ASP.NET form. This functionality is technically supported, but you would need to write code to implement it.
	• **AgileForms** - Specifies the name that appears in the participant's Task List for this activity.
	  The default value for this field is FormRender. It is recommended to change this value.
	
	Default Value:
	
	None, except for AgileForms process models.
	
	Property Group:
	
	Basic

Displaying a Task on a Mobile Device

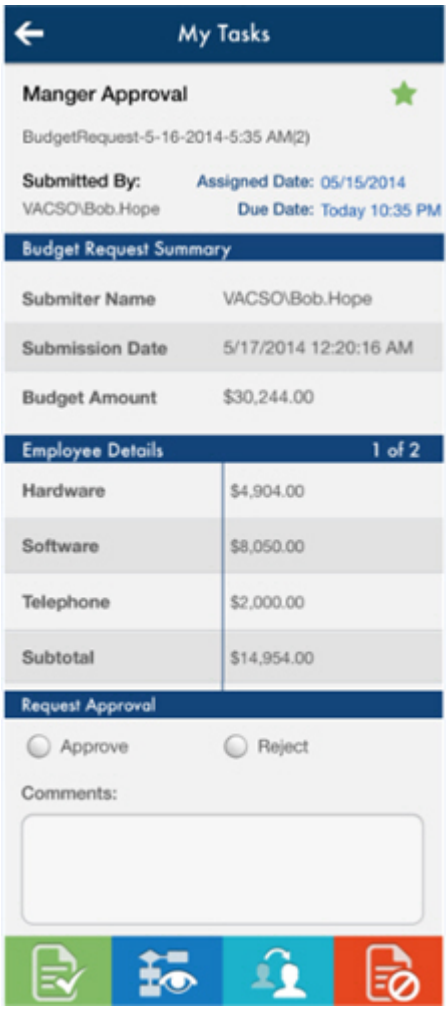
This topic provides an example of how to display a task on a mobile device using the Mobile View options. This example assumes you are using the AgilePoint mobile apps, but the same would work for any mobile app using the AgilePoint REST API.

Example Process: Budget Request



Example Mobile View: CFO Approval

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



Prerequisites

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

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

Navigation

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

Instructions

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

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

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

   Repeat this procedure for each of this following fields.

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

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

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

5. Click **Schema**.
6. On the **Select XPath from Attributes Window**, select **${Employee}**.
7. In the **Display Name** field, ensure the fields you want to display are selected.

   The following table shows the sample value for the following fields.

Display Name	Value
Software	${Software}
Hardware	${Hardware}
Telephone	${Telephone}
Subtotal	${Subtotal}

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

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

Adding Participants to an Activity

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

Navigation

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

Instructions

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

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

Field Name	Definition
	Custom Attributes: Yes

3. Click **OK**.

Selecting an AgilePoint User Participant

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

Navigation

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

Instructions

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

Selecting an AgilePoint Role Participant

Topic paragraph

Navigation

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

Instructions

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

Selecting an AgilePoint Group Participant

Topic paragraph

Navigation

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

Instructions

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

Selecting an Active Directory Group Participant

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

Navigation

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

Instructions

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

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

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

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

Selecting a SharePoint Group Participant

Topic paragraph

Navigation

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

Instructions

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

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

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

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

Attaching Files to Activities at Runtime

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

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

Prerequisites

- Set up an AgilePoint process repository in SharePoint.

Navigation

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

Instructions

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

Creating a Reminder Email Notification

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

Navigation

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

Instructions

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

Troubleshooting

The following topics provide troubleshooting information for this AgileShape.

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

Symptoms

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

Cause

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

Resolution

Set the Reuse Participant property to False.

AgilePart - Common Setup

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

Technically, AgilePart refers to 2 .NET source code templates from which all automatic activities are derived in the AgilePoint system: standard AgilePart, and Queue Based AgilePart. There are some technical differences between these 2 types of AgileParts.

The main difference concerning AgilePoint Envision users is that Queue Based AgileParts include several properties that standard AgileParts don't include. Otherwise, all AgileParts have the same basic functionality. This section describes the design time properties, configuration settings, and instructions common to all AgileParts. Properties that are unique to Queue Base AgileParts are indicated.

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

Common AgilePart Properties

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

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

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

Field Name	Definition

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

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

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

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

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

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

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

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

BPMN Properties

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

Common AgilePart Tasks

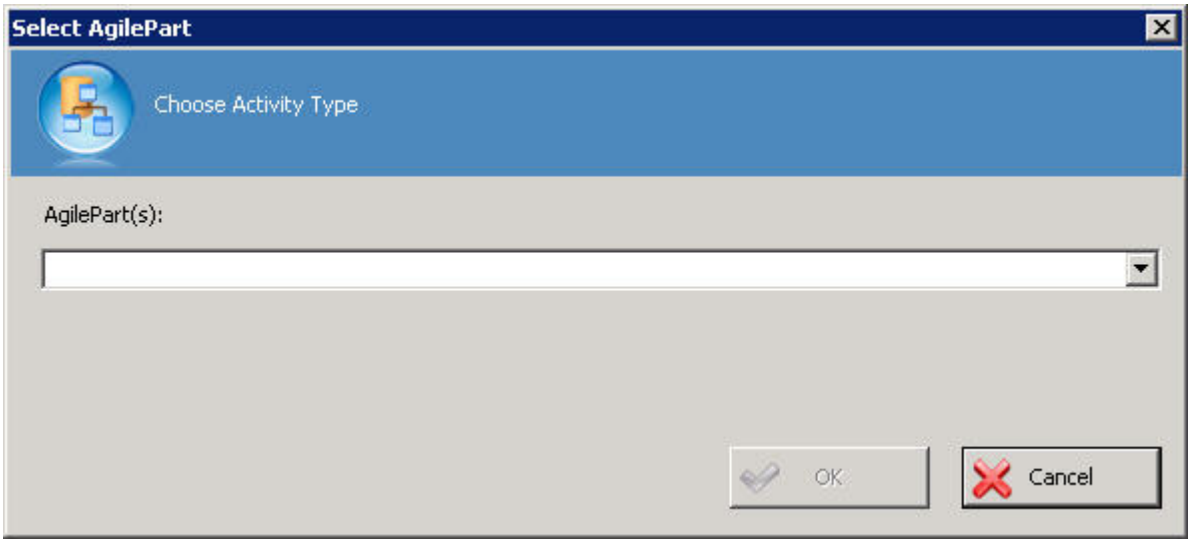
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

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

Set Context Properties Window - AgilePart

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



Prerequisites

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

Navigation

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

3. On the **Generic BPM** stencil, drag the **AgilePart** AgileShape, and drop it on the process template.

Field Definitions

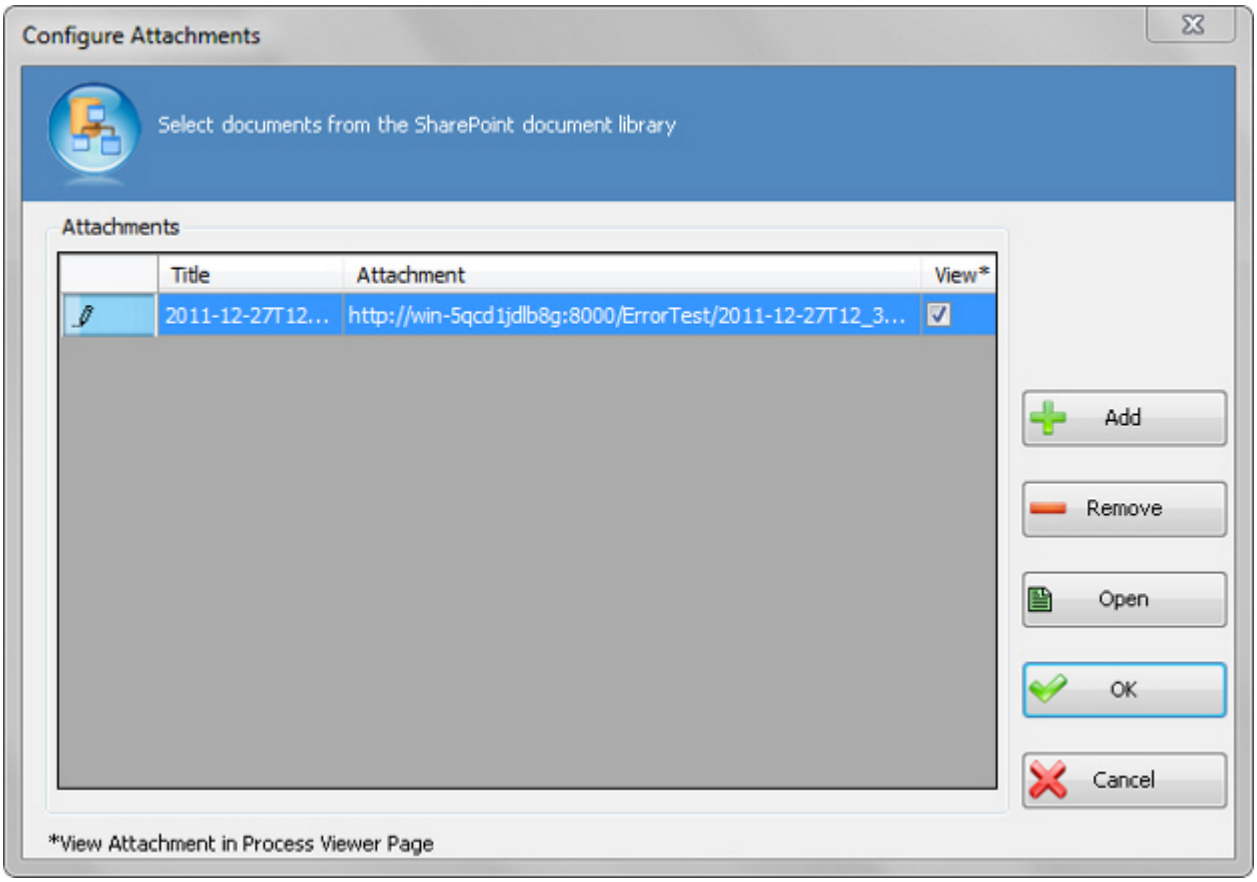
Field Name	Definition
AgilePart(s)	Definition: Specifies the custom AgilePart to associate with the generic AgilePart AgileShape in Envision. Allowed Values: The name of a custom AgilePart that is registered in Envision. Default Value: None

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Configure Attachments Window

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



Prerequisites

- Set up an AgilePoint process repository in SharePoint.

Navigation

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

Field Definitions

Field Name	Definition
Add	Opens the Following Window: Get SharePoint Document Library Window Purpose of this Window:

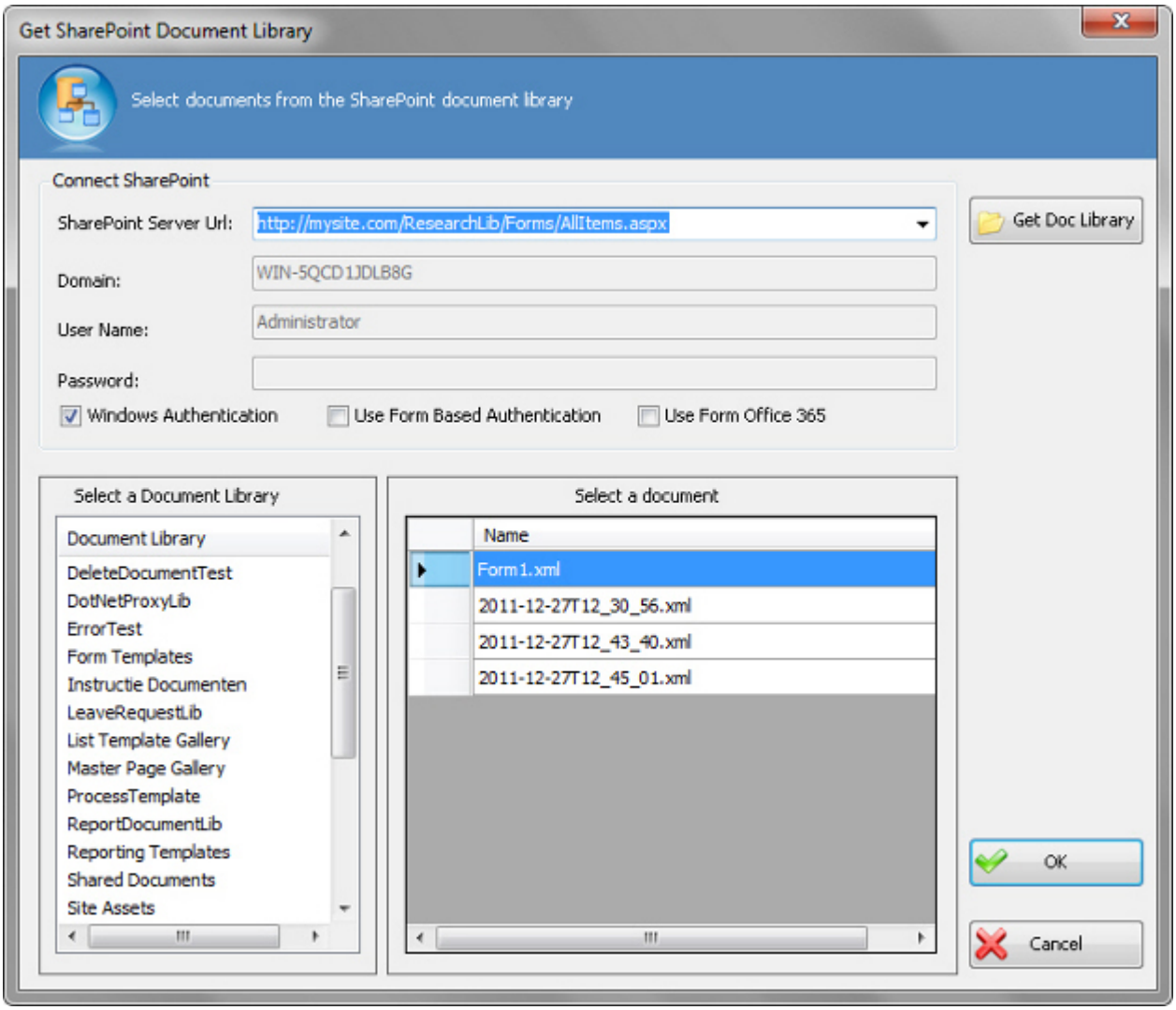
Field Name	Definition
	Specifies files to attach to an AgileShape from a process repository.
Remove	Function: Removes a document from the Attachments list.
Open	Function: Opens a document in the Attachments list for preview.
Other Predecessor Activities	Definition: Specifies whether to display a link to the attached file in the AgilePoint Process Viewer. Allowed Values: • **Selected** - The link is displayed in the process viewer. • **Deselected** - The link is not displayed in the process viewer. Default Value: Selected

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Get SharePoint Document Library Window

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



Prerequisites

- Set up an AgilePoint process repository in SharePoint.

Navigation

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

Field Definitions

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

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

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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

Attaching Files to Activities at Runtime

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

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

Prerequisites

- Set up an AgilePoint process repository in SharePoint.

Navigation

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

Instructions

1. On the Configure Attachments Window, click **Add**.

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

Troubleshooting

The following topics provide troubleshooting information for this AgileShape.

Error Using CreateWorkItem from AgilePart

Symptoms

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

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

Cause

CreateWorkItem API must be called from a manual activity.

Resolution

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

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

Generic BPM

This section describes the AgileShapes in the Generic BPM stencil.

AgilePart Shape

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



Prerequisites

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

Navigation

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

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

AgileWork Shape

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

associate with the custom AgilePart or AgileWork. These AgileShapes include all of the core properties of AgileParts and AgileWorks. They can also include additional custom properties.



Prerequisites

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

Navigation

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

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgileWork Properties

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

BPMN Properties

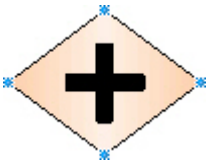
Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

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

And

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



Navigation

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

Properties for This AgileShape

Field Name	Definition
Email	Definition: The name of an email template used to generate the email notification at runtime. Allowed Values: • **An existing email template name** - Applies the selected, predefined template to the email. • **Add Mail Template** - Opens the Email Template Wizard, where you can add a new email template. • **None** - Specifies that no email is sent. Default Value: None
Dynamic	Definition: Specifies which direct predecessor AgileShapes to wait for before entering the AgileShape at runtime. Allowed Values:

Field Name	Definition
	• **True** - Specifies that the AgileShape is entered only after all of the AgileShape's direct predecessors are exited that are not bypassed because of the process's logic. If any of the direct predecessors are bypassed, they are ignored by the WaitAllIncoming property. This prevents the process from becoming delayed indefinitely by an AgileShape that cannot be entered. This setting is the logically the same as setting the Wait All Incoming property for an AgileShape to True (Dynamic). • **False** - Specifies that the AgileShape is entered only after all of the AgileShape's direct predecessors are exited. **Note:** If any of the direct predecessors are un-enterable, this AgileShape will never be entered, and the process instance may be permanently delayed at this AgileShape. This setting is the logically the same as having an And AgileShape with Dynamic set to True (Static). Default Value: True

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

Tasks for This AgileShape

- Converging Branches of a Process Flow

Instructions

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

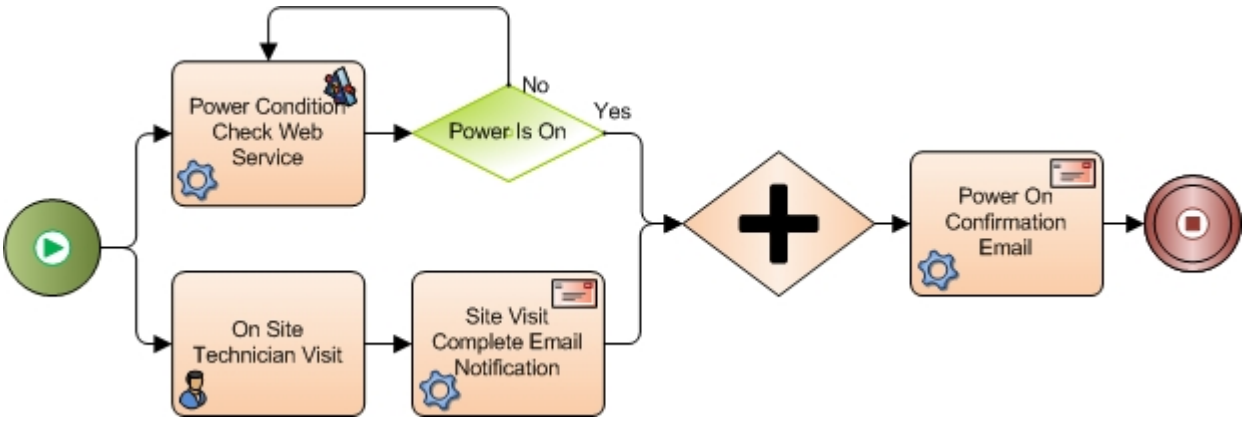
Converging Branches of a Process Flow

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

Instructional Goals

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

Example Process: Respond to Utility Customer Power Outage Report



Problem Statement

Fix a power outage for a utility company consumer.

Business Requirements

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

Navigation

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

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

Instructions

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

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

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

Email

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

For more information, see Messages and Notifications.



Navigation

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

Properties for This AgilePart

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

Field Name	Definition
	Default Value: None

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

Manual

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

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



Navigation

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

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgileWork Properties

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

BPMN Properties

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

Common AgileWork Tasks

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

Manual With Timeout

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

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



Navigation

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

Properties for This AgileWork

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

Common AgileWork Properties

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

BPMN Properties

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

Common AgileWork Tasks

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

Tasks for This AgileShape

- Setting Time Limits using Manual with Timeout

Instructions

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

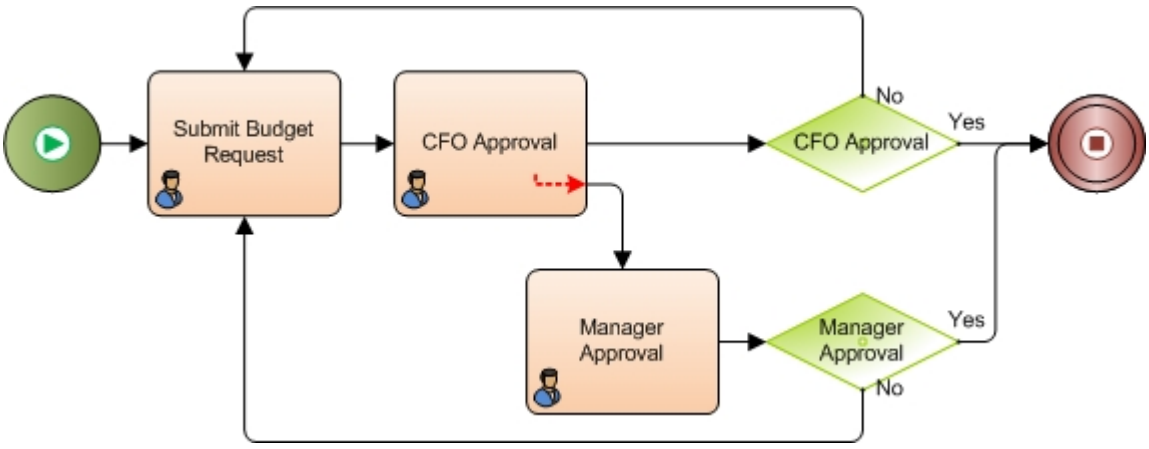
Setting Time Limits using Manual with Timeout

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

Instructional Goals

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

Example Process: Respond to a Budget Request



Problem Statement

Submit and approve a budget request.

Business Requirements

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

Navigation

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

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

Instructions

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

Field Name	Value
Business Time	Yes
Length	2
Time Unit	Day

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

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

Multiple Condition

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



Navigation

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

Properties for This AgileShape

Field Name	Definition
Property Binding	Opens the Following Window: New Condition Activity Window - Multiple Condition AgileShape

Field Name	Definition
	Purpose of this Window: Associates a set of logical rules with the Multiple Condition AgileShape.

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

Tasks for This AgileShape

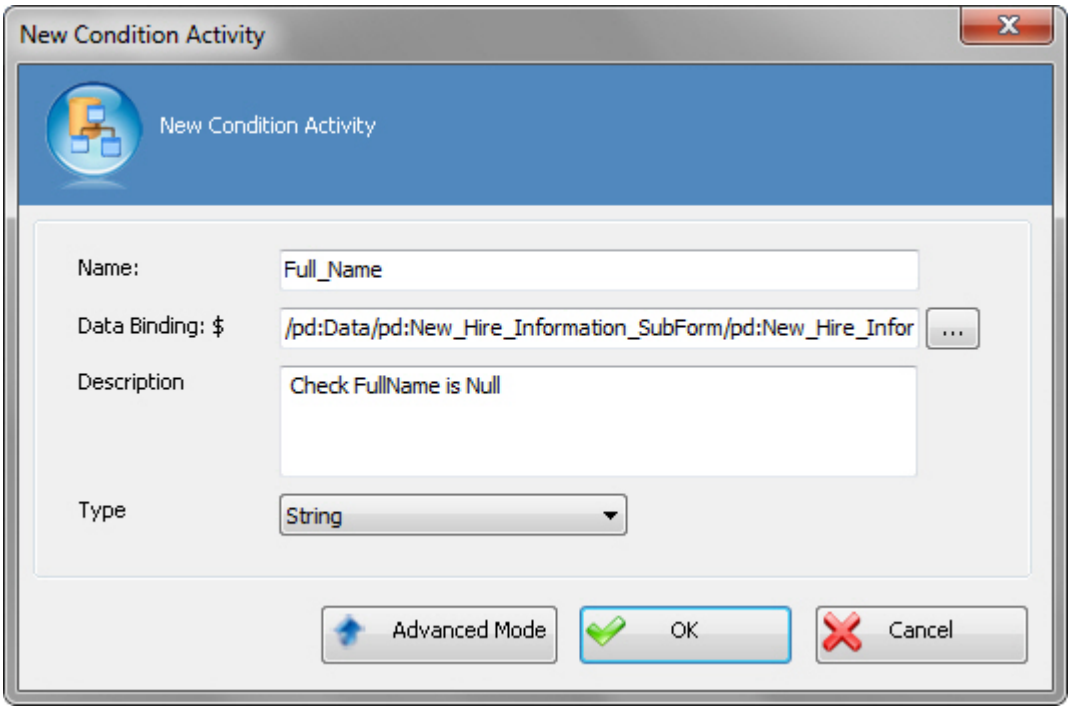
- Evaluating a Rule with Multiple Conditions
- Using the Multiple Condition AgileShape to Check if a Value is Null

Configuration Windows

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

New Condition Activity Window - Multiple Condition AgileShape

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



Navigation

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

Field Definitions

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

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

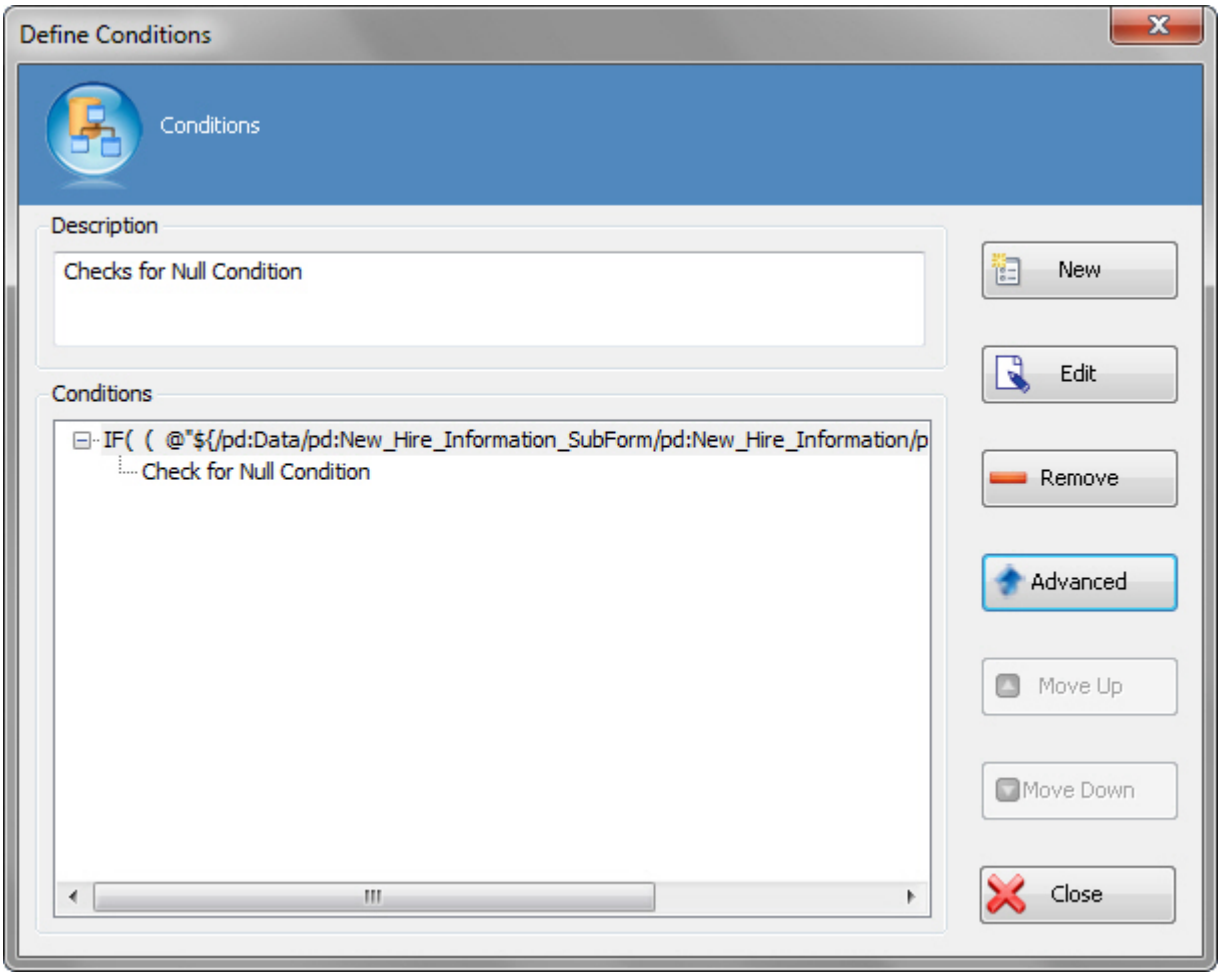
Field Name	Definition
	No
Advanced Mode	Opens the Following Window: Define Conditions Window Purpose of this Window: Allows you to add, edit, and manage conditions. You can specify a list of conditions using a complex expressions for each condition.
OK	Function: Completes the task. Opens the Condition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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Define Conditions Window

Allows you to add, edit, and manage conditions. You can specify a list of conditions using a complex expressions for each condition. You can define expressions for complex branching conditions. Using the Advanced option, you can manually define multiple conditions with complex expressions.



Navigation

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

Field Definitions

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

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

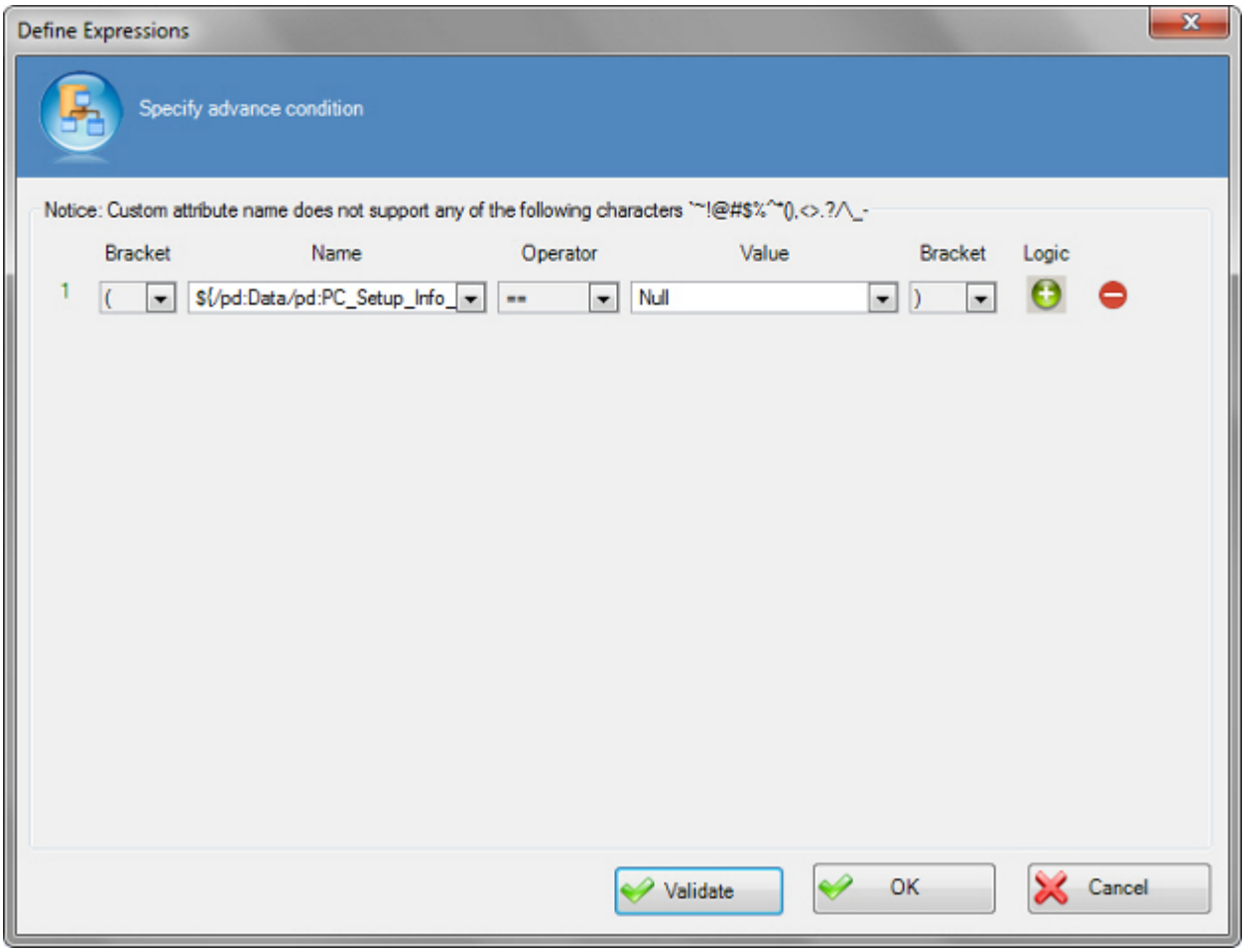
Field Name	Definition
	The Edit button is unavailable if you have not specified any expression values using the New button.
Remove	Function: Removes the selected condition from the Conditions list.
Advanced	Function: Opens a window with the Visual Studio editor where you can type an expression. The editor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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Define Expressions Window

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



Navigation

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

Field Definitions

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

<table>
<tr><th>Field Name</th><th>Definition</th></tr>
<tr><td></td><td>Allowed Values:
{ .. }
{{ .. }}
{{{ .. }}}
{{{{ .. }}}}
{{{{{ .. }}}}}
{{{{{{ .. }}}}}}
Default Value:
None
Custom Attributes:
No</td></tr>
<tr><td>Name</td><td>Definition:
Specifies the name of the data variable.
Allowed Values:
A text string that can contain spaces.
A list of predetermined custom attributes.
Default Value:
None
Custom Attributes:
Yes</td></tr>
<tr><td>Operator</td><td>Definition:
Displays a list of logical operators for the data types that can be used to define a expression.
Allowed Values:<table><tr><th>Data Type</th><th>Expression Operators</th></tr><tr><td>String</td><td>, ==, StartsWith, EndsWith, Contains, !=, Does Not Contain Data, Contains Data</td></tr><tr><td>Bool</td><td>==</td></tr><tr><td>DateTime</td><td>, ==, >, >= , <, <=, !=</td></tr><tr><td>Number</td><td>, ==, >, >=, <, <=, !=</td></tr></table></td></tr>
</table>

Field Name	Definition
	Default Value: None
Value	Definition: The value for the data variable. Allowed Values: • A number or a text string that can contain spaces. • A list of predetermined custom attributes. Default Value: None Custom Attributes: Yes

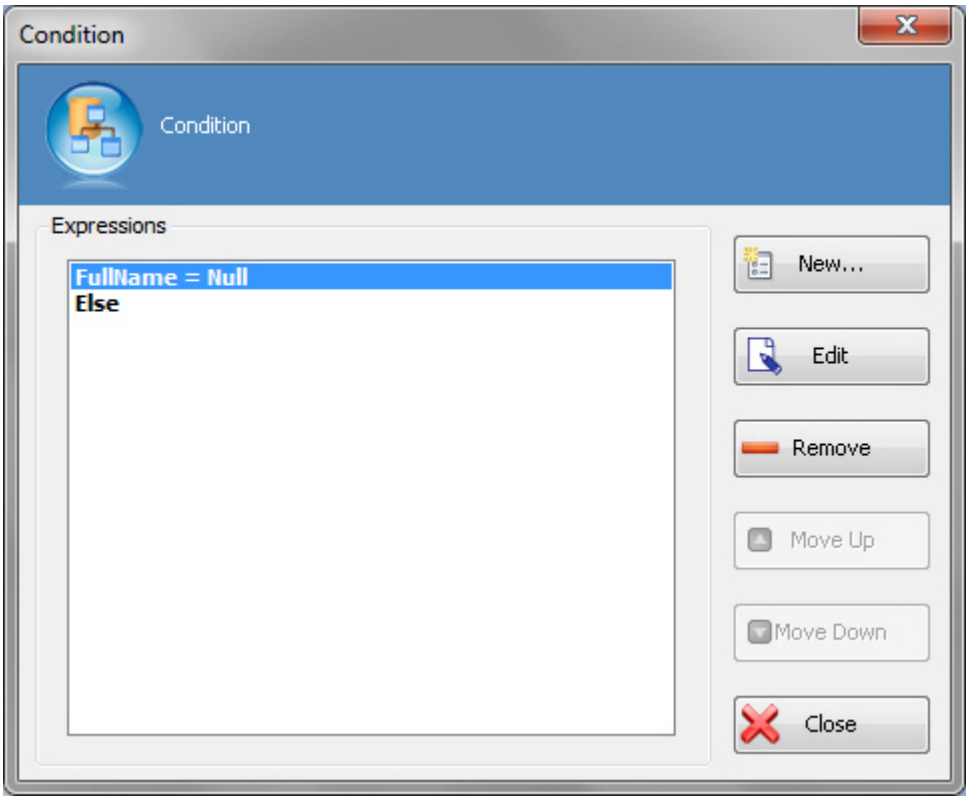
Logic	Function:
	• **Plus** button - Specifies another expression that can be joined to previous expression using the logical AND or OR operator.
	  • **And** - Specifies the logical AND operator.
	  • **Or** - Specifies the logical OR operator.
	• **Minus** button - Removes the expression.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Condition Window

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



Navigation

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

Field Definitions

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

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

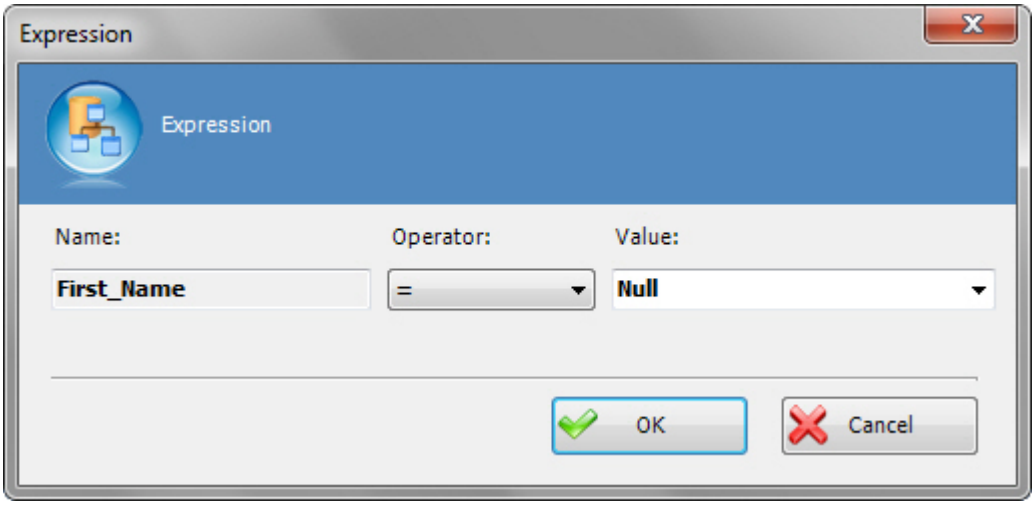
Common Configuration Tasks

- Data Binding
- Using Process Attributes

Expression Window

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

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



Navigation

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

Field Definitions

<table>
<tr><th>Field Name</th><th>Definition</th></tr>
<tr><td>Name</td><td>Definition:
Specifies the name of the data variable.
Allowed Values:
A text string that can contain spaces.
Default Value:
None
Custom Attributes:
No</td></tr>
<tr><td>Operator</td><td>Definition:
Displays a list of logical operators for the data types that can be used to define a expression.
Allowed Values:
<table><tr><th>Data Type</th><th>Expression Operators</th></tr><tr><td>String</td><td>=, =(IgnoreCase), StartsWith, EndsWith, Contains</td></tr><tr><td>DateTime</td><td>=, Later Than, Earlier Than, !=</td></tr><tr><td>Integer</td><td>=, >, >=, <, <=, !=</td></tr><tr><td>Double</td><td>=, >, >=, <, <=, !=</td></tr><tr><td>Short</td><td>=, >, >=, <, <=, !=</td></tr></table></td></tr>
</table>

<table>
<tr><th>Field Name</th><th>Definition</th></tr>
<tr><td></td><td>
<table>
<tr><th>Data Type</th><th>Expression Operators</th></tr>
<tr><td>Float</td><td>=, >, >=, <, <=, !=</td></tr>
<tr><td>Decimal</td><td>=, >, >=, <, <=, !=</td></tr>
</table>
<u>Default Value:</u>
None</td></tr>
<tr><td>Value</td><td><u>Definition:</u>
The value for the data variable.
<u>Allowed Values:</u>
A number or a text string that can contain spaces.
<u>Default Value:</u>
None
<u>Custom Attributes:</u>
No</td></tr>
</table>

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

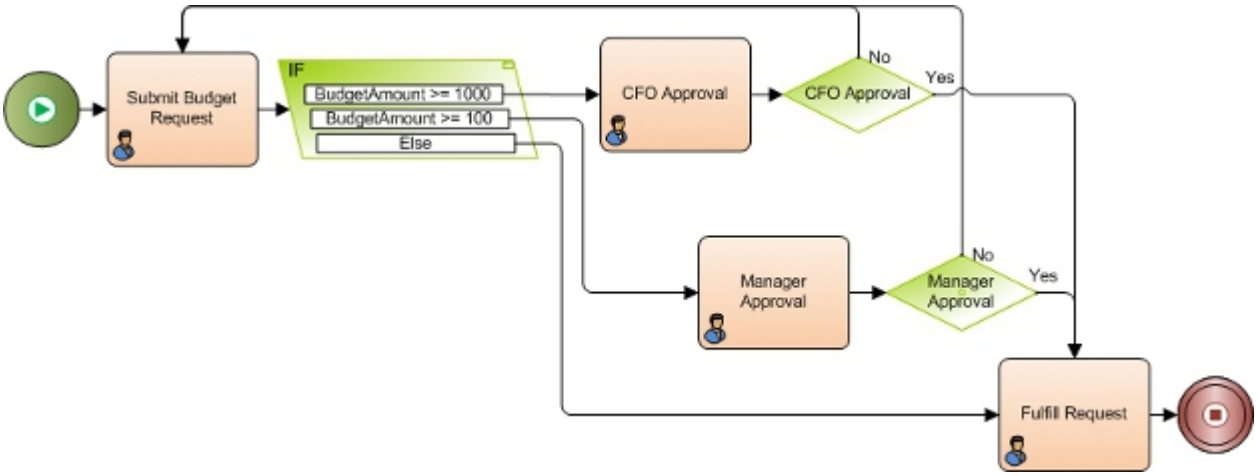
Evaluating a Rule with Multiple Conditions

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

Instructional Goals

- Demonstrate how to route a process based on a logical rule with multiple conditions using theMultiple Condition AgileShape.

Example Process: Budget Request and Fulfillment



Problem Statement

Submit and approve a budget request.

Business Requirements

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

Navigation

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

Instructions

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

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

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

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

Prerequisites

- The Multiple Condition AgileShape must use simple mode.

Navigation

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

Instructions

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

   <NULL>

Example

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

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

More Information

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

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

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

Prerequisites

- The Multiple Condition AgileShape must use simple mode.

Navigation

1. In AgilePoint Envision, open a process template.

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

Instructions

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

      The **Create or Update Custom Attributes** window appears.
   d. Click **Add**, and then select the newly added row to make the **Schema** button available for use.
   e. Then, click **Schema**.

      The **Select XPath from Attributes** window appears.
      a. Click the **Process Attributes** tab.
      b. Select the **Empty** attribute, and then click **OK** to close the **Select XPath from Attributes** window.
   f. On the **Create or Update Custom Attributes** window, in the **Expression** column for the **Empty** attribute, enter **""**.
   g. Click **OK** to close the **Create or Update Custom Attributes** window.
3. Add a **Multiple Condition** AgileShape to your process model. Do the following:
   a. On the **New Condition Activity** window, click **Advanced Mode**.

      The **Define Conditions** window appears.
   b. Click **New**. The **Define Expressions** window appears.
      a. Enter a **Name** and **Operator** for the condition. For example, empName and == (String comparison operator).
      b. In the **Value** list, select **<XML Schema>**.
      c. Click **OK** to close the **Define Expressions** window.
   c. On the **Define Conditions** window, in the **Description** box, type a description for the condition, and then click **Close**.

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

More Information

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

Troubleshooting

The following topics provide troubleshooting information for this AgileShape.

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

Symptoms

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

Cause

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

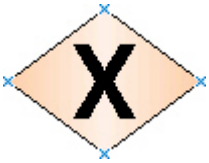
Resolution

To fix this issue:

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

Or

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



Navigation

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

Properties for This AgilePart

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

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

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

Tasks for This AgileShape

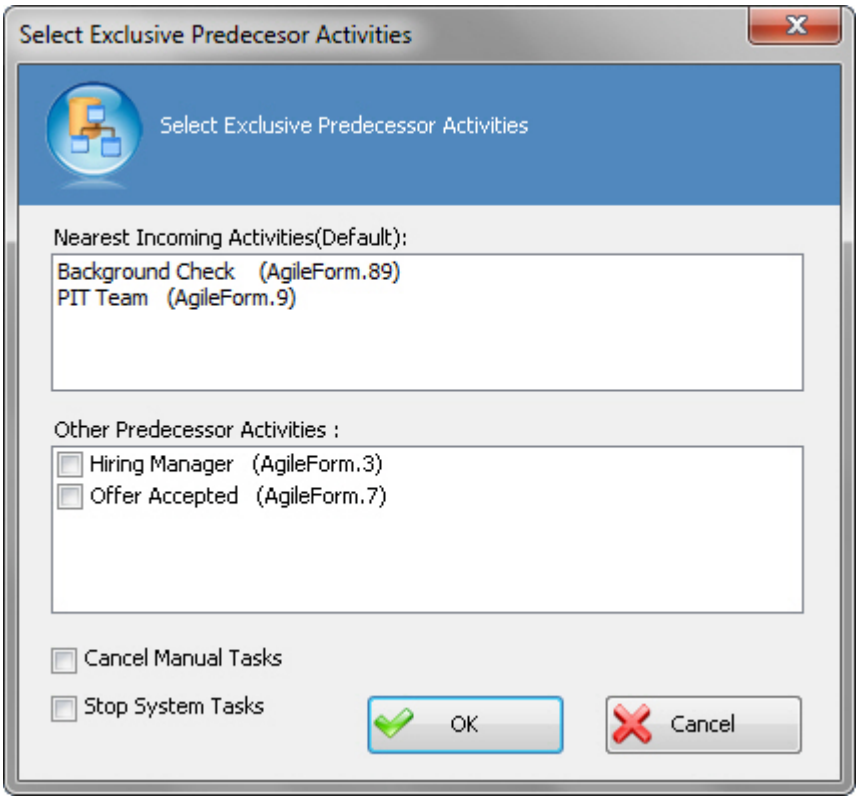
- Canceling Activities Using the Or AgileShape

Configuration Windows

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

Select Exclusive Predecessor Activities Window

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



Navigation

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

Field Definitions

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

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

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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

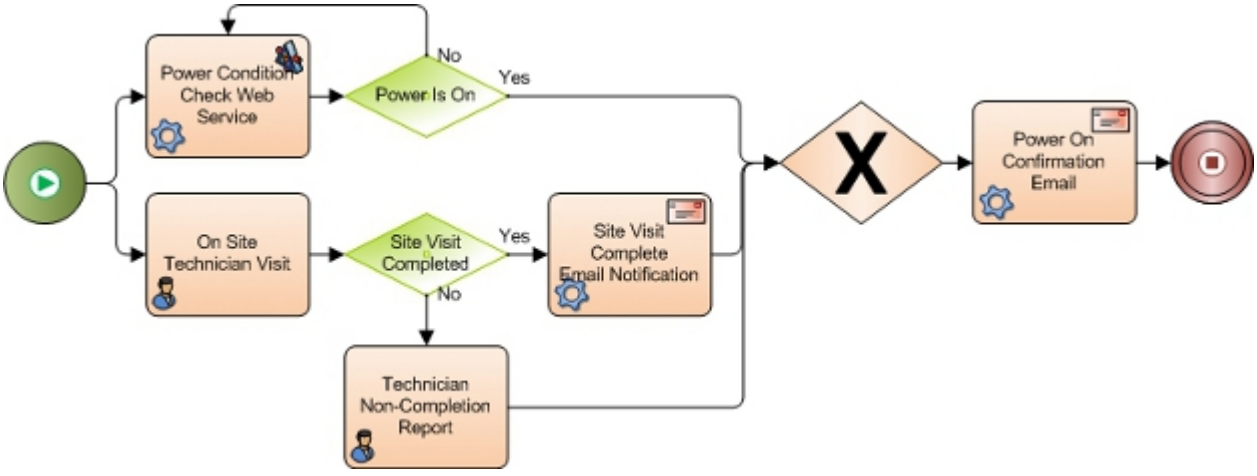
Canceling Activities Using the Or AgileShape

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

Instructional Goals

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

Example Process: Respond to Utility Customer Power Outage Report



Problem Statement

Fix a power outage for a utility company consumer.

Business Requirements

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

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

Navigation

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

Instructions

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

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

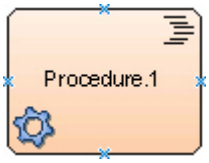
   In this example, if Technician Non-Completion Report is in progress when Power Condition Check Web Service responds Yes, Technician Non-Completion Report is cancelled.
3. In the **Other Predecessor Activities** list, select **On Site Technician Visit**.

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

Procedure

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

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



Good to Know

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

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

Navigation

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

Properties for This AgileShape

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

Field Name	Definition
	Default Value: False

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

Procedure With Timeout

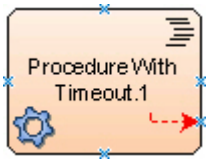
An AgilePart that enables to impose a time-constraint on the processing of a procedural activity. The AgileShape is similar to the Procedure AgileShape with an additional feature that allows to process another task when a procedural activity is not completed within the allotted time slot.

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

Good to Know

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

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



Navigation

1. In AgilePoint Envision, open a process template.

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

Properties for This AgileShape

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

Field Name	Definition
	Property Group: Email Notification

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

Single Condition

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



Navigation

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

Properties for This AgileShape

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

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

Tasks for This AgileShape

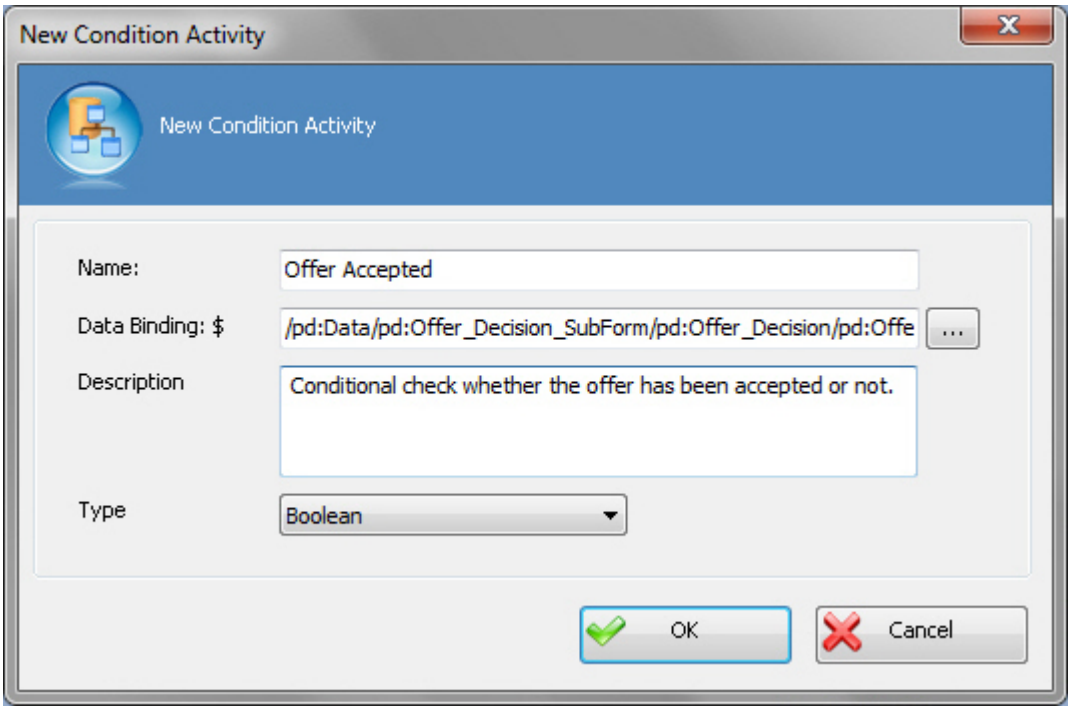
- Evaluating a Single Boolean Condition

Configuration Windows

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

New Condition Activity Window - Single Condition AgileShape

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



Navigation

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

Field Definitions

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

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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

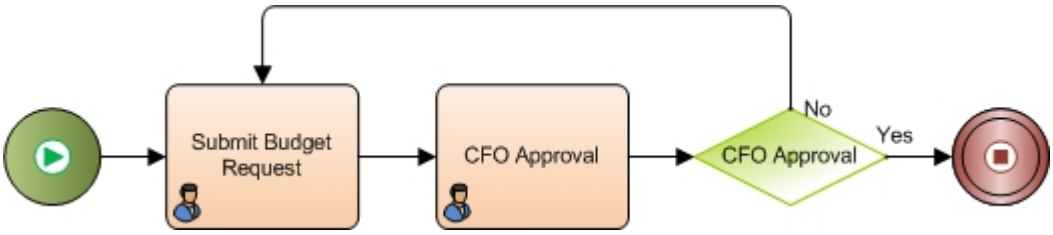
Evaluating a Single Boolean Condition

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

Instructional Goals

- Demonstrate how to route a process based on a Boolean condition using theSingle Condition AgileShape.

Example Process: Simple Budget Request



Problem Statement

Submit and approve a budget request.

Business Requirements

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

Navigation

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

Instructions

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

Troubleshooting

The following topics provide troubleshooting information for this AgileShape.

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

Symptoms

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

Cause

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

Details

To fix this issue:

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

Start

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



Good to Know

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

Navigation

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

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

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

Tasks for This AgileShape

- Creating a Process Model

Instructions

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

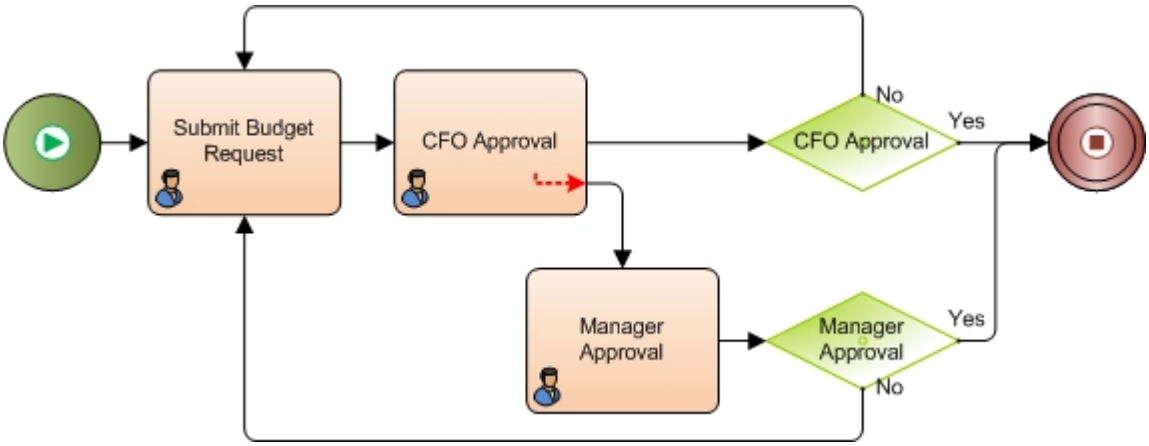
Creating a Process Model

To create a process model, do the following.

Instructions

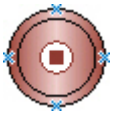
1. In AgilePoint Envision, open a process template.
2. Navigate to the **Generic BPM** stencil.
3. On the **Generic BPM** stencil, drag the **Start** AgileShape, and drop it on the process template.
4. On the **Generic BPM** stencil, drag the **Stop** AgileShape, and drop it on the process template.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

Example Process



Stop

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



Good to Know

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

Navigation

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

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

Tasks for This AgileShape

- Creating a Process Model

Instructions

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

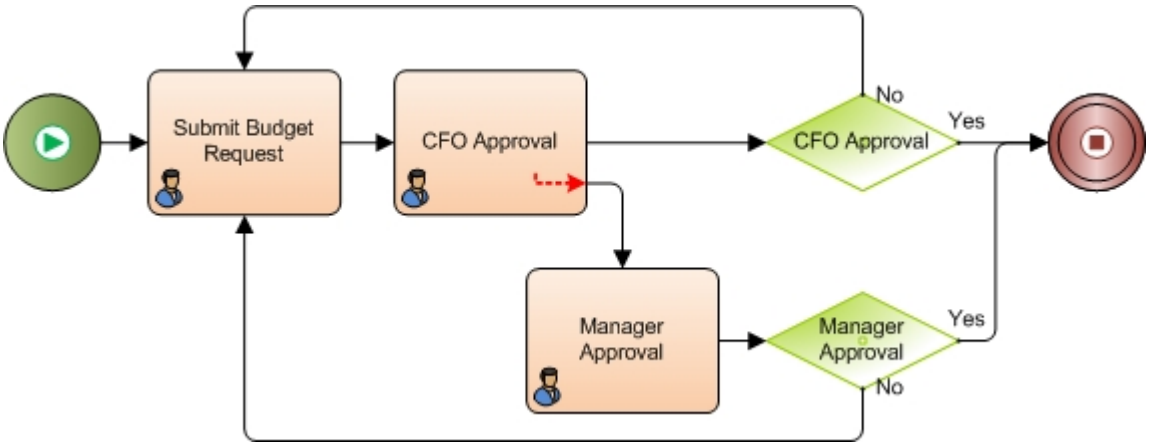
Creating a Process Model

To create a process model, do the following.

Instructions

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

Example Process



SubProcess

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



Navigation

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

Properties for This AgileShape

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

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

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

Tasks for This AgileShape

- Using Parent and Child Processes

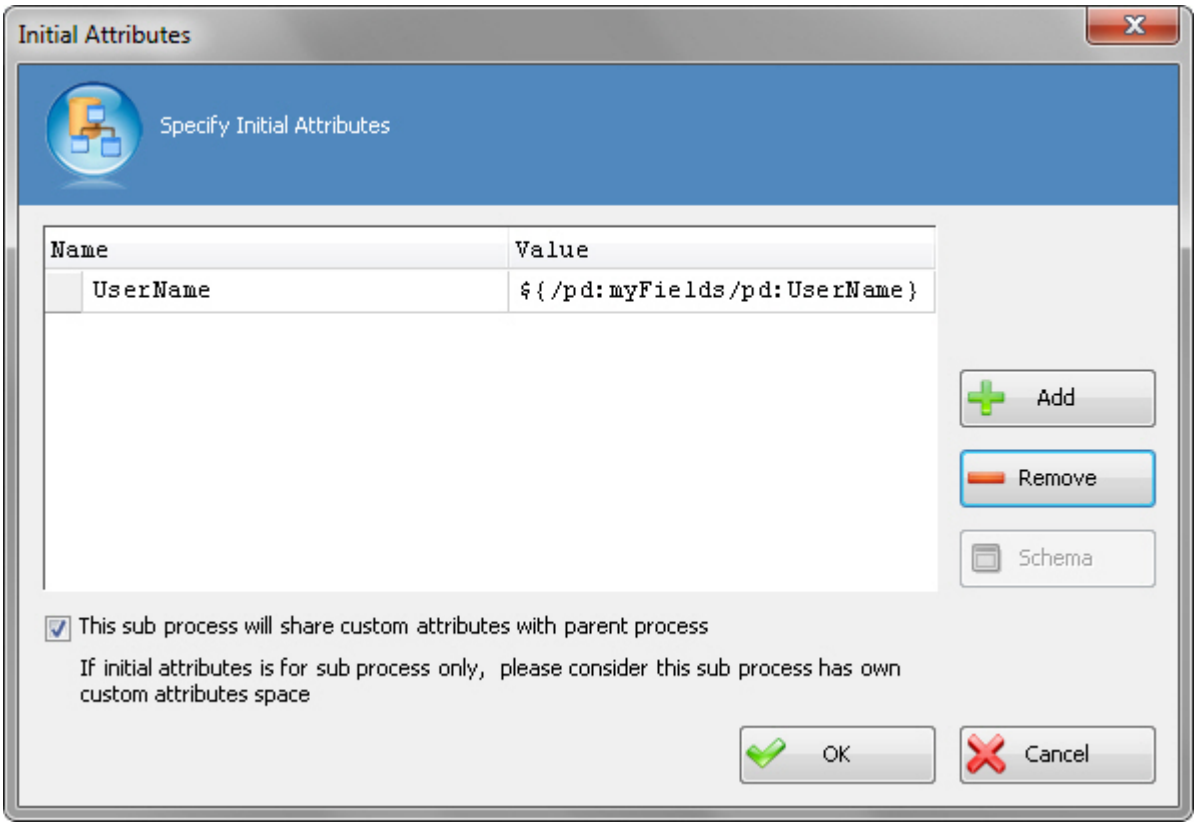
Configuration Windows

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

Initial Attributes Configuration Window

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

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



Navigation

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

Field Definitions

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

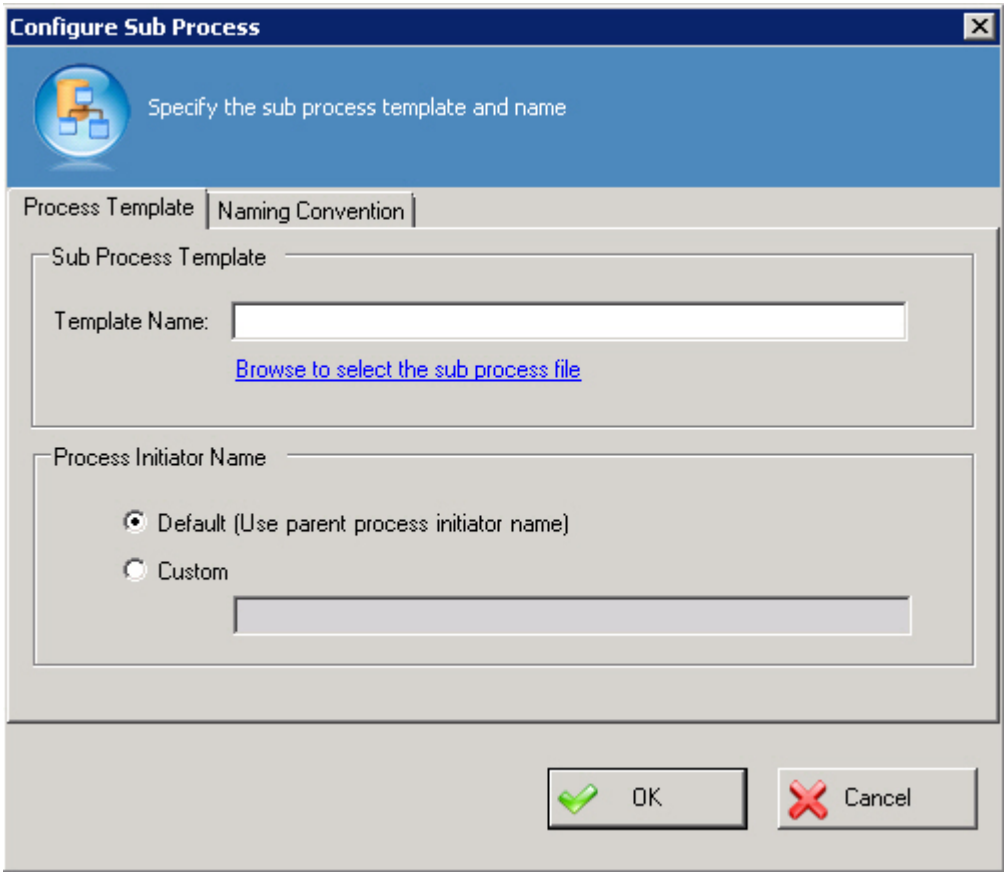
Field Name	Definition
	Selected

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Configure SubProcess Window - Process Template Tab

Specifies the process template for a sub process.



Navigation

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

Field Definitions

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

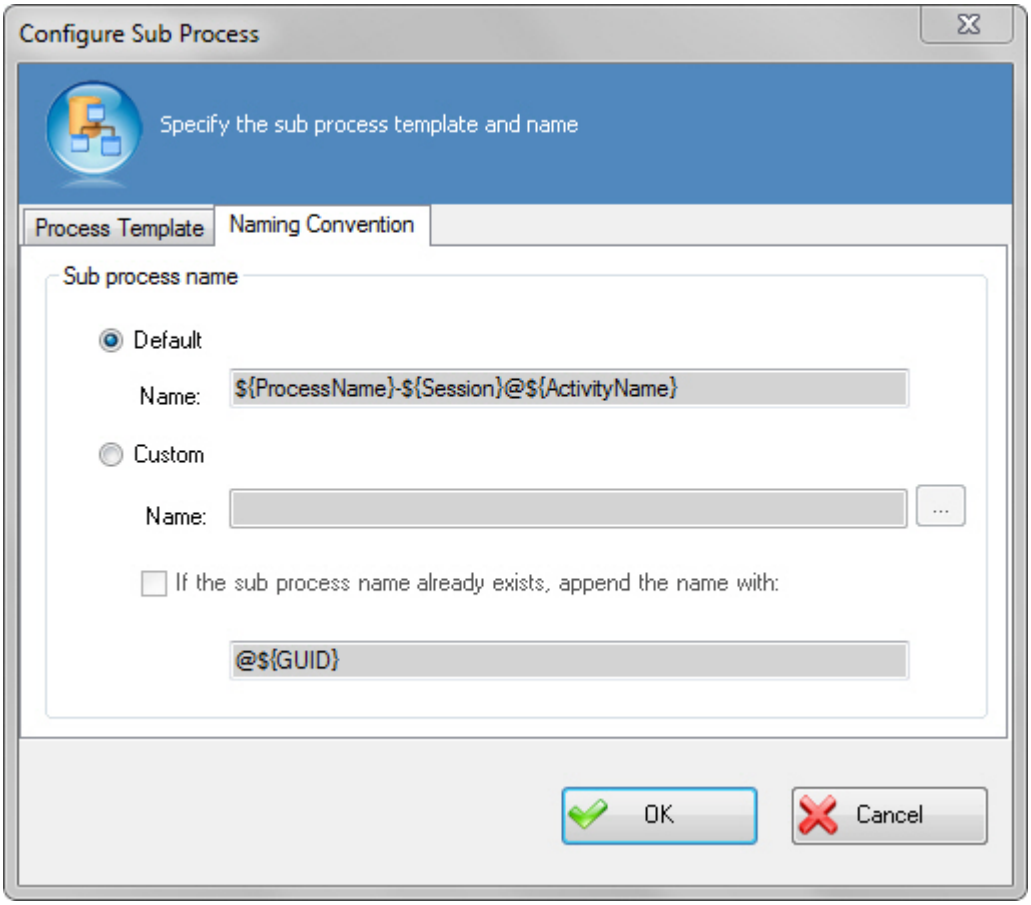
Field Name	Definition
	Configure SubProcess Window - Naming Convention Tab

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Configure SubProcess Window - Naming Convention Tab

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



Navigation

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

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

Field Definitions

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

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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

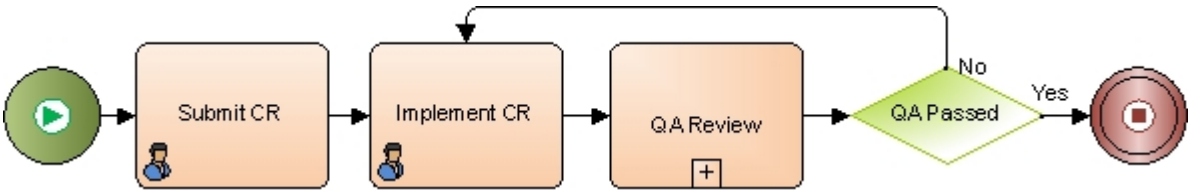
Using Parent and Child Processes

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

Instructional Goals

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

Example Parent Process: Execute a Software Change Request



Example Sub Process: QA Test the Change Request



Problem Statement

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

Business Requirements

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

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

Navigation

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

Instructions

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

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

Mapping Custom Attributes in a Sub Process

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

Navigation

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

Instructions

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

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

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

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

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

Navigation

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

Instructions

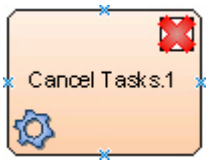
1. On the Initial Attributes Configuration Window, deselect **This sub process will share custom attributes with parent process**.
2. Map the custom attributes from your parent process to your sub process.

Premier Extension

This section describes the AgileShapes in the Premier Extension stencil.

Cancel Tasks

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



Navigation

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

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

Delay

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



Navigation

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

Properties for This AgileShape

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

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

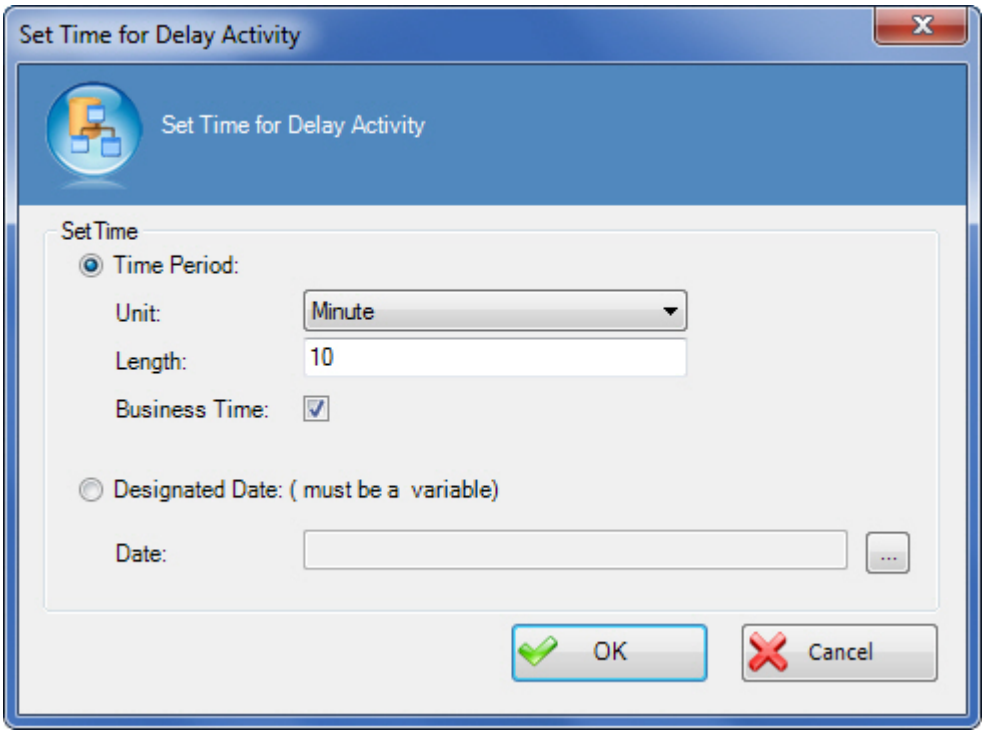
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

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

Set Time for Delay Activity Window

Specifies the duration associated with the Delay AgileShape.



Navigation

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

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

Field Definitions

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

Field Name	Definition
	• A custom attribute Default Value: 10 Custom Attributes: Yes
Business Time	Definition: Determines whether the time span represents actual time, or business hours only. Allowed Values: • **Deselected** - The time span represents actual time. It is unaffected by any business time configuration settings. • **Selected** - The time span represents a span of business hours only. For example, 5 days of business time might be equivalent to 7 days of actual time. 8 hours of business time might be equivalent to 24 hours of actual time. Default Value: Deselected Example: The Business Time property is set to True, and business hours are configured as 9 a.m. to 5 p.m. A Manual AgileShape with a Time Span of 6 business hours is entered at 4 p.m. on Tuesday, then the activity must be completed by 2 p.m. on Wednesday.
Designated Date	Definition: Indicates that a process is delayed until a specified date occurs before moving to the next AgileShape. Allowed Values: • **Deselected** - The delay expires based on a timed duration. • **Selected** - The delay expires based on a date. Default Value: Deselected
Date	Definition:

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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

Delaying a Process

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

Navigation

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

Instructions

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

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

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

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

Field Name	Definition
	Default Value: $VariableForDesignatedDate Custom Attributes: Yes

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

Dynamic Group

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



Navigation

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

Properties for This AgileShape

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

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

Common AgileWork Properties

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

BPMN Properties

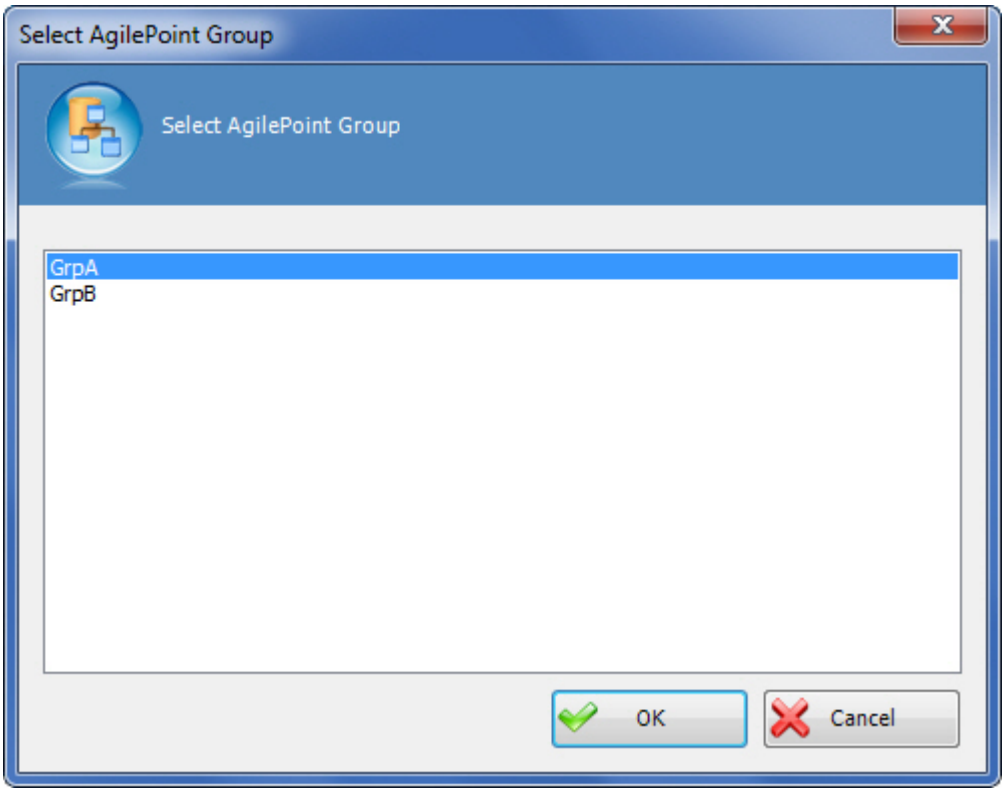
Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

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

Select AgilePoint Group Window

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



Navigation

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

Field Definitions

Field Name	Definition
Select AgilePoint Group	Definition: Specifies the AgilePoint group to assign the task. Allowed Values: An AgilePoint group selected from the list. Default Value: None

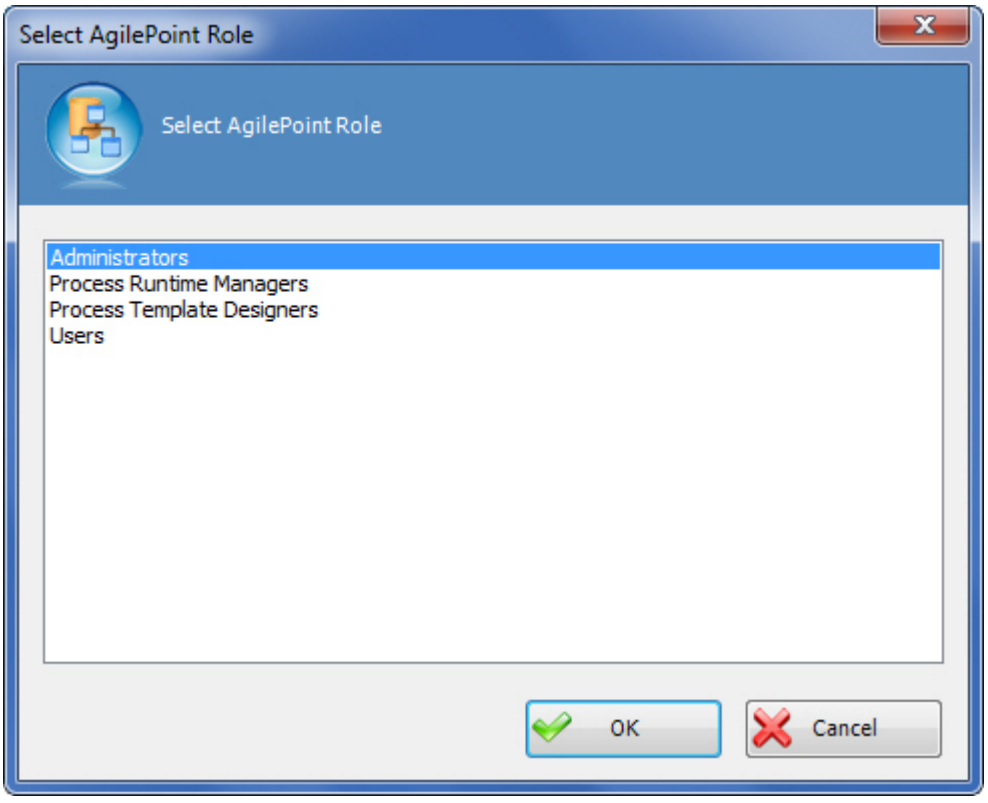
Field Name	Definition
	Custom Attributes: No

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select AgilePoint Role Window

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



Navigation

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

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

Field Definitions

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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Dynamic Parallel Approval

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



Navigation

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

Properties for This AgileShape

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

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

Common AgileWork Properties

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

BPMN Properties

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

Common AgileWork Tasks

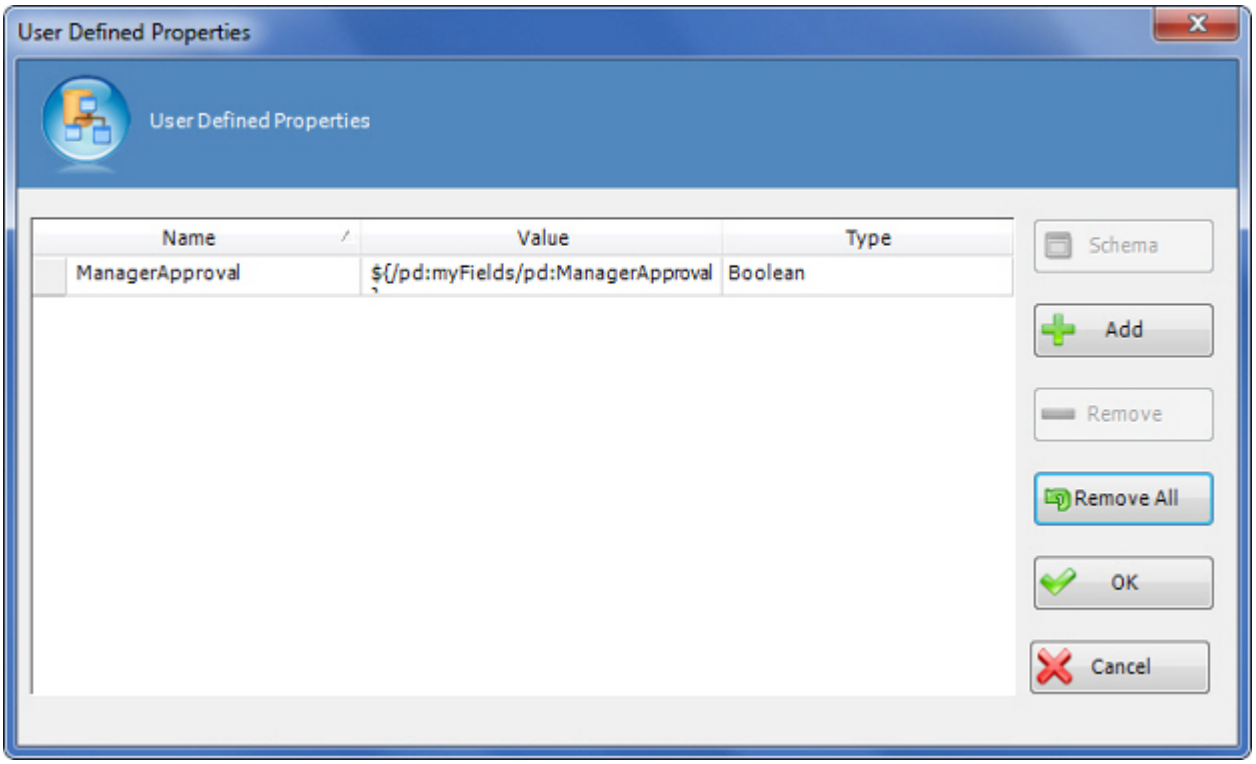
- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

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

User Defined Properties Window

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



Navigation

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

Field Definitions

Field Name	Definition
Add	Function: Creates a row where you can specify a ClientData property.

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

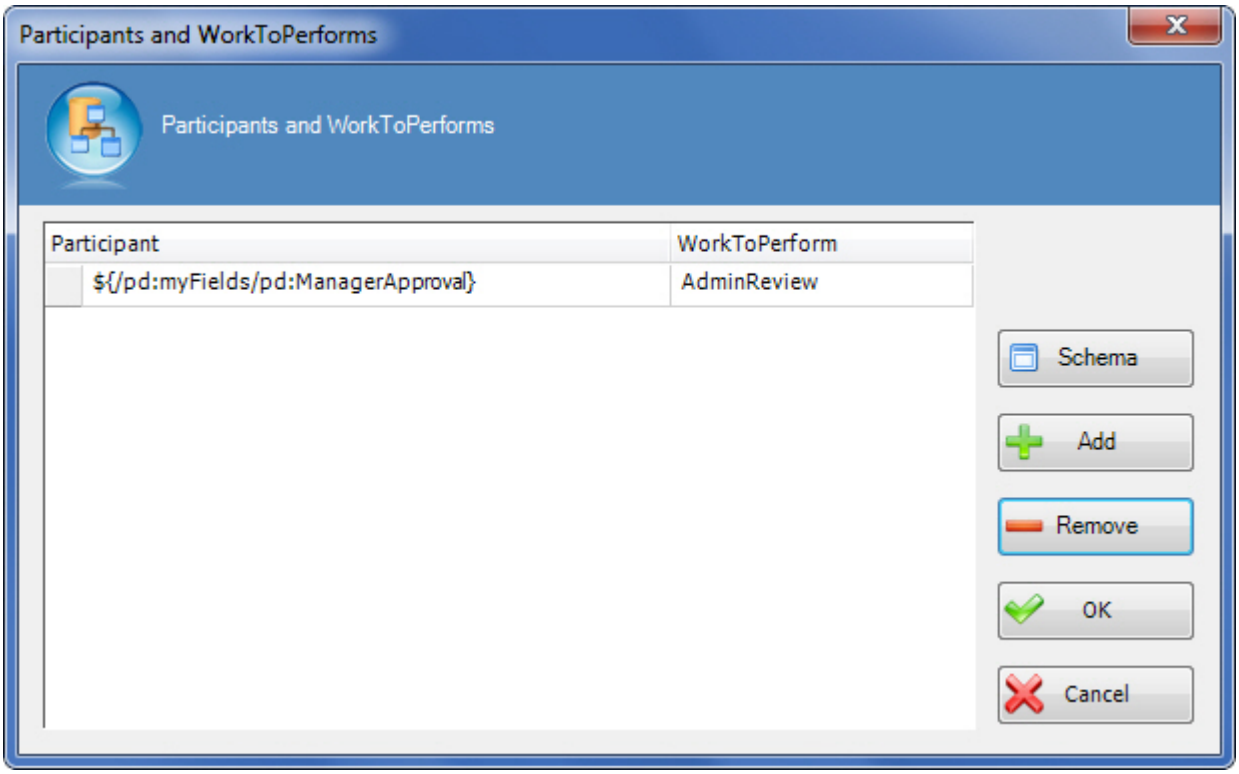
Field Name	Definition
	• **String** • **Float** • **Decimal** • **DateTime** • **Boolean** Default Value: None
Remove	Function: Deletes the selected row from the user defined properties list.
Remove All	Function: Deletes all rows from the user defined properties list.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Participants and WorkToPerforms Window

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



Navigation

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

Field Definitions

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

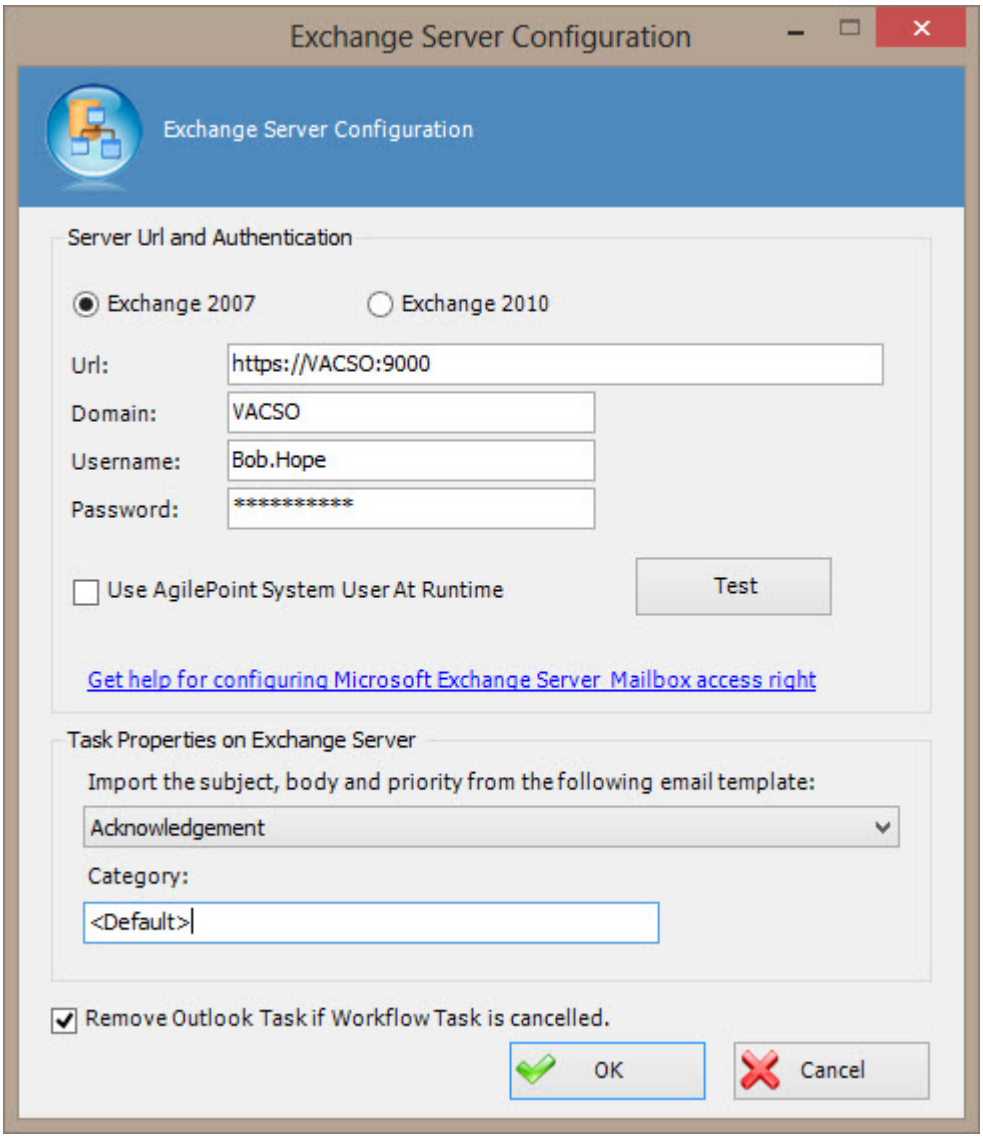
Field Name	Definition
	• A list of predetermined custom attributes. You can specify only one user name in the Participant field. You cannot specify multiple participants such as group of users, or a user role for the task at a time. However, you can add multiple instances of a Work to Perform, each with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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Exchange Server Configuration Window

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



Navigation

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

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

Field Definitions

Field Name	Definition
Exchange 2007 or Exchange 2010	Definition: Specifies the version of your Microsoft Exchange Server. Allowed Values: • **Exchange 2007** - Enables to configure this AgileShape to access Exchange Server 2007. • **Exchange 2010** - Enables to configure this AgileShape to access Exchange Server 2010. Default Value: Exchange 2007
Url	Definition: Specifies the Exchange Server URL. Allowed Values: • **Exchange 2007** - https://[machine name]:[port] • **Exchange 2010** - https://[machine name]:[port]/EWS/Exchange.asmx Default Value: https://[MachineName]:[Port] Custom Attributes: No Example: • **Exchange 2007** - https://mydomain.com:2030 • **Exchange 2010** - https://mydomain.com:2030/EWS/Exchange.asmx
Domain	Definition: The authentication domain. Allowed Values: A valid domain. Default Value: None

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

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

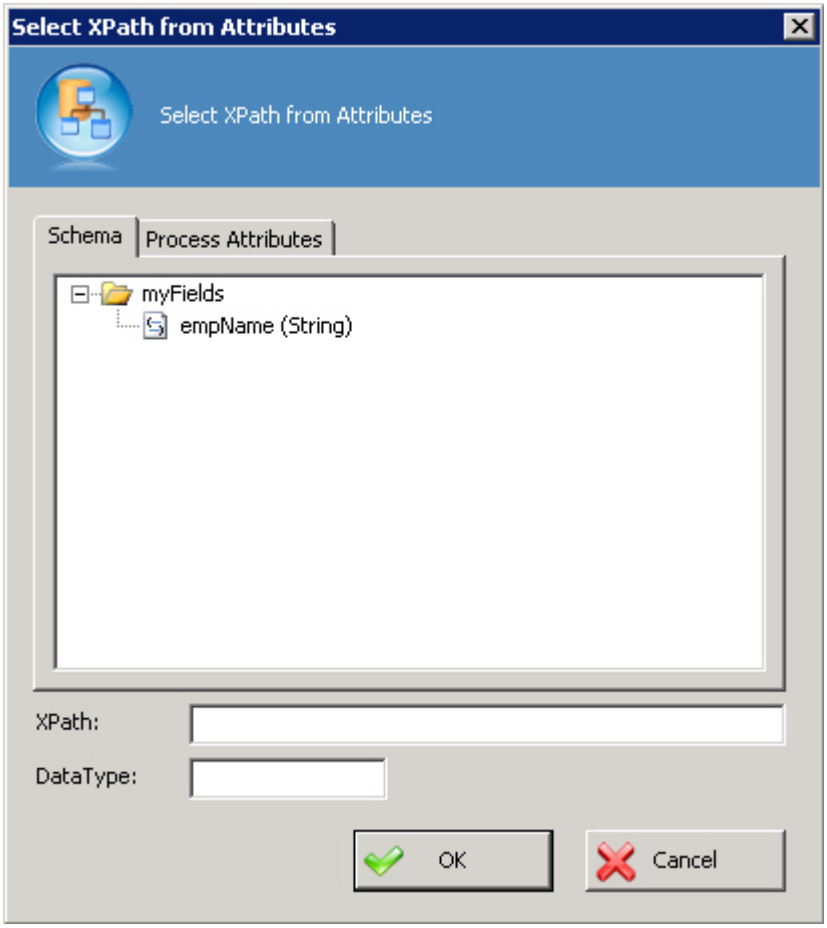
Field Name	Definition
	Selected

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

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



Prerequisites

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

Navigation

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

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

Field Definitions

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

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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

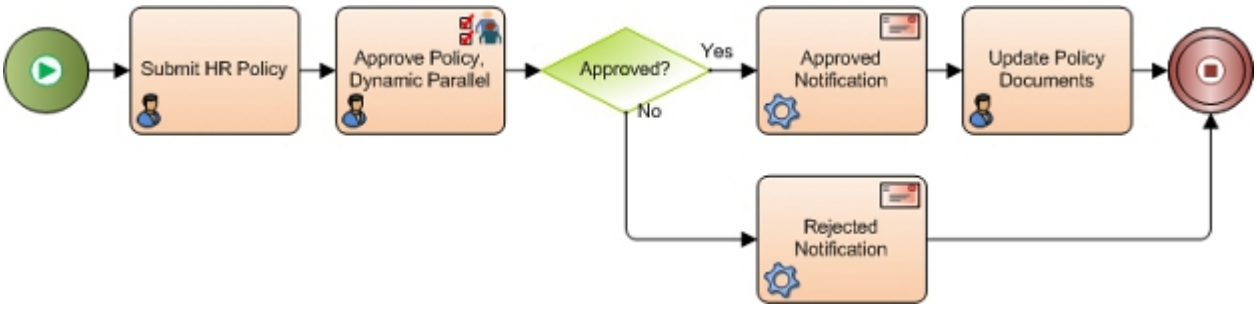
Enabling Parallel Approvals by Multiple Participants

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

Instructional Goals

- Demonstrate how to set up parallel approvals for an activity.

Example Process: Create or Update a Human Resources Policy



Problem Statement

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

Business Requirements

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

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

Navigation

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

Instructions

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

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

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

Dynamic Sequential Approval

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



Navigation

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

Properties for This AgileShape

Field Name	Definition
UserDefinedProperties	Opens the Following Window: User Defined Properties Window Purpose of this Window: Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable-like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want.
Approvers	Definition: Specifies the custom attribute that contains the user names of the participants. The user names in the custom attribute must be separated by a semicolon. This property works as a part of the loop to specify the participants (who are the approvers) required to

Field Name	Definition
	complete the activity. The task is assigned to each user one-by-one through each iteration of the loop. During each iteration, the AgileShape assigns the task to the first user name specified by the Approvers property. Then, the custom attribute associated with this property is modified - the first user name is removed from the list, and the next user name is assigned to the task for the next iteration of the loop until all the approvers complete the task. Allowed Values: A custom attribute. **Note:** The value of this property must be the name of a custom attribute. The value of the custom attribute must be initialized elsewhere using an Update Custom Attributes AgileShape. If the value of the custom attribute is not updated in the loop, it ends up in an infinite loop. Default Value: $Approvers Custom Attributes: Yes
LoopCondition	Definition: The custom attribute that specifies the status of the sequential loop as a Boolean value. The value of the custom attribute is updated each time the AgileShape exits an iteration of the loop to determine whether more participants are remaining to complete the task. The value of the specified custom attribute must be checked using a Single Condition AgileShape to determine when the process needs to exit from the loop to move to another activity. Allowed Values: A custom attribute. **Note:** The value of this property must be the name of a custom attribute. The value of the custom attribute must be initialized elsewhere using an Update Custom Attributes AgileShape.

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

Common AgileWork Properties

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

BPMN Properties

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

Common AgileWork Tasks

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

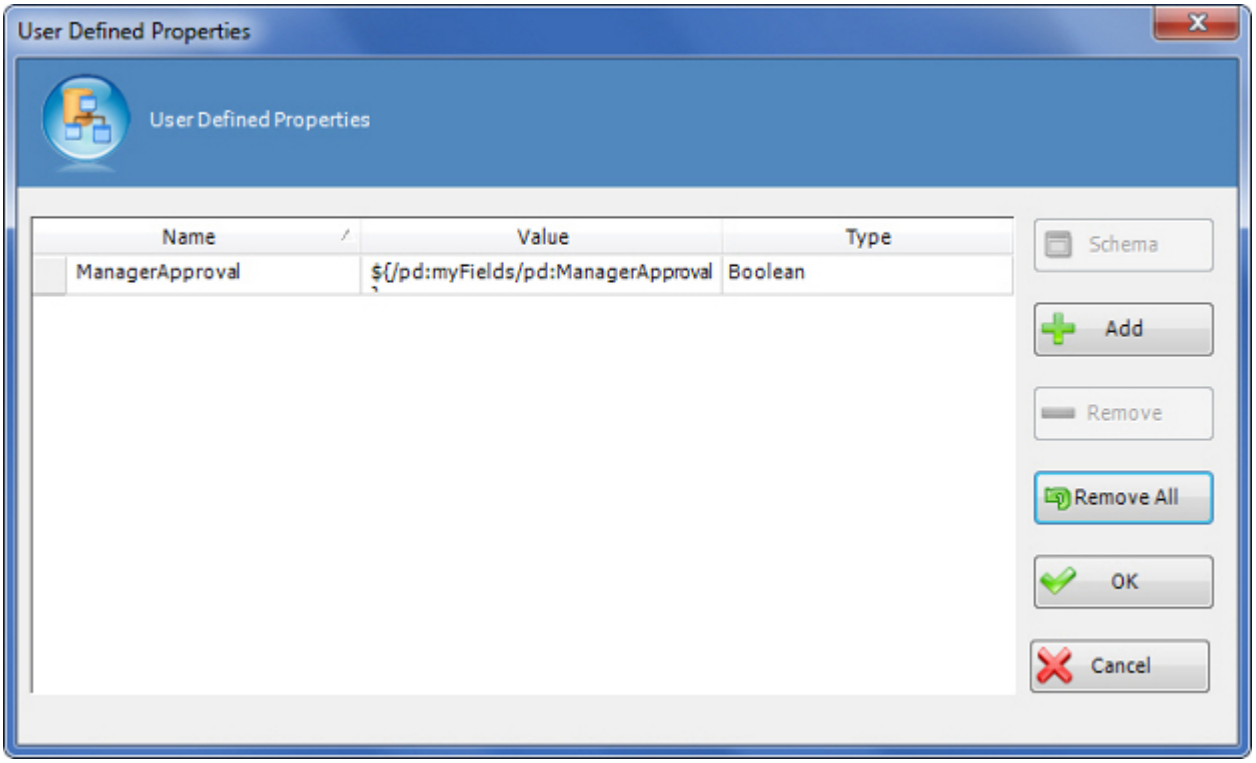
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

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

User Defined Properties Window

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



Navigation

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

- **Process Adaptation**
- **Vote**
- **Web Form**
- **Workload Balance**

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

Field Definitions

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

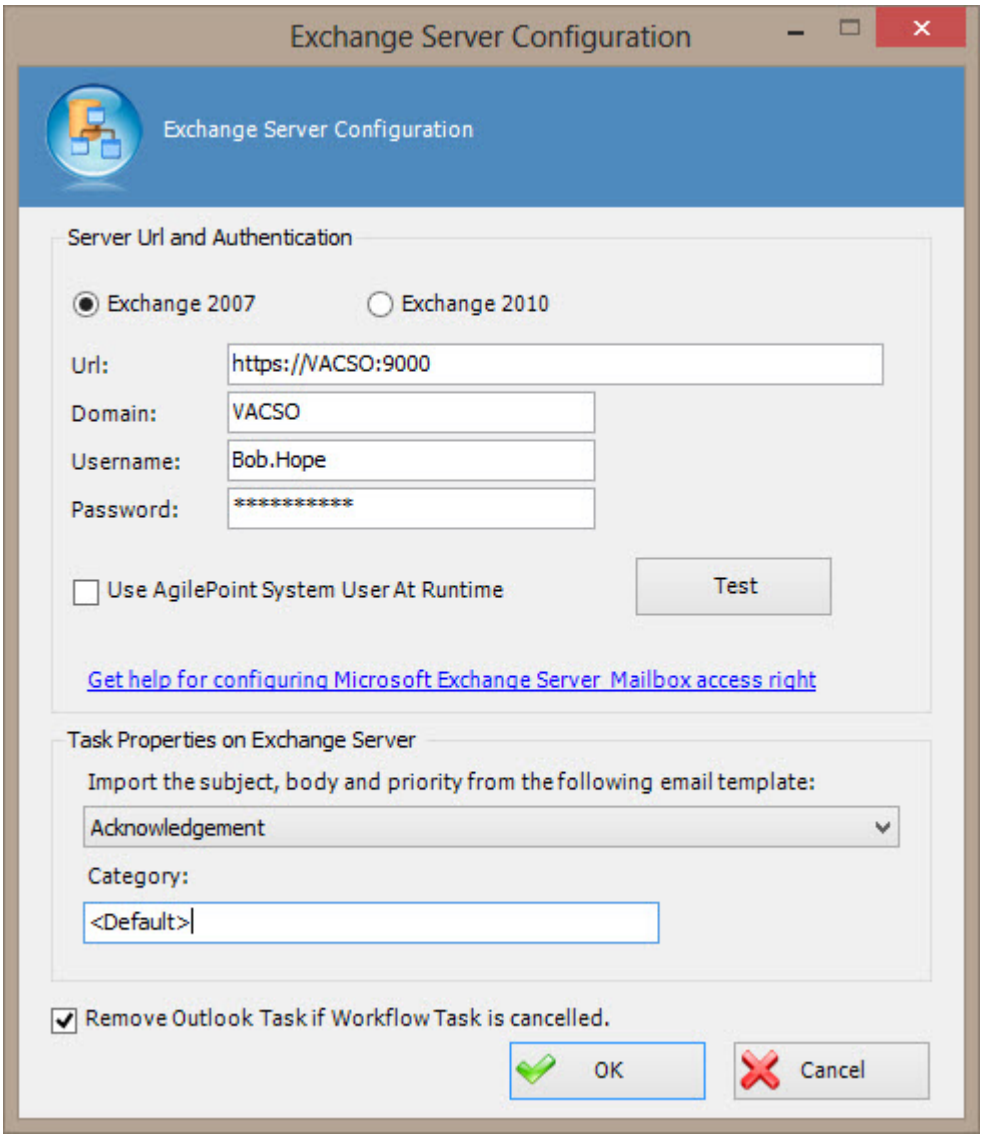
Field Name	Definition
	A number or a text string that can contain spaces. You can dynamically set the value for the variable by using XML metadata. Default Value: None Custom Attributes: Yes
Type	Definition: Determines the data type for the ClientData variable. Allowed Values: • **Integer** • **String**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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Exchange Server Configuration Window

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



Navigation

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

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

Field Definitions

Field Name	Definition
Exchange 2007 or Exchange 2010	Definition: Specifies the version of your Microsoft Exchange Server. Allowed Values: • **Exchange 2007** - Enables to configure this AgileShape to access Exchange Server 2007. • **Exchange 2010** - Enables to configure this AgileShape to access Exchange Server 2010. Default Value: Exchange 2007
Url	Definition: Specifies the Exchange Server URL. Allowed Values: • **Exchange 2007** - https://[machine name]:[port] • **Exchange 2010** - https://[machine name]:[port]/EWS/Exchange.asmx Default Value: https://[MachineName]:[Port] Custom Attributes: No Example: • **Exchange 2007** - https://mydomain.com:2030 • **Exchange 2010** - https://mydomain.com:2030/EWS/Exchange.asmx
Domain	Definition: The authentication domain. Allowed Values: A valid domain. Default Value: None

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

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

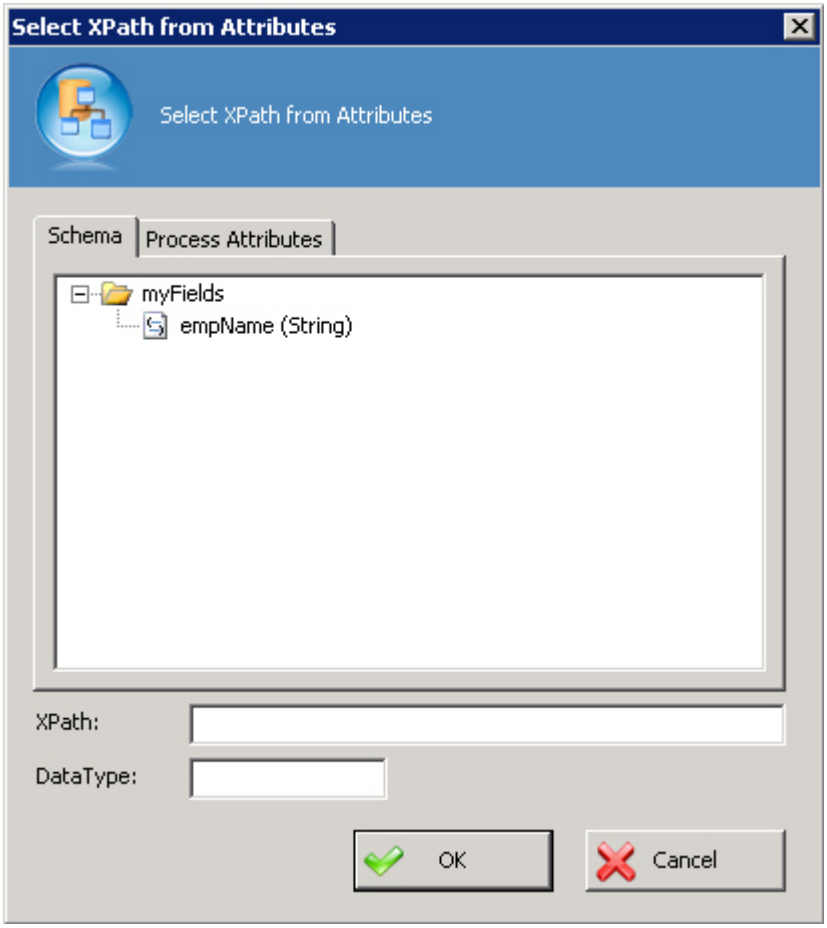
Field Name	Definition
	Selected

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

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



Prerequisites

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

Navigation

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

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

Field Definitions

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

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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

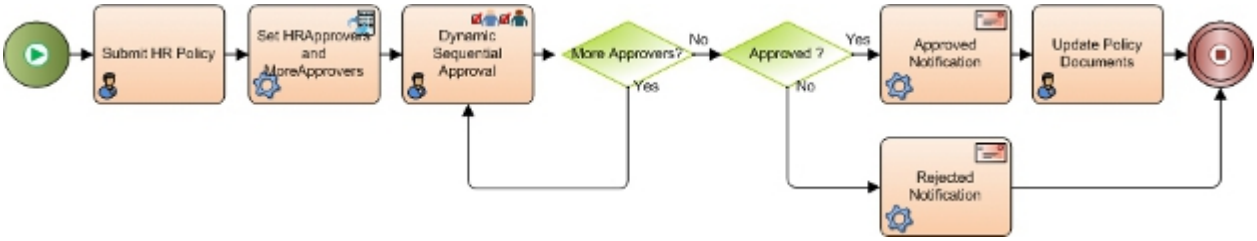
Enabling Sequential Approvals by Multiple Participants

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

Instructional Goals

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

Example Process: Create or Update a Human Resources Policy



Problem Statement

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

Business Requirements

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

Navigation

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

Instructions

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

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

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

   You can also click the **Schema** button to select the **HRApprovers** attribute from your InfoPath or ASP.NET XML schema.
6. In the **Expression** column, enter a C# expression that indicates the list of approvers for your Dynamic Sequential Approval task.

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

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

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

Process Adaptation

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



Prerequisites

- A user must have **Create a Task** and **Cancel a Task** access rights in AgilePoint Enterprise Manager in order to see the Process Adaptation functionality in AgilePoint Enterprise Manager.
- To enable the **Open Process Adaptation** link in the Process Viewer, you must add the following modification to the AgilePoint Web application's web.config file:

```
<appSettings>
         <add key="ProcessAdaptationUrl"
              value="http://[AgilePoint Server host]:[port]/EnterpriseManager/
ProcessAdaptation/LinkedTasks.aspx"/>
</appSettings>
```

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

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

Navigation

1. In AgilePoint Envision, open a process template.

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

Properties for This AgileShape

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

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

Common AgileWork Properties

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

BPMN Properties

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

Common AgileWork Tasks

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

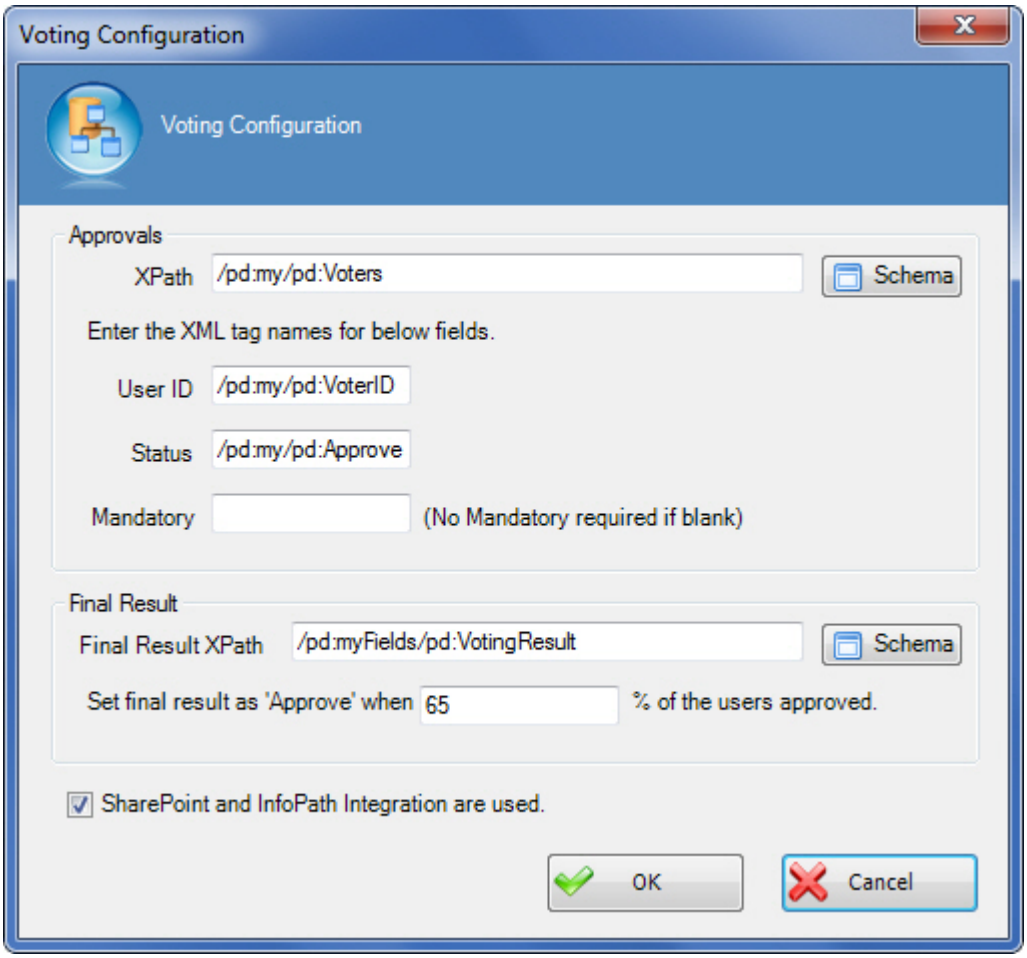
Configuration Windows

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

Voting Configuration Window

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

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



Navigation

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

Field Definitions

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

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

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

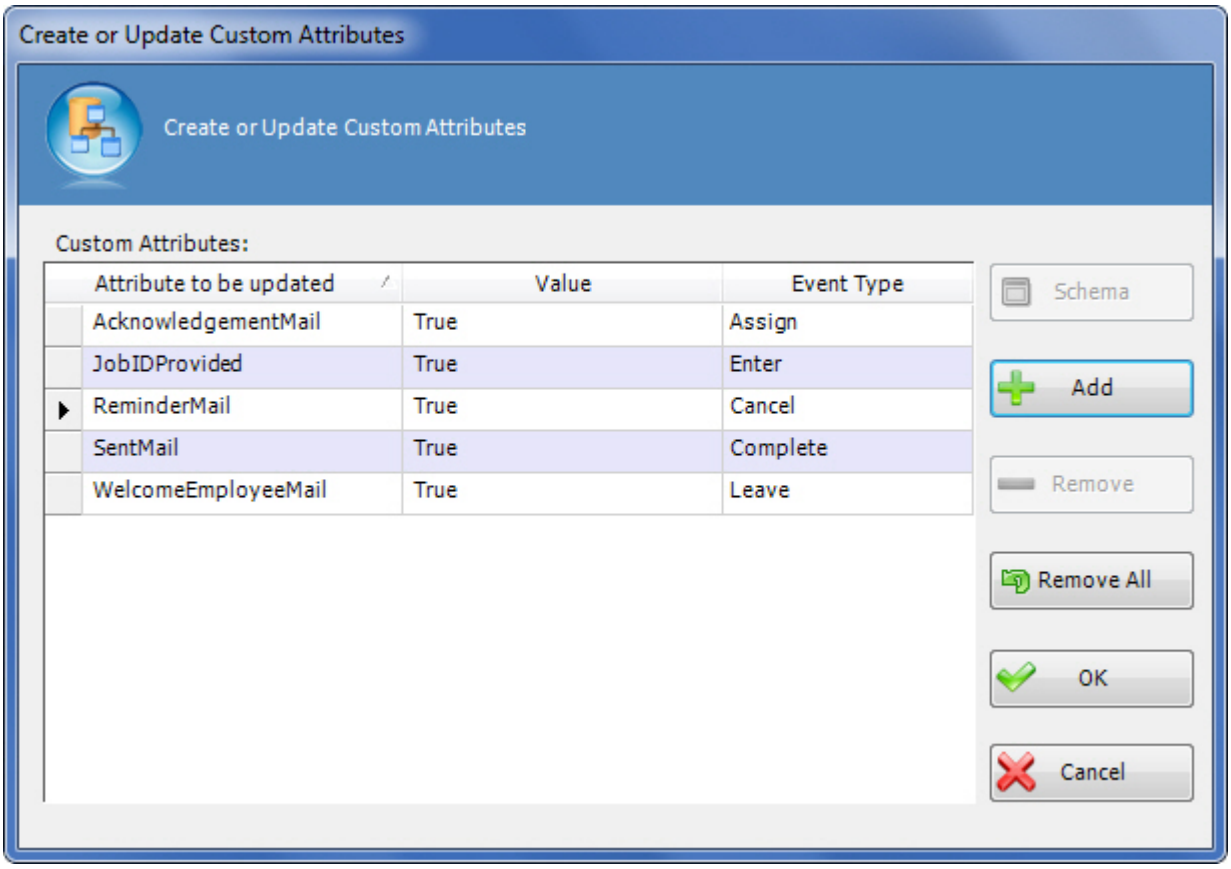
Field Name	Definition
	Specifies the final result whether an approval activity is approved or rejected. This is also an Boolean value. Allowed Values: An XPath to a schema node that represents the final result of the voting. The final result can be stored in a custom attribute. Default Value: None Custom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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Create or Update Custom Attributes Window - Process Adaptation AgileShape

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



Navigation

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

Field Definitions

Field Name	Definition
Add	Function:

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

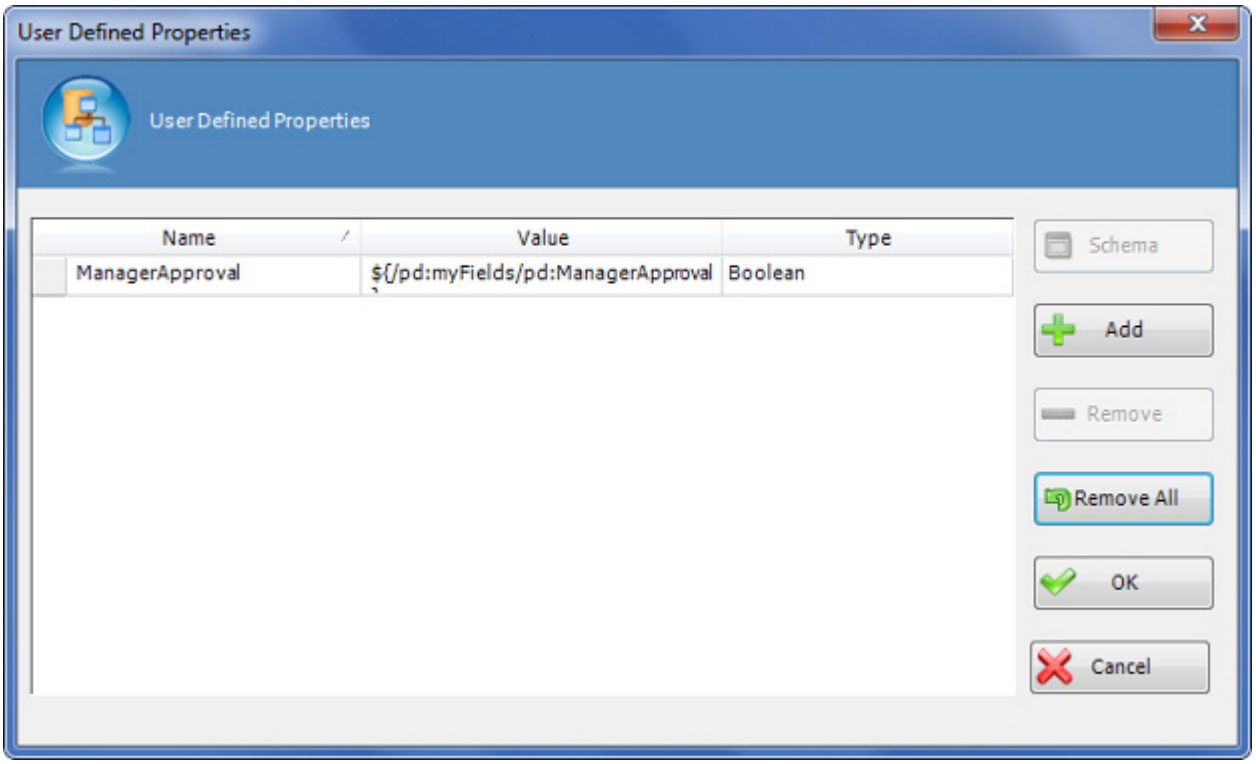
Field Name	Definition
Event Type	Definition: Indicates the runtime event that causes the custom attribute to be updated to the specified value. Allowed Values: • **Enter** - The process enters the AgileShape. • **Assign** - A task is assigned to a participant. • **Cancel** - A task is cancelled. • **Complete**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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

User Defined Properties Window

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



Navigation

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

Field Definitions

Field Name	Definition
Add	Function: Creates a row where you can specify a ClientData property.

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

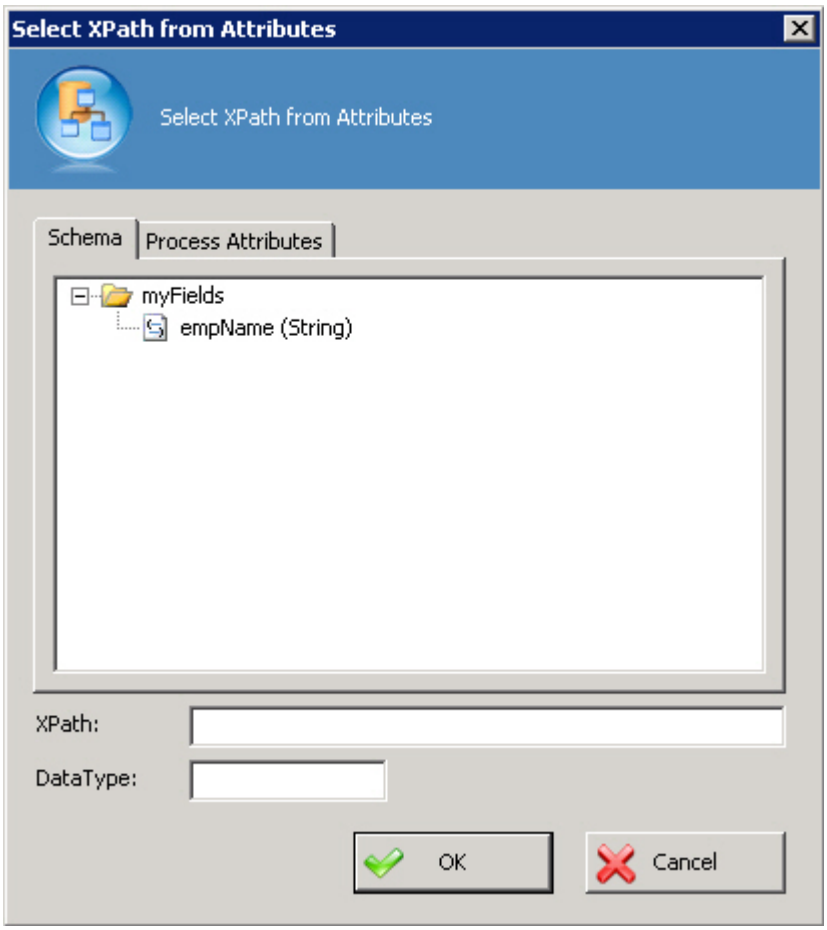
Field Name	Definition
	• **String** • **Float** • **Decimal** • **DateTime** • **Boolean** Default Value: None
Remove	Function: Deletes the selected row from the user defined properties list.
Remove All	Function: Deletes all rows from the user defined properties list.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

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



Prerequisites

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

Navigation

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

Field Definitions

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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Update Custom Attributes

An AgilePart that updates the values of process attributes.

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

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



Navigation

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

Properties for This AgileShape

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

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

Configuration Windows

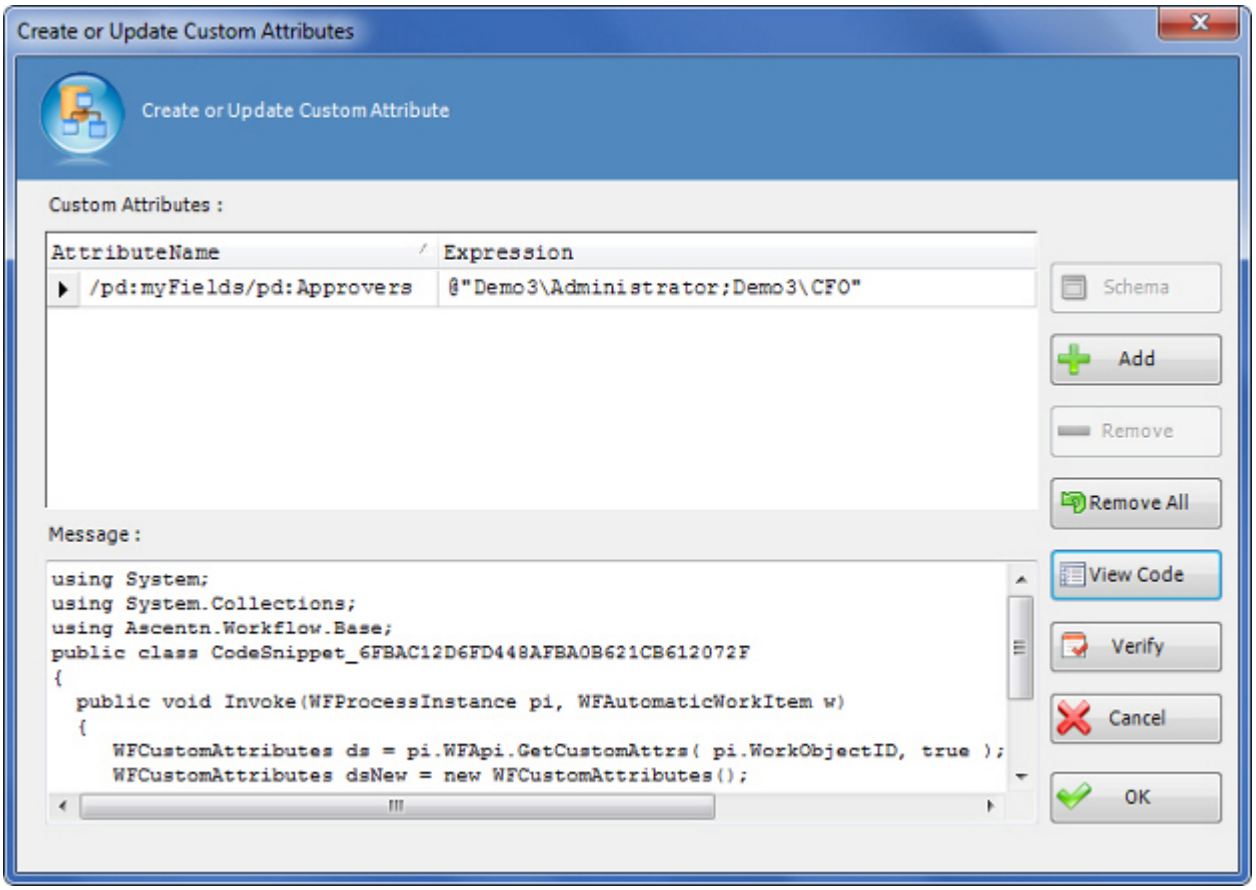
The following topics provide details about the configuration windows for this AgileShape.

Create or Update Custom Attribute Window

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



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



Navigation

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

Field Definitions

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

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

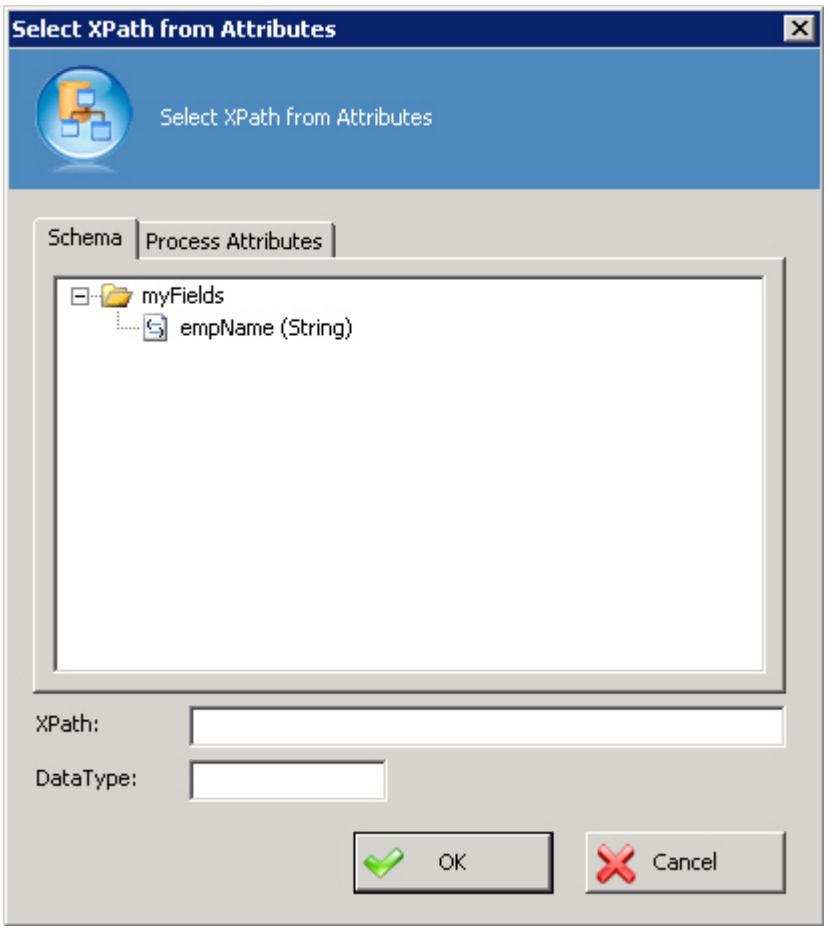
Field Name	Definition
Remove	Function: Deletes the selected row from the Custom Attributes list.
Remove All	Function: Deletes all rows from the Custom Attributes list.
View Code	Function: Displays a snippet of the C# code created for the custom attributes in the Message field.
Message	Definition: Displays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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

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



Prerequisites

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

Navigation

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

Field Definitions

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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

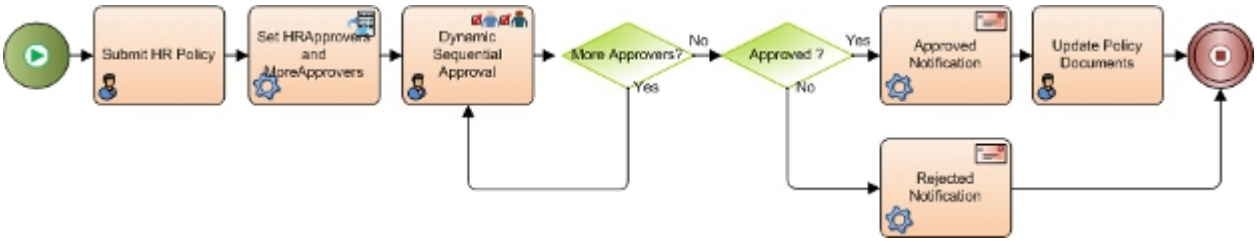
Enabling Sequential Approvals by Multiple Participants

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

Instructional Goals

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

Example Process: Create or Update a Human Resources Policy



Problem Statement

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

Business Requirements

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

Navigation

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

Instructions

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

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

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

   You can also click the **Schema** button to select the **HRApprovers** attribute from your InfoPath or ASP.NET XML schema.
6. In the **Expression** column, enter a C# expression that indicates the list of approvers for your Dynamic Sequential Approval task.

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

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

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

Update Parent Process

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



Navigation

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

Properties for This AgileShape

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

Field Name	Definition
	Default Value: $ParentProcessID Custom Attributes: Yes

Common AgilePart Properties

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

BPMN Properties

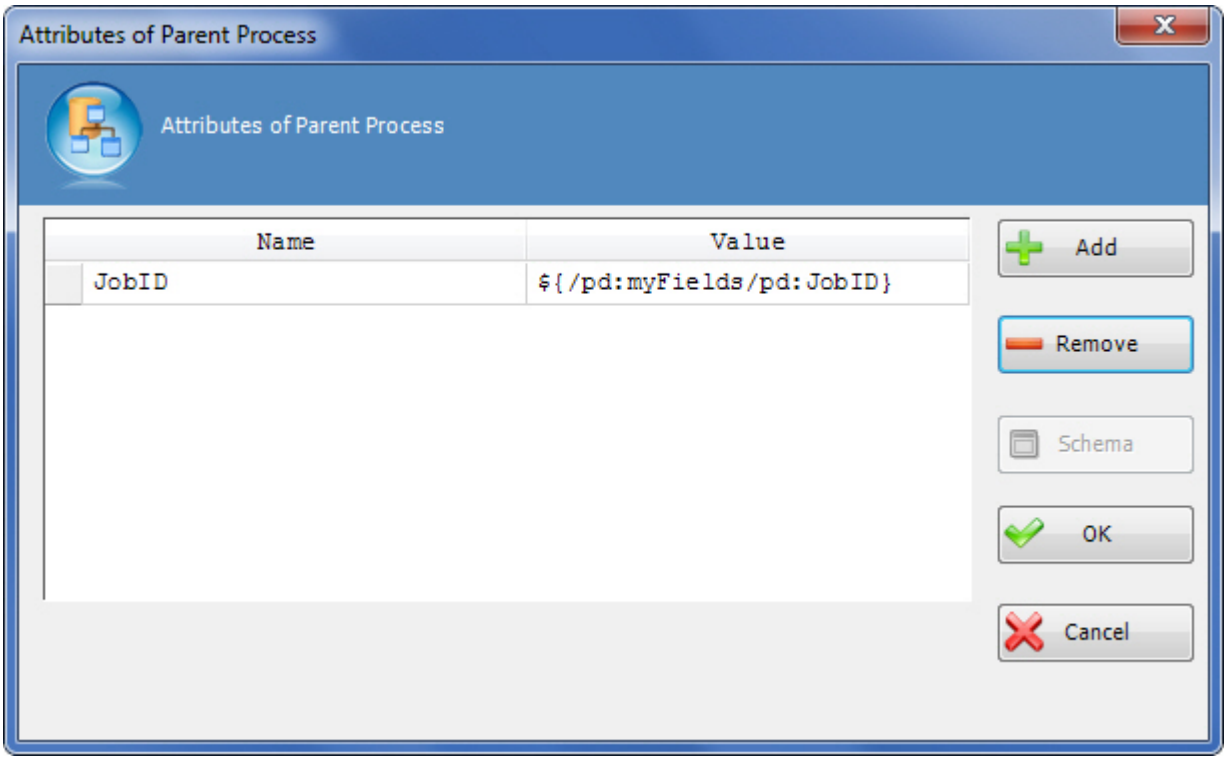
Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

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

Attributes of Parent Process Window

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



Navigation

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

Field Definitions

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

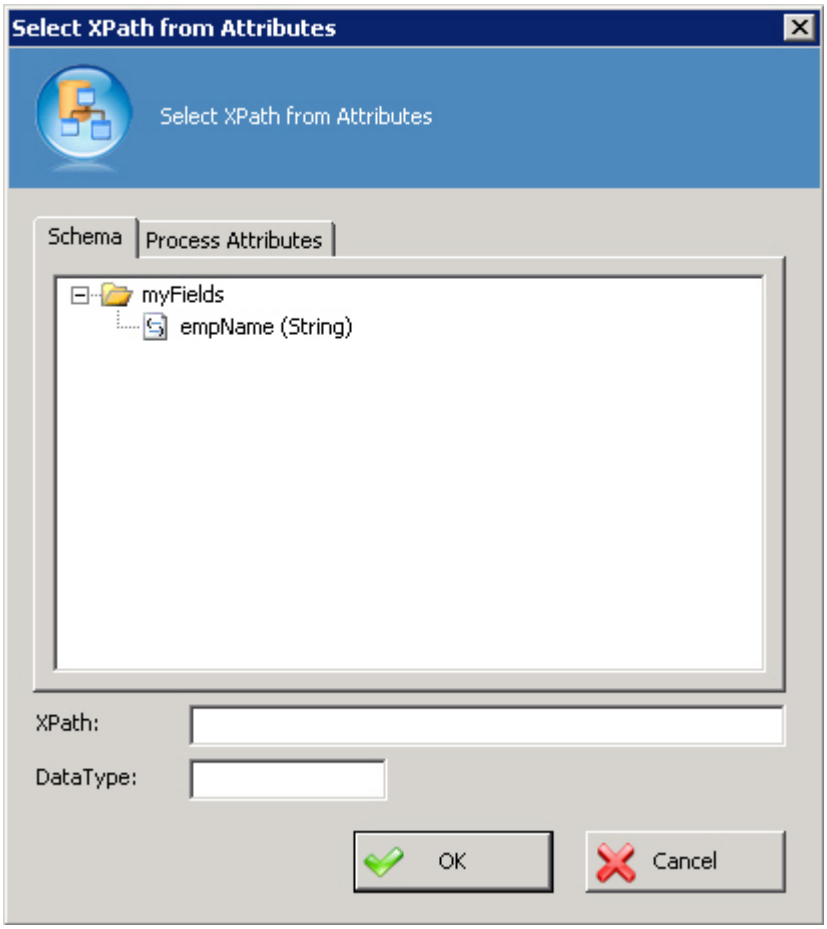
Field Name	Definition
	To activate the Schema button, select the row you want.
Name	Definition: Specifies the name of the custom attribute to update. For the AgileShape to be functional, you must ensure that on the Initial Attributes Configuration Window of the SubProcess AgileShape, the This sub process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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

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



Prerequisites

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

Navigation

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

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

Field Definitions

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

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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Vote

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



Navigation

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

Properties for This AgileShape

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

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

Common AgileWork Properties

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

BPMN Properties

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

Common AgileWork Tasks

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

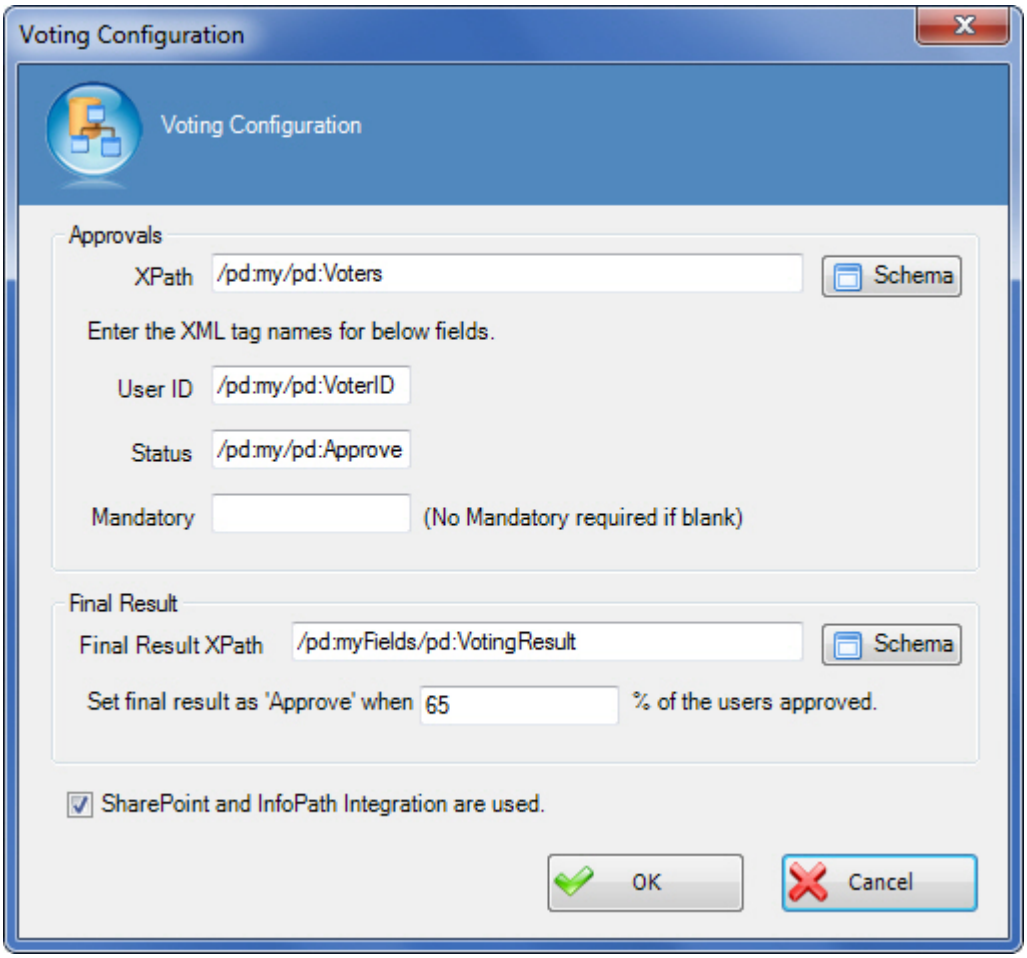
Configuration Windows

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

Voting Configuration Window

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

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



Navigation

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

Field Definitions

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

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

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

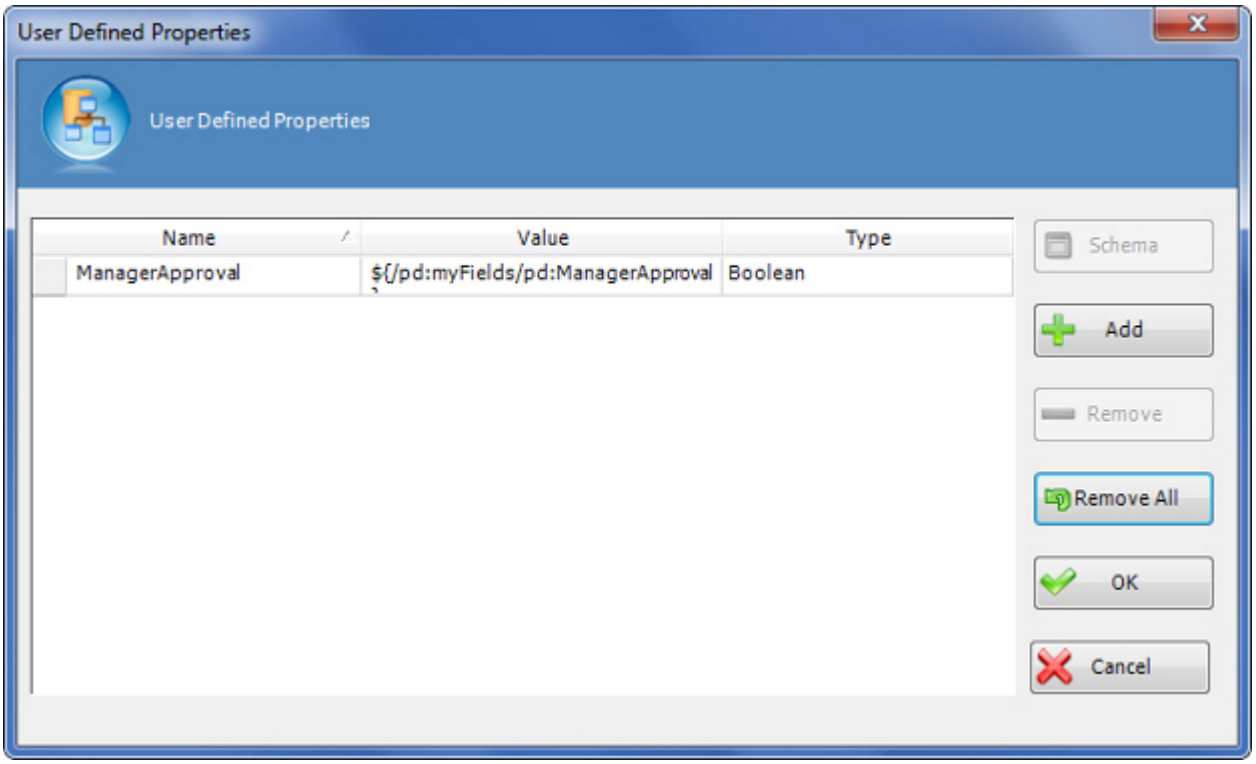
Field Name	Definition
	Specifies the final result whether an approval activity is approved or rejected. This is also an Boolean value. Allowed Values: An XPath to a schema node that represents the final result of the voting. The final result can be stored in a custom attribute. Default Value: None Custom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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

User Defined Properties Window

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



Navigation

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

Field Definitions

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

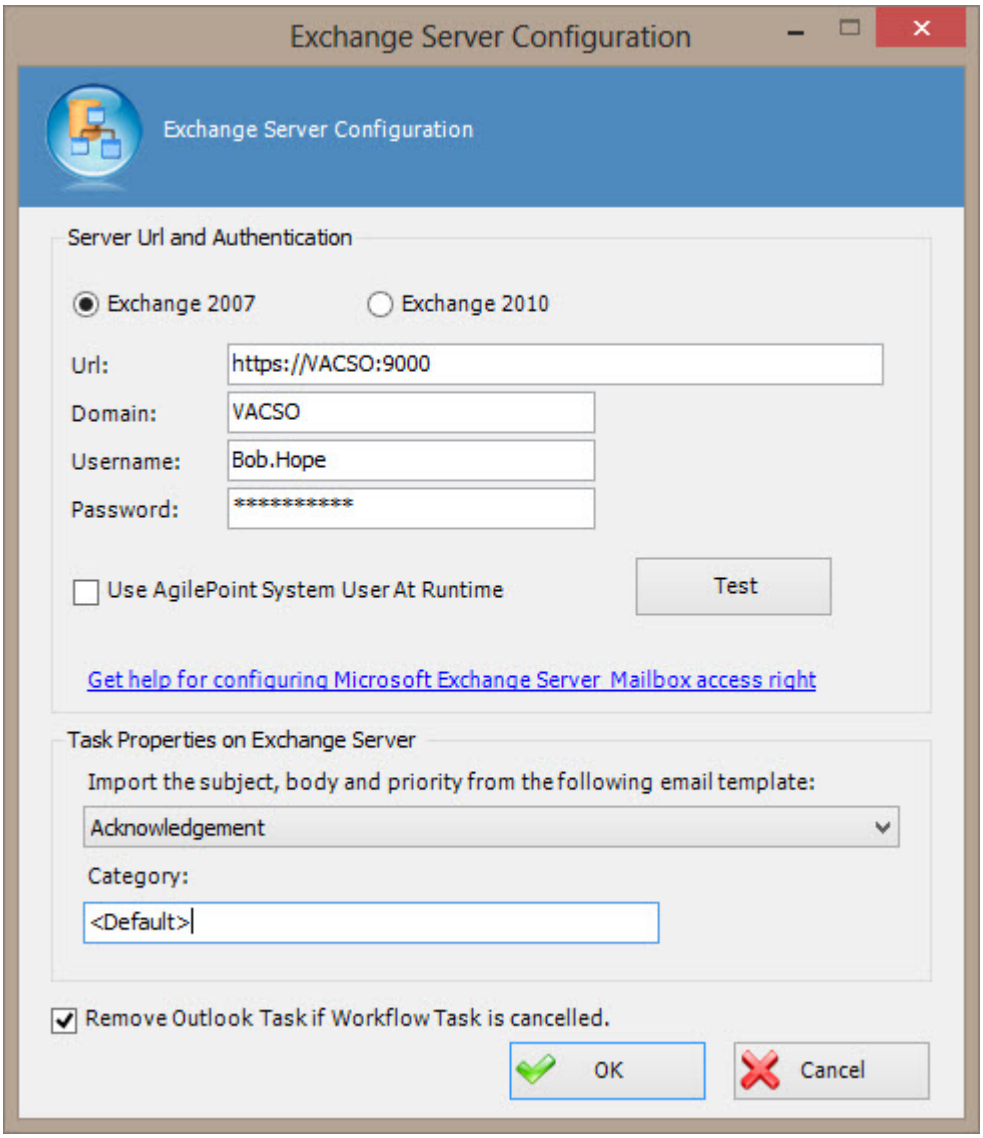
Field Name	Definition
	Yes
Type	Definition: Determines the data type for the ClientData variable. Allowed Values: • **Integer** • **String** • **Float** • **Decimal** • **DateTime** • **Boolean** Default Value: None
Remove	Function: Deletes the selected row from the user defined properties list.
Remove All	Function: Deletes all rows from the user defined properties list.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Exchange Server Configuration Window

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



Navigation

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

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

Field Definitions

Field Name	Definition
Exchange 2007 or Exchange 2010	Definition: Specifies the version of your Microsoft Exchange Server. Allowed Values: • **Exchange 2007** - Enables to configure this AgileShape to access Exchange Server 2007. • **Exchange 2010** - Enables to configure this AgileShape to access Exchange Server 2010. Default Value: Exchange 2007
Url	Definition: Specifies the Exchange Server URL. Allowed Values: • **Exchange 2007** - https://[machine name]:[port] • **Exchange 2010** - https://[machine name]:[port]/EWS/Exchange.asmx Default Value: https://[MachineName]:[Port] Custom Attributes: No Example: • **Exchange 2007** - https://mydomain.com:2030 • **Exchange 2010** - https://mydomain.com:2030/EWS/Exchange.asmx
Domain	Definition: The authentication domain. Allowed Values: A valid domain. Default Value: None

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

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

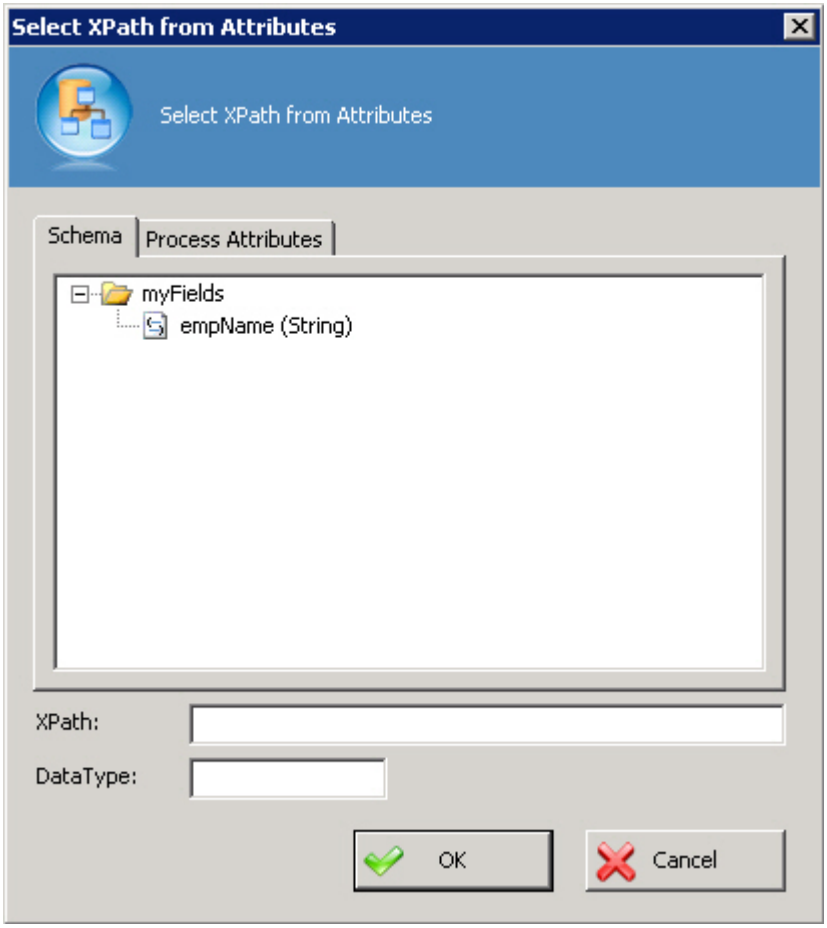
Field Name	Definition
	Selected

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

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



Prerequisites

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

Navigation

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

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

Field Definitions

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

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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

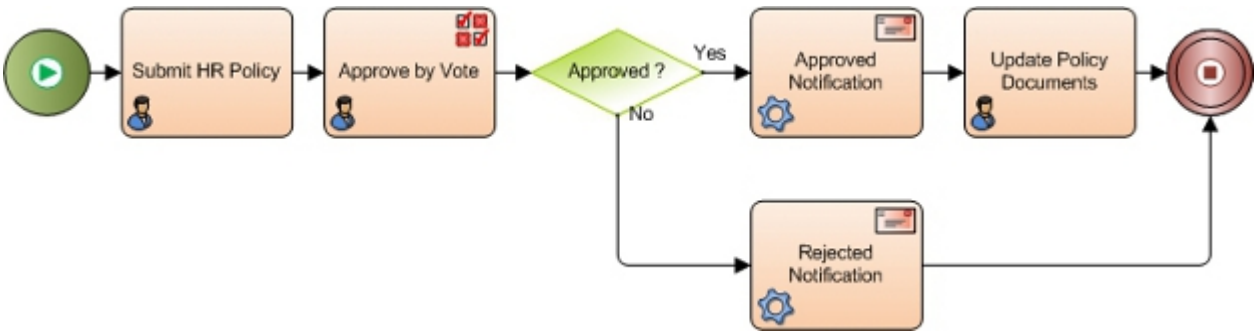
Approving an Activity by Vote

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

Instructional Goals

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

Example Process: Create or Update a Human Resources Policy



Problem Statement

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

Business Requirements

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

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

Prerequisites

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

Navigation

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

Instructions

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

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

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

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

Web Form

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

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

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



Prerequisites

- Generic process template.

Good to Know

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

Navigation

1. In AgilePoint Envision, open a process template.

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

Properties for This AgileShape

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

Field Name	Definition

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

EnabledExchangeServer	Definition: Integrates the AgileShape with Microsoft Exchange Server. The AgileShape's associated tasks are visible in the Microsoft Outlook's task list to the assigned participants. Allowed Values: • **False** - The AgileShape in not integrated with Microsoft Exchange Server. • **True** - The AgileShape is integrated with Microsoft Exchange Server that enables the

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

Common AgileWork Properties

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

BPMN Properties

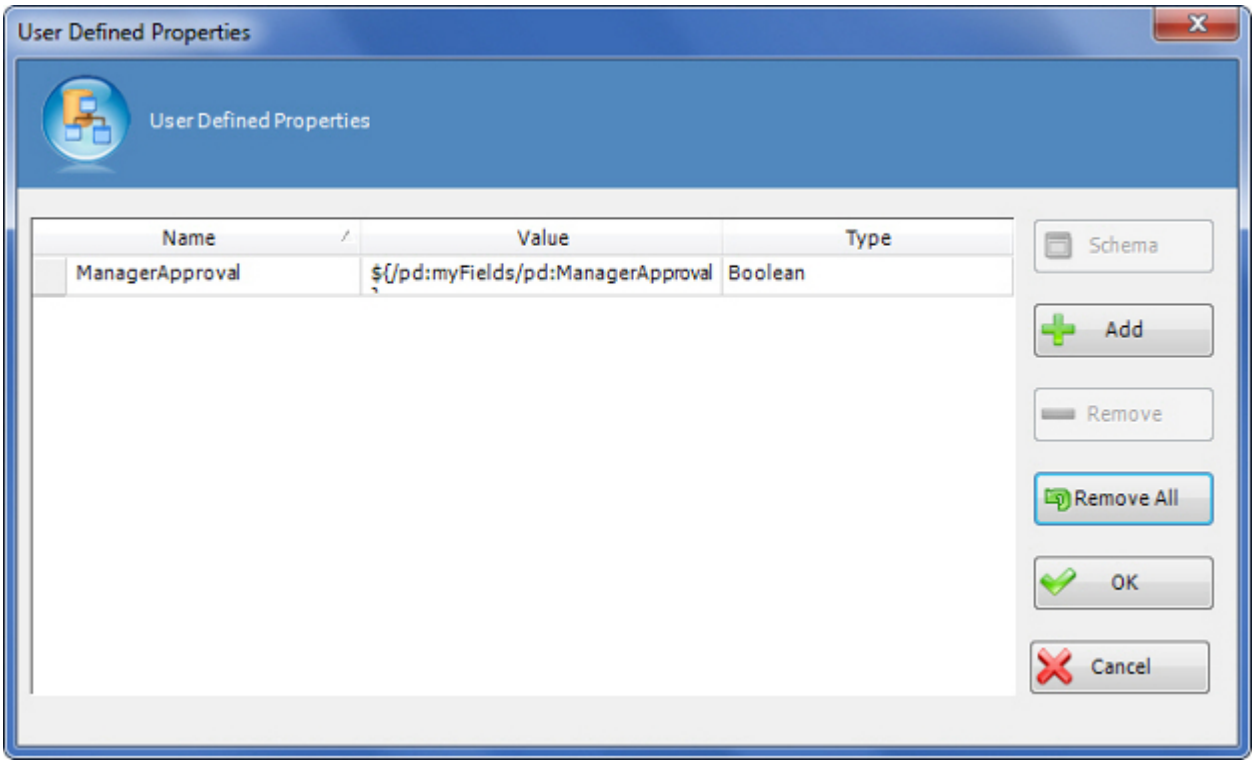
Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

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

User Defined Properties Window

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



Navigation

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

Field Definitions

Field Name	Definition
Add	Function: Creates a row where you can specify a ClientData property.

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

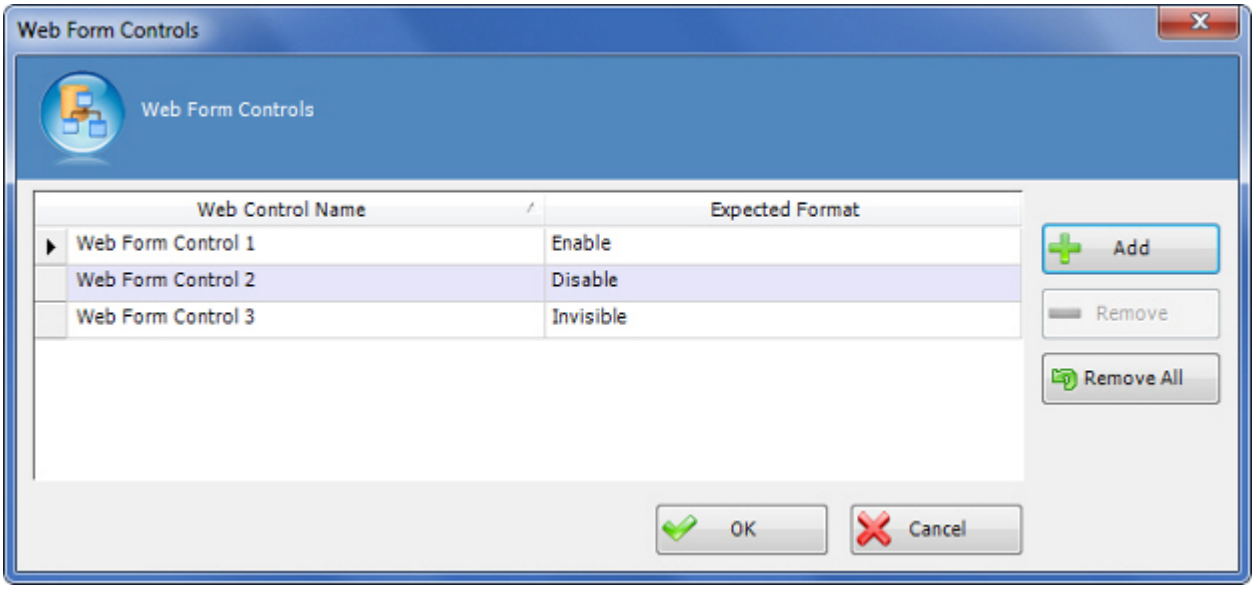
Field Name	Definition
	• **String** • **Float** • **Decimal** • **DateTime** • **Boolean** Default Value: None
Remove	Function: Deletes the selected row from the user defined properties list.
Remove All	Function: Deletes all rows from the user defined properties list.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Web Form Controls Window

Sets up the display of custom web form.



Navigation

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

Field Definitions

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

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

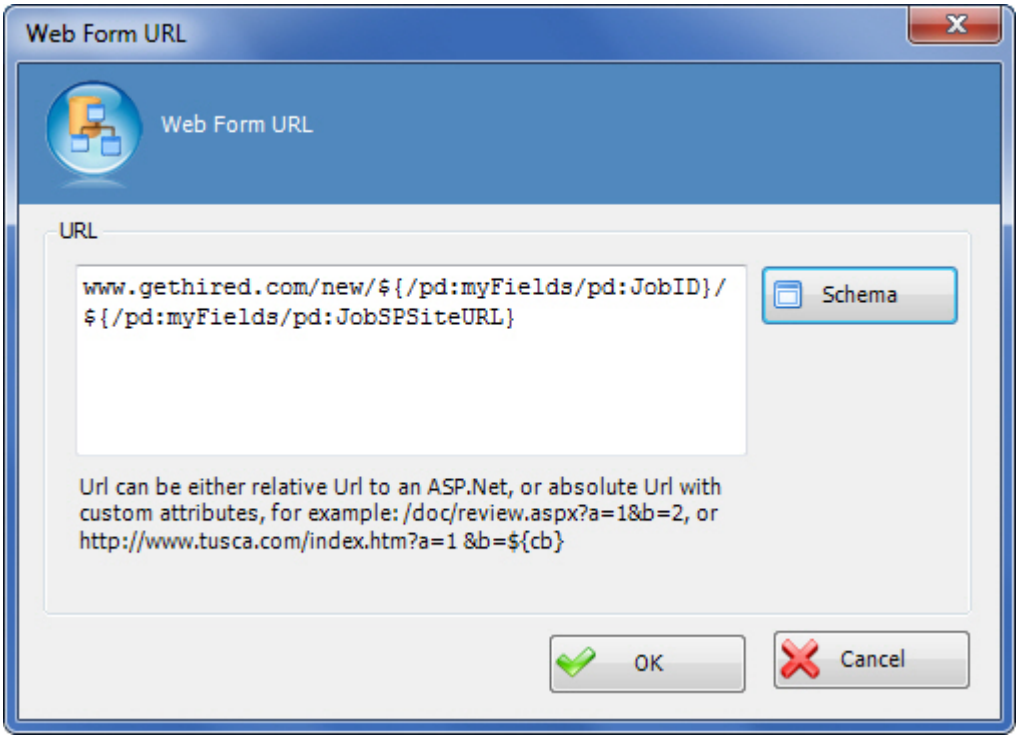
Common Configuration Tasks

- Data Binding
- Using Process Attributes

Web Form URL Window

Specifies the URL for the web form for the activity.

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



Prerequisites

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

  For more information, see Set the AgilePoint Configuration List.

Navigation

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

Field Definitions

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

Field Name	Definition
	includes the URL of the SharePoint home page. Notice the phrase **%26Source=${HomePage}** at the end, which is the only difference: http://[machine name]:[port]/sites/[site name]/Lists/[list name]/Item/editifs.aspx?List=${ListID}&ID=${ListItemID}&Web=${WebID}&Source=http://[machine name]:[port]/sites/[site name]/_layouts/AP/CompleteWorkItem%2Easpx?WID=${WorkItemID}**%26Source=${HomePage}** Default Value: None Custom Attributes: Yes Example: ASP.NET examples: • **Relative URL** - /doc/review.aspx?a=1&b=2 • **Absolute URL** - http://www.tusca.com/MyPage.aspx?item=$\{itemid\}&quantity=$\{qty\}&express=no The values of two of the parameters are initialized by custom process attributes ($\{itemid\} and $\{qty\}) at runtime, and the third is initialized to a hard coded value. SharePoint examples: • **OpenTaskInNewWindow** is set to **True** - http://demo3:8010/Lists/TestList/Item/editifs.aspx?List=${ListID}&ID=${ListItemID}&Web=${WebID}&Source=http://demo3:8000/_layouts/AP/CompleteWorkItem%2Easpx?WID=${WorkItemID} • **OpenTaskInNewWindow** is set to **False** - http://demo3:8010/Lists/TestList/Item/editifs.aspx?List=${ListID}&ID=${ListItemID}&Web=${WebID}&Source=http://demo3:8000/_layouts/AP/CompleteWorkItem%2Easpx?WID=${WorkItemID}%26Source=${HomePage}
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window:

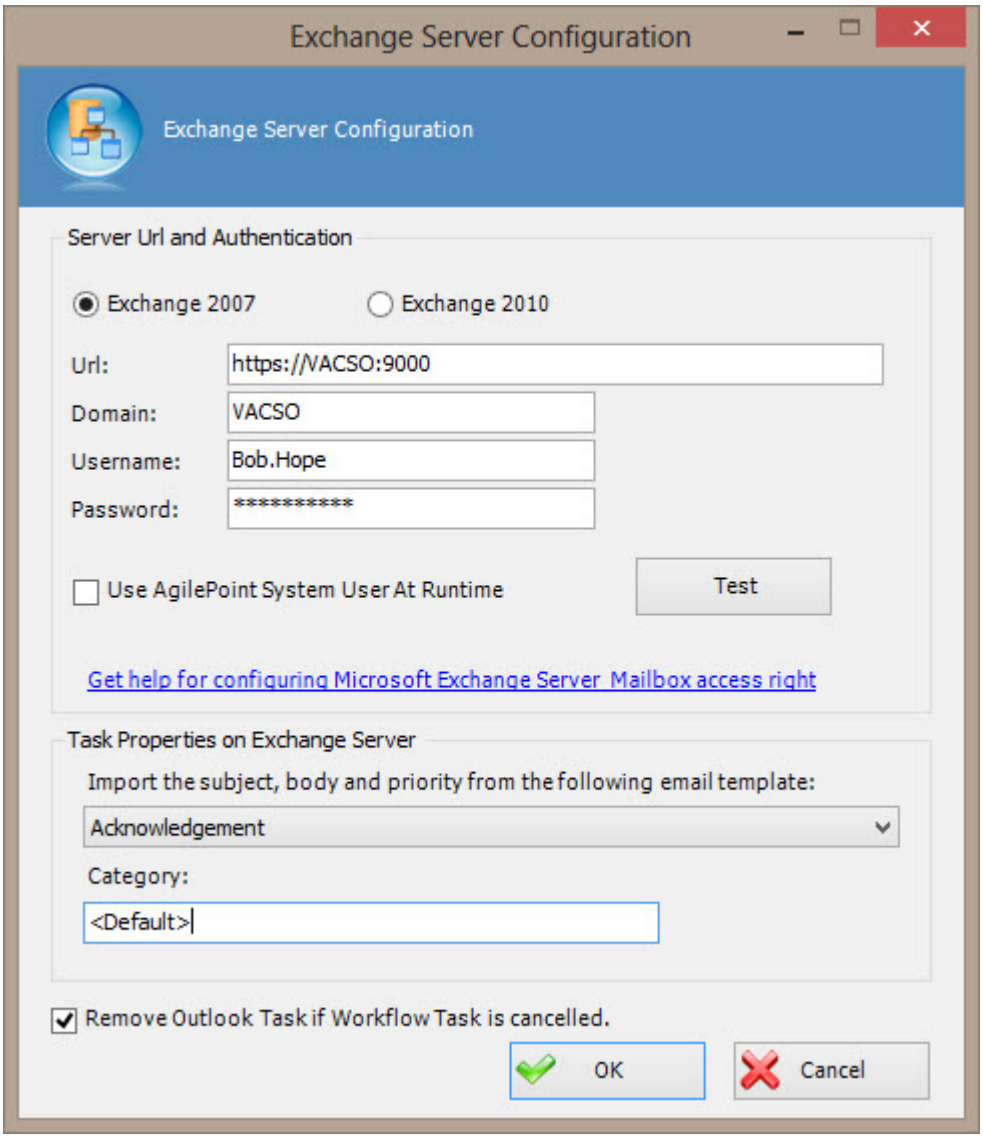
Field Name	Definition
	Enables you to select a schema node from the XML schema for your process.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Exchange Server Configuration Window

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



Navigation

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

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

Field Definitions

Field Name	Definition
Exchange 2007 or Exchange 2010	Definition: Specifies the version of your Microsoft Exchange Server. Allowed Values: • **Exchange 2007** - Enables to configure this AgileShape to access Exchange Server 2007. • **Exchange 2010** - Enables to configure this AgileShape to access Exchange Server 2010. Default Value: Exchange 2007
Url	Definition: Specifies the Exchange Server URL. Allowed Values: • **Exchange 2007** - https://[machine name]:[port] • **Exchange 2010** - https://[machine name]:[port]/EWS/Exchange.asmx Default Value: https://[MachineName]:[Port] Custom Attributes: No Example: • **Exchange 2007** - https://mydomain.com:2030 • **Exchange 2010** - https://mydomain.com:2030/EWS/Exchange.asmx
Domain	Definition: The authentication domain. Allowed Values: A valid domain. Default Value: None

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

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

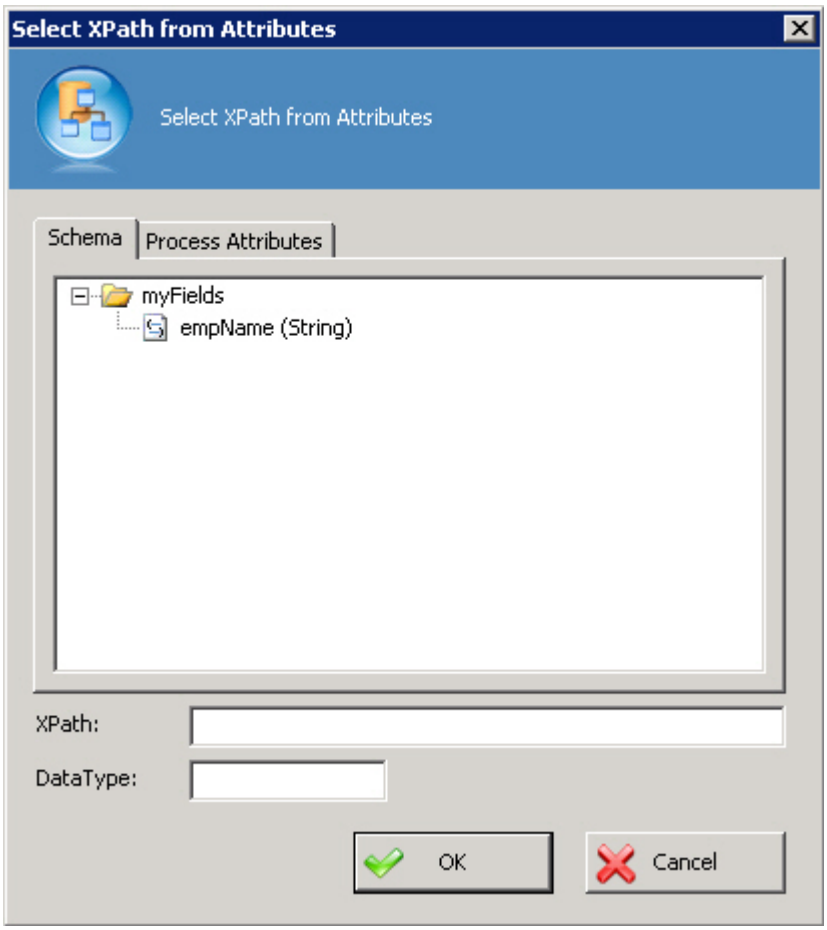
Field Name	Definition
	Selected

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

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



Prerequisites

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

Navigation

1. In AgilePoint Envision, open a process template.

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

Field Definitions

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

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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Workload Balance

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



Good to Know

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

Navigation

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

Properties for This AgileShape

Field Name	Definition
UserDefinedProperties	Opens the Following Window: User Defined Properties Window Purpose of this Window: Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable-like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want.
Claimable	Definition: Determines whether the participant who has been assigned the work item can have the option to reject it. If the participant rejects the work item, the work item is placed back in the pool and assigned to a different participant. Allowed Values: • **True** - The participant can reject the work item. If rejected, the work item is placed back in the pool. • **False** - The participant doesn't have the option to reject the work item. Default Value: True
EnabledExchangeServer	Definition: Integrates the AgileShape with Microsoft Exchange Server. The AgileShape's associated tasks are visible in the Microsoft Outlook's task list to the assigned participants. Allowed Values: • **False** - The AgileShape in not integrated with Microsoft Exchange Server. • **True** - The AgileShape is integrated with Microsoft Exchange Server that enables the participants to view the assigned tasks in Microsoft Outlook.

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

Common AgileWork Properties

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

BPMN Properties

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

Common AgileWork Tasks

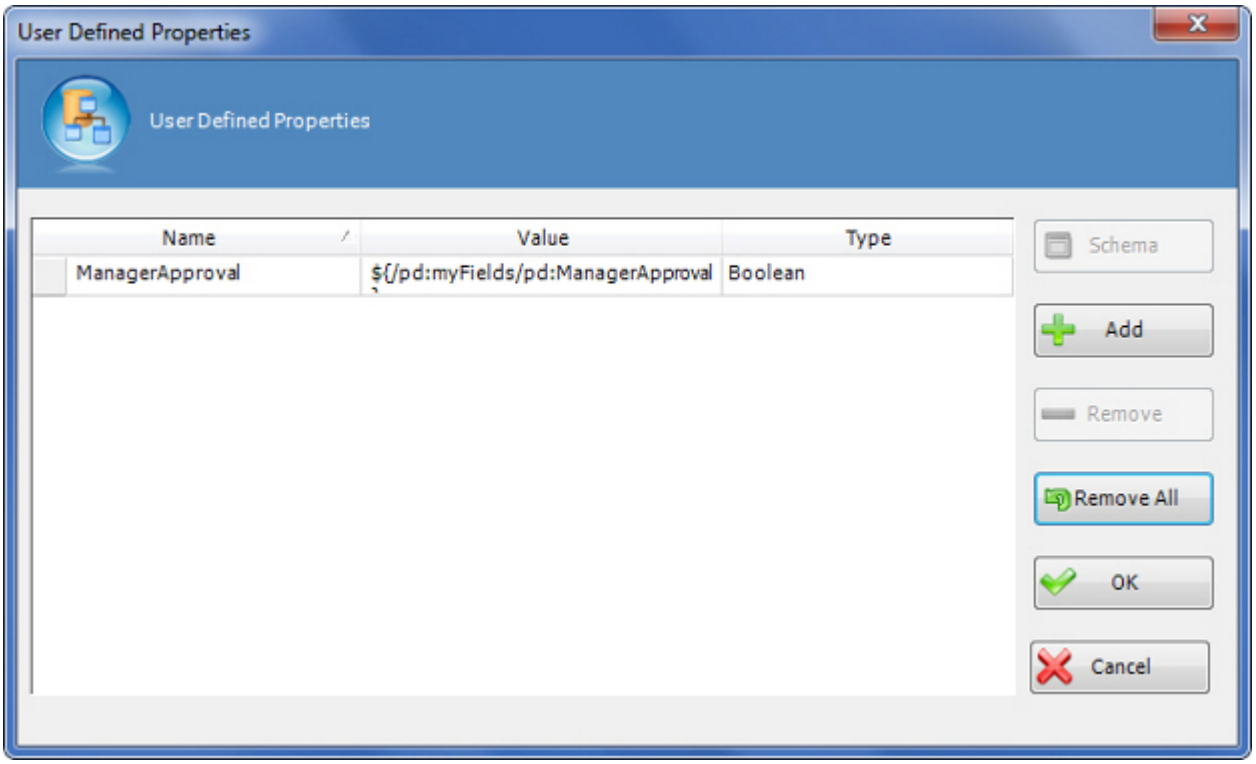
- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

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

User Defined Properties Window

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



Navigation

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

Field Definitions

Field Name	Definition
Add	Function: Creates a row where you can specify a ClientData property.

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

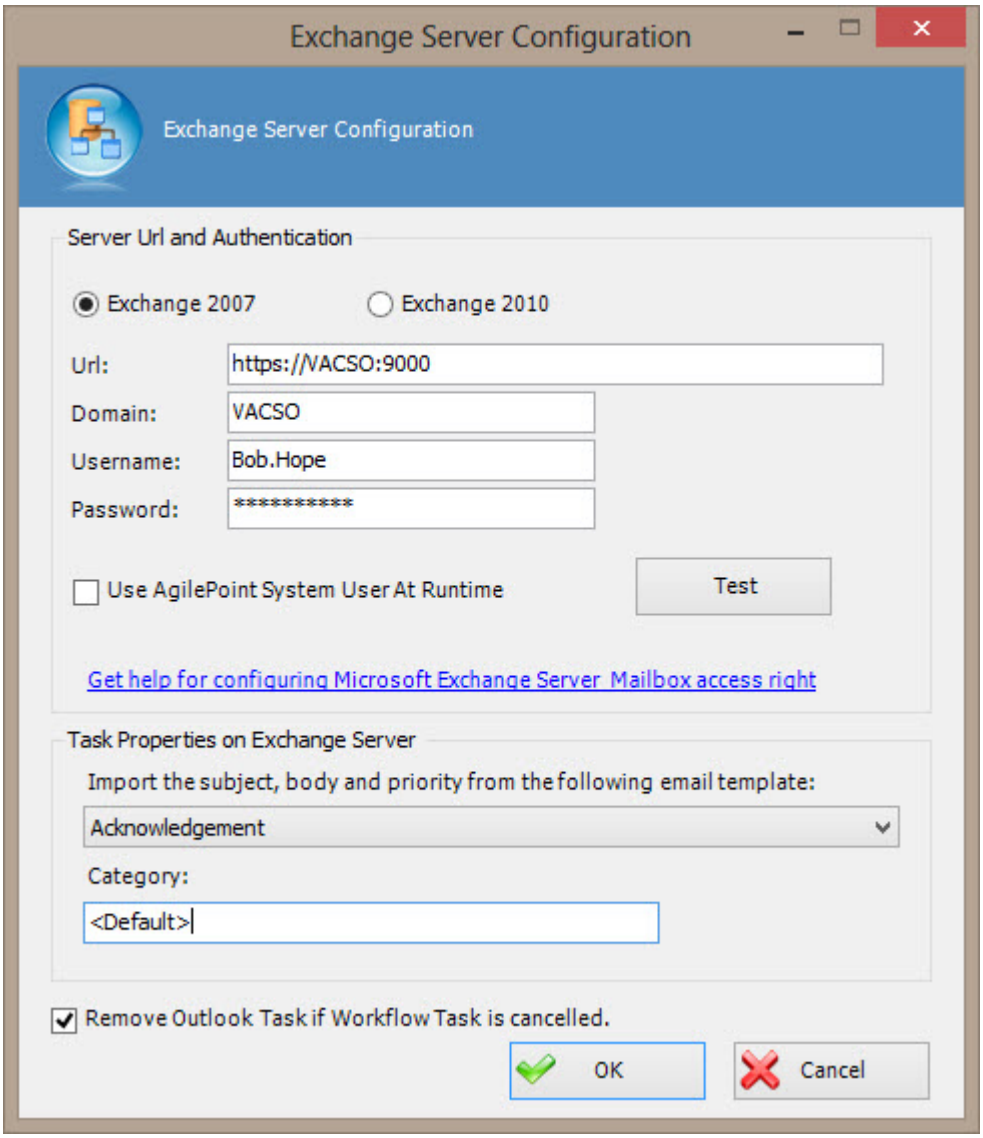
Field Name	Definition
	• **String** • **Float** • **Decimal** • **DateTime** • **Boolean** Default Value: None
Remove	Function: Deletes the selected row from the user defined properties list.
Remove All	Function: Deletes all rows from the user defined properties list.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Exchange Server Configuration Window

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



Navigation

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

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

Field Definitions

Field Name	Definition
Exchange 2007 or Exchange 2010	Definition: Specifies the version of your Microsoft Exchange Server. Allowed Values: • **Exchange 2007** - Enables to configure this AgileShape to access Exchange Server 2007. • **Exchange 2010** - Enables to configure this AgileShape to access Exchange Server 2010. Default Value: Exchange 2007
Url	Definition: Specifies the Exchange Server URL. Allowed Values: • **Exchange 2007** - https://[machine name]:[port] • **Exchange 2010** - https://[machine name]:[port]/EWS/Exchange.asmx Default Value: https://[MachineName]:[Port] Custom Attributes: No Example: • **Exchange 2007** - https://mydomain.com:2030 • **Exchange 2010** - https://mydomain.com:2030/EWS/Exchange.asmx
Domain	Definition: The authentication domain. Allowed Values: A valid domain. Default Value: None

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

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

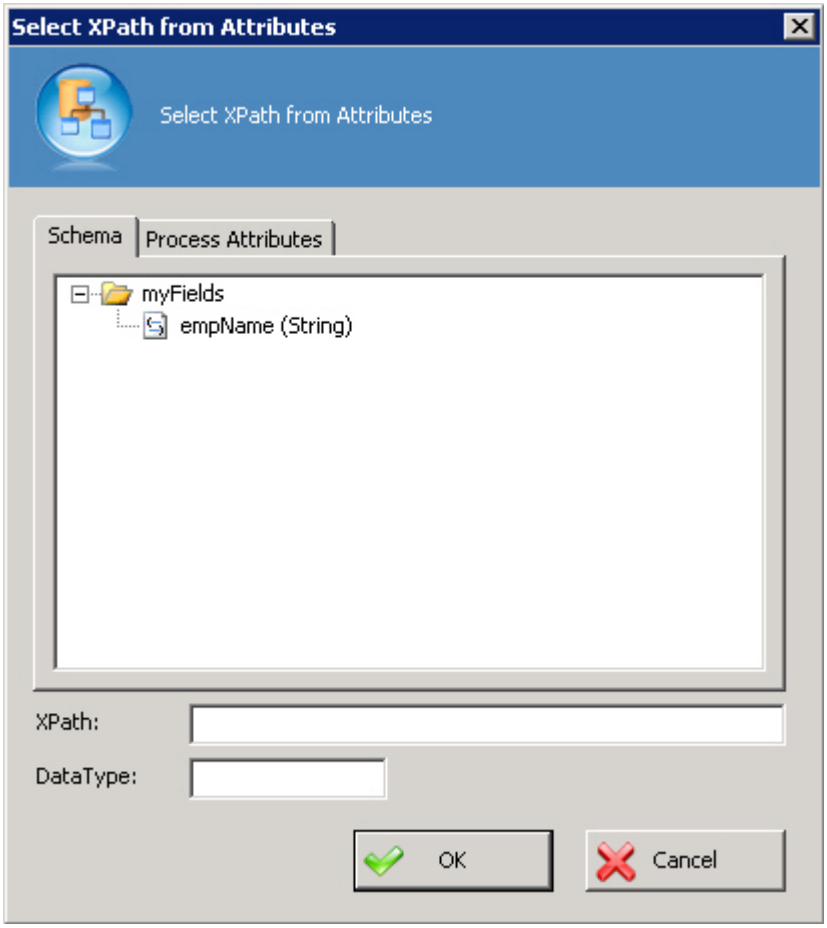
Field Name	Definition
	Selected

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

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



Prerequisites

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

Navigation

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

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

Field Definitions

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

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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

Assigning Tasks Based On Workload

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

Navigation

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

Instructions

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

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

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

SharePoint / Microsoft SPS

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

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

Add User to SP Group

An AgilePart that adds a user to a SharePoint Group.



Navigation

1. In AgilePoint Envision, open a process template.

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

Properties for This AgileShape

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

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

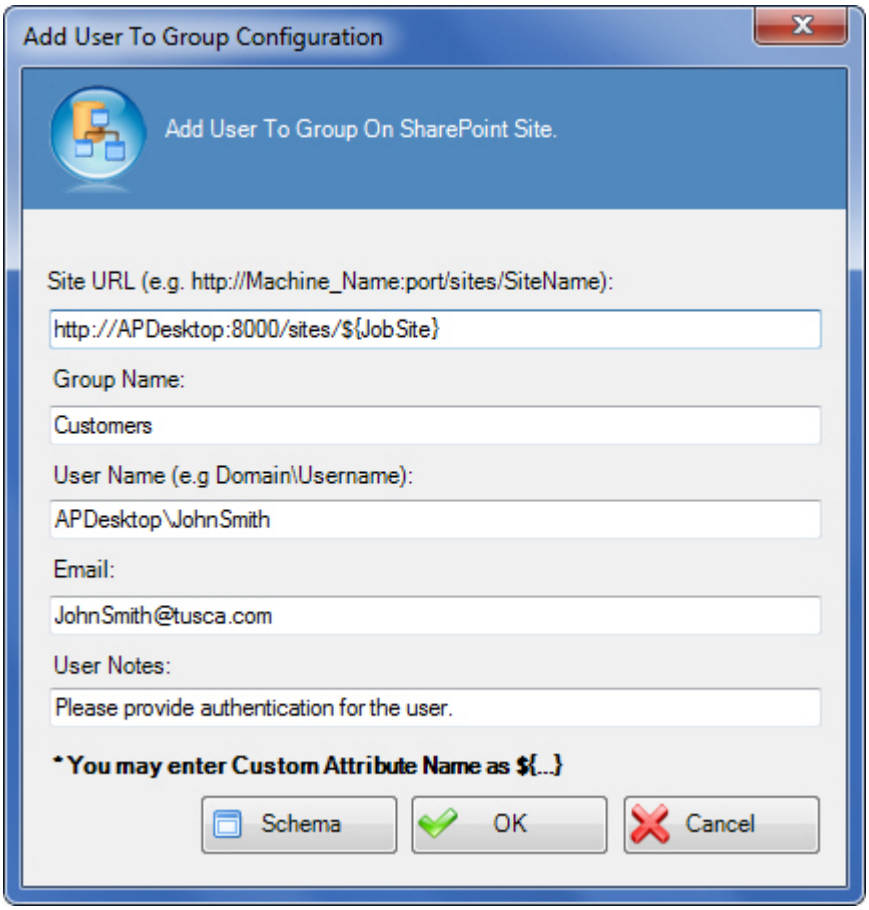
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

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

Add User To Group Configuration Window

Specifies user information to be created in SharePoint for the Add User to SP Group AgileShape.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Add User to SP Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **AddUserToGroup Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL.

Field Name	Definition
	Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Group Name	Definition: The name of the SharePoint group you want. Allowed Values: A valid SharePoint group name. Default Value: None Custom Attributes: Yes
User Name	Definition: Specifies the user name to be added to the SharePoint group. Allowed Values: A user name, including the domain name, in the following format: [domain]\[user name] Default Value: None Custom Attributes: Yes Example: MyDomain\Administrator
Email Address	Definition: The user's email address. Allowed Values: A valid email address. Default Value:

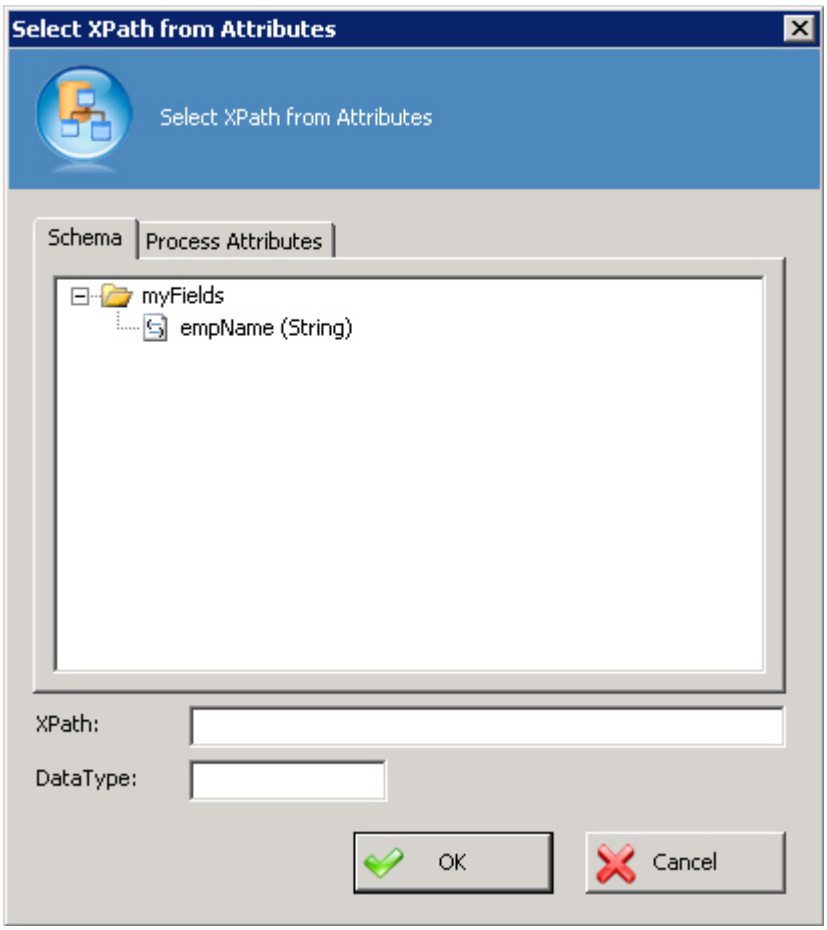
Field Name	Definition
	None Custom Attributes: Yes
User Notes	Definition: Provides information related to this activity. For example, you can specify group-related privileges to be assigned to the user. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

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



Prerequisites

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

Navigation

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

Field Definitions

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

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

Adding a User to a SharePoint Group

To add a user to a SharePoint group, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Add User to SP Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **AddUserToGroup Configuration** field, click the **Ellipses** button.

Instructions

1. On the **Add User from Group Configuration** window, complete the following required fields:

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Group Name	Definition:

Field Name	Definition
	The name of the SharePoint group you want. Allowed Values: A valid SharePoint group name. Default Value: None Custom Attributes: Yes
User Name	Definition: Specifies the user name to be added to the SharePoint group. Allowed Values: A user name, including the domain name, in the following format: [domain]\[user name] Default Value: None Custom Attributes: Yes Example: MyDomain\Administrator
Email Address	Definition: The user's email address. Allowed Values: A valid email address. Default Value: None Custom Attributes: Yes

2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Add User To Group Configuration Window

Approve

An AgileWork that is identical to the Manual AgileShape, except that its Work To Perform property defaults to the value **Approve**, and it has a different visual appearance in the process template. This AgileShape is provided simply for the convenience of the process modeler.

Note: This AgileShape has been deprecated. Beginning with AgilePoint BPMS v5.0 SP4 this AgileShape is available only through the Traditional AgileShape stencils, and not through the current stencils.



Navigation

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

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgileWork Properties

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

BPMN Properties

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

Common AgileWork Tasks

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

Approve Reject Content

An AgileWork that can be used to automatically approve or reject a document, or file.



Navigation

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

Properties for This AgileShape

Field Name	Definition
Approval Type	Definition: Determines whether the document is approved or rejected. Allowed Values: • **Reject** - The document is rejected. • **Approve** - The document is approved. Default Value: Reject
Document URL	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes:

Field Name	Definition
	Yes

Common AgileWork Properties

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

BPMN Properties

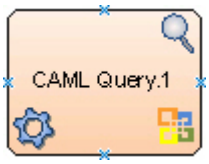
Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

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

CAML Query

An AgilePart that creates a SharePoint view based on available fields using a CAML query. Use the CAML Query Builder AgilePart to create your CAML query, and your view.



Prerequisites

- Log on to SharePoint.

Navigation

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

Properties for This AgileShape

Field Name	Definition
CAML Query Configuration	Opens the Following Window: • CAML Query Builder Configuration Window - List and View Fields Tab - Creates a view from the available fields, or columns, in a SharePoint list. • CAML Query Builder Configuration Window - Where Clause Tab - Configures a Where clause to filter the results of a CAML query. • CAML Query Builder Configuration Window - Query Options Tab - Specifies how and where CAML query operations are performed in the SharePoint list - for example, how many SharePoint records need to be retrieved, the folder location where the query needs to be performed, and whether to include the mandatory columns in the CAML query result. • CAML Query Builder Configuration Window - Grouping Tab - Groups SharePoint list data by a specified column name, either in ascending or descending order • CAML Query Builder Configuration Window - Output Mapping Tab - Maps the SharePoint columns in a CAML query response to the nodes in an AgilePoint or InfoPath schema. • CAML Query Builder Configuration Window - Test Query Tab - Verifies whether the specified CAML query is correct.

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

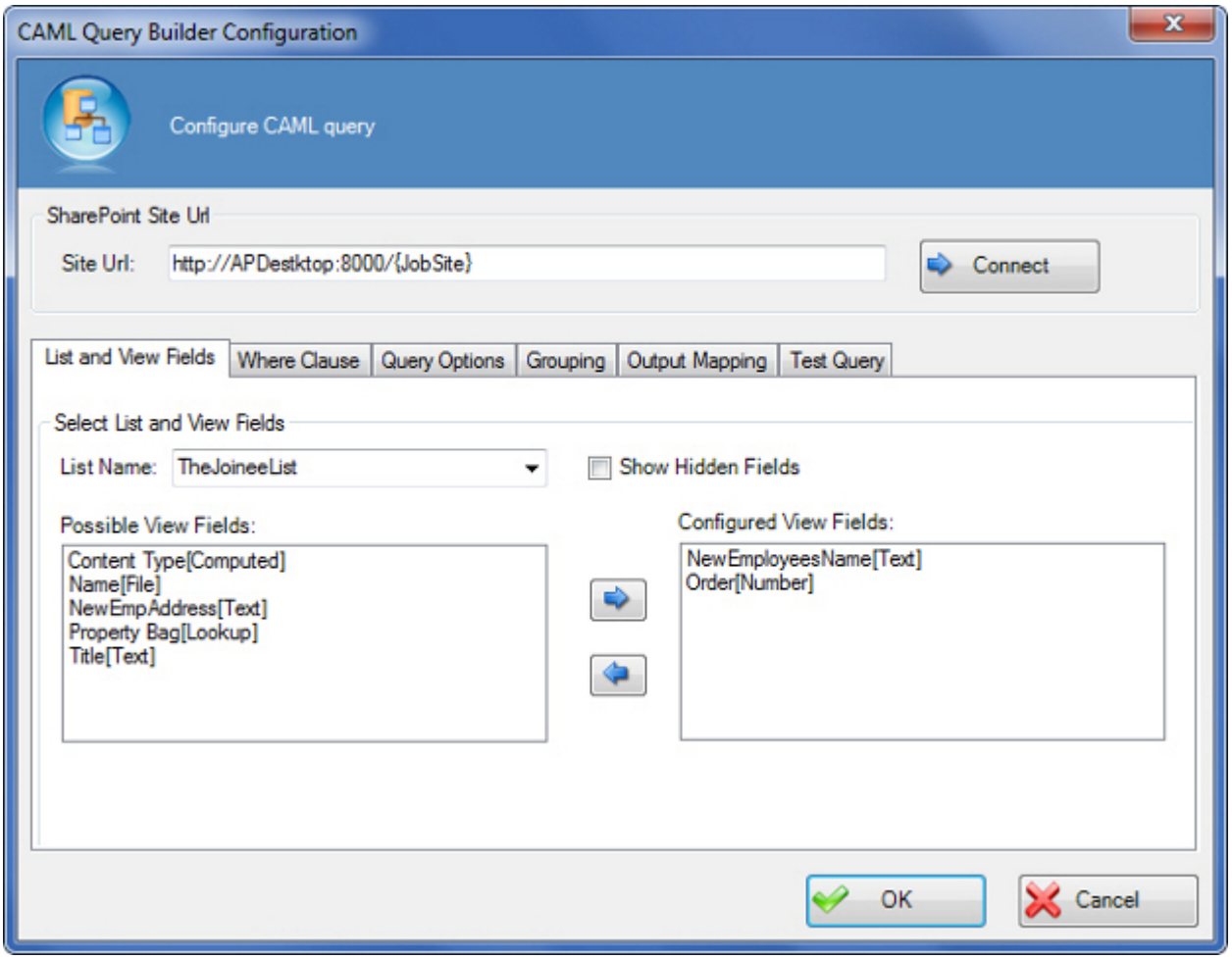
- Using Process Attributes

Configuration Windows

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

CAML Query Builder Configuration Window - List and View Fields Tab

Creates a view from the available fields, or columns, in a SharePoint list.



Navigation

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

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Connect	Function: Retrieves all the SharePoint lists and document libraries of the specified SharePoint site to the List Name list.
List Name	Definition: Determines the name of the SharePoint list you want to use. Allowed Values: The name of your SharePoint list. Default Value: None Custom Attributes: Yes
Show Hidden Fields	Definition: Determines whether you can use the SharePoint hidden columns to create the CAML query. Allowed Values: • **Deselected** - The SharePoint hidden columns are not available for creating the CAML query.

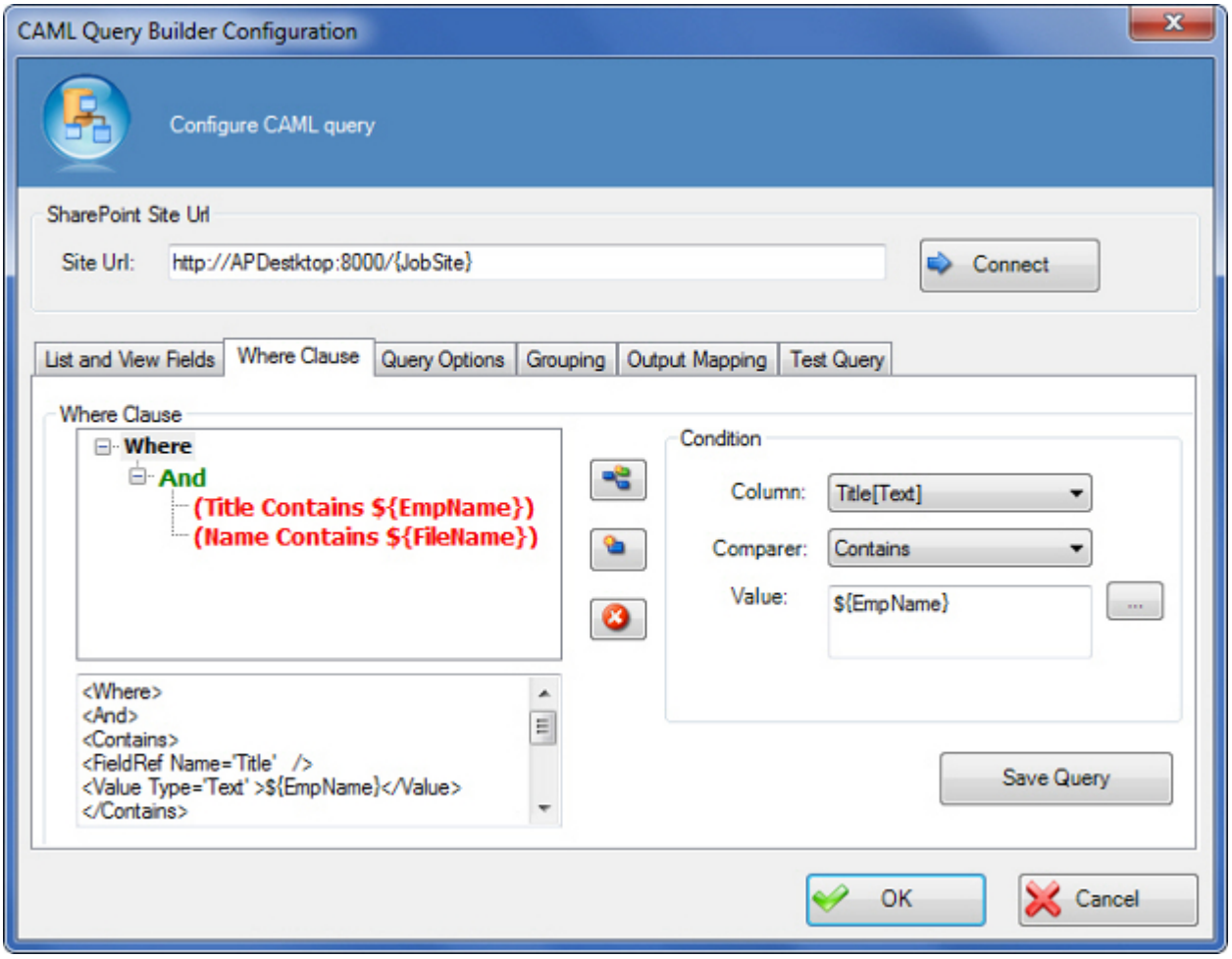
Field Name	Definition
	• **Selected** - The SharePoint hidden columns are displayed in the Possible View Fields box. Thus, you can use them to create the CAML query. Default Value: Deselected
Possible View Fields	Definition: Displays all the columns of the specified SharePoint list. Allowed Values: A SharePoint column selected from the list. Default Value: None Custom Attributes: No
Left Arrow	Function: Moves the selected fields from the Possible View Fields box to the Configured View Fields box.
Right Arrow	Function: Moves the selected fields from the Configured View Fields box to the Possible View Fields box.
Configured View Fields	Definition: Specifies the SharePoint columns that are required to create the CAML query. Allowed Values: A list of columns moved from the Possible View Fields box using the Left Arrow button. To remove a particular column from the list, select the column, and then click the Right Arrow button. Default Value: None Custom Attributes: No

Common Configuration Tasks

- Data Binding
- Using Process Attributes

CAML Query Builder Configuration Window - Where Clause Tab

Configures a Where clause to filter the results of a CAML query. Only the SharePoint records are retrieved that fulfill the criteria of the Where clause.



Navigation

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

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Connect	Function: Retrieves all the SharePoint lists and document libraries of the specified SharePoint site to the List Name list.
Where Clause Box	Definition: Displays the tree-view structure of the Where clause set for the CAML query. The Where clause is specified using the conditions and logical operators. Allowed Values: Read only.
Select Nest Type	Function: Determines the use of logical AND and OR operators to nest conditions for the Where clause. • **And** - Specifies the logical AND operator. • **Or** - Specifies the logical OR operator. You must set the nest type first, before defining the condition for the where clause.
Configure Condition	Function: Sets the criteria that defines which SharePonit list data to be retrieved. • **Column** - The name of the SharePoint column.

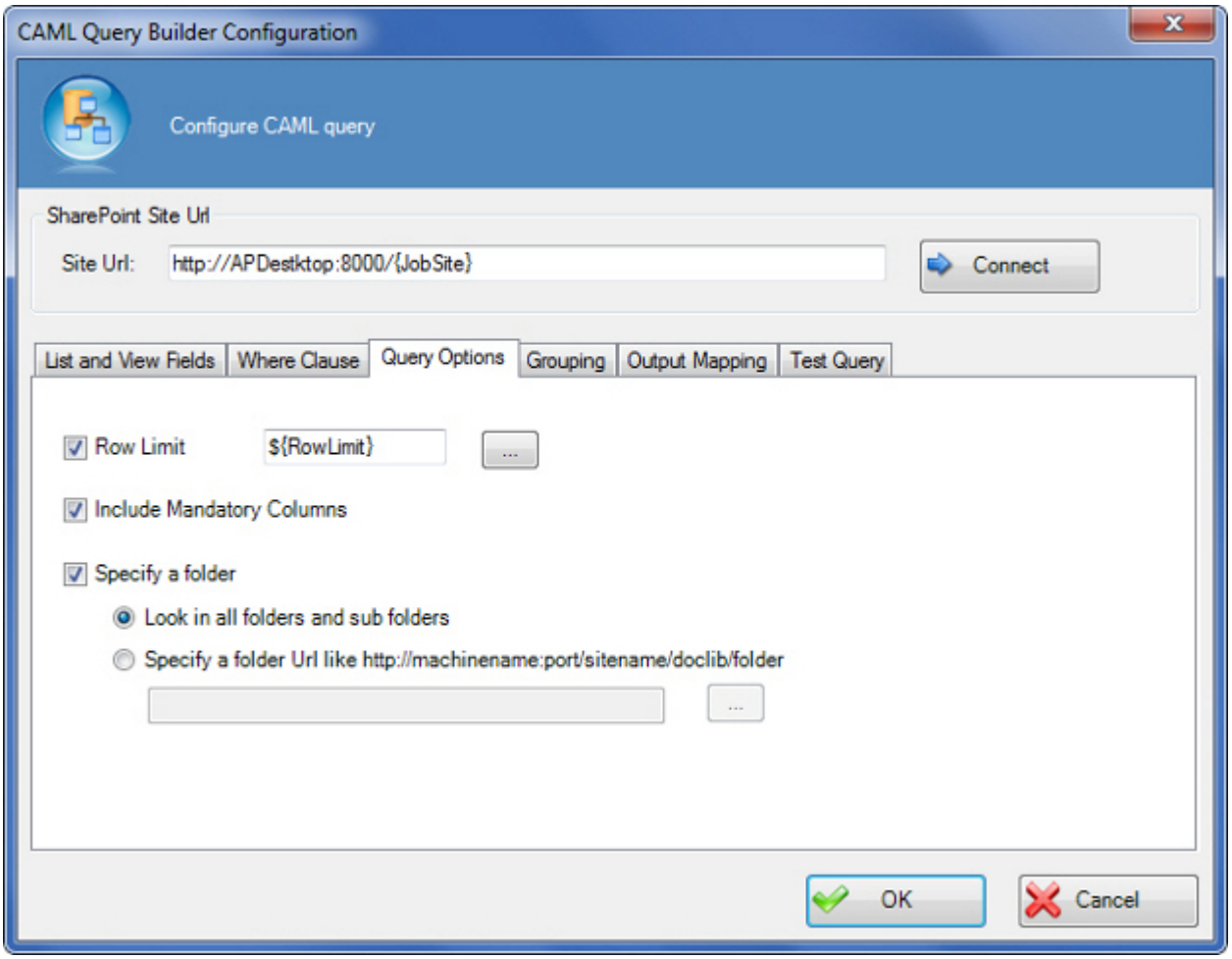
Field Name	Definition
	• **Comparer** - A list of comparison operators that are used with Where clause. • **Value** - The value for the column. You can also specify a custom attribute using the Ellipses button.
Delete Condition	Function: Deletes the selected condition specified for the Where clause.
Save Query	Function: Saves the Where clause specified for the CAML query. Also, displays the code snippet generated for the Where clause, in the code snippet box where you can make changes. When you make changes in the code snippet box, the Edit and Save Query button appears to save the specified changes. Once you click the Edit and Save Query button, the changes are reflected in the Where Clause box.
Where Clause Code Snippet Box	Definition: Displays the code snippet which is generated for the Where clause when you click Save Query. The Where clause is specified using the conditions and logical operators. Allowed Values: A code snippet. You can edit the code in the code snippet box. When you make changes in the code snippet box, the Edit and Save Query button appears to save the specified changes. Once you click the Edit and Save Query button, the changes are reflected in the Where Clause box. Default Value: A code snippet generated for the Where clause.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

CAML Query Builder Configuration Window - Query Options Tab

Specifies how and where CAML query operations are performed in the SharePoint list - for example, how many SharePoint records need to be retrieved, the folder location where the query needs to be performed, and whether to include the mandatory columns in the CAML query result.



Navigation

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

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Connect	Function: Retrieves all the SharePoint lists and document libraries of the specified SharePoint site to the List Name list.
Row Limit	Definition: Determines the maximum number of rows to be retrieved using the CAML query. By default, 10,000 records can be fetched from the CAML query. Allowed Values: • **Deselected** - Specifies that maximum 10,000 records can be fetched from the CAML query. • **Selected** - Retrieves the specified number of records. Default Value: Deselected
Include Mandatory Columns	Definition: Specifies that mandatory columns are included in the CAML query results. Allowed Values: • **Selected** - The mandatory columns are included in the CAML query results.

Field Name	Definition
	• **Deselected** - The mandatory columns are not included in the CAML query results. Default Value: Selected

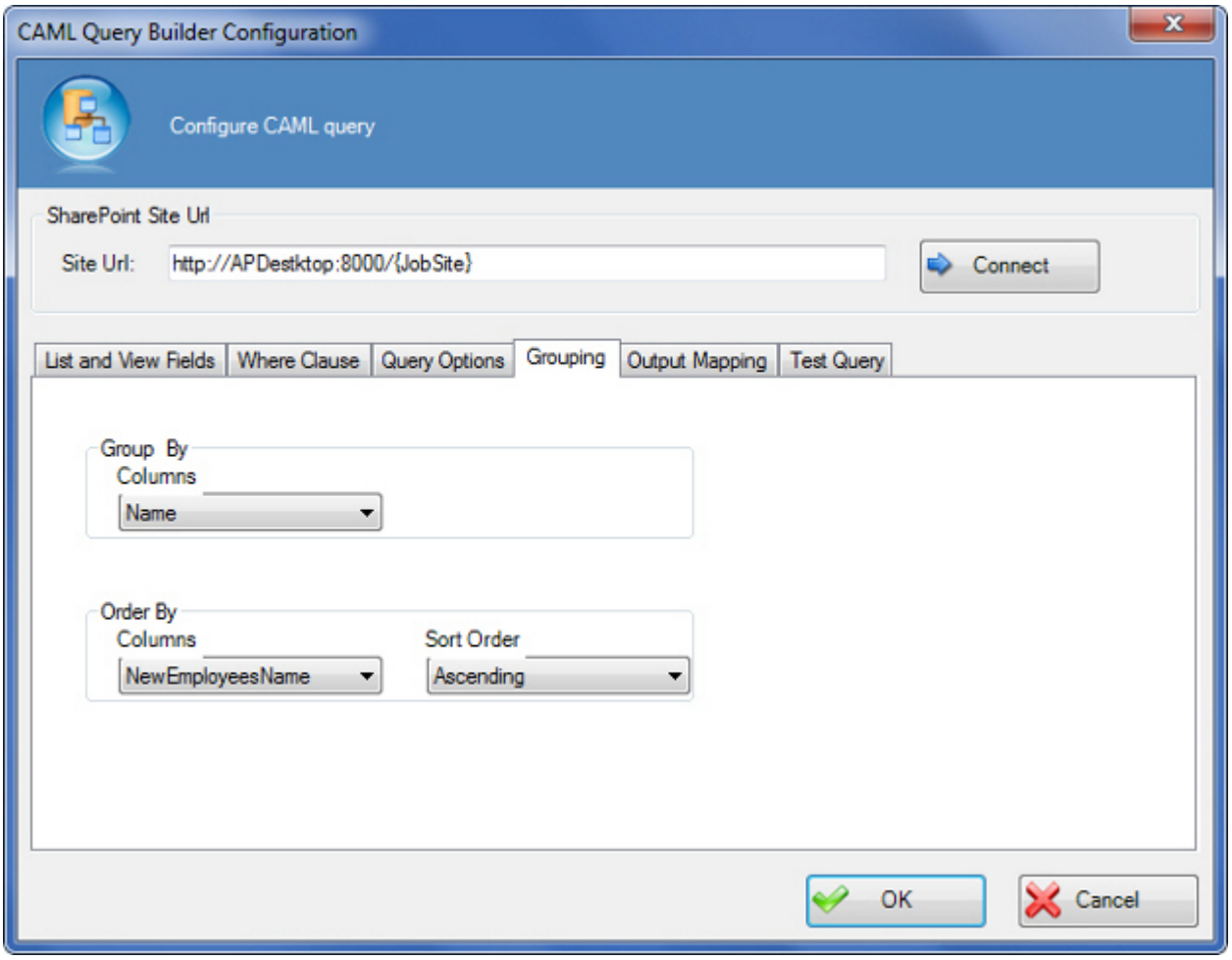
Specify a folder	Definition:
	
	Specifies the location of a folder you want the CAML query to be executed.
	
	Allowed Values:
	
	• **Selected** - The AgileShape executes the CAML query at the folder location.
	  • **Look in all folders and sub folders** - The CAML query is executed in all the folders and their subfolders.
	  • **Specify a folder Url** - The CAML query is executed only in the specified folder.
	• **Deselected** - The AgileShape executes the CAML query in the entire SharePoint database.
	
	Default Value:
	
	Deselected

Common Configuration Tasks

- Data Binding
- Using Process Attributes

CAML Query Builder Configuration Window - Grouping Tab

Groups SharePoint list data by a specified column name, either in ascending or descending order



Navigation

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

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL.

Field Name	Definition
	Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Connect	Function: Retrieves all the SharePoint lists and document libraries of the specified SharePoint site to the List Name list.
Group By - Columns	Definition: Specifies the name of the SharePoint column you want to group the SharePoint records to retrieve the required result set. Allowed Values: The name of your SharePoint list column. Default Value: None Custom Attributes: No
Order By - Columns	Definition: Specifies the name of the SharePoint column you want the CAML query result set to be arranged. Allowed Values: The name of your SharePoint list column. Default Value: None Custom Attributes: No
Order By - Sort Order	Definition: Determines the order the result set is to be arranged by the specified column. Allowed Values:

Field Name	Definition
	• **Ascending** - The result set is arranged in an ascending order. • **Descending** - The result set is arranged in a descending order. Default Value: Ascending

Common Configuration Tasks

- Data Binding
- Using Process Attributes

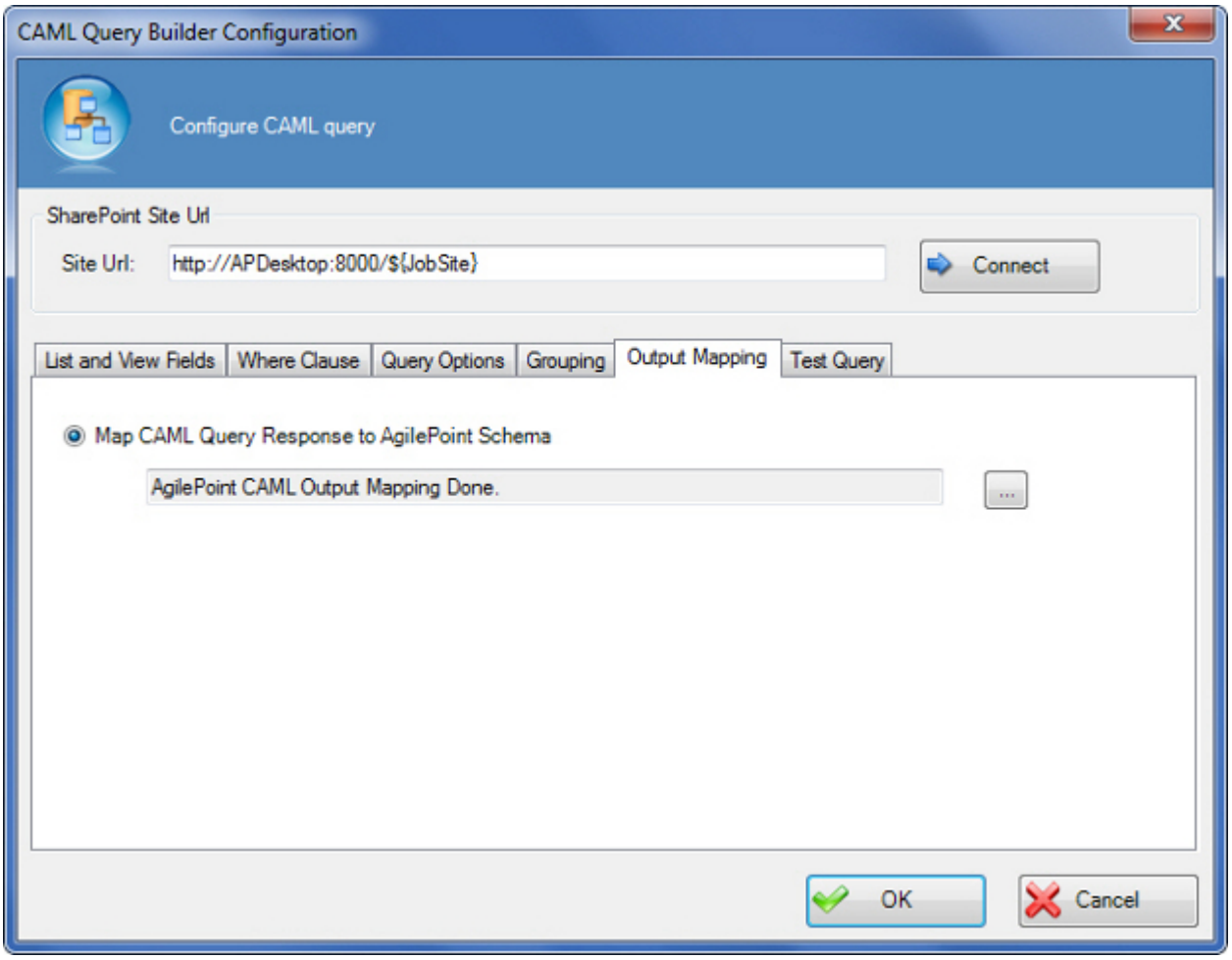
CAML Query Builder Configuration Window - Output Mapping Tab

Maps the SharePoint columns in a CAML query response to the nodes in an AgilePoint or InfoPath schema.

If the output type is an InfoPath form, the results from the CAML query operations are automatically updated in the InfoPath form. The following conditions apply:

- The InfoPath form must have a repeating table that can be mapped from the SharePoint column to the row node.
- The columns must be mapped to this repeating table.
- The ItemCount node contains the number of rows returned by the CAML query. This can also be mapped if required.

If these conditions are not met, then you must manually map the CAML query response to the InfoPath.



Navigation

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

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL.

Field Name	Definition
	Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Connect	Function: Retrieves all the SharePoint lists and document libraries of the specified SharePoint site to the List Name list.
Map CAML Query Response to AgilePoint Schema	Definition: Determines whether to map the nodes from the SharePoint columns returned from the CAML query to the AgilePoint schema. Allowed Values: • **Selected** - The nodes from the SharePoint column are mapped to the AgilePoint schema. • **Deselected** - Mapping is not performed. Default Value: Selected
CAML Output Mapping Box	Definition: Specifies whether the CAML Query response is mapped to the AgilePoint schema. Allowed Values: Read Only - message is populated when the mapping options are set on the Schema Mapper Window. Use the Ellipses button to map the schemas for the process and the CAML query response.
Ellipses	Opens the Following Window: Schema Mapper Window Purpose of this Window: Maps SharePoint fields, form fields, web methods, or other input sources to an XML schema.

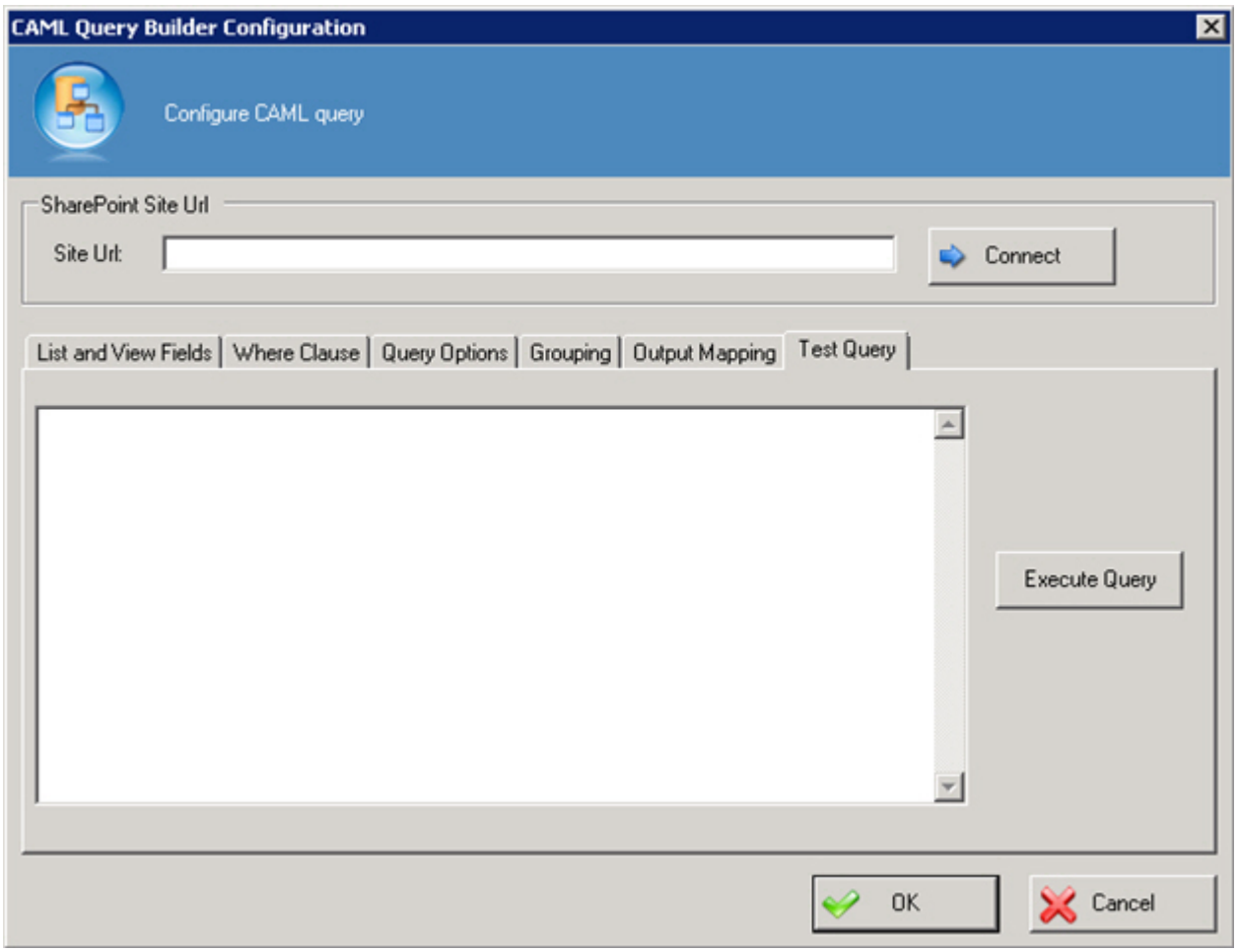
Field Name	Definition
	Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options: • **Reset All Mappings** - Deletes all mappings that have been made in the Schema Mapper for this activity. • **Remove Invalid Mappings only** - Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same. • **Cancel** - Aborts opening the Schema Mapper window.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

CAML Query Builder Configuration Window - Test Query Tab

Verifies whether the specified CAML query is correct.



Navigation

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

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL.

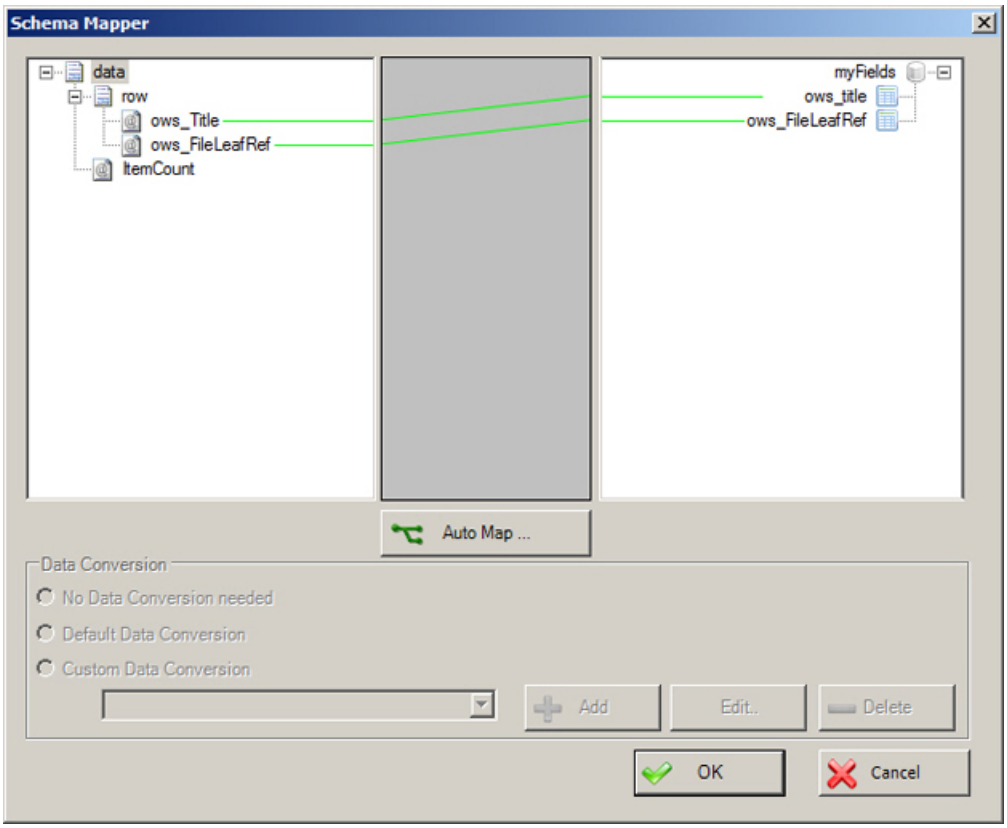
Field Name	Definition
	Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Connect	Function: Retrieves all the SharePoint lists and document libraries of the specified SharePoint site to the List Name list.
Execute Query	Function: Verifies the CAML query and displays the error message if an error occurs. If the CAML query is executed successfully, the result is displayed in the box.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Schema Mapper Window

Maps SharePoint fields, form fields, web methods, or other input sources to an XML schema.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **SharePoint**
   - **Web Services**
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **CAML Query**
   - **WSE (Web Service Extension)**
   - **WCF (Windows Communication Foundation)**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The fields that display vary, depending upon the AgsileShape you are using. For example, **Configure**.
6. On one of the following windows, under the **Output Mapping** or **Request/Response** tab, click the **Ellipses** button:
   - CAML Query Builder Configuration Window - Output Mapping Tab
   - WebService Configuration Window - Request Tab
   - WebService Configuration Window - Response Tab
   - Configuration for WCF Service Window - Request Tab

- Configuration for WCF Service Window - Response Tab

Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options:

- **Reset All Mappings** - Deletes all mappings that have been made in the Schema Mapper for this activity.
- **Remove Invalid Mappings only** - Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same.
- **Cancel** - Aborts opening the Schema Mapper window.

Field Definitions

Field Name	Definition
Mapping Schemas for Request/Response and Process Model	Definition: Maps the schemas for a service's request or response and the AgilePoint schema: • CAML query schema for a response and AgilePoint schema • WSE service schema for a request/response and the AgilePoint schema • WCF service schema for a request/response and the AgilePoint schema The source and the destination schemas are displayed in a tree-view structure in the left and right panes. Allowed Values: Read only - However, the drag and drop operations are supported to map the schemas. Drag a data node from the source schema pane to the destination schema pane: • Green line - The data type of source and destination nodes matches. • Blue line - The data type of source and destination nodes doesn't match. The data conversion is required to map the schemas. • Red line - Specifies that the custom data conversion is required.
Automap	Function: Maps all fields in the data source and the process schema that have the same name.
No Data Conversion needed	Definition:

Field Name	Definition
	Determines whether the data conversion is not required between the source and the destination schema data fields. Allowed Values: • **Deselected** - Data conversion is required between the schema data fields. • **Selected** - Data conversion is not required between the schema data fields. Default Value: None However, the No Data Conversion needed option is selected if the data type of the source and destination schema data fields matches.
Default Data Conversion	Definition: Determines whether the default data conversion is required between the source and the destination schema fields. Allowed Values: • **Deselected** - Default data conversion is not required between the schema data fields. • **Selected** - Default data conversion is required between the schema data fields. Default Value: None However, the Default Data Conversion option is selected if the data type of the source and destination schema fields doesn't match.
Custom Data Conversion	Definition: Determines whether the custom data conversion is required. You can create your own data conversion types by using the Add button. Allowed Values: • **Deselected** - Custom data conversion is not required. • **Selected** - Custom data conversion is required. Default Value: Deselected
Add	Opens the Following Window:

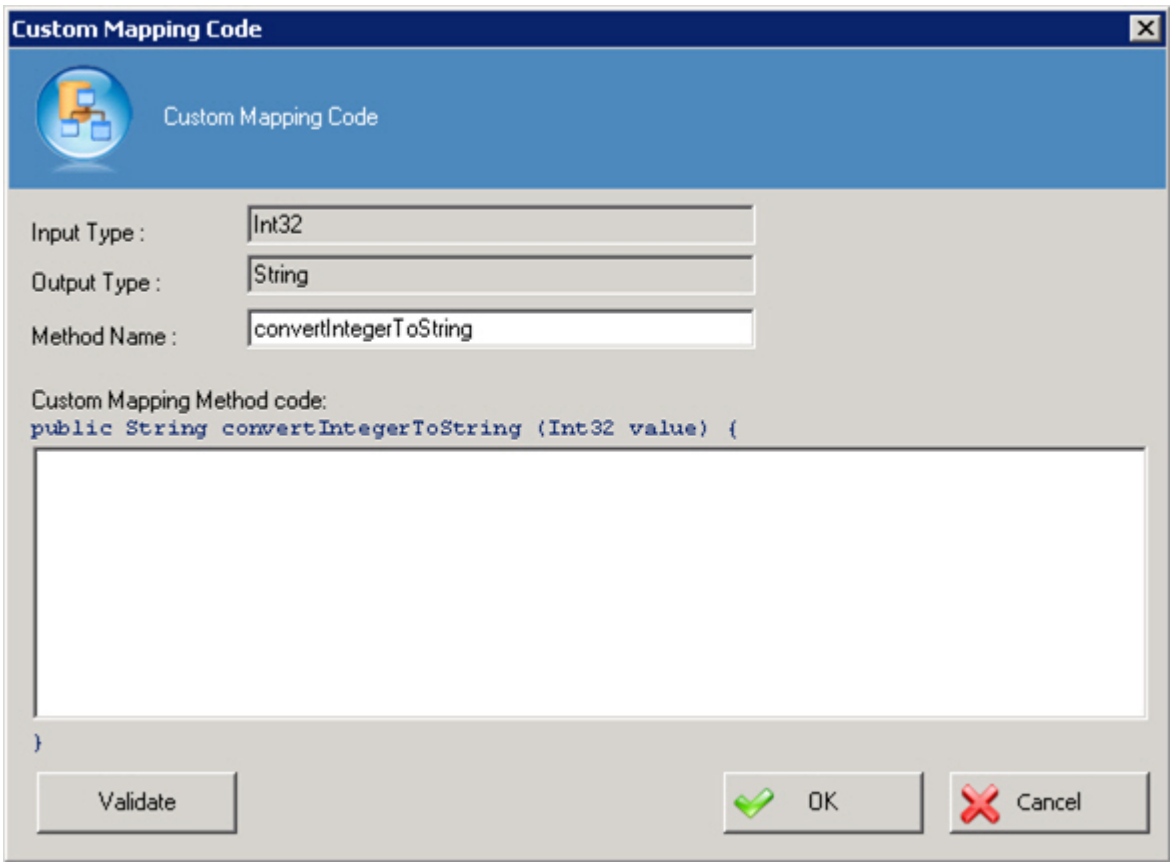
Field Name	Definition
	Custom Mapping Code Window Purpose of this Window: Specifies custom C# code that can be used to map fields to an XML schema.
Edit	Opens the Following Window: Custom Mapping Code Window Purpose of this Window: Specifies custom C# code that can be used to map fields to an XML schema.
Delete	Function: Deletes the selected custom data conversion from the list.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Custom Mapping Code Window

Specifies custom C# code that can be used to map fields to an XML schema.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **SharePoint**
   - **Web Services**
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **CAML Query**
   - **WSE (Web Service Extension)**
   - **WCF (Windows Communication Foundation)**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The fields that display vary, depending upon the AgsileShape you are using. For example, **Configure**.
6. On one of the following windows, under the **Output Mapping** or **Request/Response** tab, click the **Ellipses** button:
   - CAML Query Builder Configuration Window - Output Mapping Tab
   - WebService Configuration Window - Request Tab
   - WebService Configuration Window - Response Tab

- Configuration for WCF Service Window - Request Tab
- Configuration for WCF Service Window - Response Tab

Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options:

- **Reset All Mappings** - Deletes all mappings that have been made in the Schema Mapper for this activity.
- **Remove Invalid Mappings only** - Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same.
- **Cancel** - Aborts opening the Schema Mapper window.

7. On the Schema Mapper Window, select the **Custom Data Conversion** option, and then click **Add**.

Field Definitions

Field Name	Definition
Input Type	Definition: Specifies the data type of a source schema data field. This indicates that the data type of the source schema field didn't match to the destination schema field on the Schema Mapper Window. Allowed Values: Read only.
Output Type	Definition: Specifies the data type of a destination schema data field. This indicates that the data type of the source schema field didn't match to the destination schema field on the Schema Mapper Window. Allowed Values: Read only.
Method Name	Definition: Specifies the name of a method you want to create for custom data conversion. Allowed Values: Any method name. Default Value:

Field Name	Definition
	Populated on the basis of the data type of the selected schema fields on the Schema Mapper Window. Custom Attributes: No
Custom Mapping Method Code	Definition: Specifies the code for the custom mapping data conversion. Allowed Values: A valid code. Default Value: None Custom Attributes: No

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

Using a CAML Query to Retrieve Information from SharePoint

This example shows a process that uses a CAML query to retrieve information from a SharePoint list and display the information on a web page.

Instructional Goals

- Demonstrate how to retrieve data from SharePoint using the CAML Query AgileShape.

Example Process: Retrieve Expenses



Problem Statement

Display a custom, ad hoc report of employee expenses.

Business Requirements

- Display a report of employee expenses.
- Expenses are stored as items in a SharePoint list.

Prerequisites

- A SharePoint list, named **ExpenseList**, with the following columns set up to record employee expenses:

SharePoint Column
EmployeeID
Department
ExpenseDate
ExpenseType
Amount

- An InfoPath form with the following 2 views:
  - **Find Expenses** - Fields to enter the following search criteria:

InfoPath Field
EmployeeID
Department
ExpenseDate
ExpenseType
Amount

  - **View Expenses** - Display the expense information returned by the search in a repeating table.
- To access your SharePoint list, you must log on to SharePoint.

Navigation

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

5. On the **CAML Query Configuration** field, click the **Ellipses** button.

Instructions

On the **CAML Query Builder Configuration** window, do the following to set up a CAML query to retrieve employee expenses from the SharePoint list according to the options in the **Find Expenses** form. These instructions provide sample values based on the example process.

1. On the List and View Fields tab, complete the following fields:

Field Name	Value
Site Url	**http://demo3:8000/**
List Name	**ExpenseList**
Configured View Fields	Use the **right arrow** button to move the following fields from the **Possible View Fields** list to the **Configured View Fields** list: • **EmployeeID** • **ExpenseDate** • **ExpenseType** • **Department** • **Amount**

2. On the Where Clause tab, build your query using the dialog box, or simply copy and paste code that represents your query in the text area. This example uses the following clause:

```
<Where>
<And>
<Eq>
<FieldRef Name='EmployeeID'   />
<Value Type='Text' >${/my:ExpenseDetails/my:EmployeeID}</Value>
</Eq>
<And>
<Eq>
<FieldRef Name='Department'   />
<Value Type='Text' >${/my:ExpenseDetails/my:Department}</Value>
</Eq>
<And>
<Eq>
<FieldRef Name='ExpenseType'   />
<Value Type='Text' >${/my:ExpenseDetails/my:ExpenseType}</Value>
</Eq>
<And>
<Geq>
<FieldRef Name='ExpenseDate'  IncludeTimeValue='TRUE' />
<Value Type='DateTime' IncludeTimeValue='TRUE'>${/my:ExpenseDetails/
my:FromDate}</Value>
</Geq>
<Leq>
<FieldRef Name='ExpenseDate'  IncludeTimeValue='TRUE' />
<Value Type='DateTime' IncludeTimeValue='TRUE'>${/my:ExpenseDetails/my:To}</
Value>
</Leq>
```

```
</And>
</And>
</And>
</And>
</Where>
<OrderBy>
<FieldRef Name='ExpenseDate' Ascending='True' />
</OrderBy>
```

3. On the Grouping tab, complete the following fields:

Field Name	Value
Order By - Columns	**ExpenseDate**
Order By - Sort Order	**Ascending**

4. On the Output Mapping tab, select **Map CAML Query Response to AgilePoint Schema**.
5. Click the **Ellipses** button.
6. On the Schema Mapper Window, map the columns in your SharePoint list to the schema elements on your InfoPath form.

SharePoint Column	InfoPath Field
EmployeeID	EmployeeID
Department	Department
ExpenseDate	ExpenseDate
ExpenseType	ExpenseType
Amount	Amount

7. To test your query, on the Test Query tab, click **Execute Query**. Resolve any errors that occur, and continue testing until the query executes successfully.

Check In File

An AgilePart that checks a file in to SharePoint.



Navigation

1. In AgilePoint Envision, open a process template.

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

Properties for This AgileShape

Field Name	Definition
Checkin Type	Definition: Specifies how a file is checked in to a SharePoint document library. Allowed Values: • **MinorCheckIn** - The file is in a draft status. • **MajorCheckIn** - The file is ready to be published. • **OverwriteCheckIn** - The check-in file overwrites the same file if it already exists. Default Value: MajorCheckIn
Comments	Definition: Specifies any information you want to associate with the check-in action. Allowed Values: Multiple lines of text. Default Value: None Custom Attributes: No
Document URL	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes:

Field Name	Definition
	Yes

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

Instructions

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

Checking In a SharePoint File

To check a file in to SharePoint, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

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

Instructions

1. Complete the following required property for the **Check In File** AgileShape:

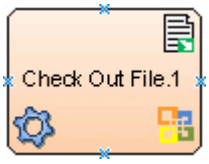
Field Name	Definition
Document URL	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out.

Field Name	Definition
	Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes

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

Check Out File

An AgilePart that checks a file out from SharePoint.



Navigation

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

Properties for This AgileShape

Field Name	Definition
CheckoutToLocal	Definition: Determines whether a file can be checked out from a SharePoint document library to your computer. Allowed Values: • **False** - A draft copy of the file is stored on the server. This indicates that you can access the SharePoint file over internet.

Field Name	Definition
	• **True** - A copy of file is checked out on your computer's hard drive. Thus, you can work on the file on your computer. Default Value: False
Document URL	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

Instructions

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

Checking Out a SharePoint File

To check a file out of SharePoint, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

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

Instructions

1. Complete the following required property for the **Check Out File** AgileShape:

Field Name	Definition
Document URL	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes

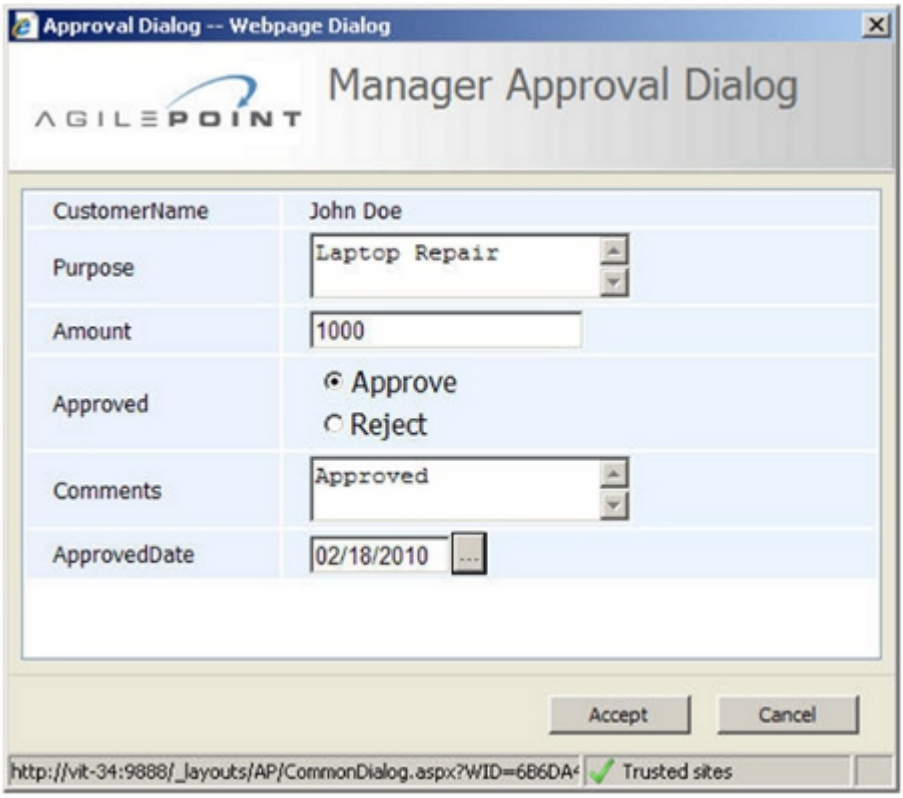
2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Check Out File

Common Dialog

An AgileWork that creates a dialog box form in SharePoint.



The most common use for this AgileShape is creating simple input or approval forms. Once you have created a Common Dialog and deployed your process, the dialog displays to a user when he or she clicks a task in SharePoint. The following image shows an approval form using a Common Dialog.



Good to Know

- For the Work to Perform property, Approve, Publish, or Submit are not valid values for this AgileWork. These are reserved values.

Navigation

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

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: • Customize Common Dialog Interface Window - General Tab - Sets up a dialog box to display in SharePoint. • Customize Common Dialog Interface Window - Data Configuration Tab - Opens the Data

Field Name	Definition
	Configuration tab, where you can define the fields for a common dialog form.

Common AgileWork Properties

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

BPMN Properties

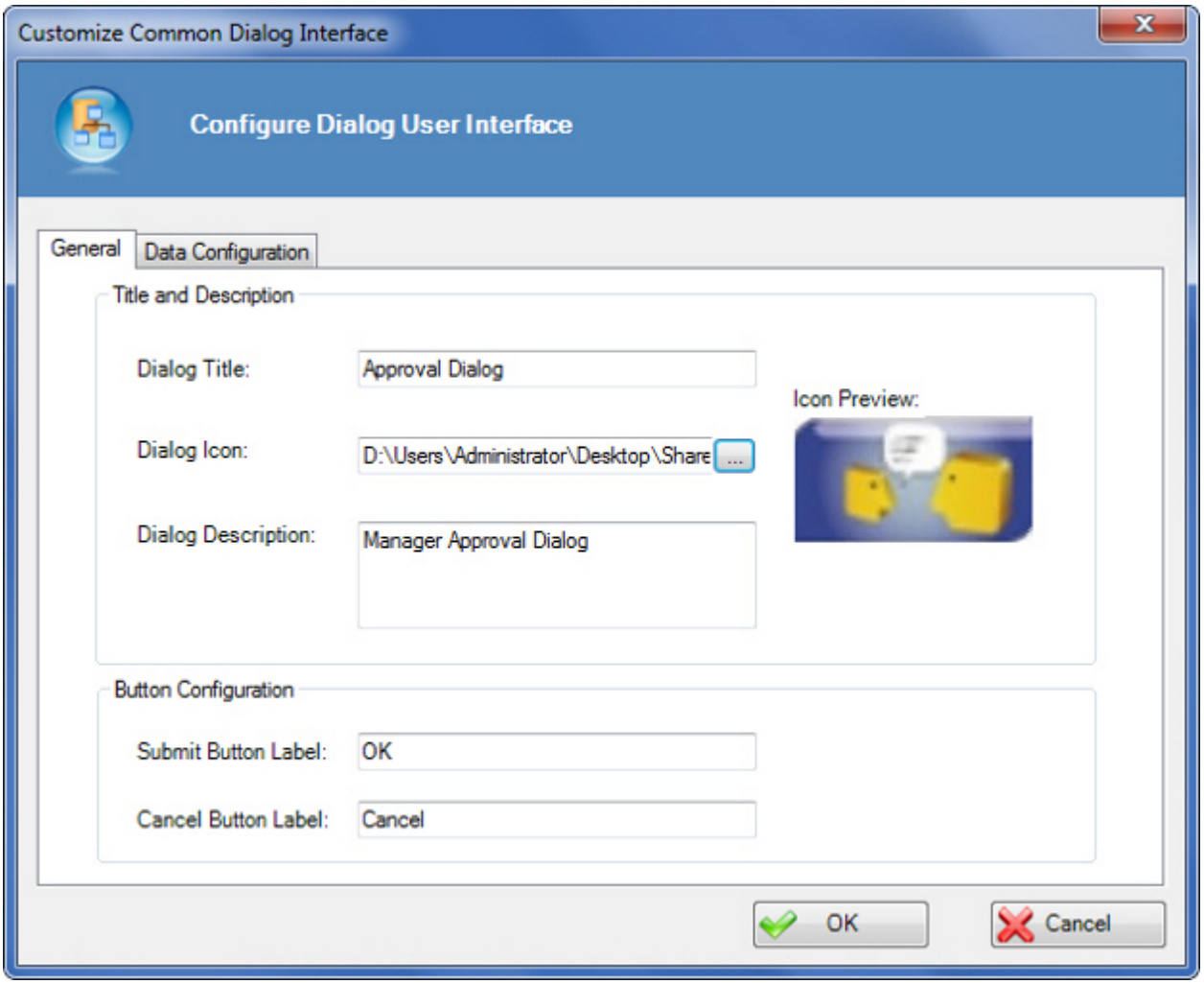
Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

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

Customize Common Dialog Interface Window - General Tab

Sets up a dialog box to display in SharePoint.



Navigation

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

Field Definitions

Field Name	Definition
Dialog Title	Definition: Specifies the title to be displayed in the title bar of the dialog box.

Field Name	Definition
	Allowed Values: A text string. Default Value: Approval Dialog Custom Attributes: No
Dialog Icon	Definition: Specifies an image to be displayed in the banner on the dialog box. Allowed Values: The name of an image file with the complete path. Default Value: None Custom Attributes: No
Icon Preview	Definition: Displays the selected dialog icon for preview. Allowed Values: Read only.
Dialog Description	Definition: Specifies the text description of the dialog box. The description is displayed below the title bar, along with the image, on the dialog box. Allowed Values: A text string with spaces. Default Value: Manager Approval Dialog Custom Attributes: No
Submit Button Label	Definition: Specifies the text to be displayed on the Submit button.

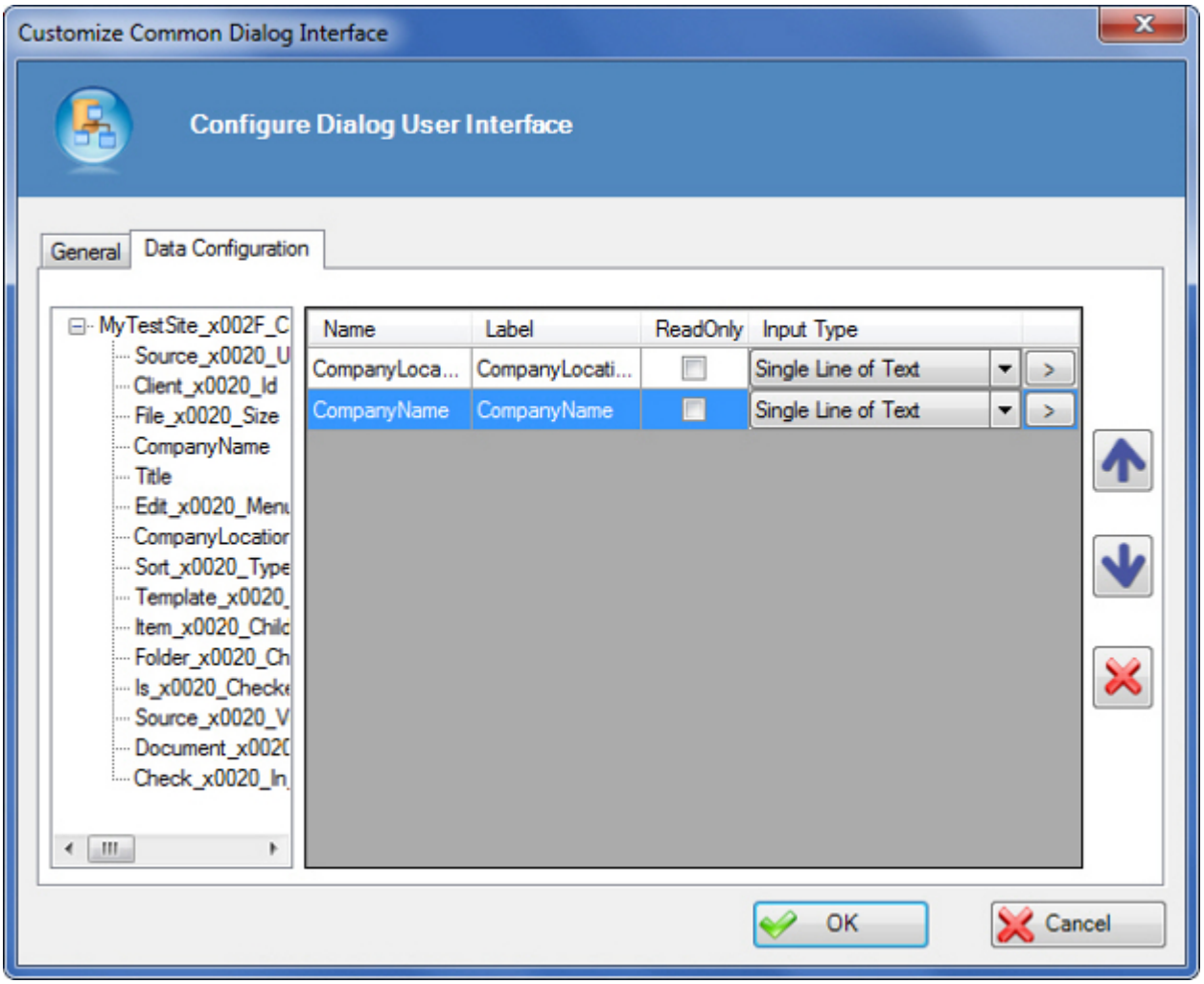
Field Name	Definition
	A Submit button on the dialog box is used to submit the form and close the dialog box. Allowed Values: A text string. Default Value: OK Custom Attributes: No
Cancel Button Label	Definition: Specifies the text to be displayed on the Cancel button. A Cancel button is used to close the dialog box without submitting the form. Allowed Values: A text string. Default Value: Cancel Custom Attributes: No

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Customize Common Dialog Interface Window - Data Configuration Tab

Opens the Data Configuration tab, where you can define the fields for a common dialog form.



Navigation

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

Field Definitions

Field Name	Definition
Schema	Definition: Displays the schema for the current process in the left pane.

Field Name	Definition
	Note: You must drag and drop schema fields to the right pane to add them to the dialog box. Allowed Values: Read only.
Name	Definition: Specifies the name of the field as it appears in the schema. Allowed Values: Read only. However, using the > (Data Binding) button, you can modify the data binding for the field.
Label	Definition: Specifies the name to be displayed for the schema field in the dialog box. Allowed Values: A text string. **Note:** By default, the Label is the same as the schema field name, however you can change the value for the Label. Default Value: Populated when you drag and drop the schema field to the right pane. Custom Attributes: No
ReadOnly	Definition: Specifies whether the field accepts user input at runtime. Allowed Values: • **Deselected** - A user can enter a value for the field. • **Selected** - A user cannot enter a value for the field. The field is displayed as read-only in the dialog box. Default Value: Deselected

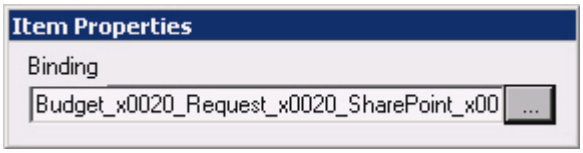
Field Name	Definition
Input Type	Definition: Specifies the type of input field to be displayed on the dialog box. Allowed Values: • **Static Text** • **Single Line of Text** • **Multiple Lines of Text** • **Check Box** • **Radio Buttons** • **Radio Button Pair** • **List Box** • **Combo Box** • **Date Picker** Default Value: Populated when you drag and drop the schema field to the right pane.
> (Data Binding)	Opens the Following Window: Item Properties Window Purpose of this Window: Allows you to modify the data binding for the field. For more information, see Data Binding.
Up Arrow	Function: Moves the selected field one row up in the list.
Down Arrow	Function: Moves the selected field one row down in the list.
X	Function: Deletes the selected field from the list.

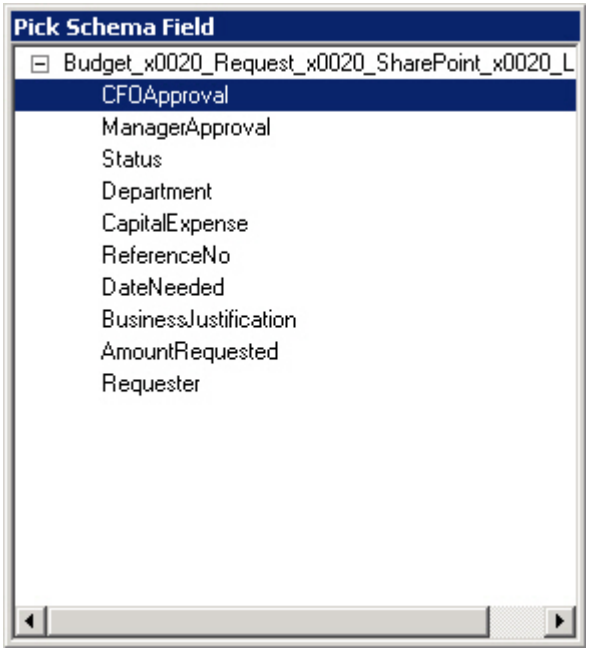
Common Configuration Tasks

- Data Binding
- Using Process Attributes

Item Properties Window

Allows you to modify the data binding for the field.





Navigation

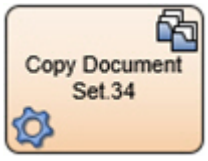
1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Common Dialog** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configuration** field, click the **Ellipses** button.
6. To modify the data binding for the field, on the Customize Common Dialog Interface Window - Data Configuration Tab, select the row you want, and then click **>** (Data Binding).

Field Definitions

Field Name	Definition
Binding	Definition: Specifies the data binding for the field. Allowed Values: A valid data binding for the field. Use the Ellipses button to select another schema field to modify the data binding for the field. Default Value: Populated depending upon the field you selected. Custom Attributes: No Example: Budget_x0020_Request_x0020_SharePoint_x0020_ListForm\CFOApproval
Ellipses	Function: Opens the Pick Schema Field list that allows you to select a schema field.

Copy Document Set

An AgilePart that copies a document set from one SharePoint document folder or library to another SharePoint document folder or library.



Prerequisites

- An environment using SharePoint 2013 and the CSOM AgileConnector.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.

3. On the **SharePoint** stencil, drag the **Copy Document Set** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: Copy Document Set Configuration Window Purpose of this Window: Specifies the details for copying a document set from one document library to another.

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

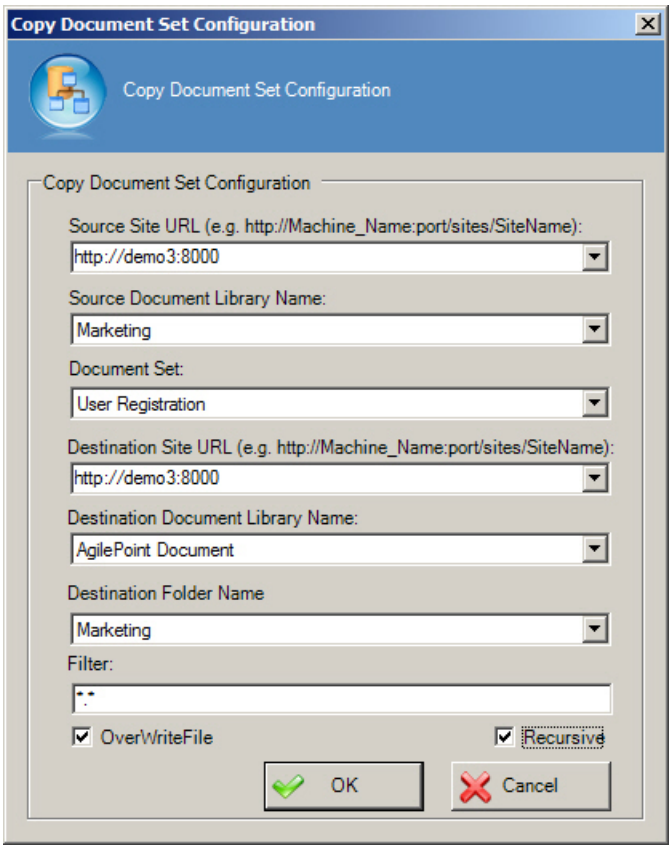
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

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

Copy Document Set Configuration Window

Specifies the details for copying a document set from one document library to another.



Navigation

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

Field Definitions

Field Name	Definition
Source Site URL	Definition: Specifies the URL for your SharePoint site. The source site contains the SharePoint document library and document set you want — for example, the document set you want to copy or move to the destination document library. Allowed Values: A valid SharePoint site URL.

Field Name	Definition
	Default Value: None Custom Attributes: Yes Example: http://APDesktop:8000
Source Document Library Name	Definition: Specifies the name of the SharePoint document library. The source document library contains the document set you want to copy or move to the destination document library. Allowed Values: The name of your SharePoint library. Default Value: None Custom Attributes: Yes
Document Set	Definition: Specifies the name of the document set. Allowed Values: The name of your document set. Default Value: None Custom Attributes: Yes
Destination Site URL	Definition: Specifies the URL for your SharePoint site. The destination site contains the document library where you want to copy or move the document set from the source document library. Allowed Values: A valid SharePoint site URL. Default Value: None

Field Name	Definition
	Custom Attributes: Yes
Destination Document Library Name	Definition: Specifies the name of the destination SharePoint document library where you want to copy or move the document set. Allowed Values: The name of your SharePoint document library. Default Value: None Custom Attributes: Yes
Destination Folder Name	Definition: Specifies the name of the SharePoint folder where you want to copy or move the document set from the source location. Allowed Values: The name of your SharePoint folder If the folder does not exist within the specified SharePoint list, the AgilePoint system creates it. Default Value: None Custom Attributes: Yes

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

Copying a Document Set

To copy a document set from one SharePoint location to another, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

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

Instructions

1. On the **Copy Document Set Configuration** window, complete the following fields as required:

Field Name	Definition
Source Site URL	Definition: Specifies the URL for your SharePoint site. The source site contains the SharePoint document library and document set you want — for example, the document set you want to copy or move to the destination document library. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://APDesktop:8000
Source Document Library Name	Definition: Specifies the name of the SharePoint document library. The source document library contains the document set you want to copy or move to the destination document library. Allowed Values: The name of your SharePoint library. Default Value: None

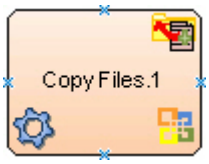
Field Name	Definition
	Custom Attributes: Yes
Document Set	Definition: Specifies the name of the document set. Allowed Values: The name of your document set. Default Value: None Custom Attributes: Yes
Destination Site URL	Definition: Specifies the URL for your SharePoint site. The destination site contains the document library where you want to copy or move the document set from the source document library. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes
Destination Document Library Name	Definition: Specifies the name of the destination SharePoint document library where you want to copy or move the document set. Allowed Values: The name of your SharePoint document library. Default Value: None Custom Attributes: Yes

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

- Copy Document Set

Copy Files

An AgilePart that copies one or more files from one SharePoint folder or library to another SharePoint folder or library.



Navigation

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

Properties for This AgileShape

Field Name	Definition
Filter	Definition: Specifies the file name or a set of files expressed using the filter expression you want to search within the specified source location. For example, files to be downloaded by the Download Files AgilePart, to be uploaded by the Upload Files AgilePart, or to be converted to PDF by the PDF Converter AgilePart. Allowed Values: • A file name. • A filter string that uses asterisks (*) as wildcards. Default Value: ${DocName} Custom Attributes: Yes Example: Following are some examples of filter expressions:

Field Name	Definition
	• ***.*** - All files are searched. • ***.xml*** - The files that have the **.xml** file extension are searched. • ***.doc*** - The files that have the **.doc** file extension are searched. • **MyFile.xml** - Only the specific file MyFile.xml is searched. The filter action is performed at the source location, that vary depending upon the AgileShape.
OverWriteFile	Definition: Specifies whether the AgileShape overwrites the files if they already exist at the specified destination location. Allowed Values: • **False** - The AgileShape does not overwrite any existing file. • **True** - The AgileShape overwrites the file if it exists with the same name at the destination location. Default Value: False
Recursive	Definition: Determines whether the AgileShape's specified action - such as copying, uploading, or deleting - is recursive. In other words, it determines whether the action is repeated in subfolders of the target folder or document library. Allowed Values: • **False** - The AgileShape performs the action only on the files located at the specified source folder. Files within subfolders aren't affected. • **True** - The AgileShape performs the action on the files located at the specified source folder, as well as the files that are located within the subfolders. Default Value: False
SourceFolderUrl	Definition:

Field Name	Definition
	Specifies the URL for the SharePoint document library or subfolder which contains the files to be copied to the destination location. Allowed Values: A valid SharePoint document library or folder URL. Default Value: ${SPServer}/${SitePath}/${DocLibPath} Custom Attributes: Yes Example: • http://[machine name]:[port]/sites/[site name]/[document library name] • http://[machine name]:[port]/sites/[site name]/[document library name]/[folder name]
TargetFolderUrl	Definition: Specifies the URL for the SharePoint document library or subfolder where you want the files to be copied from the source location. Allowed Values: A valid SharePoint document library or folder URL. Default Value: None Custom Attributes: Yes Example: • http://[machine name]:[port]/sites/[site name]/[document library name] • http://[machine name]:[port]/sites/[site name]/[document library name]/[folder name]

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

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

Instructions

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

Copying SharePoint Files

To copy files from one SharePoint location to another, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

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

Instructions

1. Complete the following required properties for the **Copy Files** AgileShape:

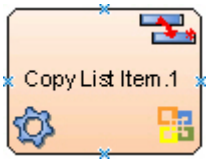
Field Name	Definition
SourceFolderUrl	Definition: Specifies the URL for the SharePoint document library or subfolder which contains the files to be copied to the destination location. Allowed Values: A valid SharePoint document library or folder URL. Default Value: ${SPServer}/${SitePath}/${DocLibPath} Custom Attributes: Yes Example:

Field Name	Definition
	• http://[machine name]:[port]/sites/[site name]/[document library name] • http://[machine name]:[port]/sites/[site name]/[document library name]/[folder name]
TargetFolderUrl	Definition: Specifies the URL for the SharePoint document library or subfolder where you want the files to be copied from the source location. Allowed Values: A valid SharePoint document library or folder URL. Default Value: None Custom Attributes: Yes Example: • http://[machine name]:[port]/sites/[site name]/[document library name] • http://[machine name]:[port]/sites/[site name]/[document library name]/[folder name]

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

Copy List Item

An AgilePart that copies specified list items from one list to another.



Prerequisites

- Log on to SharePoint.

Good to Know

- If errors occur during the execution, a message will be written into the SharePoint Integration log file.

Navigation

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

Properties for This AgileShape

Field Name	Definition
CopyListItemsConfiguration	Opens the Following Window: Configuration for Copy ListItems AgilePart Purpose of this Window: Specifies how to copy SharePoint list items.

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

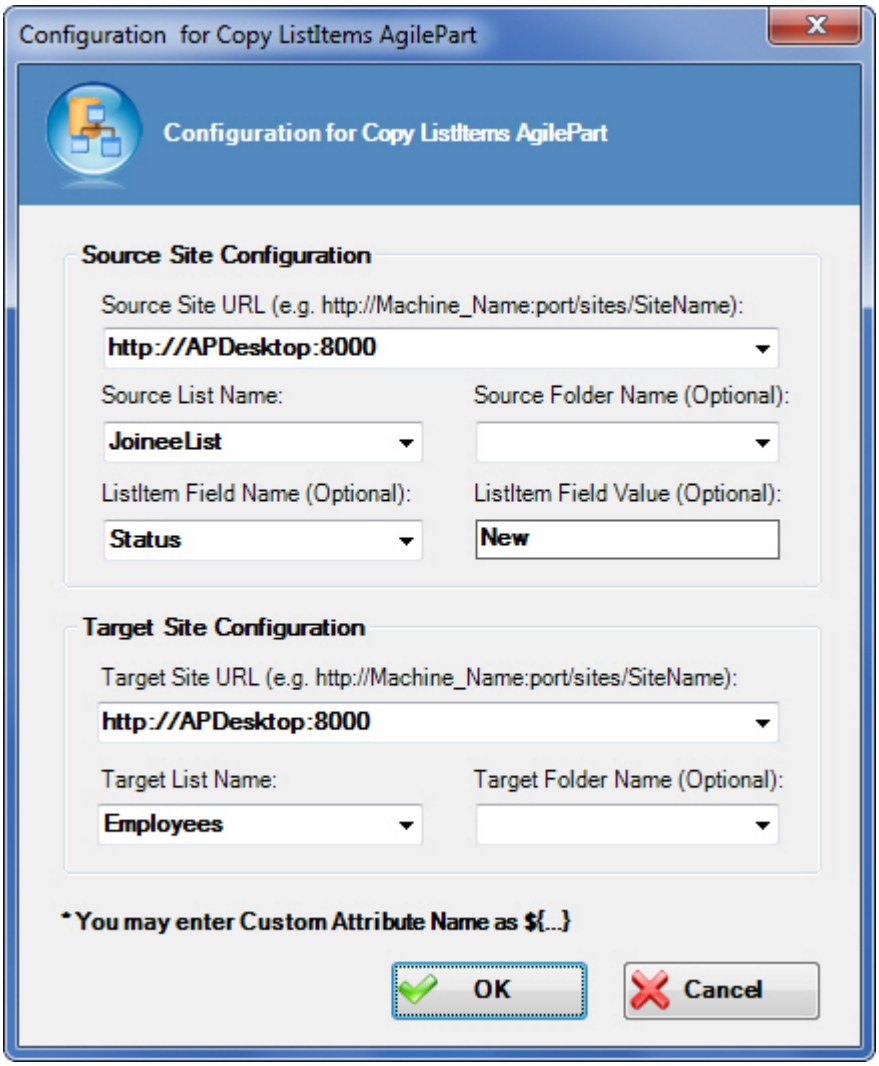
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

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

Configuration for Copy ListItems AgilePart

Specifies how to copy SharePoint list items.



Navigation

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

Field Definitions

Field Name	Definition
Source Site URL	Definition: Specifies the URL for your SharePoint site. The source site contains the SharePoint list and list

Field Name	Definition
	items you want — for example, the list items you want to copy or move to the destination list. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://APDesktop:8000
Source List Name	Definition: Specifies the name of the SharePoint list. The source list contains the list items you want to copy or move to the destination list. Allowed Values: The name of your SharePoint list. Default Value: None Custom Attributes: Yes
Source Folder Name	Definition: Specifies the name of a SharePoint folder. The source folder contains the list items you want to copy or move to the destination folder. Allowed Values: The name of your SharePoint folder. Default Value: None Custom Attributes: Yes
ListItem Field Name	Definition: Specifies the name of a SharePoint list column. Allowed Values:

Field Name	Definition
	The name of your SharePoint list column. Default Value: None Custom Attributes: Yes
ListItem Field Value	Definition: Specifies the SharePoint list column's value. This value can be used as a filter to limit the scope of the action. Allowed Values: The list column's value. Default Value: None Custom Attributes: Yes
Target Site URL	Definition: Specifies the URL for your SharePoint site. The target site contains the SharePoint list where you want to copy or move list items from the source list. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes
Target List Name	Definition: Specifies the name of the destination SharePoint list where you want to copy or move the list items. Allowed Values: The name of your SharePoint list. Default Value: None Custom Attributes:

Field Name	Definition
	Yes
Target Folder Name	Definition: Specifies the name of the SharePoint folder where you want to copy or move the list items from the source location. Allowed Values: The name of your SharePoint folder If the folder does not exist within the specified SharePoint list, the AgilePoint system creates it. Default Value: None Custom Attributes: Yes

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

Copying a SharePoint List Item

To copy a SharePoint list item from one folder or list to another, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

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

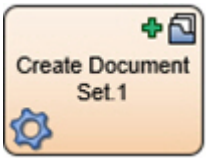
Instructions

1. On the Configuration for Copy ListItems AgilePart, complete the fields as required to specify the source (copy from) and target (copy to).

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

Create Document Set

An AgilePart that creates a new document set.



Prerequisites

- An environment using SharePoint 2013 and the CSOM AgileConnector.

Navigation

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

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: Create Document Set Configuration Window Purpose of this Window: Specifies the details for creating a document set.

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

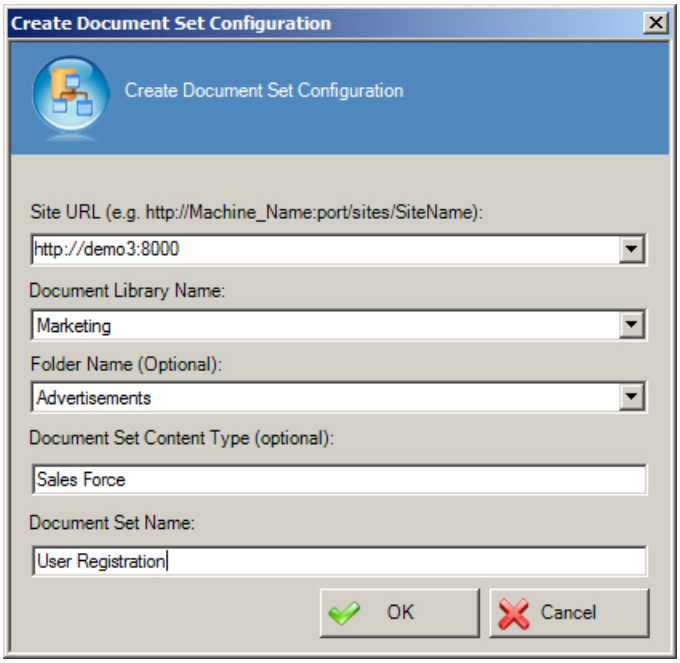
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

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

Create Document Set Configuration Window

Specifies the details for creating a document set.



Navigation

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

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Document Library Name	Definition: Specifies the name of the SharePoint document library. Allowed Values: A valid SharePoint document library name. Default Value: None Custom Attributes: Yes
Folder Name	Definition: Specifies the name of a SharePoint folder. Allowed Values: The name of your SharePoint folder If the folder does not exist within the specified SharePoint list, the AgilePoint system creates it. Default Value: None Custom Attributes: Yes

Field Name	Definition
Document Set Content Type	Definition: Specifies the content type for your document set. Allowed Values: A single line of text. Default Value: None (document set) If this field is blank, SharePoint applies the default name for the document set content type. Custom Attributes: No
Document Set Name	Definition: Specifies the name for the document set. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

Creating a Document Set

To create a new document set, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.

2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Create Document Set** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **CreateDocSetConfiguration** field, click the **Ellipses** button.

Instructions

1. On the **Create Document Set Configuration** window, complete the following fields as required:

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Document Library Name	Definition: Specifies the name of the SharePoint document library. Allowed Values: A valid SharePoint document library name. Default Value: None Custom Attributes: Yes
Document Set Name	Definition: Specifies the name for the document set. Allowed Values: A single line of text. Default Value:

Field Name	Definition
	None Custom Attributes: Yes

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

Create SharePoint List

An AgilePart that creates a SharePoint list.



Navigation

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

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: Configuration for New List Window Purpose of this Window: Specifies the settings for a new SharePoint list.

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

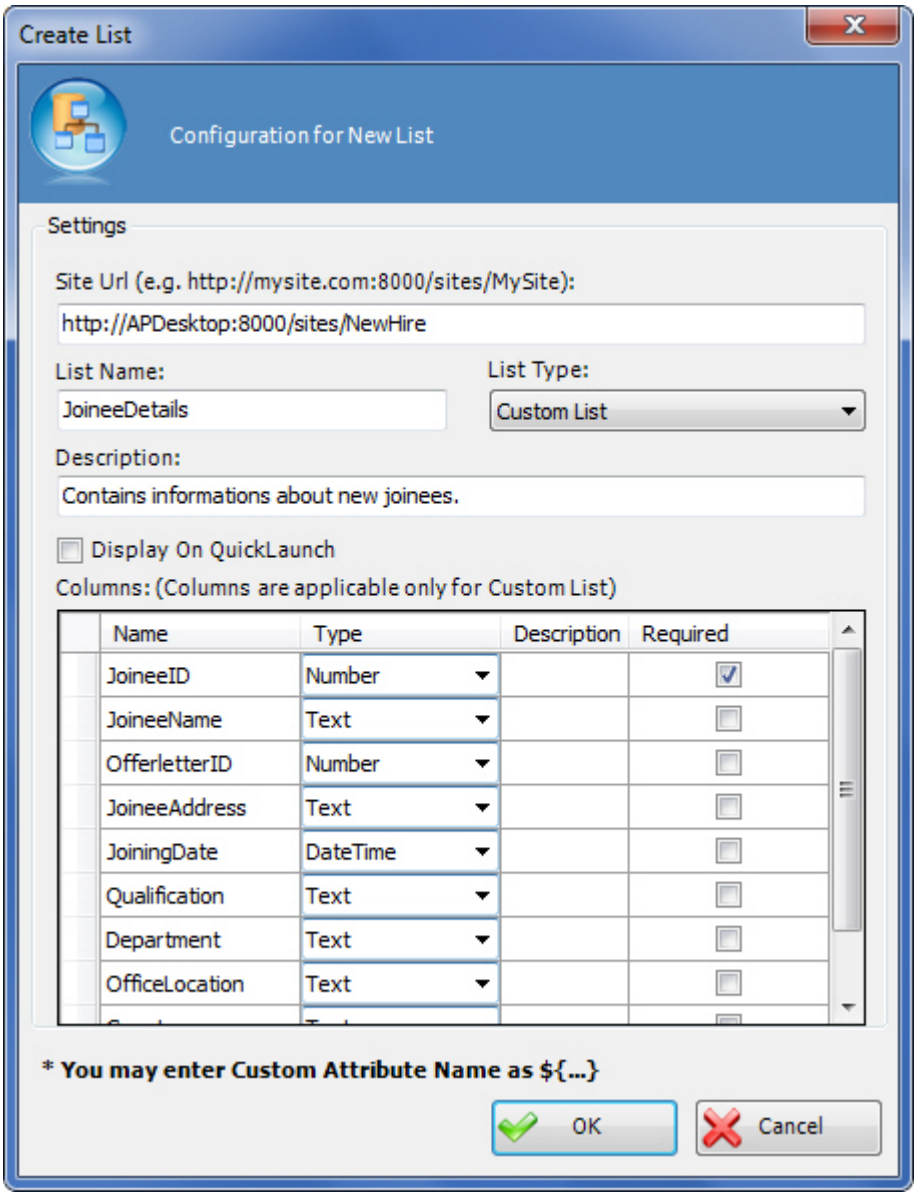
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

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

Configuration for New List Window

Specifies the settings for a new SharePoint list.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Create SharePoint List** AgileShape, and drop it on the process template.
4. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
List Name	Definition: Specifies the name of the SharePoint list you want to create. Allowed Values: A text string. Default Value: None Custom Attributes: Yes
List Type	Definition: Specifies the type of SharePoint list you want. Allowed Values: • **Announcements** • **Contacts** • **Custom List** • **Custom List in Datasheet View** • **DataSources** • **Discussion Board** • **Document Library** • **Events**

Field Name	Definition
	• **Form Library** • **Issues** • **Links** • **Picture Library** • **Survey** • **Tasks** Default Value: Custom List
Description	Definition: A free text description of your SharePoint list. Allowed Values: A single line of text. Default Value: None Custom Attributes: No
Display on QuickLaunch	Definition: Specifies whether to include the SharePoint list in the Quick Launch menu. Allowed Values: • **Deselected** - The list is not included in the Quick Launch menu. • **Selected** - The list is included in the Quick Launch menu. Default Value: Deselected
Column Name	Definition: Specifies the name of a custom SharePoint list column. **Note:** This option is available only when you select the Custom List option in the List Type field. Custom List is a built-in SharePoint list template. Allowed Values:

Field Name	Definition
	A text string. Default Value: None Custom Attributes: Yes
Column Type	Definition: Specifies the column type for a custom SharePoint list column. **Note:** This option is available only when you select the Custom List option in the List Type field. Custom List is a built-in SharePoint list template. Allowed Values: • **Text** • **Calculated** • **Choice** • **Currency** • **DateTime** • **Lookup** • **Number** • **User** Default Value: None
Column Description	Definition: The free text description of a custom SharePoint list column. **Note:** This option is available only when you select the Custom List option in the List Type field. Custom List is a built-in SharePoint list template. Allowed Values: A single line of text. Default Value: None Custom Attributes:

Field Name	Definition
	Yes
Column Required	Definition: Specifies whether the custom SharePoint column is required. **Note:** This option is available only when you select the Custom List option in the List Type field. Custom List is a built-in SharePoint list template. Allowed Values: • **Deselected** - The custom SharePoint column is not required. • **Selected** - The custom SharePoint column is mandatory. Default Value: Deselected

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

Creating a SharePoint List

To create a new SharePoint list, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Create SharePoint List** AgileShape, and drop it on the process template.
4. On the **Configuration** field, click the **Ellipses** button.

Instructions

1. On the Configuration for New List Window, complete the following fields as required:

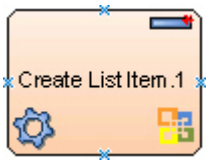
Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
List Name	Definition: Specifies the name of the SharePoint list you want to create. Allowed Values: A text string. Default Value: None Custom Attributes: Yes
List Type	Definition: Specifies the type of SharePoint list you want. Allowed Values: • **Announcements** • **Contacts** • **Custom List** • **Custom List in Datasheet View** • **DataSources** • **Discussion Board** • **Document Library** • **Events** • **Form Library** • **Issues**

Field Name	Definition
	• **Links** • **Picture Library** • **Survey** • **Tasks** Default Value: Custom List

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

Create List Item

An AgilePart that This AgileShape can be used to create a list item.



Prerequisites

- Log on to SharePoint.

Good to Know

- If errors occur during the execution, a message will be written into the SharePoint Integration log file.

Navigation

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

Properties for This AgileShape

Field Name	Definition
ItemValues	Opens the Following Window: Configuration for Creating List Item Window

Field Name	Definition
	Purpose of this Window: Specifies how to create a SharePoint list item.

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

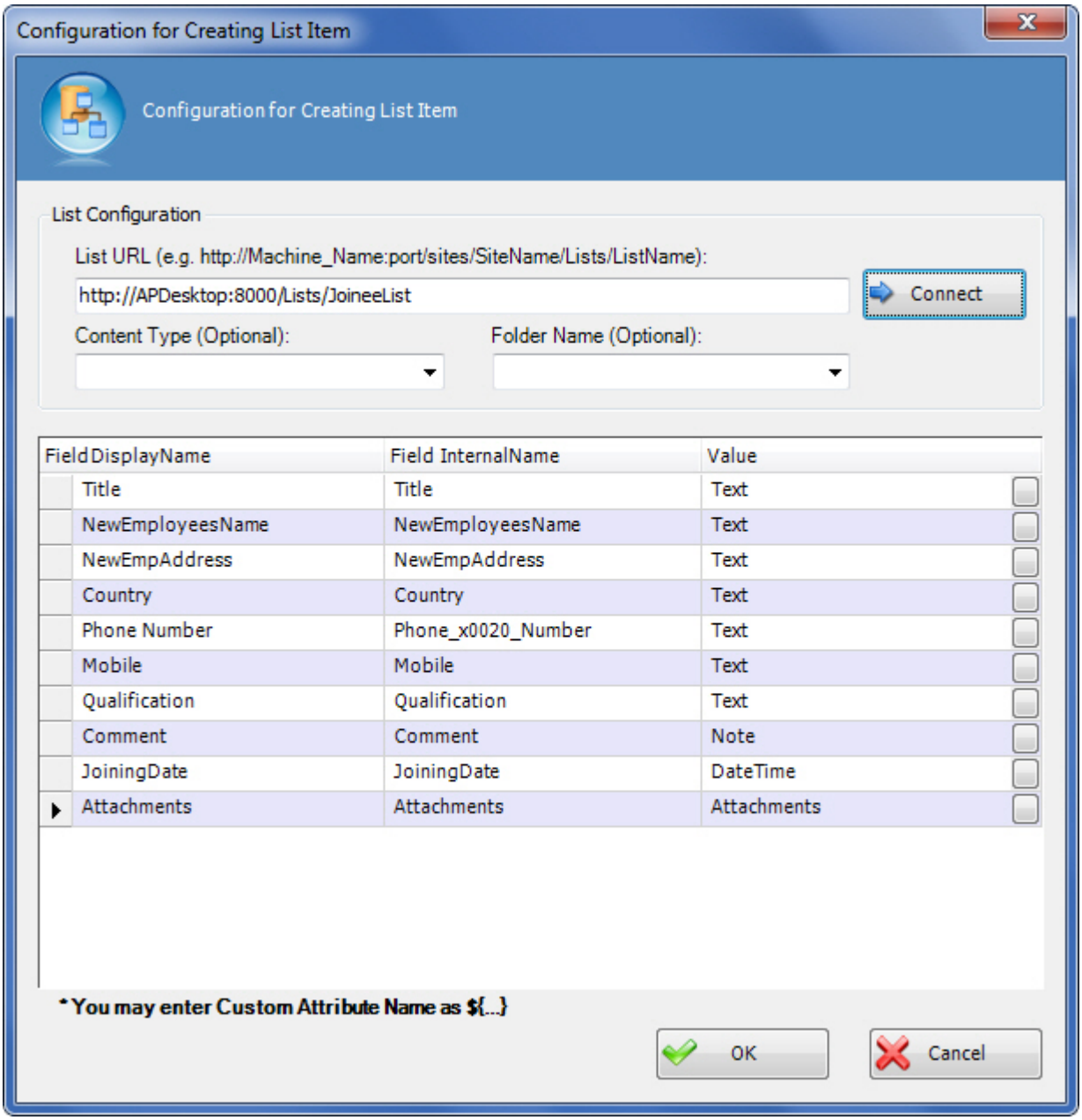
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

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

Configuration for Creating List Item Window

Specifies how to create a SharePoint list item.



Navigation

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

Field Definitions

Field Name	Definition
List URL	Definition: Specifies the SharePoint list URL you want. Allowed Values: A valid SharePoint list URL. **Note:** If you use a library URL, such as a document library URL or form library URL, instead of a list URL, an error occurs during execution. Default Value: ${DocUrl} Custom Attributes: Yes Example: • http://[machine name]:[port]/sites/[site name] • $\{DocUrl\}
Connect	Function: Connects to the specified SharePoint list. This button populates the fields with the correct values for the specified SharePoint list.
Content Type	Definition: Specifies the content type for the list item. Allowed Values: The name of your content type. Default Value: None **Note:** If you don't provide a content type for the list item, the SharePoint system applies a default content type, named "Item." Custom Attributes: No

Field Name	Definition
Folder Name	Definition: Specifies the name of a SharePoint folder. Allowed Values: The name of your SharePoint folder If the folder does not exist within the specified SharePoint list, the AgilePoint system creates it. Default Value: None Custom Attributes: Yes
Field DisplayName	Definition: Specifies the SharePoint column names for the specified list or library. Allowed Values: An editable SharePoint column name. Default Value: None Custom Attributes: Yes
Field InternalName	Definition: Specifies the internal names of the SharePoint columns for the specified list or library. Allowed Values: An editable internal SharePoint column name. Default Value: None Custom Attributes: Yes
Value	Definition: The value for the SharePoint column. Allowed Values: • A valid column value.

Field Name	Definition

	• A null value.
	• A custom attribute.
	• An XPath to a schema element.
	To add XML metadata associated with the process model, click the button in the Value field.
	• An attachment.
	You can attach a file using:
	  • **Local file path** - c:\[path]\[file name]
	  • **URL** - http://[URL]/[file name]
	Default Value:
	The data type of the SharePoint column.
	Note: By default, the Value field displays the column's data type. Set the actual value.
	Custom Attributes:
	Yes

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

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

Creating a SharePoint List Item

To create a new SharePoint list item, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

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

Instructions

1. On the **Item Values** window, enter the URL for the SharePoint site that contains the list item you want to delete.
2. Click **Connect**.
3. Complete any additional configuration for this AgileShape according to your requirements:
   - Configuration for Creating List Item Window
   - AgilePart - Common Setup

Create SP Group

An AgilePart that adds a user to a SharePoint Group.



Navigation

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

Properties for This AgileShape

Field Name	Definition
Group Configuration	Opens the Following Window: Create Group Configuration Window Purpose of this Window: Specifies the details for creating a SharePoint group.

Common AgilePart Properties

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

BPMN Properties

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

Common AgilePart Tasks

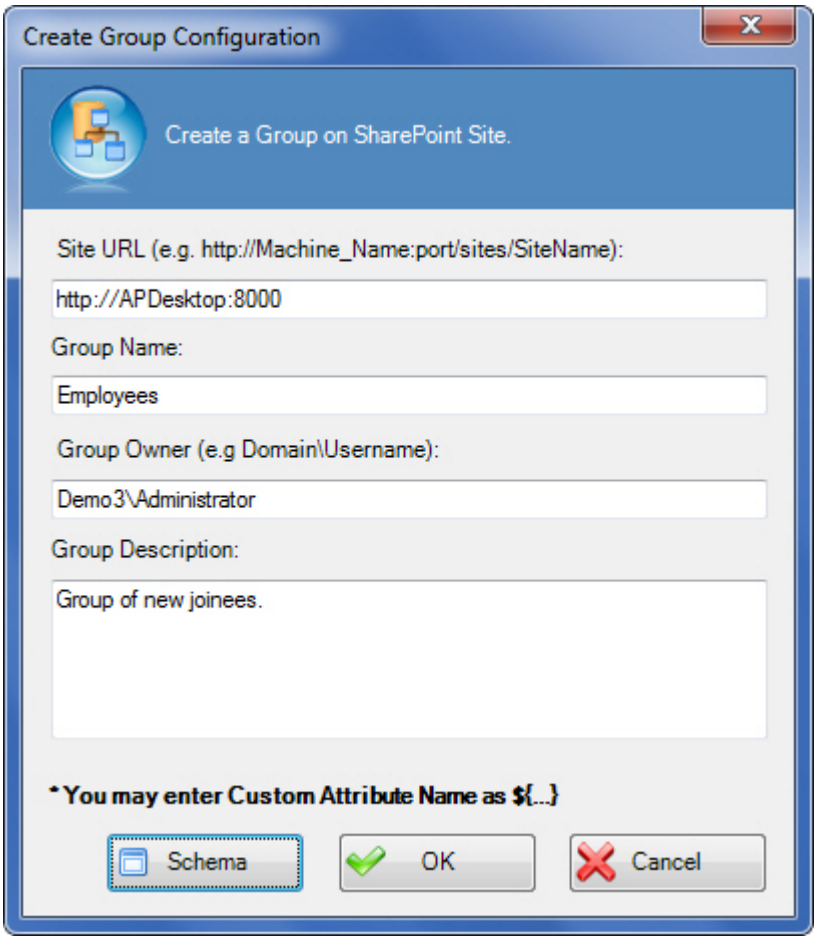
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

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

Create Group Configuration Window

Specifies the details for creating a SharePoint group.



Navigation

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

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Group Name	Definition: The name of the SharePoint group you want. Allowed Values: A valid SharePoint group name. Default Value: None Custom Attributes: Yes
Group Owner	Definition: Specifies the name of the SharePoint user you want to be the owner of the group. Allowed Values: A user name, including the domain name, in the following format:

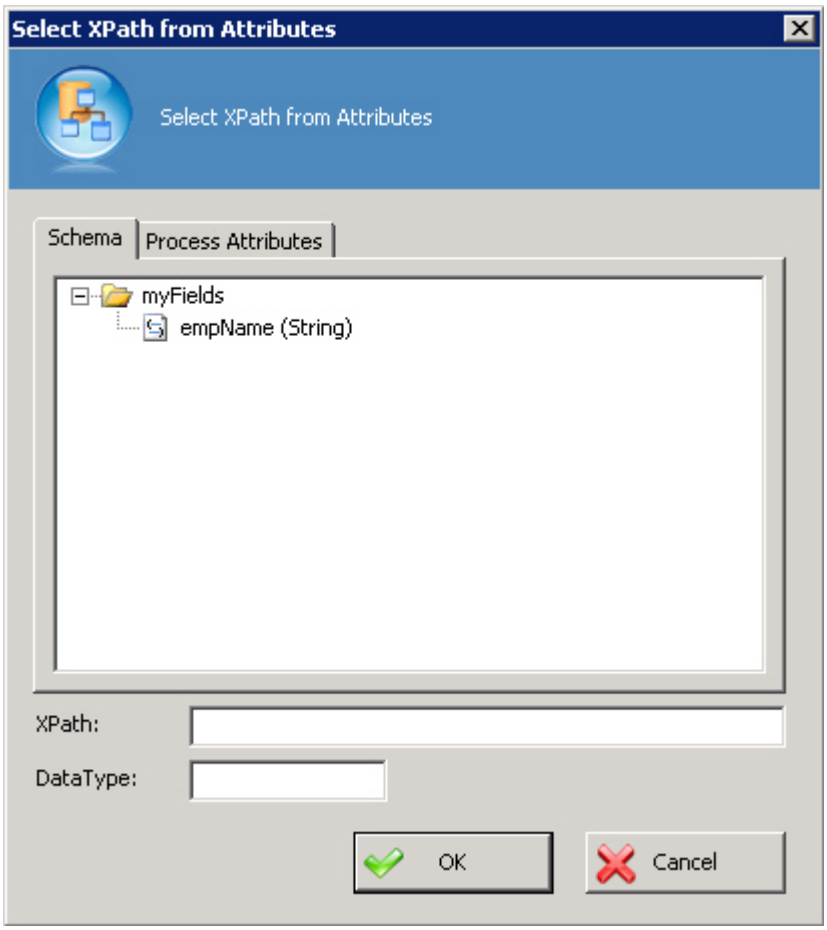
Field Name	Definition
	[domain]\[user name] Default Value: None Custom Attributes: Yes Example: MyDomain\Administrator
Group Description	Definition: A free text description of the group. Allowed Values: Multiple lines of text. Default Value: None Custom Attributes: Yes
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

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



Prerequisites

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

Navigation

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

Field Definitions

Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a SharePoint Group

To create a new SharePoint group, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Create SP Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Group Configuration** field, click the **Ellipses** button.

Instructions

1. On the **Create Group Configuration** window, complete the following required fields:

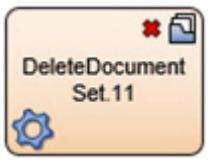
Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Group Name	Definition: The name of the SharePoint group you want.

Field Name	Definition
	Allowed Values: A valid SharePoint group name. Default Value: None Custom Attributes: Yes
Group Owner	Definition: Specifies the name of the SharePoint user you want to be the owner of the group. Allowed Values: A user name, including the domain name, in the following format: [domain]\[user name] Default Value: None Custom Attributes: Yes Example: MyDomain\Administrator

2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Create Group Configuration Window

Delete Document Set

An AgilePart that removes a specified document set from the SharePoint document library.



Prerequisites

- An environment using SharePoint 2013 and the CSOM AgileConnector.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Delete Document Set** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: Delete Document Set Configuration Window Purpose of this Window: Specifies the document set you want to delete.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

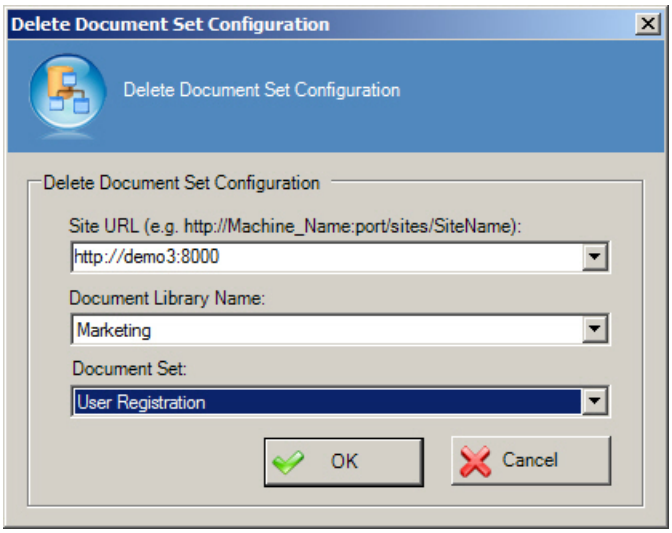
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Delete Document Set Configuration Window

Specifies the document set you want to delete.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Delete Document Set** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **DeleteDocSetConfiguration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Document Library Name	Definition: Specifies the name of the SharePoint document library.

Field Name	Definition
	Allowed Values: A valid SharePoint document library name. Default Value: None Custom Attributes: Yes
Document Set	Definition: Specifies the name of the document set. Allowed Values: The name of your document set. Default Value: None Custom Attributes: Yes

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Deleting a Document Set

To delete a document set from the document library, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Delete Document Set** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **DeleteDocSetConfiguration** field, click the **Ellipses** button.

Instructions

1. On the **Delete Document Set Configuration** window, complete the following fields as required:

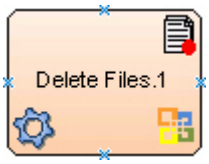
Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Document Library Name	Definition: Specifies the name of the SharePoint document library. Allowed Values: A valid SharePoint document library name. Default Value: None Custom Attributes: Yes
Document Set	Definition: Specifies the name of the document set. Allowed Values: The name of your document set. Default Value: None Custom Attributes: Yes

2. Complete any additional configuration for this AgileShape according to your requirements:

- AgilePart - Common Setup
- Delete Document Set

Delete Files

An AgilePart that deletes files from SharePoint.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Delete Files** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
DocumentLibrary Url	Definition: The URL for the SharePoint document library or folder which contains the files to be deleted. Allowed Values: A valid SharePoint document library or folder URL. Default Value: None Custom Attributes: No
Filter	Definition: Specifies the file name or a set of files expressed using the filter expression you want to search within the specified source location. For example, files to be downloaded by the Download Files AgilePart, to be uploaded by the Upload Files AgilePart, or to be converted to PDF by the PDF Converter AgilePart.

Field Name	Definition
	Allowed Values: • A file name. • A filter string that uses asterisks (*) as wildcards. Default Value: None Custom Attributes: No Example: Following are some examples of filter expressions: • ***.*** - All files are searched. • ***.xml*** - The files that have the **.xml** file extension are searched. • ***.doc*** - The files that have the **.doc** file extension are searched. • **MyFile.xml** - Only the specific file MyFile.xml is searched. The filter action is performed at the source location, that vary depending upon the AgileShape.
Recursive	Definition: Determines whether the AgileShape's specified action - such as copying, uploading, or deleting - is recursive. In other words, it determines whether the action is repeated in subfolders of the target folder or document library. Allowed Values: • **False** - The AgileShape performs the action only on the files located at the specified source folder. Files within subfolders aren't affected. • **True** - The AgileShape performs the action on the files located at the specified source folder, as well as the files that are located within the subfolders. Default Value: False

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Deleting Files from SharePoint

To delete files from a SharePoint list or folder, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Delete Files** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. On the **Delete Files** AgileShape, complete the following required properties:

Field Name	Definition
DocumentLibrary Url	Definition: The URL for the SharePoint document library or folder which contains the files to be deleted. Allowed Values: A valid SharePoint document library or folder URL. Default Value: None Custom Attributes:

Field Name	Definition
	No

2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Delete Files

Delete SharePoint List

An AgilePart that deletes a SharePoint list.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Delete SharePoint List** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: Configuration for Deleting List Window Purpose of this Window: Specifies the SharePoint list you want to delete.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

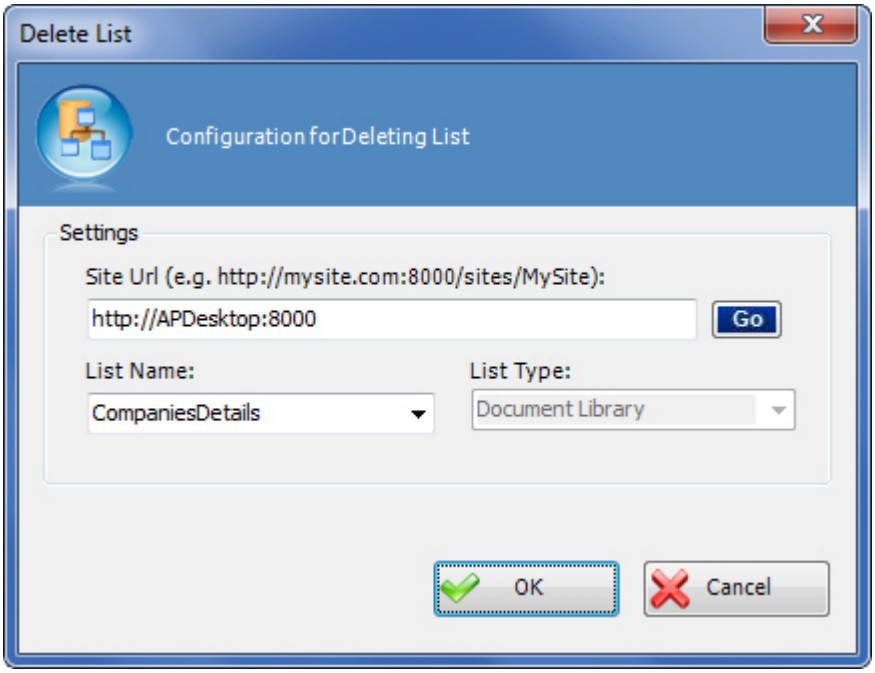
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Deleting List Window

Specifies the SharePoint list you want to delete.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Delete SharePoint List** AgileShape, and drop it on the process template.
4. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
GO	Function: Populates the fields with the correct values - the SharePoint lists and their list types - for the specified SharePoint site.
List Name	Definition: Specifies the name of the SharePoint list you want. Allowed Values: The name of your SharePoint list. Default Value: None Custom Attributes: Yes
List Type	Definition: Displays the list type of the specified SharePoint list. Allowed Values: Read only

Common Configuration Tasks

- Data Binding

- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Deleting a SharePoint List

To delete a SharePoint list, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Delete SharePoint List** AgileShape, and drop it on the process template.
4. On the **Configuration** field, click the **Ellipses** button.

Instructions

1. On the **Configuration for Deleting List** window, in the **Site URL** field, enter the URL of the SharePoint site that contains the list you want to delete.
2. Click **Go**.
3. In the **List Name** field, select the list you want to delete.
4. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup

Delete List Item

An AgilePart that deletes SharePoint list items.



Prerequisites

- Log on to SharePoint.

Good to Know

- If errors occur during the execution, a message will be written into the SharePoint Integration log file.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Delete List Item** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
DeleteListItemsConfiguration	Opens the Following Window: Configuration for Deleting List Items Window Purpose of this Window: Specifies the SharePoint list items you want to delete. You can delete all list items within a SharePoint list or a folder, or you can identify a field name and value pair to delete a limited set of list items.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

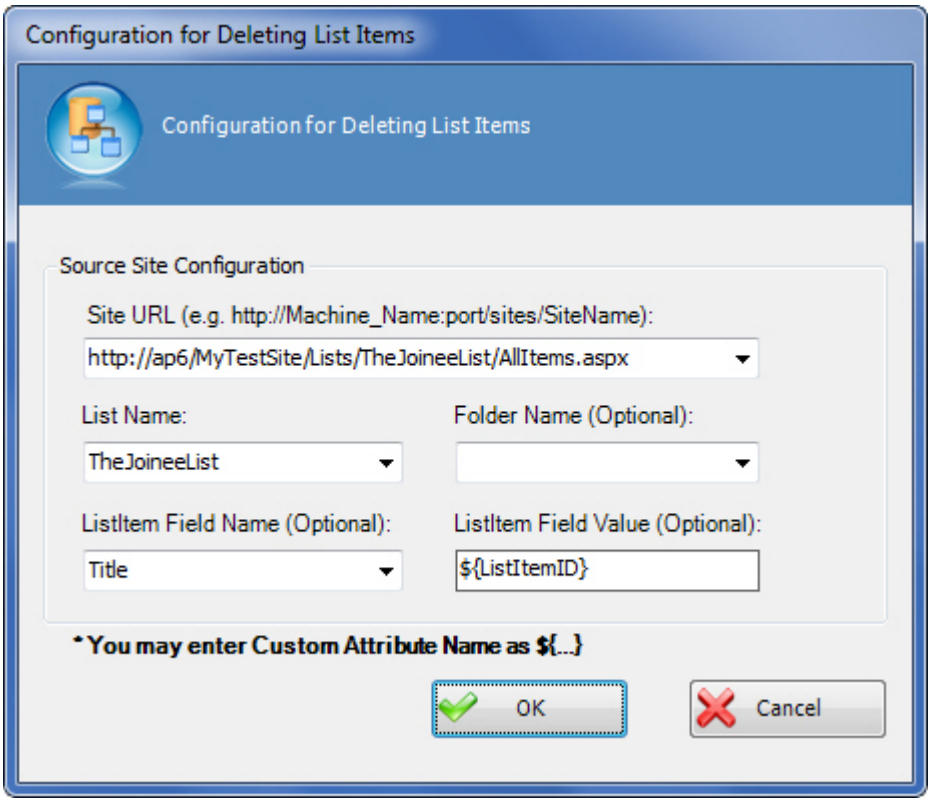
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Deleting List Items Window

Specifies the SharePoint list items you want to delete. You can delete all list items within a SharePoint list or a folder, or you can identify a field name and value pair to delete a limited set of list items.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Delete List Item** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **DeleteListItemsConfiguration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: ${DocUrl} Custom Attributes:

Field Name	Definition
	Yes Example: http://mysharepoint:8000/sites/${mysite}
List Name	Definition: Specifies the name of the SharePoint list you want. Allowed Values: The name of your SharePoint list. Default Value: None Custom Attributes: Yes
Folder Name	Definition: Specifies the name of a SharePoint folder. Allowed Values: The name of your SharePoint folder If the folder does not exist within the specified SharePoint list, the AgilePoint system creates it. Default Value: None Custom Attributes: Yes
ListItem Field Name	Definition: Specifies the name of a SharePoint list column or field. Along with the field value, the field name specifies a particular group of list items to delete. To identify a list item group, you must provide a filed name and value. If you do not specify a field name and value, all list items are deleted from the list or folder you specify. Allowed Values: The name of your SharePoint list column. Default Value: "ID", the list column that specifies the unique list item ID.

Field Name	Definition
	Custom Attributes: Yes Example: If ListItem Field Name is set to ID, and ListItem Field Value is set to 5, only the list item with the ID equal to 5 is deleted. If ListItem Field Name is set to Created By, and ListItem Field Value is set to Mary Jones, all list items created by Mary Jones are deleted.
ListItem Field Value	Definition: Specifies the value of the field defined in ListItem Field Name. To identify a list item group, you must provide a filed name and value. If you do not specify a field name and value, all list items are deleted from the list or folder you specify.. Allowed Values: The value of the list column specified in the ListItem Field Name. Default Value: ${ListItemID} A custom attribute representing a SharePoint List Item ID. This value corresponds to ID, the default value of ListItem Field Name. Custom Attributes: Yes Example: If ListItem Field Name is set to ID, and ListItem Field Value is set to 5, only the list item with the ID equal to 5 is deleted. If ListItem Field Name is set to Created By, and ListItem Field Value is set to Mary Jones, all list items created by Mary Jones are deleted.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Deleting a SharePoint List Item

To delete a SharePoint list item, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Delete List Item** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **DeleteListItemsConfiguration** field, click the **Ellipses** button.

Instructions

1. On the **Delete List Item** AgileShape, complete the following required properties:

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: ${DocUrl} Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
List Name	Definition: Specifies the name of the SharePoint list you want. Allowed Values: The name of your SharePoint list.

Field Name	Definition
	Default Value: None Custom Attributes: Yes

2. Complete any additional configuration for this AgileShape according to your requirements:
   - Delete List Item
   - AgilePart - Common Setup

Delete Particular FileVersion

An AgilePart that deletes a major or minor version of a file from a SharePoint list.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Delete Particular FileVersion** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Delete File Version Configuration	Opens the Following Window: Delete a Particular Version of a File Window Purpose of this Window: Specifies a list item file version you want to delete.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

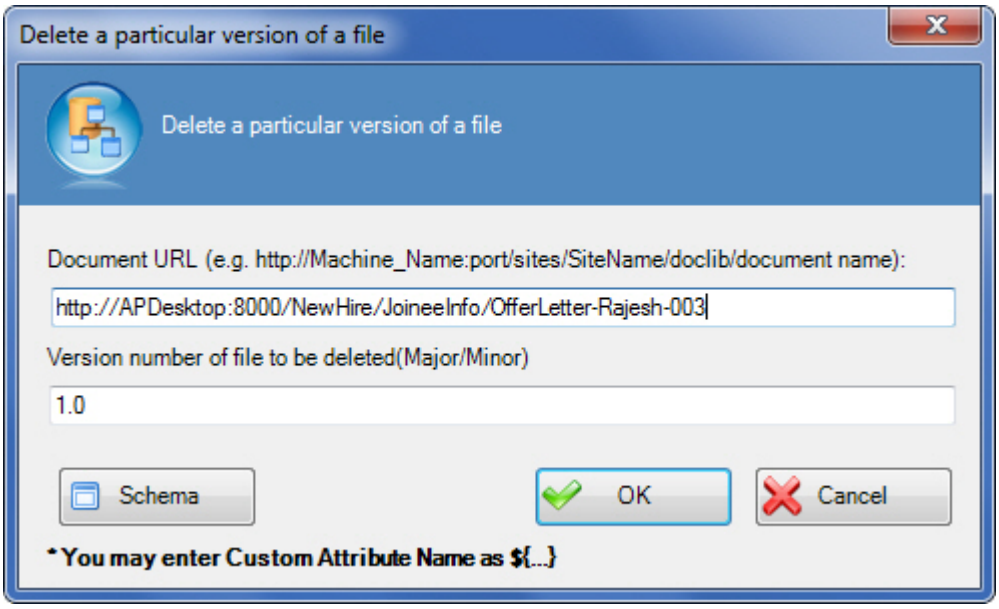
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Delete a Particular Version of a File Window

Specifies a list item file version you want to delete.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Delete Particular FileVersion** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Delete File Version Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Document URL	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes
Version number of file to be deleted	Definition: Specifies the major or minor file version you want to delete or restore. Allowed Values: A valid file version number. • **A major file version number** - A whole number • **A minor file version number** - [major version number].[minor version number] • **Blank (null)** - If you do not enter any number, the last number in the current version number is incremented. Default Value: None Custom Attributes: Yes Example: • A major file version number - 1 or 1.0 • A minor file version number - 1.3 In this example, 1 is the major version; 3 is the minor version.
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window:

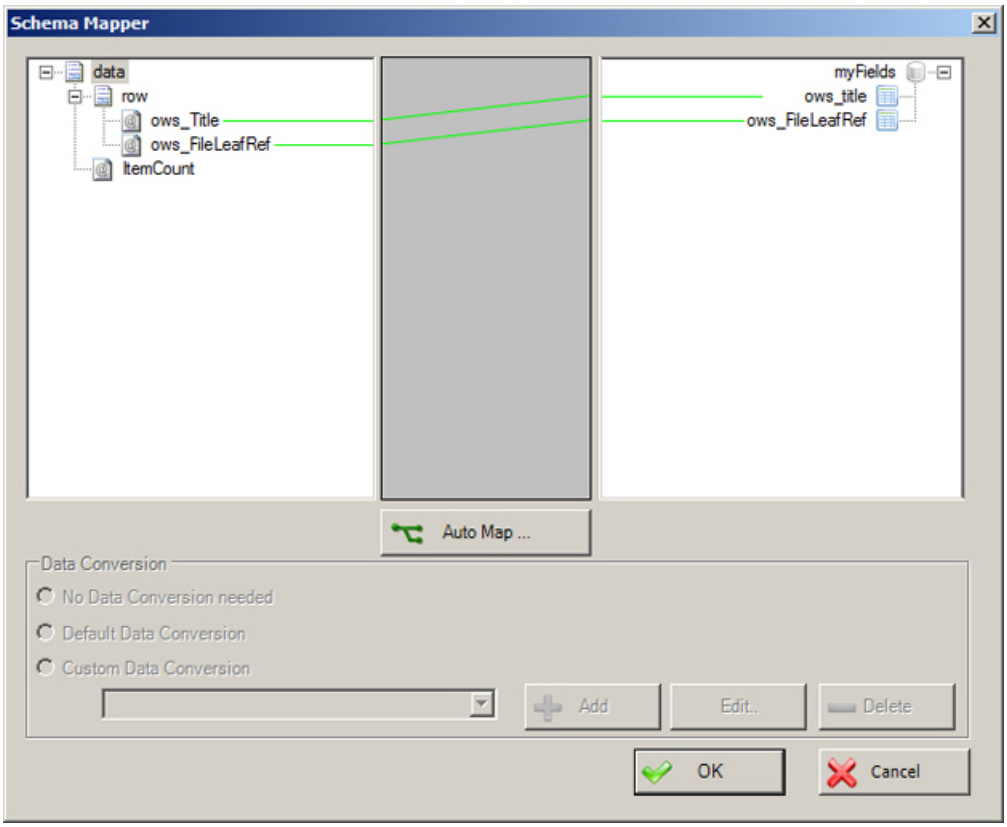
Field Name	Definition
	Enables you to select a schema node from the XML schema for your process. **Note:** If the process template has an associated schema, the Schema button appears.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Schema Mapper Window

Maps SharePoint fields, form fields, web methods, or other input sources to an XML schema.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **SharePoint**

- **Web Services**

3. Drag one of the following AgileShapes, and drop it on the process model:
   - **CAML Query**
   - **WSE (Web Service Extension)**
   - **WCF (Windows Communication Foundation)**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The fields that display vary, depending upon the AgsileShape you are using. For example, **Configure**.
6. On one of the following windows, under the **Output Mapping** or **Request/Response** tab, click the **Ellipses** button:
   - CAML Query Builder Configuration Window - Output Mapping Tab
   - WebService Configuration Window - Request Tab
   - WebService Configuration Window - Response Tab
   - Configuration for WCF Service Window - Request Tab
   - Configuration for WCF Service Window - Response Tab



Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options:

- **Reset All Mappings** - Deletes all mappings that have been made in the Schema Mapper for this activity.
- **Remove Invalid Mappings only** - Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same.
- **Cancel** - Aborts opening the Schema Mapper window.

Field Definitions

Field Name	Definition
Mapping Schemas for Request/Response and Process Model	Definition: Maps the schemas for a service's request or response and the AgilePoint schema: • CAML query schema for a response and AgilePoint schema • WSE service schema for a request/response and the AgilePoint schema • WCF service schema for a request/response and the AgilePoint schema The source and the destination schemas are displayed in a tree-view structure in the left and right panes. Allowed Values:

Field Name	Definition
	Read only - However, the drag and drop operations are supported to map the schemas. Drag a data node from the source schema pane to the destination schema pane: • Green line - The data type of source and destination nodes matches. • Blue line - The data type of source and destination nodes doesn't match. The data conversion is required to map the schemas. • Red line - Specifies that the custom data conversion is required.
Automap	Function: Maps all fields in the data source and the process schema that have the same name.
No Data Conversion needed	Definition: Determines whether the data conversion is not required between the source and the destination schema data fields. Allowed Values: • **Deselected** - Data conversion is required between the schema data fields. • **Selected** - Data conversion is not required between the schema data fields. Default Value: None However, the No Data Conversion needed option is selected if the data type of the source and destination schema data fields matches.
Default Data Conversion	Definition: Determines whether the default data conversion is required between the source and the destination schema fields. Allowed Values: • **Deselected** - Default data conversion is not required between the schema data fields. • **Selected** - Default data conversion is required between the schema data fields. Default Value: None

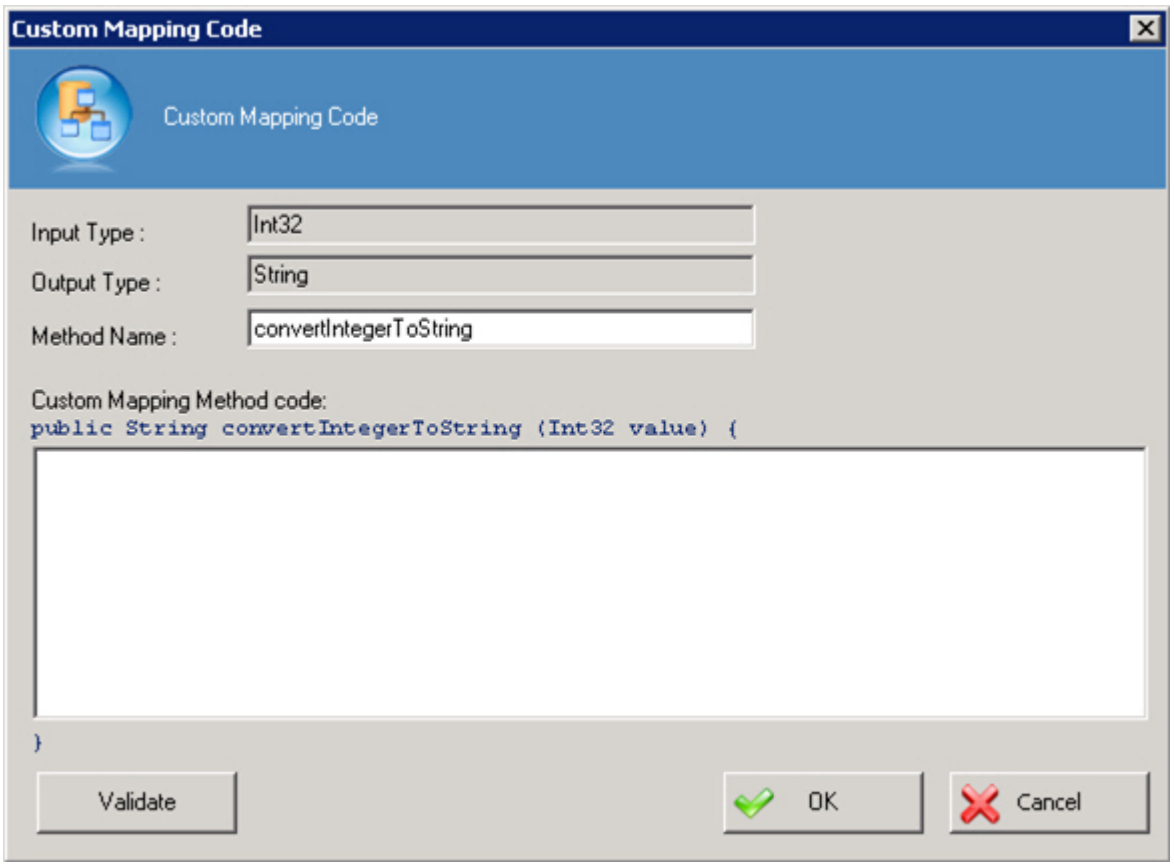
Field Name	Definition
	However, the Default Data Conversion option is selected if the data type of the source and destination schema fields doesn't match.
Custom Data Conversion	Definition: Determines whether the custom data conversion is required. You can create your own data conversion types by using the Add button. Allowed Values: • **Deselected** - Custom data conversion is not required. • **Selected** - Custom data conversion is required. Default Value: Deselected
Add	Opens the Following Window: Custom Mapping Code Window Purpose of this Window: Specifies custom C# code that can be used to map fields to an XML schema.
Edit	Opens the Following Window: Custom Mapping Code Window Purpose of this Window: Specifies custom C# code that can be used to map fields to an XML schema.
Delete	Function: Deletes the selected custom data conversion from the list.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Custom Mapping Code Window

Specifies custom C# code that can be used to map fields to an XML schema.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **SharePoint**
   - **Web Services**
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **CAML Query**
   - **WSE (Web Service Extension)**
   - **WCF (Windows Communication Foundation)**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The fields that display vary, depending upon the AgsileShape you are using. For example, **Configure**.
6. On one of the following windows, under the **Output Mapping** or **Request/Response** tab, click the **Ellipses** button:
   - CAML Query Builder Configuration Window - Output Mapping Tab
   - WebService Configuration Window - Request Tab
   - WebService Configuration Window - Response Tab

- Configuration for WCF Service Window - Request Tab
- Configuration for WCF Service Window - Response Tab

Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options:

- **Reset All Mappings** - Deletes all mappings that have been made in the Schema Mapper for this activity.
- **Remove Invalid Mappings only** - Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same.
- **Cancel** - Aborts opening the Schema Mapper window.

7. On the Schema Mapper Window, select the **Custom Data Conversion** option, and then click **Add**.

Field Definitions

Field Name	Definition
Input Type	Definition: Specifies the data type of a source schema data field. This indicates that the data type of the source schema field didn't match to the destination schema field on the Schema Mapper Window. Allowed Values: Read only.
Output Type	Definition: Specifies the data type of a destination schema data field. This indicates that the data type of the source schema field didn't match to the destination schema field on the Schema Mapper Window. Allowed Values: Read only.
Method Name	Definition: Specifies the name of a method you want to create for custom data conversion. Allowed Values: Any method name. Default Value:

Field Name	Definition
	Populated on the basis of the data type of the selected schema fields on the Schema Mapper Window. Custom Attributes: No
Custom Mapping Method Code	Definition: Specifies the code for the custom mapping data conversion. Allowed Values: A valid code. Default Value: None Custom Attributes: No

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Deleting a Version of a SharePoint File

To delete a particular version of a SharePoint file, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Delete Particular FileVersion** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Delete File Version Configuration** field, click the **Ellipses** button.

Instructions

1. On the **Delete a Particular Version of a File** window, enter the URL of the file whose version you want to delete:

Field Name	Definition
Document URL	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes

2. Enter the file version you want to delete.

   If your process has an XML schema, you can click the **Schema** button to select the file version from the schema.

Field Name	Definition
Version number of file to be deleted	Definition: Specifies the major or minor file version you want to delete or restore. Allowed Values: A valid file version number. • **A major file version number** - A whole number • **A minor file version number** - [major version number].[minor version number] • **Blank (null)** - If you do not enter any number, the last number in the current version number is incremented. Default Value: None Custom Attributes: Yes Example:

Field Name	Definition
	• A major file version number - 1 or 1.0 • A minor file version number - 1.3 In this example, 1 is the major version; 3 is the minor version.
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. **Note:** If the process template has an associated schema, the Schema button appears.

3. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup

Download Documents from Document Set

An AgilePart that downloads one or more documents from a SharePoint document to the local file system of the AgilePoint Server machine.



Prerequisites

- An environment using SharePoint 2013 and the CSOM AgileConnector.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Download Documents from Document Set** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: Download Document Set Configuration Window Purpose of this Window: Specifies the documents to download from a SharePoint document set.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

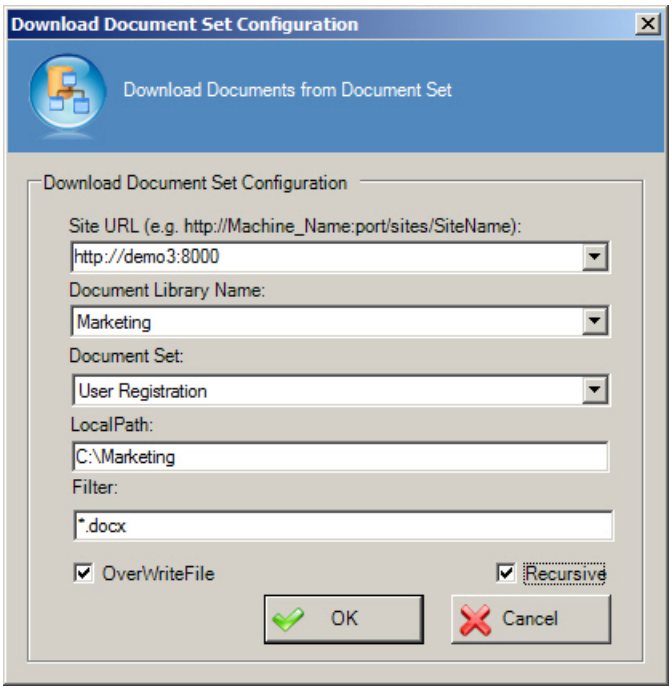
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Download Document Set Configuration Window

Specifies the documents to download from a SharePoint document set.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Download Documents from Document Set** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **DownloadDocSetConfiguration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example:

Field Name	Definition
	http://mysharepoint:8000/sites/${mysite}
Document Library Name	Definition: Specifies the name of the SharePoint document library. Allowed Values: A valid SharePoint document library name. Default Value: None Custom Attributes: Yes
Document Set	Definition: Specifies the name of the document set. Allowed Values: The name of your document set. Default Value: None Custom Attributes: Yes
Local Path	Definition: Specifies the location of the file system folder on the local computer where the AgileShape performs the certain action such as uploading or downloading files. This property defines the source location for the files to be uploaded and the destination location for the files to be downloaded. Allowed Values: • An absolute path on the AgilePoint Server machine. • A file path relative to the AgilePoint Server application's root directory. Default Value: None Custom Attributes: No

Field Name	Definition
	Example: • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the file once downloaded is to be located at: c:\Inetpub\wwwroot\AgilePointServer\files\MyFile.txt Then, the LocalPath property can be set to one of the following values: • **Relative path** - files • **Absolute path** - c:\Inetpub\wwwroot\AgilePointServer\files • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the file once downloaded is to be located at: c:\Inetpub\wwwroot\AgilePointServer\files\temp\MyFile.txt Then, the LocalPath property must be set to one of the following values: • **Relative path** - files\temp • **Absolute path** - c:\Inetpub\wwwroot\AgilePointServer\files\temp\

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Downloading Documents from a Document Set

To download documents from a document set to the local file system of the AgilePoint Server machine, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.

3. On the **SharePoint** stencil, drag the **Download Documents from Document Set** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **DownloadDocSetConfiguration** field, click the **Ellipses** button.

Instructions

1. On the **Download Document Set Configuration** Window, complete the following fields as required:

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Document Library Name	Definition: Specifies the name of the SharePoint document library. Allowed Values: A valid SharePoint document library name. Default Value: None Custom Attributes: Yes
Document Set	Definition: Specifies the name of the document set. Allowed Values: The name of your document set. Default Value: None

Field Name	Definition
	Custom Attributes: Yes
LocalPath	Definition: Specifies the location of the file system folder on the local computer where the AgileShape performs the certain action such as uploading or downloading files. This property defines the source location for the files to be uploaded and the destination location for the files to be downloaded. Allowed Values: A file path relative to the AgilePoint Server application's root directory. Default Value: None Custom Attributes: No Example: • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the file once downloaded is to be located at: c:\Inetpub\wwwroot\AgilePointServer\files\MyFile.txt Then, the LocalPath property must be set to the following value: files • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the file once downloaded is to be located at: c:\Inetpub\wwwroot\AgilePointServer\files\temp\MyFile.txt Then, the LocalPath property must be set to the following value: files\temp

2. Complete any additional configuration for this AgileShape according to your requirements:

- Download Documents from Document Set
- AgilePart - Common Setup

Download Files

An AgilePart that downloads one or more files from a SharePoint library to the local file system of the AgilePoint Server machine.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Download Files** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
AbsoluteURL	Definition: Specifies the absolute URL for the source folder on SharePoint server. Allowed Values: A valid SharePoint absolute URL. Default Value: None Custom Attributes: No Example: • http://[machine name]:[port]/sites/[site name]/[document library name]/[folder name]
Filter	Definition: Specifies the file name or a set of files expressed using the filter expression you want to search within

Field Name	Definition
	the specified source location. For example, files to be downloaded by the Download Files AgilePart, to be uploaded by the Upload Files AgilePart, or to be converted to PDF by the PDF Converter AgilePart. Allowed Values: • A file name. • A filter string that uses asterisks (*) as wildcards. Default Value: None Custom Attributes: No Example: Following are some examples of filter expressions: • ***.*** - All files are searched. • ***.xml** - The files that have the **.xml** file extension are searched. • ***.doc** - The files that have the **.doc** file extension are searched. • **MyFile.xml** - Only the specific file MyFile.xml is searched. The filter action is performed at the source location, that vary depending upon the AgileShape.
LocalPath	Definition: Specifies the location of the file system folder on the local computer where the AgileShape performs the certain action such as uploading or downloading files. This property defines the source location for the files to be uploaded and the destination location for the files to be downloaded. Allowed Values: A file path relative to the AgilePoint Server application's root directory. Default Value: None Custom Attributes: No

Field Name	Definition
	Example: • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the file once downloaded is to be located at: c:\Inetpub\wwwroot\AgilePointServer\files\MyFile.txt Then, the LocalPath property must be set to the following value: files • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the file once downloaded is to be located at: c:\Inetpub\wwwroot\AgilePointServer\files\temp\MyFile.txt Then, the LocalPath property must be set to the following value: files\temp
OverWriteFile	Definition: Specifies whether the AgileShape overwrites the files if they already exist at the specified destination location. Allowed Values: • **False** - The AgileShape does not overwrite any existing file. • **True** - The AgileShape overwrites the file if it exists with the same name at the destination location. Default Value: False
Recursive	Definition: Determines whether the AgileShape's specified action - such as copying, uploading, or deleting - is recursive. In other words, it determines whether the action is repeated in subfolders of the target folder or document library. Allowed Values:

Field Name	Definition
	• **False** - The AgileShape performs the action only on the files located at the specified source folder. Files within subfolders aren't affected. • **True** - The AgileShape performs the action on the files located at the specified source folder, as well as the files that are located within the subfolders. Default Value: False

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Downloading SharePoint Files

To download files from a SharePoint library or folder to the file system on the AgilePoint Server machine, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Download Files** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following required properties for the **Download Files** AgileShape:

Field Name	Definition
AbsoluteURL	Definition: Specifies the absolute URL for the source folder on SharePoint server. Allowed Values: A valid SharePoint absolute URL. Default Value: None Custom Attributes: No Example: • http://[machine name]:[port]/sites/[site name]/[document library name]/[folder name]
LocalPath	Definition: Specifies the location of the file system folder on the local computer where the AgileShape performs the certain action such as uploading or downloading files. This property defines the source location for the files to be uploaded and the destination location for the files to be downloaded. Allowed Values: A file path relative to the AgilePoint Server application's root directory. Default Value: None Custom Attributes: No Example: • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the file once downloaded is to be located at:

Field Name	Definition
	c:\Inetpub\wwwroot\AgilePointServer\files \MyFile.txt Then, the LocalPath property must be set to the following value: files • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the file once downloaded is to be located at: c:\Inetpub\wwwroot\AgilePointServer\files \temp\MyFile.txt Then, the LocalPath property must be set to the following value: files\temp

2. Complete any additional configuration for this AgileShape according to your requirements:
   - Download Files
   - AgilePart - Common Setup

Excel Calculate

An AgilePart that allows both writing (temporarily or permanently) and reading from an Excel document in the same step.

Good to Know

- The write operation happens first, and then the read operation occurs.

Note: Write is carried out first and then Read in executed.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Excel Calculate** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: Excel Services Configuration Window Purpose of this Window: Sets up an Excel operation.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

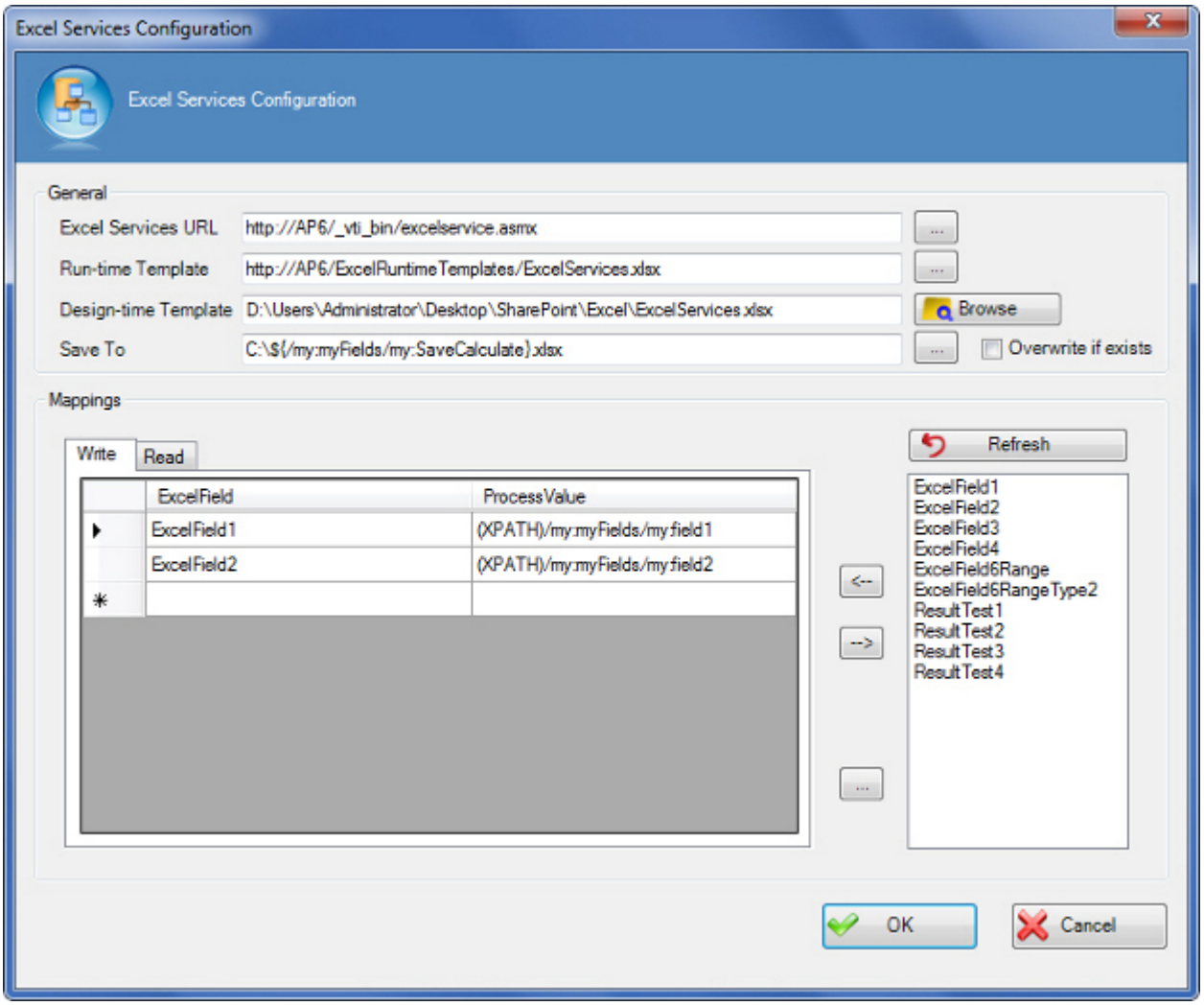
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Excel Services Configuration Window

Sets up an Excel operation.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Excel Calculate** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Excel Services URL	Definition: Specifies the URL of the SharePoint Excel Services.

Field Name	Definition
	Allowed Values: • A valid SharePoint Excel Services URL. • A custom attribute. • XML metadata To add XML metadata, use the Ellipses button. Default Value: None Custom Attributes: Yes Example: • URL - http://ind-01:8888/_vti_bin/ExcelService.asmx • A custom attribute - $\{SharePointURL\}$ \{ExcelService\}
Run-time Template	Definition: Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. Allowed Values: • A valid Excel template file name with the full path. • A custom attributes. For example, $ \{SharePointURL\}$\{RuntimeTemplateLibrary \}$\{ExcelFilename\} • XML metadata To add XML metadata, use the Ellipses button. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content. • This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. Default Value: None

Field Name	Definition
	Custom Attributes: Yes Example: http://ind-01:8888/ExcelServicesDemo/ExcelServices.xlsx
Design-time Template	Definition: Specifies the name of an Excel template file that is used at design time. Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. Allowed Values: A valid Excel template file name with the full path. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content. • Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. Default Value: None Custom Attributes: No Example: C:\Excel\ExcelSheet\ExcelServices.xlsx
Save To	Definition: Specifies the location where you want to save the resulting Excel document. Allowed Values: • A valid URI. The URI can be the URL for a SharePoint document library, or a directory path.

Field Name	Definition
	• A custom attributes. For example, $ \{SharePointURL\}$\{ExcelDocLibrary\}$ \{ExcelFilename\}. • XML metadata To add XML metadata, use the Ellipses button. Default Value: None Custom Attributes: Yes Example: http://ind-01:8888/ExcelServicesDemo/${/ my:myFields/my:SaveWrite}.xlsx
Overwrite if exists	Definition: Overwrites an existing file specified using the Save To field. Allowed Values: • **Deselected** - The AgileShape doesn't overwrite the existing file. • **Selected** - The AgileShape overwrites the file if it already exists. Default Value: Deselected
Named Fields Box	Definition: Specifies the named fields populated from the Excel sheet once you specify the Design-time Template file. This field is used for the mapping purpose. You must map the Excel named fields to the process values to: • Write to an Excel document. • Read from an Excel document. A named field in Microsoft Excel is the name of a cell or range that is used instead of the cell's reference name. For example, empName, a named field, is easier to use instead of its cell's reference name, C21. Allowed Values: A named field selected from the list.

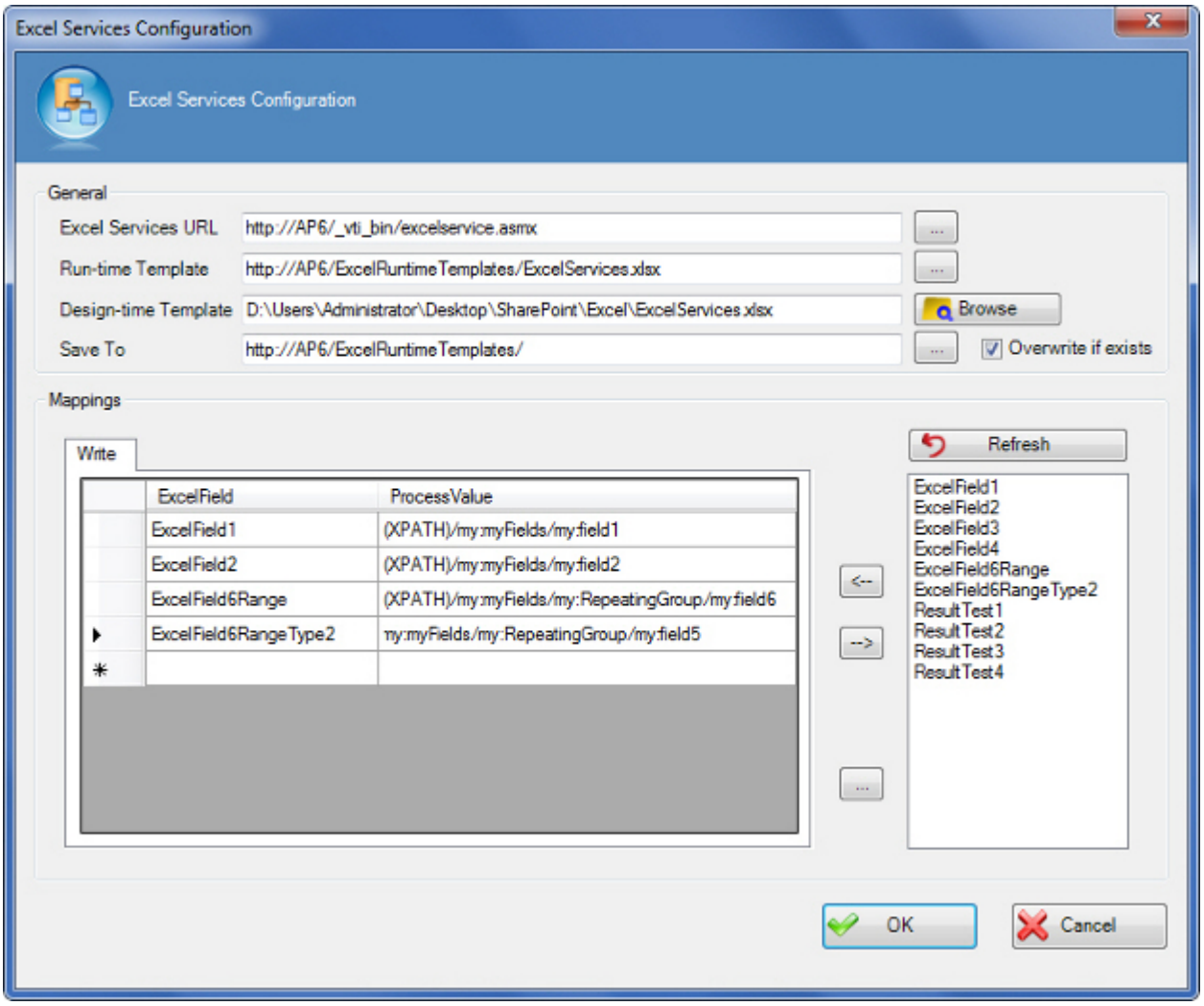
Field Name	Definition
	Default Value: None Custom Attributes: No
Refresh	Function: Reloads the named fields from the Excel sheet to the Named Fields box. **Note:** You must click the Refresh button if the file specified in the Design-time Template changes.
Left Arrow	Function: Populates the selected named field from the Named Fields Box box to the ExcelField column. You can add only one named field at a time.
Right Arrow	Function: Deletes the selected row.
Write	Opens the Following Window: Excel Services Configuration Window - Write Tab Purpose of this Window: Sets up an operation to create an Excel file.
Read	Opens the Following Window: Excel Services Configuration Window - Read Tab Purpose of this Window: Specifies an operation to read and store data from an Excel file.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Excel Services Configuration Window - Write Tab

Sets up an operation to create an Excel file.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **Excel Write**
   - **Excel Calculate**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Excel Services URL	Definition:

Field Name	Definition
	Specifies the URL of the SharePoint Excel Services. Allowed Values: • A valid SharePoint Excel Services URL. • A custom attribute. • XML metadata To add XML metadata, use the Ellipses button. Default Value: None Custom Attributes: Yes Example: • URL - http://ind-01:8888/_vti_bin/ExcelService.asmx • A custom attribute - $\{SharePointURL\}$\{ExcelService\}
Run-time Template	Definition: Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. Allowed Values: • A valid Excel template file name with the full path. • A custom attributes. For example, $\{SharePointURL\}$\{RuntimeTemplateLibrary\}$\{ExcelFilename\} • XML metadata To add XML metadata, use the Ellipses button. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content. • This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. Default Value:

Field Name	Definition
	None Custom Attributes: Yes Example: http://ind-01:8888/ExcelServicesDemo/ExcelServices.xlsx
Design-time Template	Definition: Specifies the name of an Excel template file that is used at design time. Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. Allowed Values: A valid Excel template file name with the full path. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content. • Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. Default Value: None Custom Attributes: No Example: C:\Excel\ExcelSheet\ExcelServices.xlsx
Save To	Definition: Specifies the location where you want to save the resulting Excel document. Allowed Values: • A valid URI.

Field Name	Definition
	The URI can be the URL for a SharePoint document library, or a directory path. • A custom attributes. For example, $ \{SharePointURL\}$\{ExcelDocLibrary\}$ \{ExcelFilename\}. • XML metadata To add XML metadata, use the Ellipses button. Default Value: None Custom Attributes: Yes Example: http://ind-01:8888/ExcelServicesDemo/${/ my:myFields/my:SaveWrite}.xlsx
Named Fields Box	Definition: Specifies the named fields populated from the Excel sheet once you specify the Design-time Template file. This field is used for the mapping purpose. You must map the Excel named fields to the process values to: • Write to an Excel document. • Read from an Excel document. A named field in Microsoft Excel is the name of a cell or range that is used instead of the cell's reference name. For example, empName, a named field, is easier to use instead of its cell's reference name, C21. Allowed Values: A named field selected from the list. Default Value: None Custom Attributes: No
Refresh	Function: Reloads the named fields from the Excel sheet to the Named Fields box.

Field Name	Definition
	Note: You must click the Refresh button if the file specified in the Design-time Template changes.
Left Arrow	Function: Populates the selected named field from the Named Fields Box box to the ExcelField column. You can add only one named field at a time.
Right Arrow	Function: Deletes the selected row.
Overwrite if exists	Definition: Overwrites an existing file specified using the Save To field. Allowed Values: • **Deselected** - The AgileShape doesn't overwrite the existing file. • **Selected** - The AgileShape overwrites the file if it already exists. Default Value: Deselected
ExcelField	Definition: Specifies the Excel named field to be mapped to the process value. The mapping is performed to update the named fields in the Excel sheet. Allowed Values: A named field. Use the Left Arrow button to move the named field from the Named Fields box to the ExcelField column. **Note:** The value of the named field in the ExcelField column can be evaluated from a string containing a custom attribute. For example, $\{MyExcelField\} or field$\{year\}$ \{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! Default Value: None Custom Attributes:

Field Name	Definition
	Yes
ProcessValue	Definition: Specifies the process value. The value is mapped to the named field to update the named fields in the Excel sheet. Allowed Values: • A number or a text string that can contain spaces. This must be in accordance with the data type of the Excel named field. • A custom attribute. Note the following: • Once a named field is in the ExcelField column, map a named field to the process value. First, select the row, and then click the **Ellipses** button to select from the Select XPath from Attributes Window. • You can type a custom attribute directly in the ProcessValue column. **Note:** The name of the custom attribute in the ProcessValue column can be derived from a string containing another custom attribute. For example, $\{MyCustomAttribute\} or customattribute $\{year\}$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! **Note:** You can also use advance XPath expressions such as filtering. For example, (XPATH)/my:myFields/my:field2[.>32] returns all items that match the filter (field2 > 32). In addition, you can combine XPath expressions and custom attributes such as: (XPATH)/my:myFields/my:field2[.>$\{myCustomAttribute\}] **Note:** If you have an XPath expression that returns more than one value, there is a feature for mapping them with a named field that is defined as a one-dimensional range in the Excel document. The AgilePart fills the range with returned values from the XPath expression, but if the range does not contain enough cells for the number of values, the AgilePart doesn't fill past the range of cells in order to protect rest of the

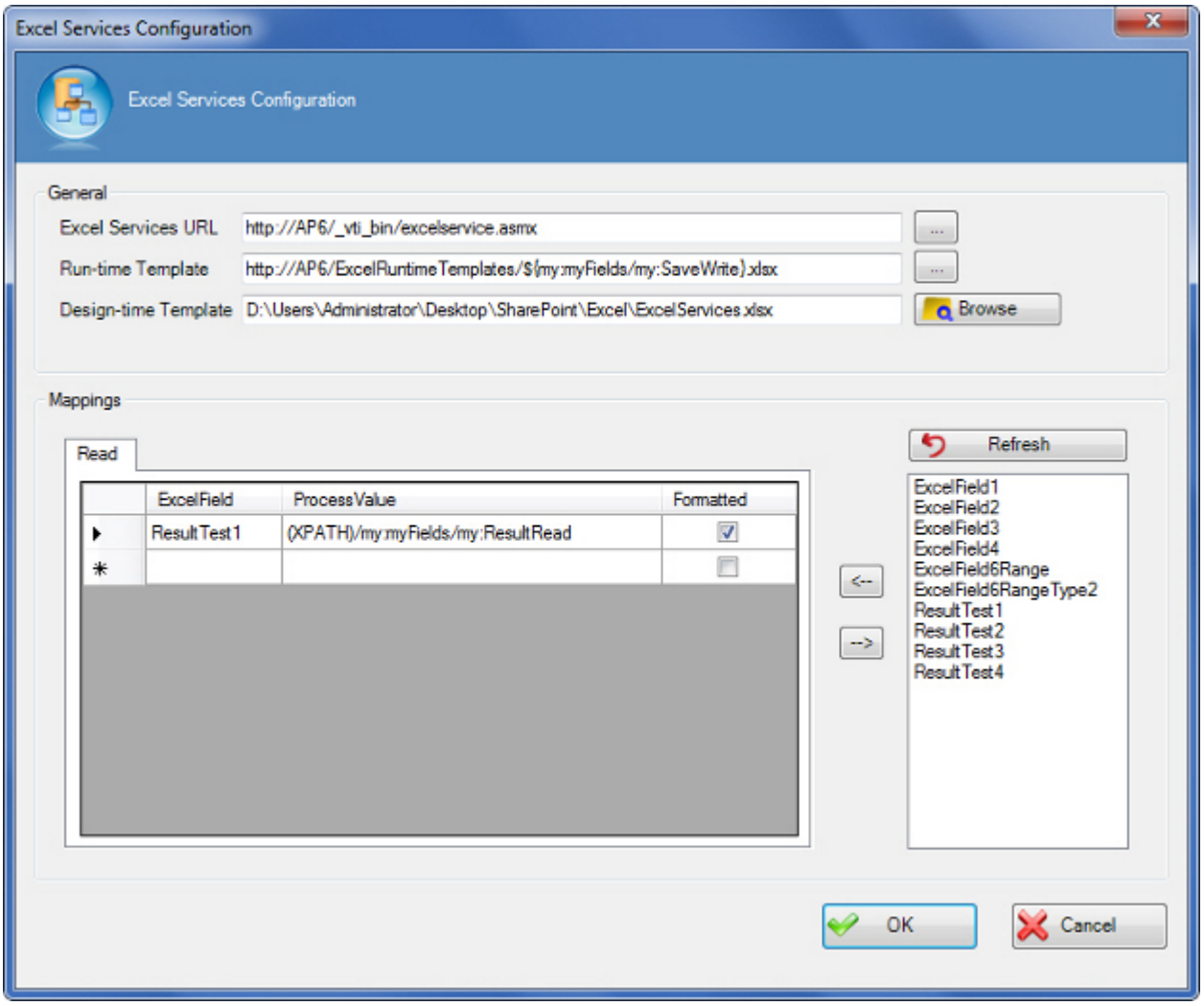
Field Name	Definition
	worksheet and the remaining values are simply discarded. Default Value: None Custom Attributes: Yes

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Excel Services Configuration Window - Read Tab

Specifies an operation to read and store data from an Excel file.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **Excel Read**
   - **Excel Calculate**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Excel Services URL	Definition:

Field Name	Definition
	Specifies the URL of the SharePoint Excel Services. Allowed Values: • A valid SharePoint Excel Services URL. • A custom attribute. • XML metadata To add XML metadata, use the Ellipses button. Default Value: None Custom Attributes: Yes Example: • URL - http://ind-01:8888/_vti_bin/ExcelService.asmx • A custom attribute - $\{SharePointURL\}$\{ExcelService\}
Run-time Template	Definition: Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. Allowed Values: • A valid Excel template file name with the full path. • A custom attributes. For example, $\{SharePointURL\}$\{RuntimeTemplateLibrary\}$\{ExcelFilename\} • XML metadata To add XML metadata, use the Ellipses button. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content. • This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. Default Value:

Field Name	Definition
	None Custom Attributes: Yes Example: http://ind-01:8888/ExcelServicesDemo/ExcelServices.xlsx
Design-time Template	Definition: Specifies the name of an Excel template file that is used at design time. Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. Allowed Values: A valid Excel template file name with the full path. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content. • Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. Default Value: None Custom Attributes: No Example: C:\Excel\ExcelSheet\ExcelServices.xlsx
Named Fields Box	Definition: Specifies the named fields populated from the Excel sheet once you specify the Design-time Template file. This field is used for the mapping purpose. You must map the Excel named fields to the process values to:

Field Name	Definition
	• Write to an Excel document. • Read from an Excel document. A named field in Microsoft Excel is the name of a cell or range that is used instead of the cell's reference name. For example, empName, a named field, is easier to use instead of its cell's reference name, C21. Allowed Values: A named field selected from the list. Default Value: None Custom Attributes: No
Refresh	Function: Reloads the named fields from the Excel sheet to the Named Fields box. **Note:** You must click the Refresh button if the file specified in the Design-time Template changes.
Left Arrow	Function: Populates the selected named field from the Named Fields Box box to the ExcelField column. You can add only one named field at a time.
Right Arrow	Function: Deletes the selected row.
ExcelField	Definition: Specifies the Excel named field to be mapped to the process value. The mapping is performed to read the value in the named field in the Excel sheet into a process attribute. Allowed Values: A named field. Use the Left Arrow button to move the named field from the Named Fields box to the ExcelField column.

Field Name	Definition
	Note: In the Read AgileShape, the named field cannot be a range in the Excel document but only a cell. **Note:** The value of the named field in the ExcelField column can be evaluated from a string containing a custom attribute. For example, $\{MyExcelField\} or field$\{year\}$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! Default Value: None Custom Attributes: Yes
ProcessValue	Definition: Specifies the name of the process attribute. The process attribute is mapped to the named field to read the value in the named field in the Excel sheet. Allowed Values: A custom attribute. **Note:** The name of the custom attribute in the ProcessValue column can be derived from a string containing another custom attribute. For example, $\{MyCustomAttribute\} or customattribute $\{year\}$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! Default Value: None However, when you add a row for a named field using the Left Arrow button, the ProcessValue column is populated with the Excel named field's name. Custom Attributes: Yes
Formatted	Function: Determines whether the formatted value of the Excel cell is read instead of the actual value. The formatted values are useful to denote numbers or dates such as in emails.

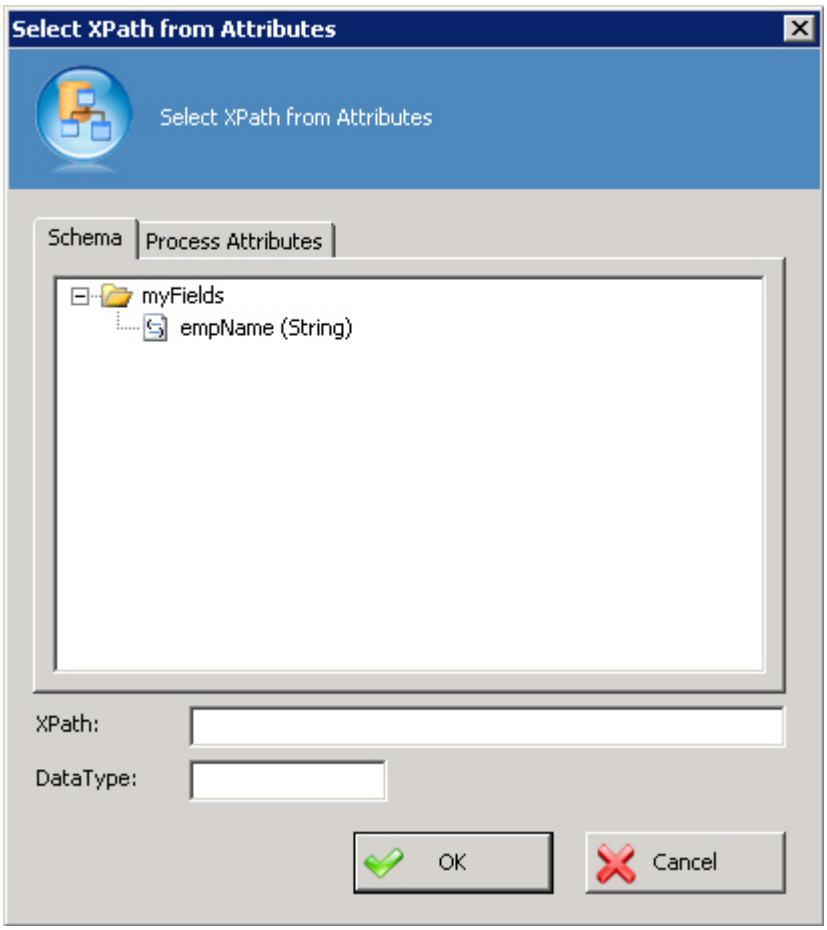
Field Name	Definition
	Allowed Values: • **Deselected** - The actual value of the cell is read. For example, 1023 • **Selected** - The formatted value of the cell is read. For example, €1,023.34 Default Value: Deselected However, when you add a row for a named field using the Left Arrow button, by default, the Formatted check box is selected. Example: When the Formatted check box is selected: • A Percentage type cell returns 15% instead of 15, where 15 is the actual value and % is the formatting code. • A Currency type cell returns €1,023.34 instead of 1023.34, where 1023.34 is the actual value and € is the formatting code. This indicates that the formatting code of the Excel cell is also read along with the cell value.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.



Prerequisites

- The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the appropriate stencil.
3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the respective field/configuration window, do one of the following, as appropriate:
   - Type the characters **${** in the property box.
   - Click the **Ellipses** button.
   - Click the **Schema** button.

Field Definitions

Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Excel Read

An AgilePart that reads data from an Excel file, and then stores the values in custom attributes that can be used in the process.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Excel Read** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: Excel Services Configuration Window - Read Tab Purpose of this Window: Specifies an operation to read and store data from an Excel file.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

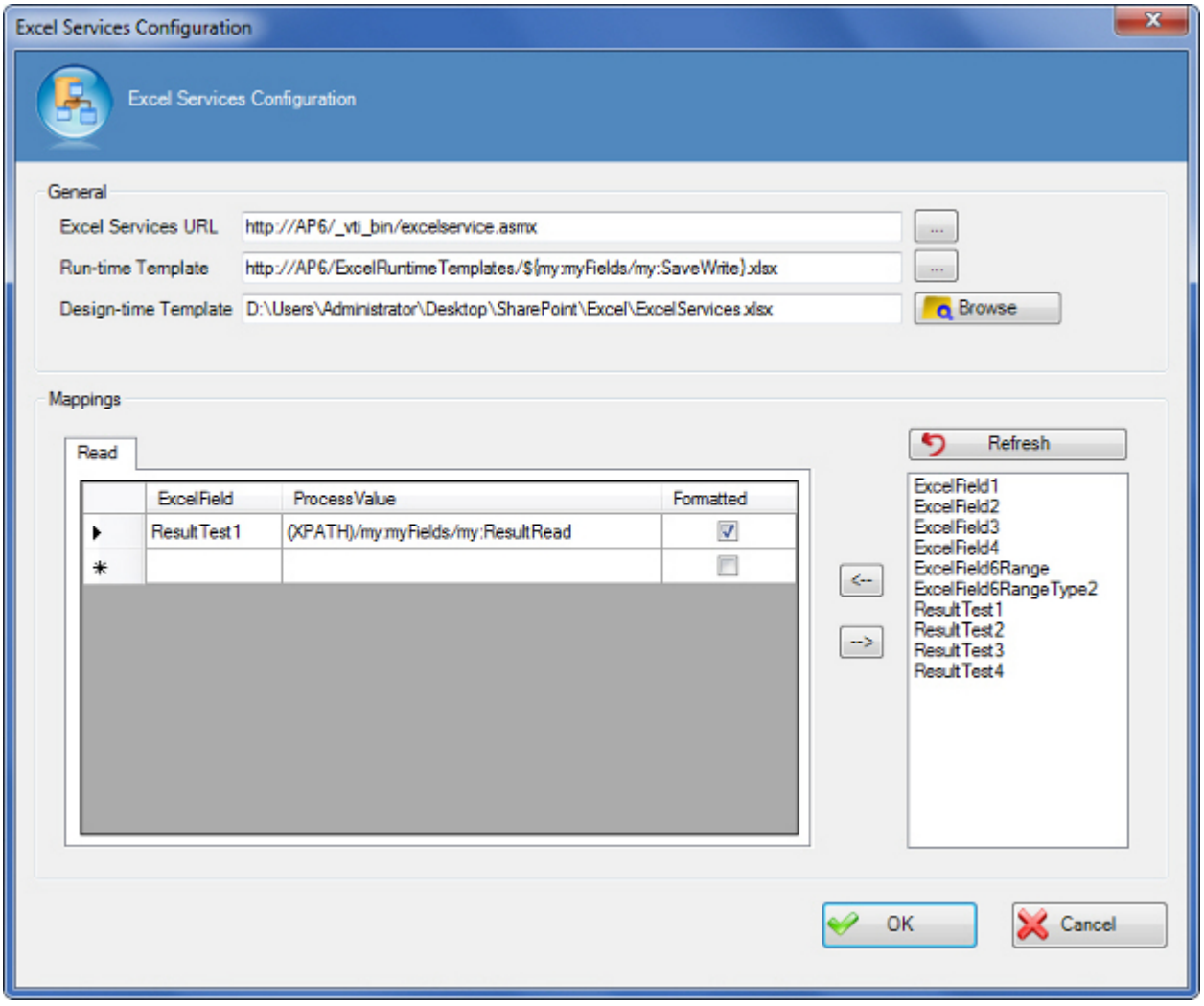
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Excel Services Configuration Window - Read Tab

Specifies an operation to read and store data from an Excel file.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **Excel Read**
   - **Excel Calculate**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Excel Services URL	Definition: Specifies the URL of the SharePoint Excel Services. Allowed Values: • A valid SharePoint Excel Services URL. • A custom attribute. • XML metadata To add XML metadata, use the Ellipses button. Default Value: None Custom Attributes: Yes Example: • URL - http://ind-01:8888/_vti_bin/ExcelService.asmx • A custom attribute - $\{SharePointURL\}$ \{ExcelService\}
Run-time Template	Definition: Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. Allowed Values: • A valid Excel template file name with the full path.

Field Name	Definition
	• A custom attributes. For example, $ \{SharePointURL\}$\{RuntimeTemplateLibrary \}$\{ExcelFilename\} • XML metadata To add XML metadata, use the Ellipses button. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content. • This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. Default Value: None Custom Attributes: Yes Example: http://ind-01:8888/ExcelServicesDemo/ExcelServices.xlsx
Design-time Template	Definition: Specifies the name of an Excel template file that is used at design time. Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. Allowed Values: A valid Excel template file name with the full path. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content.

Field Name	Definition
	• Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. Default Value: None Custom Attributes: No Example: C:\Excel\ExcelSheet\ExcelServices.xlsx
Named Fields Box	Definition: Specifies the named fields populated from the Excel sheet once you specify the Design-time Template file. This field is used for the mapping purpose. You must map the Excel named fields to the process values to: • Write to an Excel document. • Read from an Excel document. A named field in Microsoft Excel is the name of a cell or range that is used instead of the cell's reference name. For example, empName, a named field, is easier to use instead of its cell's reference name, C21. Allowed Values: A named field selected from the list. Default Value: None Custom Attributes: No
Refresh	Function: Reloads the named fields from the Excel sheet to the Named Fields box. **Note:** You must click the Refresh button if the file specified in the Design-time Template changes.
Left Arrow	Function:

Field Name	Definition
	Populates the selected named field from the Named Fields Box box to the ExcelField column. You can add only one named field at a time.
Right Arrow	Function: Deletes the selected row.
ExcelField	Definition: Specifies the Excel named field to be mapped to the process value. The mapping is performed to read the value in the named field in the Excel sheet into a process attribute. Allowed Values: A named field. Use the Left Arrow button to move the named field from the Named Fields box to the ExcelField column. **Note:** In the Read AgileShape, the named field cannot be a range in the Excel document but only a cell. **Note:** The value of the named field in the ExcelField column can be evaluated from a string containing a custom attribute. For example, $\{MyExcelField\} or field$\{year\}$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! Default Value: None Custom Attributes: Yes
ProcessValue	Definition: Specifies the name of the process attribute. The process attribute is mapped to the named field to read the value in the named field in the Excel sheet. Allowed Values: A custom attribute. **Note:** The name of the custom attribute in the ProcessValue column can be derived from a string containing another custom attribute. For example, $

Field Name	Definition
	\{MyCustomAttribute\} or customattribute $\{year\}$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! Default Value: None However, when you add a row for a named field using the Left Arrow button, the ProcessValue column is populated with the Excel named field's name. Custom Attributes: Yes
Formatted	Function: Determines whether the formatted value of the Excel cell is read instead of the actual value. The formatted values are useful to denote numbers or dates such as in emails. Allowed Values: • **Deselected** - The actual value of the cell is read. For example, 1023 • **Selected** - The formatted value of the cell is read. For example, €1,023.34 Default Value: Deselected However, when you add a row for a named field using the Left Arrow button, by default, the Formatted check box is selected. Example: When the Formatted check box is selected: • A Percentage type cell returns 15% instead of 15, where 15 is the actual value and % is the formatting code. • A Currency type cell returns €1,023.34 instead of 1023.34, where 1023.34 is the actual value and € is the formatting code. This indicates that the formatting code of the Excel cell is also read along with the cell value.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

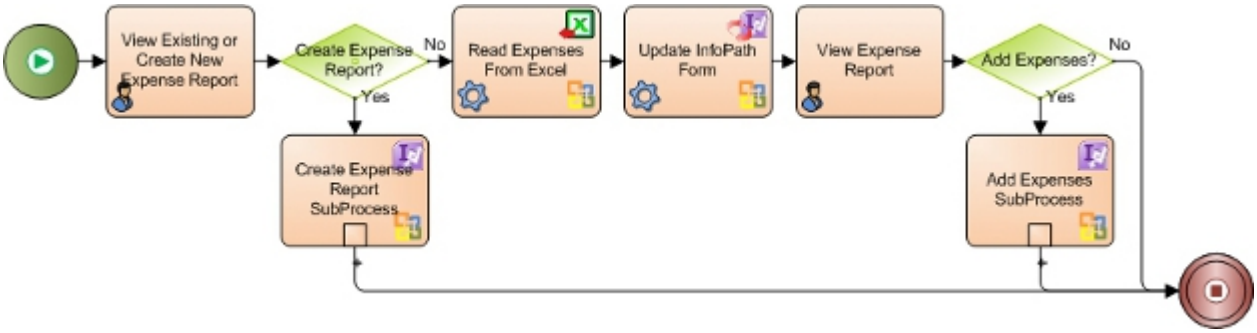
Reading Data from an Excel File

This example demonstrates how to read data from a Microsoft Excel file for display in a form using the Excel Read AgileShape.

Instructional Goals

- Demonstrate how to read data from a Microsoft Excel file from an AgilePoint process.

Example Process: Expense Reporting Application: View Existing Expense Report



Problem Statement

View the data from an existing expense report stored in a Microsoft Excel file.

This functionality is a subset of the expense reporting application.

Business Requirements

- View expense report data stored in a Microsoft Excel file.
- Integrate with an expense report management application.

Prerequisites

- An SPDoc or SPList process model with the following schema values:

Process Value
field1

Process Value
field2
field3
field4
field6

- An InfoPath form with the following fields:

InfoPath Schema Node
(XPATH)/my:myFields/my:field1
(XPATH)/my:myFields/my:field2
(XPATH)/my:myFields/my:field3
(XPATH)/my:myFields/my:field4
(XPATH)/my:myFields/my:RepeatingGroup/my:field6
(XPATH)/my:myFields/my:RepeatingGroup[my:field5='Type 2']/my:field6
(XPATH)/my:myFields/my:ResultRepeatingAll
(XPATH)/my:myFields/my:ResultRepeatingType2

- A Microsoft Excel template file named **ExcelServices.xlsx** that includes the following fields:

Excel Field
ExcelField1
ExcelField2
ExcelField3
ExcelField4
ExcelField6Range
ExcelField6RangeType2
ResultTest3
ResultTest4

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Excel Read** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configuration** field, click the **Ellipses** button.

Instructions

Repeat the following steps until all required approvers are added to the list:

1. On the Excel Services Configuration window, complete the following fields as required for your environment.

Field Name	Value
Excel Services URL	Definition: Specifies the URL of the SharePoint Excel Services. Allowed Values: • A valid SharePoint Excel Services URL. • A custom attribute. • XML metadata To add XML metadata, use the Ellipses button. Default Value: None Custom Attributes: Yes Example: • URL - http://ind-01:8888/_vti_bin/ExcelService.asmx • A custom attribute - $\{SharePointURL\}$ \{ExcelService\}
Run-time Template	Definition: Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. Allowed Values: • A valid Excel template file name with the full path.

Field Name	Value
	• A custom attributes. For example, $ \{SharePointURL\}$\{RuntimeTemplateLibrary \}$\{ExcelFilename\} • XML metadata To add XML metadata, use the Ellipses button. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content. • This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. Default Value: None Custom Attributes: Yes Example: http://ind-01:8888/ExcelServicesDemo/ExcelServices.xlsx
Design-time Template	Definition: Specifies the name of an Excel template file that is used at design time. Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. Allowed Values: A valid Excel template file name with the full path. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content.

Field Name	Value
	• Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. Default Value: None Custom Attributes: No Example: C:\Excel\ExcelSheet\ExcelServices.xlsx

2. On the **Read** tab, use the arrow buttons to map the following Excel fields and process values.

ExcelField	ProcessValue
ExcelField1	field1
ExcelField2	field2
ExcelField3	field3
ExcelField4	field4
ExcelField6Range	field6

3. For each of the mapped values, select **Formatted**.
4. When you have finished mapping the values, click **OK**.
5. On the **SharePoint** stencil, drag the **Update InfoPath** AgileShape, and drop it on the process template.
6. On the **XMLMappings** field, click the **Ellipses** button.
7. On the XML Schema Mappings Window, use the map the following Excel fields and InfoPath schema nodes.

InfoPath XPath	Value
(XPATH)/my:myFields/my:field1	${ExcelField1}
(XPATH)/my:myFields/my:field2	${ExcelField2}
(XPATH)/my:myFields/my:field3	${ExcelField3}
(XPATH)/my:myFields/my:field4	${ExcelField4}
(XPATH)/my:myFields/my:RepeatingGroup/ my:field6	${ExcelField6Range}

InfoPath XPath	Value
(XPATH)/my:myFields/ my:RepeatingGroup[my:field5='Type 2']/my:field6	${ExcelField6RangeType2}
(XPATH)/my:myFields/my:ResultRepeatingAll	${ResultTest3}
(XPATH)/my:myFields/my:ResultRepeatingType2	${ResultTest4}

Excel Write

An AgilePart that creates, and then modifies, an Excel file based on an Excel template. The output file can be saved either to a SharePoint document library or to a file path to a local or shared folder on the AgilePoint Server.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Excel Write** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: Excel Services Configuration Window - Write Tab Purpose of this Window: Sets up an operation to create an Excel file.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

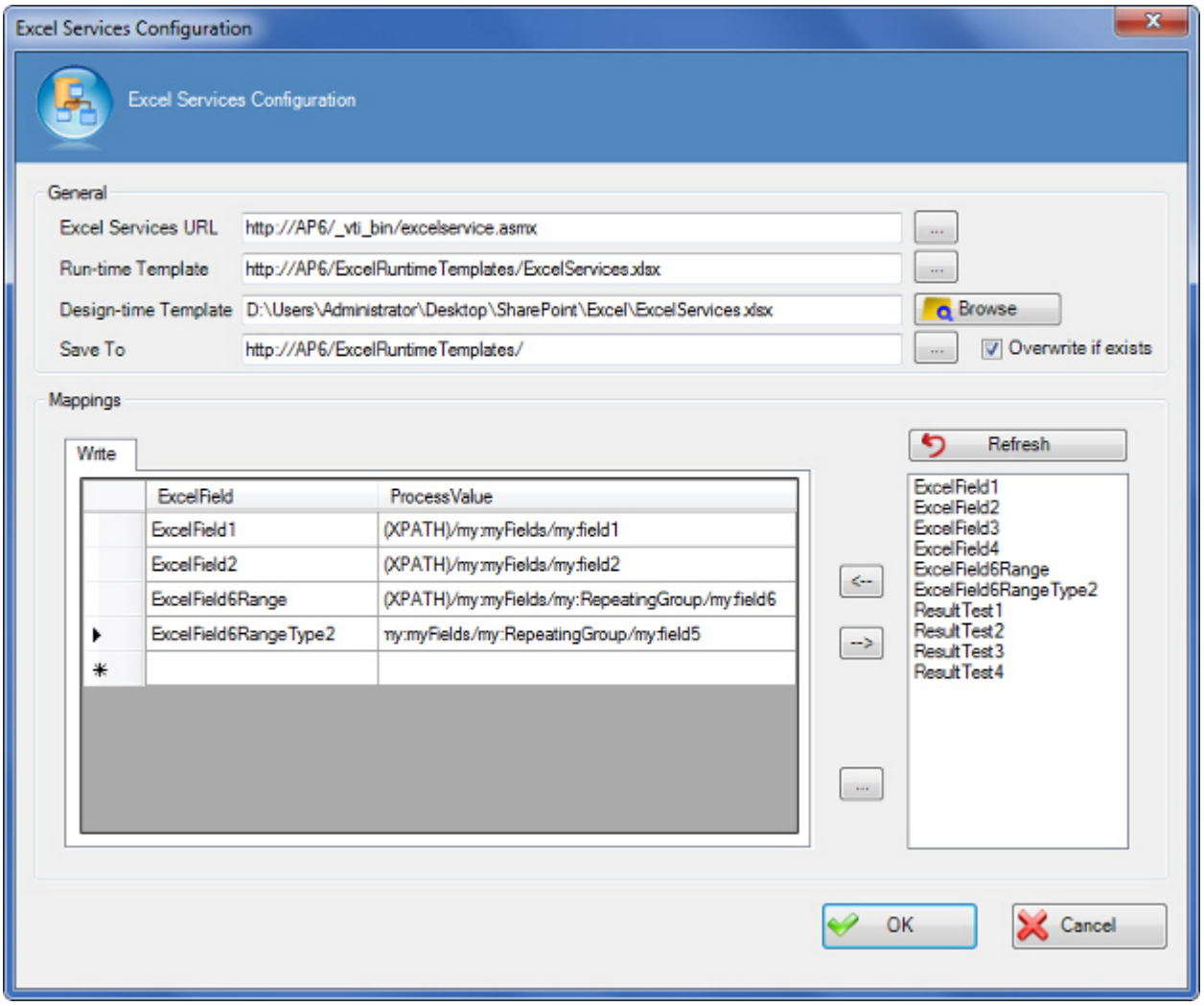
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Excel Services Configuration Window - Write Tab

Sets up an operation to create an Excel file.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **Excel Write**
   - **Excel Calculate**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Excel Services URL	Definition:

Field Name	Definition
	Specifies the URL of the SharePoint Excel Services. Allowed Values: • A valid SharePoint Excel Services URL. • A custom attribute. • XML metadata To add XML metadata, use the Ellipses button. Default Value: None Custom Attributes: Yes Example: • URL - http://ind-01:8888/_vti_bin/ExcelService.asmx • A custom attribute - $\{SharePointURL\}$\{ExcelService\}
Run-time Template	Definition: Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. Allowed Values: • A valid Excel template file name with the full path. • A custom attributes. For example, $\{SharePointURL\}$\{RuntimeTemplateLibrary\}$\{ExcelFilename\} • XML metadata To add XML metadata, use the Ellipses button. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content. • This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. Default Value:

Field Name	Definition
	None Custom Attributes: Yes Example: http://ind-01:8888/ExcelServicesDemo/ExcelServices.xlsx
Design-time Template	Definition: Specifies the name of an Excel template file that is used at design time. Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. Allowed Values: A valid Excel template file name with the full path. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content. • Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. Default Value: None Custom Attributes: No Example: C:\Excel\ExcelSheet\ExcelServices.xlsx
Save To	Definition: Specifies the location where you want to save the resulting Excel document. Allowed Values: • A valid URI.

Field Name	Definition
	The URI can be the URL for a SharePoint document library, or a directory path. • A custom attributes. For example, $ \{SharePointURL\}$\{ExcelDocLibrary\}$ \{ExcelFilename\}. • XML metadata To add XML metadata, use the Ellipses button. Default Value: None Custom Attributes: Yes Example: http://ind-01:8888/ExcelServicesDemo/${/ my:myFields/my:SaveWrite}.xlsx
Named Fields Box	Definition: Specifies the named fields populated from the Excel sheet once you specify the Design-time Template file. This field is used for the mapping purpose. You must map the Excel named fields to the process values to: • Write to an Excel document. • Read from an Excel document. A named field in Microsoft Excel is the name of a cell or range that is used instead of the cell's reference name. For example, empName, a named field, is easier to use instead of its cell's reference name, C21. Allowed Values: A named field selected from the list. Default Value: None Custom Attributes: No
Refresh	Function: Reloads the named fields from the Excel sheet to the Named Fields box.

Field Name	Definition
	Note: You must click the Refresh button if the file specified in the Design-time Template changes.
Left Arrow	Function: Populates the selected named field from the Named Fields Box box to the ExcelField column. You can add only one named field at a time.
Right Arrow	Function: Deletes the selected row.
Overwrite if exists	Definition: Overwrites an existing file specified using the Save To field. Allowed Values: • **Deselected** - The AgileShape doesn't overwrite the existing file. • **Selected** - The AgileShape overwrites the file if it already exists. Default Value: Deselected
ExcelField	Definition: Specifies the Excel named field to be mapped to the process value. The mapping is performed to update the named fields in the Excel sheet. Allowed Values: A named field. Use the Left Arrow button to move the named field from the Named Fields box to the ExcelField column. **Note:** The value of the named field in the ExcelField column can be evaluated from a string containing a custom attribute. For example, $\{MyExcelField\} or field$\{year\}$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! Default Value: None Custom Attributes:

Field Name	Definition
	Yes
ProcessValue	Definition: Specifies the process value. The value is mapped to the named field to update the named fields in the Excel sheet. Allowed Values: • A number or a text string that can contain spaces. This must be in accordance with the data type of the Excel named field. • A custom attribute. Note the following: • Once a named field is in the ExcelField column, map a named field to the process value. First, select the row, and then click the **Ellipses** button to select from the Select XPath from Attributes Window. • You can type a custom attribute directly in the ProcessValue column. **Note:** The name of the custom attribute in the ProcessValue column can be derived from a string containing another custom attribute. For example, $\{MyCustomAttribute\} or customattribute $\{year\}$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! **Note:** You can also use advance XPath expressions such as filtering. For example, (XPATH)/my:myFields/my:field2[.>32] returns all items that match the filter (field2 > 32). In addition, you can combine XPath expressions and custom attributes such as: (XPATH)/my:myFields/my:field2[.>$\{myCustomAttribute\}] **Note:** If you have an XPath expression that returns more than one value, there is a feature for mapping them with a named field that is defined as a one-dimensional range in the Excel document. The AgilePart fills the range with returned values from the XPath expression, but if the range does not contain enough cells for the number of values, the AgilePart doesn't fill past the range of cells in order to protect rest of the

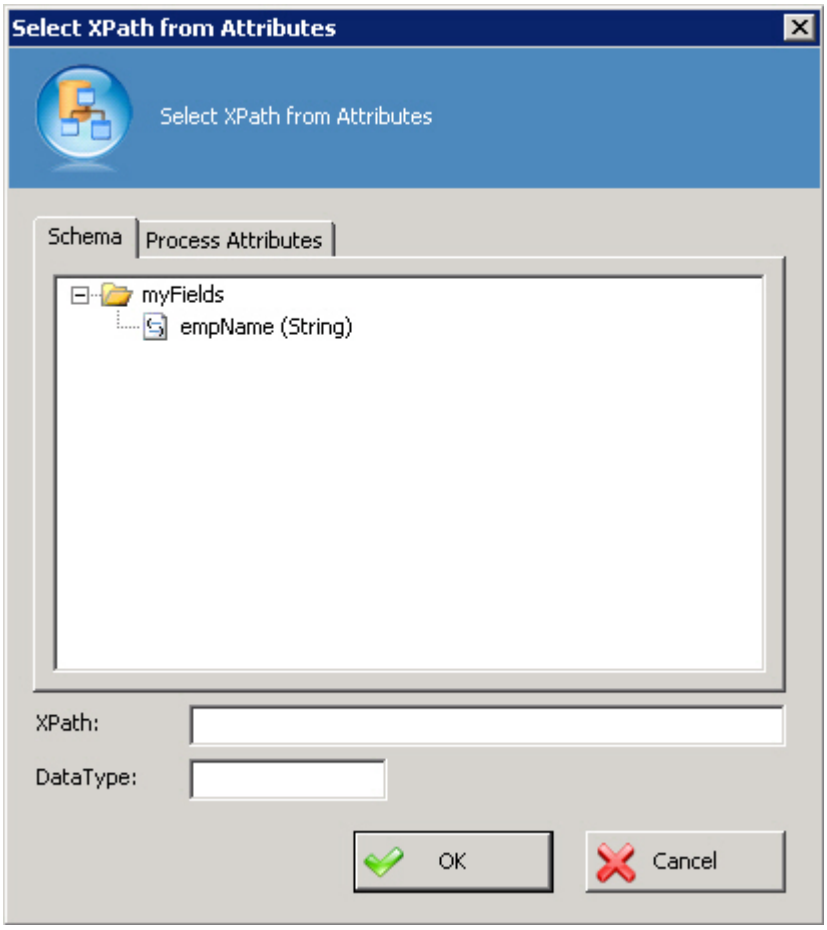
Field Name	Definition
	worksheet and the remaining values are simply discarded. Default Value: None Custom Attributes: Yes

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.



Prerequisites

- The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the appropriate stencil.
3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the respective field/configuration window, do one of the following, as appropriate:
   - Type the characters **${** in the property box.
   - Click the **Ellipses** button.
   - Click the **Schema** button.

Field Definitions

Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition:

Field Name	Definition
	Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

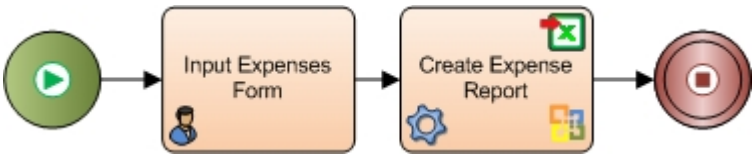
Creating an Excel File

This example demonstrates how to create a Microsoft Excel file using the Excel Write AgileShape.

Instructional Goals

- Demonstrate how to create a Microsoft Excel file from an AgilePoint process.

Example Process: Expense Reporting Application: Create New Expense Report



Problem Statement

Create an employee expense report as an Excel file.

This functionality is a subset of the expense reporting application.

Business Requirements

- Create an expense report in Microsoft Excel.
- Integrate with an expense report management application.
- Store the Excel file in SharePoint.

Prerequisites

- An SPDoc or SPList process model with the following schema values:

Process Value
field1
field2
field3
field4
field6

- An InfoPath form with the following fields:

InfoPath Schema Node
(XPATH)/my:myFields/my:field1
(XPATH)/my:myFields/my:field2
(XPATH)/my:myFields/my:field3
(XPATH)/my:myFields/my:field4
(XPATH)/my:myFields/my:RepeatingGroup/my:field6
(XPATH)/my:myFields/my:RepeatingGroup[my:field5='Type 2']/my:field6
(XPATH)/my:myFields/my:ResultRepeatingAll
(XPATH)/my:myFields/my:ResultRepeatingType2

- A Microsoft Excel template file named **ExcelServices.xlsx** that includes the following fields:

Excel Field
ExcelField1
ExcelField2

Excel Field
ExcelField3
ExcelField4
ExcelField6Range
ExcelField6RangeType2
ResultTest3
ResultTest4

- The following process attribute to indicate the file name for a new Excel file:

  ${/my:myFields/my:SaveWrite}

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Excel Write** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configuration** field, click the **Ellipses** button.

Instructions

Repeat the following steps until all required approvers are added to the list:

1. On the Excel Services Configuration window, complete the following fields as required for your environment.

Field Name	Value
Excel Services URL	Definition: Specifies the URL of the SharePoint Excel Services. Allowed Values: • A valid SharePoint Excel Services URL. • A custom attribute. • XML metadata To add XML metadata, use the Ellipses button. Default Value: None Custom Attributes:

Field Name	Value
	Yes Example: • URL - http://ind-01:8888/_vti_bin/ExcelService.asmx • A custom attribute - $\{SharePointURL\}$\{ExcelService\}
Run-time Template	Definition: Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. Allowed Values: • A valid Excel template file name with the full path. • A custom attributes. For example, $\{SharePointURL\}$\{RuntimeTemplateLibrary\}$\{ExcelFilename\} • XML metadata To add XML metadata, use the Ellipses button. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content. • This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. Default Value: None Custom Attributes: Yes Example: http://ind-01:8888/ExcelServicesDemo/ExcelServices.xlsx
Design-time Template	Definition:

Field Name	Value
	Specifies the name of an Excel template file that is used at design time. Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. Allowed Values: A valid Excel template file name with the full path. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content. • Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. Default Value: None Custom Attributes: No Example: C:\Excel\ExcelSheet\ExcelServices.xlsx
Save To	Definition: Specifies the location where you want to save the resulting Excel document. Allowed Values: • A valid URI. The URI can be the URL for a SharePoint document library, or a directory path. • A custom attributes. For example, $ \{SharePointURL\}$\{ExcelDocLibrary\}$ \{ExcelFilename\}. • XML metadata To add XML metadata, use the Ellipses button. Default Value:

Field Name	Value
	None Custom Attributes: Yes Example: http://ind-01:8888/ExcelServicesDemo/${/my:myFields/my:SaveWrite}.xlsx

2. On the **Write** tab, use the arrow buttons to map the following Excel fields and InfoPath fields.

ExcelField	ProcessValue
ExcelField1	(XPATH)/my:myFields/my:field1
ExcelField2	(XPATH)/my:myFields/my:field2
ExcelField3	(XPATH)/my:myFields/my:field3
ExcelField4	(XPATH)/my:myFields/my:field4
ExcelField6Range	(XPATH)/my:myFields/my:RepeatingGroup/my:field6
ExcelField6RangeType2	(XPATH)/my:myFields/my:RepeatingGroup[my:field5='Type 2']/my:field6
ResultTest3	(XPATH)/my:myFields/my:ResultRepeatingAll
ResultTest4	(XPATH)/my:myFields/my:ResultRepeatingType2

InfoPath SubProcess

An AgilePart that associates different InfoPath forms for each sub-process within a parent process.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.

3. On the **SharePoint** stencil, drag the **InfoPath SubProcess** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
FormLibUrl	Definition: Specifies the URL for the InfoPath form located in a SharePoint form library or folder. Allowed Values: A valid URL to a SharePoint form library. Note the following: • The InfoPath form must be located in a SharePoint form library or folder. • The value must be an absolute URL. Default Value: None Custom Attributes: No Example: http://demo3:8000/InfoPathChangeRequest/Forms/AllItems.aspx
NamingFormat	Definition: Specifies the format to name the sub process. Allowed Values: A valid format. Default Value: yyyy-MM-dd hh-mm-ss-ffffff - The DateTime format that is used to name the sub process. Custom Attributes: Yes
Prefix	Definition: Specifies the prefix that is associated with the sub process name. Allowed Values:

Field Name	Definition
	A text string. Default Value: Prefix- Custom Attributes: No Example: CR- This prefix could be used to indicate a change request for a software development process.
SubProcess	Definition: Specifies the name of the InfoPath process to be initiated as a sub process. Allowed Values: The name of the existing process to be initiated as a sub process. You can use the Ellipses button to select the InfoPath process name. Default Value: None Custom Attributes: No
Wait For Complete	Definition: Determines whether the parent process waits for the sub process to complete before moving forward. Allowed Values: • **False** - The AgileShape exits immediately once the sub process is initiated. • **True** - The AgileShape waits for sub process to complete. Default Value: True Custom Attributes: No
XMLMappings	Opens the Following Window:

Field Name	Definition
	XML Schema Mappings Window Purpose of this Window: Maps schema nodes from a parent process to a sub-process.
XsnFileUrl	Definition: The URL of the InfoPath form template file to be associated with the sub process. Allowed Values: A valid URL of the InfoPath form template file. Default Value: /forms/template.xsn Custom Attributes: Yes Example: /forms/QAReview.xsn

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

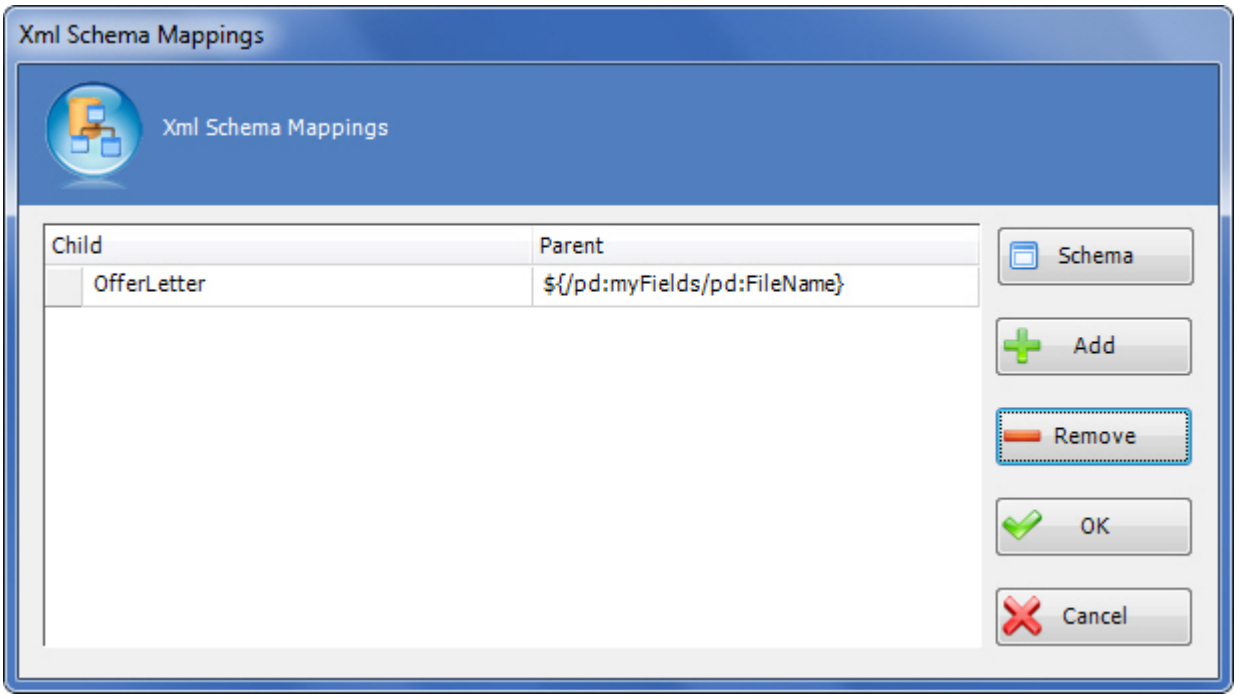
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

XML Schema Mappings Window

Maps schema nodes from a parent process to a sub-process.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **InfoPath SubProcess** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **XMLMappings** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Add	Function: Adds a row to create a new parent/child pair you can map using the schema mapper. Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.
Child	Definition:

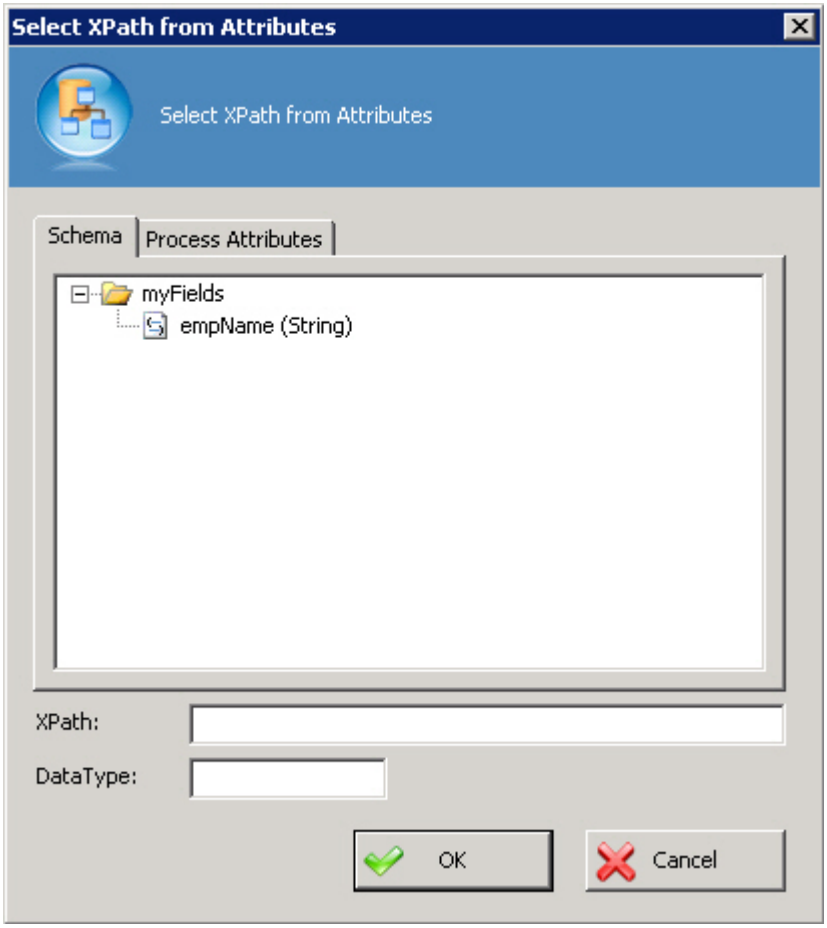
Field Name	Definition
	Specifies the XML schema node for a child process. Allowed Values: XML metadata defined for the child process. You can use custom attributes also. Default Value: None Custom Attributes: Yes
Parent	Definition: Specifies the XML schema node for a parent process. Allowed Values: XML metadata defined for the parent process. Default Value: None Custom Attributes: Yes
Schema	Function: Opens the schema associated with the selected sub process or parent process. Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.
Remove	Function: Deletes the selected new parent/child schema node pair.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.



Prerequisites

- The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the appropriate stencil.
3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the respective field/configuration window, do one of the following, as appropriate:
   - Type the characters **${** in the property box.
   - Click the **Ellipses** button.
   - Click the **Schema** button.

Field Definitions

Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

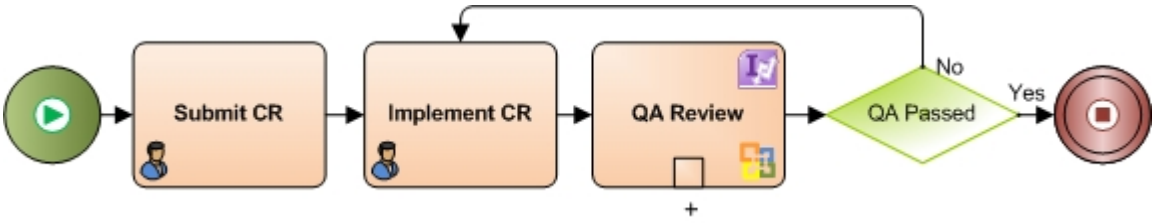
Using an InfoPath Sub Process

This example shows how a sub process can be activated from a parent process using the InfoPath SubProcess AgileShape. By using a sub process, departments can manage their parts of a process independently, and sub processes can grow and change without affecting the parent process.

Instructional Goals

- Demonstrate how to call a sub process from a parent process using the InfoPath SubProcess AgileShape.

Example Parent Process: Execute a Software Change Request



Example Sub Process: QA Test the Change Request



Problem Statement

Fulfill a change request (CR) for a software product.

Business Requirements

- The process is initiated when someone submits a CR.
- Engineering implements the CR.
- Once the CR is implemented in the code, the Quality Assurance (QA) department tests it. The QA department has the following unique requirements:

- QA for this product requires complex preparation, where test cases must be written and real-world system configurations and data must be set up prior to testing to ensure proper implementation of fixes and enhancements. This requirement carries a unique set of needs for resources and logistics.
- The QA department is managed separately from Engineering, and follows its own internal processes. They want to maintain autonomous control over their processes.
- There is an initiative in the company to improve the QA process in order to improve efficiency and product quality. Therefore, the QA review process is likely to change more frequently than the overall Change Request process.

To meet the QA department's requirements, the company uses a sub process to define and manage the QA review process.

- The form technology is InfoPath

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **InfoPath SubProcess** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Set up the following properties for InfoPath SubProcess AgileShape:

Field	Configuration
FormLibUrl	Definition: Specifies the URL for the InfoPath form located in a SharePoint form library or folder. Allowed Values: A valid URL to a SharePoint form library. Note the following: • The InfoPath form must be located in a SharePoint form library or folder. • The value must be an absolute URL. Default Value: None Custom Attributes: No Example: http://demo3:8000/InfoPathChangeRequest/Forms/AllItems.aspx

Field	Configuration
NamingFormat	Definition: Specifies the format to name the sub process. Allowed Values: A valid format. Default Value: yyyy-MM-dd hh-mm-ss-ffffff - The DateTime format that is used to name the sub process. Custom Attributes: Yes
Prefix	Definition: Specifies the prefix that is associated with the sub process name. Allowed Values: A text string. Default Value: Prefix- Custom Attributes: No Example: CR- This prefix could be used to indicate a change request for a software development process.
SubProcess	Definition: Specifies the name of the InfoPath process to be initiated as a sub process. Allowed Values: The name of the existing process to be initiated as a sub process. You can use the Ellipses button to select the InfoPath process name. Default Value: None Custom Attributes:

Field	Configuration
	No
Wait For Complete	Definition: Determines whether the parent process waits for the sub process to complete before moving forward. Allowed Values: • **False** - The AgileShape exits immediately once the sub process is initiated. • **True** - The AgileShape waits for sub process to complete. Default Value: True Custom Attributes: No
XMLMappings	Opens the Following Window: XML Schema Mappings Window Purpose of this Window: Maps schema nodes from a parent process to a sub-process.
XsnFileUrl	Definition: The URL of the InfoPath form template file to be associated with the sub process. Allowed Values: A valid URL of the InfoPath form template file. Default Value: /forms/template.xsn Custom Attributes: Yes Example: /forms/QAReview.xsn

Downloads

NTLoginTest.zip.

ListForm

An AgileWork that uses a SharePoint List to create form UI for manual tasks. This feature provides an easy way of building forms with different views based on a SharePoint List.



Navigation

1. In AgilePoint Envision, open a **Microsoft SPList** process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **ListForm** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
UserDefinedProperties	Opens the Following Window: User Defined Properties Window Purpose of this Window: Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable-like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want.
ListFormControls	Opens the Following Window: Customize List Form User Interface Window Purpose of this Window: Specifies whether the fields on a SharePoint List Form are **Editable**, **Read Only**, or **Hidden** when the process participant accesses the form at runtime.

Field Name	Definition
SubmitStep	Definition: Determines whether the form based on a SharePoint list is used as the Submit step. **Note:** If you have set a custom field as required in a SharePoint list, it must be editable on the Submit step, otherwise SharePoint throws an exception. **Note:** If you have set a field to be of type Multiple lines of text, the field cannot be set as Read Only. Allowed Values: • **False** - The form cannot be used as the Submit step. • **True** - The form is used as the Submit step. This property must be set to True if you are creating the list item using the form. Default Value: False

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

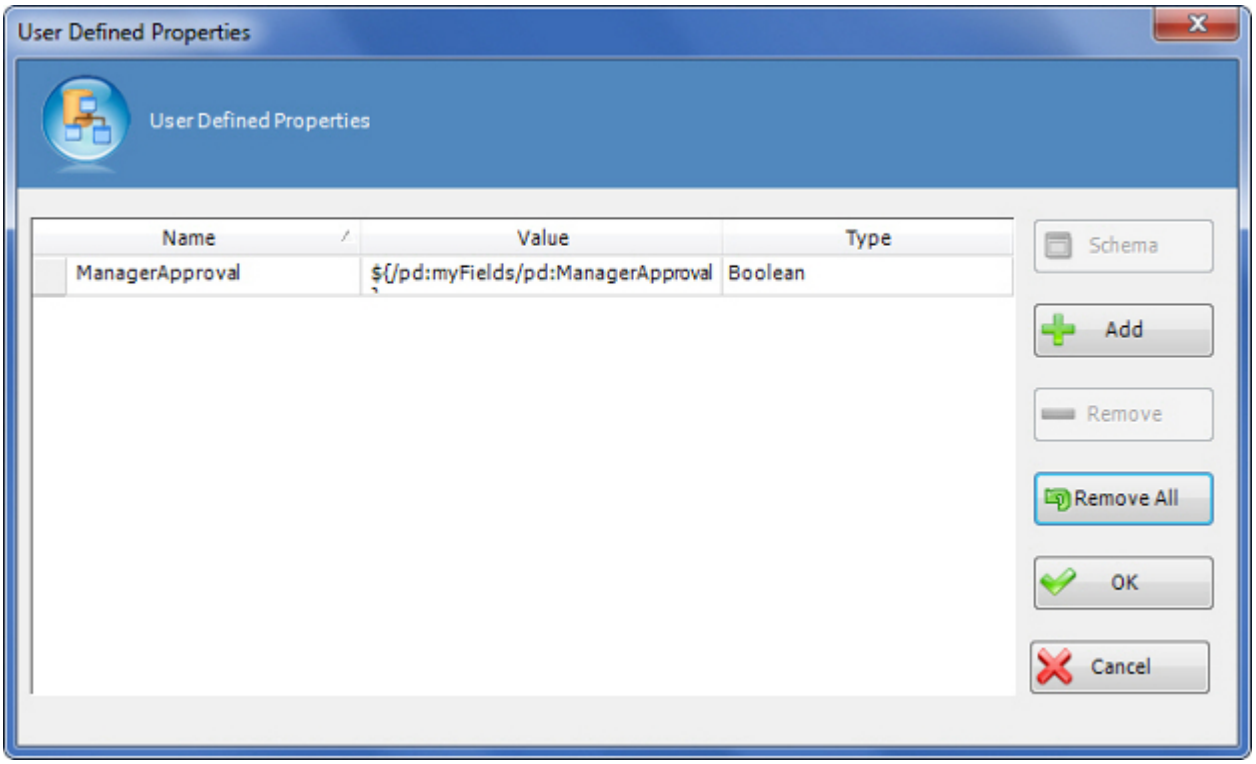
- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

User Defined Properties Window

Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable-like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Premier Extension** stencil.
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **Dynamic Parallel Approval**
   - **Dynamic Sequential Approval**
   - **Process Adaptation**
   - **Vote**
   - **Web Form**
   - **Workload Balance**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **UserDefinedProperties** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Add	Function: Creates a row where you can specify a ClientData property.
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want.
Name	Definition: Specifies the name for the ClientData. **Note:** The ClientData property is used to store data related to the AgileWork AgileShapes. This is like defining a variable to store specific values. Allowed Values: A text string with spaces. Default Value: None Custom Attributes: Yes
Value	Definition: The value for the ClientData variable. Allowed Values: A number or a text string that can contain spaces. You can dynamically set the value for the variable by using XML metadata. Default Value: None Custom Attributes:

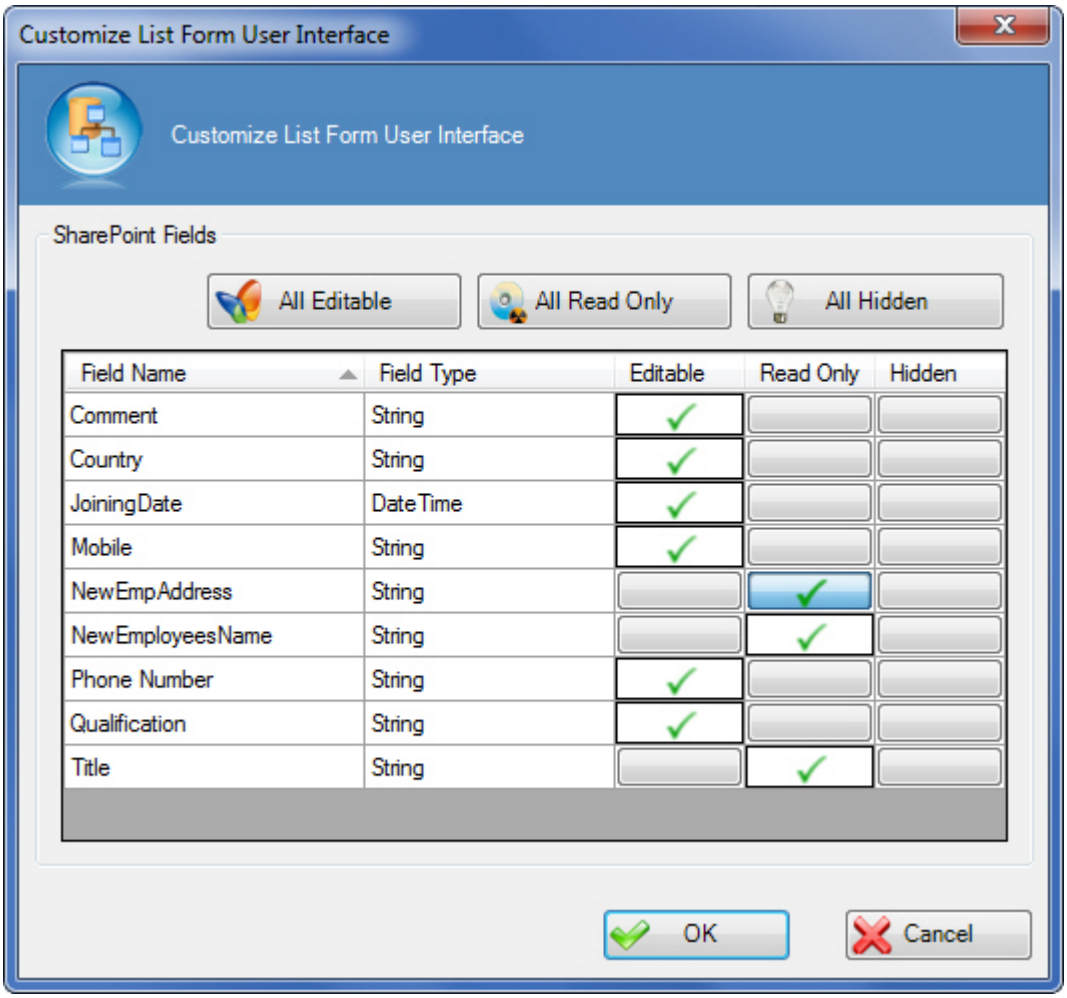
Field Name	Definition
	Yes
Type	Definition: Determines the data type for the ClientData variable. Allowed Values: • **Integer** • **String** • **Float** • **Decimal** • **DateTime** • **Boolean** Default Value: None
Remove	Function: Deletes the selected row from the user defined properties list.
Remove All	Function: Deletes all rows from the user defined properties list.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Customize List Form User Interface Window

Specifies whether the fields on a SharePoint List Form are **Editable**, **Read Only**, or **Hidden** when the process participant accesses the form at runtime.



Navigation

1. In AgilePoint Envision, open a **Microsoft SPList** process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **ListForm** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ListFormControls** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
All Editable	Function: Selects all the check boxes of the Editable column for all SharePoint list form fields at the same time.

Field Name	Definition
	Note: By default, all the Editable check boxes are selected for all SharePoint list form fields.
All Read Only	Function: Selects all the check boxes of the Read Only column for all SharePoint list form fields at the same time.
All Hidden	Function: Selects all the check boxes of the Hidden column for All SharePoint list form fields at the same time.
Field Name	Definition: Specifies the names of the SharePoint list form fields. **Note:** You can click the triangle button to change the order of the display. Allowed Values: Read only.
Field Type	Definition: Specifies the data types of the SharePoint list form fields. Allowed Values: Read only.
Editable	Function: Specifies that the selected SharePoint list form field is editable. Also, you can make all the fields editable at the same time by using All Editable button.
Read Only	Function: Specifies that the selected SharePoint list form field is read-only. Also, you can make all the fields read-only at the same time by using the All Read Only button.
Hidden	Function: Specifies that the selected SharePoint list form field is hidden.

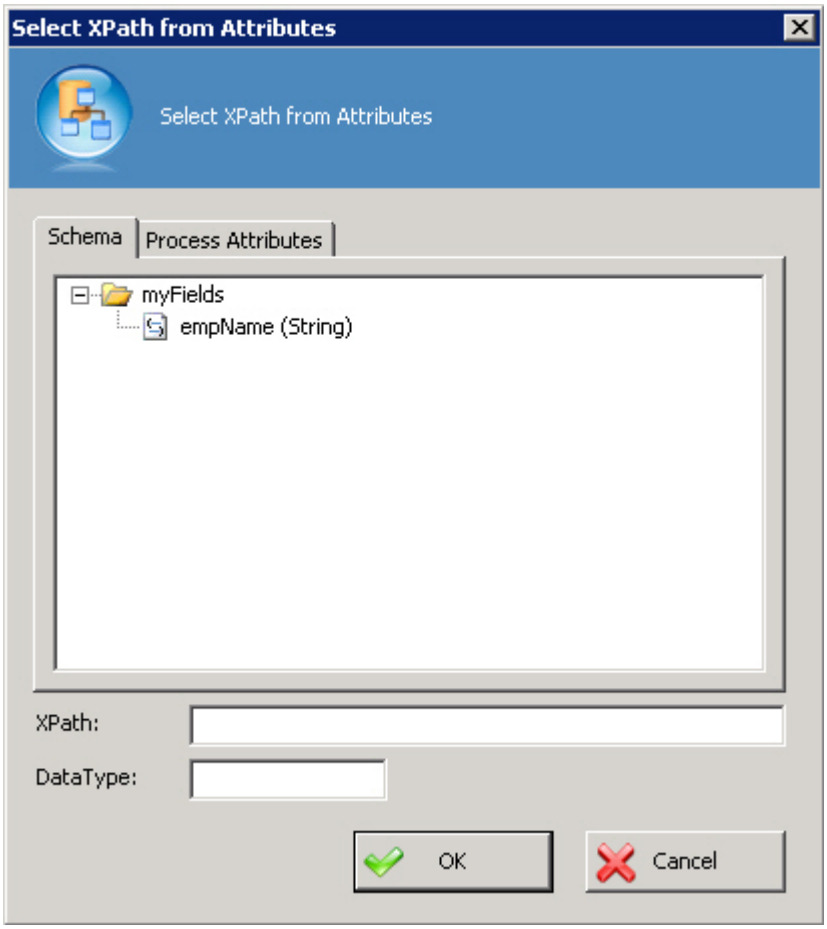
Field Name	Definition
	Also, you can make all the fields hidden at the same time by using the All Hidden button.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.



Prerequisites

- The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.

2. Navigate to the appropriate stencil.
3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the respective field/configuration window, do one of the following, as appropriate:
   - Type the characters **${** in the property box.
   - Click the **Ellipses** button.
   - Click the **Schema** button.

Field Definitions

Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.

Field Name	Definition
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

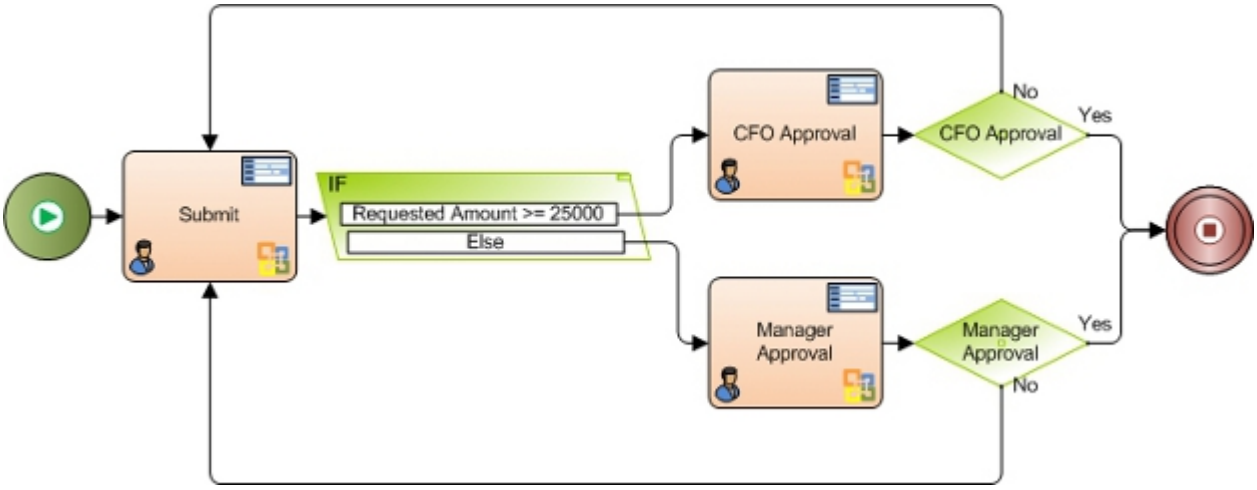
Completing an Activity Using SharePoint List Forms

This example shows a process that is completed using SharePoint list forms.

Instructional Goals

- Demonstrate how to route a process based on a logical rule with multiple conditions using the SharePoint ListForm AgileShape.

Example Process: Budget Request and Fulfillment



Problem Statement

Submit and approve a budget request.

Business Requirements

- The process is initiated when an employee submits a budget request form.
- The process uses SharePoint list forms.

Prerequisites

- A SharePoint list with columns set up to represent the fields you want to use on your ListForm.
- To access your SharePoint list, you must log on to SharePoint.

Navigation

1. In AgilePoint Envision, open a **Microsoft SPList** process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **ListForm** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ListFormControls** field, click the **Ellipses** button.

Instructions

1. On the Customize List Form User Interface Window, specify how you want the columns on your form to display on your form - editable, read-only, or hidden.

   In this example, the following rules are applied.

Field Name	Value
Submit form	• **Manager Approval field** - Hidden • **CFO Approval field** - Hidden
Manager Approval form	• **Manager Approval field** - Editable • **CFO Approval field** - Hidden
CFO Approval form	• **Manager Approval field** - Hidden • **CFO Approval field** - Editable

Downloads

NTLoginTest.zip.

Move Document Set

An AgilePart that moves a document set from one SharePoint document library or folder to another document library or folder.



Prerequisites

- An environment using SharePoint 2013 and the CSOM AgileConnector.

Good to Know

- If you move a document set from one library to another and then back to its original location, the columns on both libraries must be the same.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Move Document Set** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: Move Document Set Configuration Window Purpose of this Window: Specifies the source and destination for moving a document set from one document library or folder to another.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

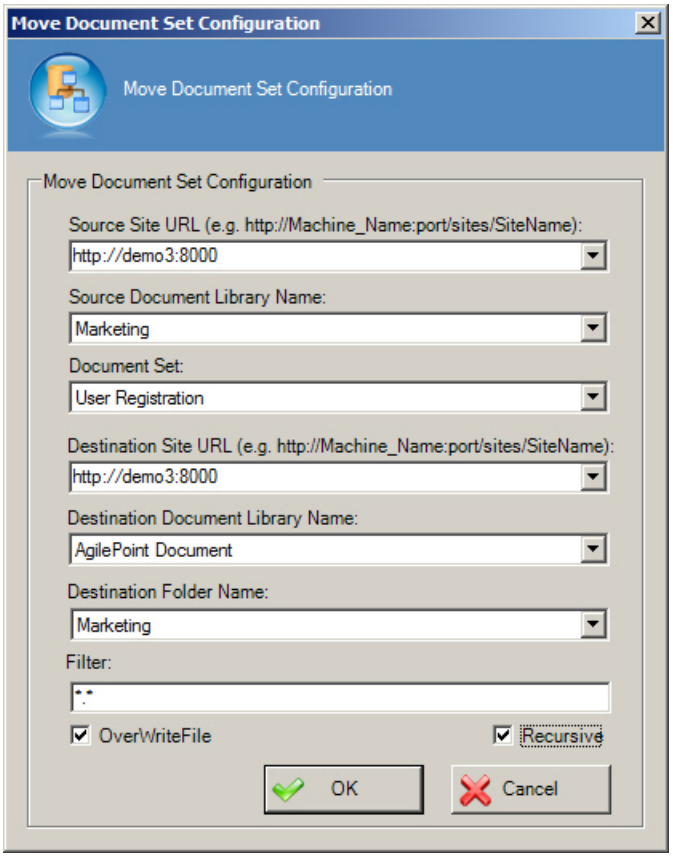
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Move Document Set Configuration Window

Specifies the source and destination for moving a document set from one document library or folder to another.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Move Document Set** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **MoveDocSetConfiguration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Source Site URL	Definition: Specifies the URL for your SharePoint site. The source site contains the SharePoint document library and document set you want — for example, the document set you want to copy or move to the destination document library. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://APDesktop:8000
Source Document Library Name	Definition: Specifies the name of the SharePoint document library. The source document library contains the document set you want to copy or move to the destination document library. Allowed Values: The name of your SharePoint library. Default Value: None Custom Attributes: Yes

Field Name	Definition
Source Folder Name	Definition: Specifies the name of a SharePoint folder. The source folder contains the document set you want to copy or move to the destination folder. Allowed Values: The name of your SharePoint folder. Default Value: None Custom Attributes: Yes
Destination Site URL	Definition: Specifies the URL for your SharePoint site. The destination site contains the document library where you want to copy or move the document set from the source document library. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes
Destination Document Library Name	Definition: Specifies the name of the destination SharePoint document library where you want to copy or move the document set. Allowed Values: The name of your SharePoint document library. Default Value: None Custom Attributes: Yes
Destination Folder Name	Definition:

Field Name	Definition
	Specifies the name of the SharePoint folder where you want to copy or move the document set from the source location. Allowed Values: The name of your SharePoint folder If the folder does not exist within the specified SharePoint list, the AgilePoint system creates it. Default Value: None Custom Attributes: Yes

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Moving a Document Set From One SharePoint Location To Another

To move a document set from one SharePoint library or folder to another, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Move Document Set** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **MoveDocSetConfiguration** field, click the **Ellipses** button.

Instructions

1. On the **Move Document Set Configuration** window, complete the following fields as required:

Field Name	Definition
Source Site URL	Definition:

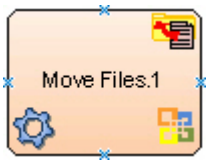
Field Name	Definition
	Specifies the URL for your SharePoint site. The source site contains the SharePoint document library and document set you want — for example, the document set you want to copy or move to the destination document library. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://APDesktop:8000
Source Document Library Name	Definition: Specifies the name of the SharePoint document library. The source document library contains the document set you want to copy or move to the destination document library. Allowed Values: The name of your SharePoint library. Default Value: None Custom Attributes: Yes
Source Folder Name	Definition: Specifies the name of a SharePoint folder. The source folder contains the document set you want to copy or move to the destination folder. Allowed Values: The name of your SharePoint folder. Default Value: None Custom Attributes: Yes

Field Name	Definition
Destination Site URL	Definition: Specifies the URL for your SharePoint site. The destination site contains the document library where you want to copy or move the document set from the source document library. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes
Destination Document Library Name	Definition: Specifies the name of the destination SharePoint document library where you want to copy or move the document set. Allowed Values: The name of your SharePoint document library. Default Value: None Custom Attributes: Yes

2. Complete any additional configuration for this AgileShape according to your requirements:
   - Move Document Set
   - AgilePart - Common Setup

Move Files

An AgilePart that moves a file from one SharePoint library or folder to another SharePoint library or folder.



Good to Know

- If you move a file from one library to another and then back to its original location, the columns on both libraries must be the same.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Move Files** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
DocumentUrl	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: $DocUrl Custom Attributes: Yes
OverWriteFile	Definition: Specifies whether the AgileShape overwrites the files if they already exist at the specified destination location. Allowed Values: • **False** - The AgileShape does not overwrite any existing file. • **True** - The AgileShape overwrites the file if it exists with the same name at the destination location. Default Value: False
TargetFolder	Definition: Specifies the name of the SharePoint folder where you want to move the files from the source location.

Field Name	Definition
	Allowed Values: The name of your SharePoint folder If the folder does not exist, the AgilePoint system automatically creates the folder. Default Value: None Custom Attributes: No Example: FolderName/SubFolderName

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Moving Files From One SharePoint Location To Another

To move files from one SharePoint library or folder to another, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Move Files** AgileShape, and drop it on the process template.

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

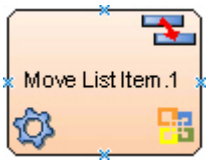
1. Complete the following required properties for the **Copy Files** AgileShape:

Field Name	Definition
DocumentUrl	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: $DocUrl Custom Attributes: Yes
TargetFolder	Definition: Specifies the name of the SharePoint folder where you want to move the files from the source location. Allowed Values: The name of your SharePoint folder If the folder does not exist, the AgilePoint system automatically creates the folder. Default Value: None Custom Attributes: No Example: FolderName/SubFolderName

2. Complete any additional configuration for this AgileShape according to your requirements:
   - Move Files
   - AgilePart - Common Setup

Move List Item

An AgilePart that moves a specified list item from one SharePoint list to another.



Prerequisites

- Log on to SharePoint.

Good to Know

- If errors occur during the execution, a message will be written into the SharePoint Integration log file.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Move List Item** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
MoveListItemsConfiguration	Opens the Following Window: Configuration for Move ListItems AgilePart Window Purpose of this Window: Sets up the details for moving list items from one SharePoint list to another.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding

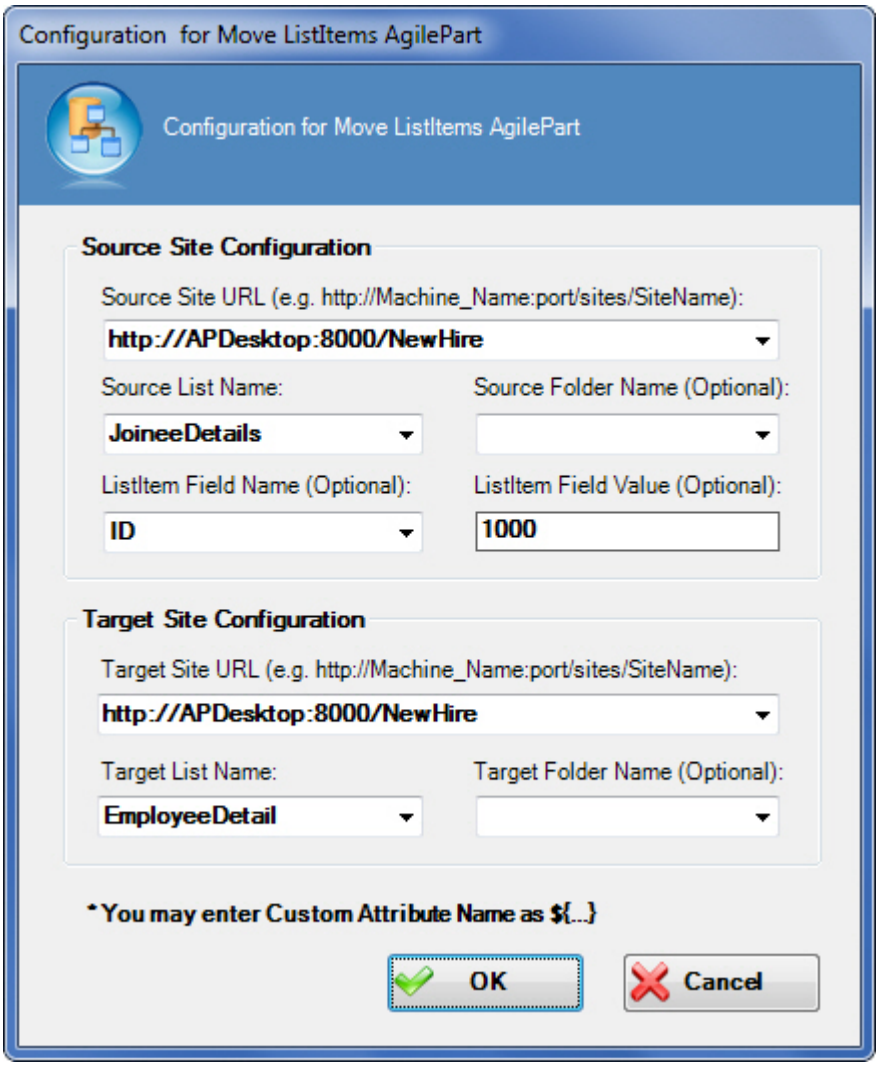
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Move ListItems AgilePart Window

Sets up the details for moving list items from one SharePoint list to another.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Move List Item** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

5. On the **MoveListItemsConfiguration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Source Site URL	Definition: Specifies the URL for your SharePoint site. The source site contains the SharePoint list and list items you want — for example, the list items you want to copy or move to the destination list. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://APDesktop:8000
Source List Name	Definition: Specifies the name of the SharePoint list. The source list contains the list items you want to copy or move to the destination list. Allowed Values: The name of your SharePoint list. Default Value: None Custom Attributes: Yes
Source Folder Name	Definition: Specifies the name of a SharePoint folder. The source folder contains the list items you want to copy or move to the destination folder. Allowed Values: The name of your SharePoint folder. Default Value: None

Field Name	Definition
	Custom Attributes: Yes
ListItem Field Name	Definition: Specifies the name of a SharePoint list column. Allowed Values: The name of your SharePoint list column. Default Value: None Custom Attributes: Yes
ListItem Field Value	Definition: Specifies the SharePoint list column's value. This value can be used as a filter to limit the scope of the action. Allowed Values: The list column's value. Default Value: None Custom Attributes: Yes
Target Site URL	Definition: Specifies the URL for your SharePoint site. The target site contains the SharePoint list where you want to copy or move list items from the source list. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes
Target List Name	Definition: Specifies the name of the destination SharePoint list where you want to copy or move the list items.

Field Name	Definition
	Allowed Values: The name of your SharePoint list. Default Value: None Custom Attributes: Yes
Target Folder Name	Definition: Specifies the name of the SharePoint folder where you want to copy or move the list items from the source location. Allowed Values: The name of your SharePoint folder If the folder does not exist within the specified SharePoint list, the AgilePoint system creates it. Default Value: None Custom Attributes: Yes

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Moving a SharePoint List Item

To move a SharePoint list item from one folder or list to another, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Move List Item** AgileShape, and drop it on the process template.

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **MoveListItemsConfiguration** field, click the **Ellipses** button.

Instructions

1. On the **Configuration for Move ListItems** window, complete the following required fields:

Field Name	Definition
Source Site URL	Definition: Specifies the URL for your SharePoint site. The source site contains the SharePoint list and list items you want — for example, the list items you want to copy or move to the destination list. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://APDesktop:8000
Source List Name	Definition: Specifies the name of the SharePoint list. The source list contains the list items you want to copy or move to the destination list. Allowed Values: The name of your SharePoint list. Default Value: None Custom Attributes: Yes
Target Site URL	Definition: Specifies the URL for your SharePoint site. The target site contains the SharePoint list where you want to copy or move list items from the source list. Allowed Values: A valid SharePoint site URL.

Field Name	Definition
	Default Value: None Custom Attributes: Yes
Target List Name	Definition: Specifies the name of the destination SharePoint list where you want to copy or move the list items. Allowed Values: The name of your SharePoint list. Default Value: None Custom Attributes: Yes
DocumentUrl	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: $DocUrl Custom Attributes: Yes
TargetFolder	Definition: Specifies the name of the SharePoint folder where you want to move the files from the source location. Allowed Values: The name of your SharePoint folder If the folder does not exist, the AgilePoint system automatically creates the folder. Default Value: None Custom Attributes:

Field Name	Definition
	No Example: FolderName/SubFolderName

2. Complete any additional configuration for this AgileShape according to your requirements:
   - Configuration for Move ListItems AgilePart Window
   - AgilePart - Common Setup

New Folder

An AgilePart that creates a folder under an existing SharePoint document library.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **New Folder** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
AbsoluteURL	Definition: Specifies the absolute URL for the source folder on SharePoint server. Allowed Values: A valid SharePoint absolute URL. Default Value: None Custom Attributes: No Example:

Field Name	Definition
	• http://[machine name]:[port]/sites/[site name]/[document library name]/[folder name]

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a SharePoint Folder

To create a new folder in SharePoint, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **New Folder** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following required property for the New Folder AgileShape:

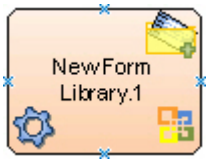
Field Name	Definition
AbsoluteURL	Definition: Specifies the absolute URL for the source folder on SharePoint server.

Field Name	Definition
	Allowed Values: A valid SharePoint absolute URL. Default Value: None Custom Attributes: No Example: • http://[machine name]:[port]/sites/[site name]/[document library name]/[folder name]

2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup

New Form Library

An AgilePart that creates a new form library under an existing SharePoint site.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **New Form Library** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Enable ContentManagement	Definition: Determines whether the content management is enabled for the SharePoint form or document library. This adds content type to the library. Allowed Values:

Field Name	Definition
	• **False** - The content management feature is disabled. • **True** - The content management feature is enabled. Default Value: False
Enable Versioning	Definition: Determines whether you can use the versioning feature to manage your SharePoint form library or document library. Versioning feature allows you to keep track of different version of your files. You can view, restore, and delete a particular version of file. Allowed Values: • **False** - The file versioning feature is disabled. • **True** - The file versioning feature is enabled. Default Value: False
FormLibraryName	Definition: Specifies the name for the new form library. Allowed Values: A text string. Default Value: None Custom Attributes: No
FormTemplateRelativePath	Definition: Specifies the location of the InfoPath form template file to be associated with the new form library. Allowed Values: An InfoPath file path relative to the AgilePoint Server application's root directory. Default Value: None Custom Attributes:

Field Name	Definition
	No Example: • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the InfoPath form template file is located at: c:\Inetpub\wwwroot\AgilePointServer\files\MyTemplate.xsn Then, this property must be set to the following value: files\MyTemplate.xsn
OverWriteFormLib	Definition: Determines whether the AgileShape overwrites the form or document library that already exists at the location where the new library is to be created. Allowed Values: • **False** - The AgileShape does not overwrite an existing SharePoint form or document library. **Note:** If you specify False when a form or document library already exists, then SharePoint is not modified. The AgileShape exits and updates the appropriate custom process attributes specified by the SaveErrorMessageTo and SaveStatusTo properties. • **True** - The AgileShape overwrites an existing SharePoint form or document library. Default Value: False
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes

Field Name	Definition
	Example: http://mysharepoint:8000/sites/${mysite}

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a SharePoint Form Library

To create a new SharePoint form library, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **New Form Library** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following required property for the **New Library** AgileShape:

Field Name	Definition
FormLibraryName	Definition: Specifies the name for the new form library.

Field Name	Definition
	Allowed Values: A text string. Default Value: None Custom Attributes: No
FormTemplateRelativePath	Definition: Specifies the location of the InfoPath form template file to be associated with the new form library. Allowed Values: An InfoPath file path relative to the AgilePoint Server application's root directory. Default Value: None Custom Attributes: No Example: • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the InfoPath form template file is located at: c:\Inetpub\wwwroot\AgilePointServer\files\MyTemplate.xsn Then, this property must be set to the following value: files\MyTemplate.xsn
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes:

Field Name	Definition
	Yes Example: http://mysharepoint:8000/sites/${mysite}

New Library

An AgilePart that creates a new document library under an existing SharePoint site.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **New Library** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
DocumentLibraryName	Definition: Specifies the name for the new document library. Allowed Values: A text string. Default Value: None Custom Attributes: No
DocumentTemplate	Definition: Specifies the SharePoint document template to be associated with the new document library. Allowed Values:

Field Name	Definition
	The name of a SharePoint document template. The valid values for this property are the same as the values listed in the New Document Library page, such as: • Microsoft Office FrontPage Web page • Microsoft Office Excel spreadsheet • Microsoft Office PowerPoint presentation • Basic page • Web Part Page The New Document Library page is displayed when you manually create a new document library in SharePoint. Default Value: Microsoft Office Word document - A new document library is created for Microsoft Word documents. Custom Attributes: No
Enable ContentManagement	Definition: Determines whether the content management is enabled for the SharePoint form or document library. This adds content type to the library. Allowed Values: • **False** - The content management feature is disabled. • **True** - The content management feature is enabled. Default Value: False
Enable Versioning	Definition: Determines whether you can use the versioning feature to manage your SharePoint form library or document library. Versioning feature allows you to keep track of different version of your files. You can view, restore, and delete a particular version of file. Allowed Values: • **False** - The file versioning feature is disabled. • **True** - The file versioning feature is enabled.

Field Name	Definition
	Default Value: False
ListTemplate	Definition: Specifies the name of the SharePoint list template to be used to create the new document library. Allowed Values: The name of the SharePoint list template. Default Value: Document Library Custom Attributes: No Example: Following are some SharePoint list templates: • **Document Library** - The SharePoint default. • **Control Document Library** - Included with SharePoint Integration for AgilePoint.
OverWriteDocLib	Definition: Determines whether the AgileShape overwrites the form or document library that already exists at the location where the new library is to be created. Allowed Values: • **False** - The AgileShape does not overwrite an existing SharePoint form or document library. **Note:** If you specify False when a form or document library already exists, then SharePoint is not modified. The AgileShape exits and updates the appropriate custom process attributes specified by the SaveErrorMessageTo and SaveStatusTo properties. • **True** - The AgileShape overwrites an existing SharePoint form or document library. Default Value: False
Site URL	Definition: Specifies the URL for your SharePoint site.

Field Name	Definition
	Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a SharePoint Library

To create a new SharePoint library, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **New Library** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following required properties for the **New Library** AgileShape:

Field Name	Definition
DocumentLibraryName	Definition: Specifies the name for the new document library. Allowed Values: A text string. Default Value: None Custom Attributes: No
ListTemplate	Definition: Specifies the name of the SharePoint list template to be used to create the new document library. Allowed Values: The name of the SharePoint list template. Default Value: Document Library Custom Attributes: No Example: Following are some SharePoint list templates: • **Document Library** - The SharePoint default. • **Control Document Library** - Included with SharePoint Integration for AgilePoint.
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes:

Field Name	Definition
	Yes Example: http://mysharepoint:8000/sites/${mysite}

2. Complete any additional configuration for this AgileShape according to your requirements:
   - New Library
   - AgilePart - Common Setup

New Site

An AgilePart that creates a new SharePoint site.



Prerequisites

- When creating a site or site collection, a top-level site must already exist, if one does not exist, declare a blank site and enable the web site using the SharePoint Configuration Manager.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **New Site** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
ConvertIfThere	Definition: Determines whether the AgileShape converts an existing site of the same name to a new SharePoint site. Allowed Values: • **False** - The AgileShape does not overwrite an existing SharePoint site.

Field Name	Definition
	Note: If you specify False when a site or site collection already exists, then SharePoint is not modified. The AgileShape exits and updates the appropriate custom process attributes specified by the SaveErrorMessageTo and SaveStatusTo properties. • **True** - The AgileShape overwrites an existing SharePoint site. Default Value: False
Locale	Definition: Specifies the locale code for the new SharePoint site or site collection. A locale code identifies the language used in a particular region or country. Allowed Values: A valid locale code. Default Value: 1033 Custom Attributes: No Example: The locale code 1033 represents English language - United States.
OverWriteSite	Definition: Specifies whether the AgileShape overwrites the site or site collection if it already exists at the location where the new site collection is to be created. Allowed Values: • **False** - The AgileShape does not overwrite an existing SharePoint site or site collection. **Note:** If you specify False when a site or site collection already exists, then SharePoint is not modified. The AgileShape exits and updates the appropriate custom process attributes

Field Name	Definition
	specified by the SaveErrorMessageTo and SaveStatusTo properties. • **True** - The AgileShape overwrites an existing SharePoint site or site collection. Default Value: False
SiteTitle	Definition: Specifies the title for the new SharePoint site or site collection. Allowed Values: A text string. Default Value: None Custom Attributes: No
Site URL	Definition: Specifies the URL for a new SharePoint site where you want to add or remove the associated item such as a SharePoint site, document library, site collection, user, and group. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: • http://[machine name]:[port]/sites/[site name] **Note:** You must include the **/sites** in the Site URL for the site to be created successfully. • $\{DocUrl\}
UseUniquePermissions	Definition: Specifies whether the sub site can inherit permissions from the parent site.

Field Name	Definition
	Allowed Values: • **False** - The site inherits permissions from the parent site. • **True** - The site uses unique permissions. Default Value: False
WebTemplate	Definition: Specifies the name of the SharePoint site template that is used to create the new SharePoint site or site collection. Allowed Values: The name of a SharePoint site template. Default Value: Team Site Custom Attributes: No

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a SharePoint Site

To create a new SharePoint site, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **New Site** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following required properties for the **New Site** AgileShape:

Field Name	Definition
SiteTitle	Definition: Specifies the title for the new SharePoint site or site collection. Allowed Values: A text string. Default Value: None Custom Attributes: No
Site URL	Definition: Specifies the URL for a new SharePoint site where you want to add or remove the associated item such as a SharePoint site, document library, site collection, user, and group. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: • http://[machine name]:[port]/sites/[site name]

Field Name	Definition
	Note: You must include the **/sites** in the Site URL for the site to be created successfully. • $\{DocUrl\}

2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - New Site

New Site Collection

An AgilePart that creates a new SharePoint site collection.



Prerequisites

- When creating a site or site collection, a top-level site must already exist, if one does not exist, declare a blank site and enable the web site using the SharePoint Configuration Manager.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **New Site Collection** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
CentralAdminUrl	Definition: Specifies the URL of the SharePoint central administration site. Using this site, you can control and manage all SharePoint sites and related activities. Allowed Values: A valid SharePoint central administration site URL.

Field Name	Definition
	Default Value: None Custom Attributes: No
Locale	Definition: Specifies the locale code for the new SharePoint site or site collection. A locale code identifies the language used in a particular region or country. Allowed Values: A valid locale code. Default Value: 1033 Custom Attributes: No Example: The locale code 1033 represents English language - United States.
OverWriteSite	Definition: Specifies whether the AgileShape overwrites the site or site collection if it already exists at the location where the new site collection is to be created. Allowed Values: • **False** - The AgileShape does not overwrite an existing SharePoint site or site collection. **Note:** If you specify False when a site or site collection already exists, then SharePoint is not modified. The AgileShape exits and updates the appropriate custom process attributes specified by the SaveErrorMessageTo and SaveStatusTo properties. • **True** - The AgileShape overwrites an existing SharePoint site or site collection. Default Value: False

Field Name	Definition
OwnerEmail	Definition: Specifies the email address of the owner of the new SharePoint site collection. Allowed Values: A valid email address. Default Value: None Custom Attributes: No
OwnerLoginName	Definition: Specifies the user name of the owner of the new SharePoint site collection. Allowed Values: A user name, including the domain name, in the following format: [domain]\[user name] Default Value: None Custom Attributes: No Example: MyDomain\Administrator
OwnerName	Definition: Specifies the display name of the owner of the new SharePoint site collection. Allowed Values: A text string. Default Value: None Custom Attributes: No
SiteTitle	Definition:

Field Name	Definition
	Specifies the title for the new SharePoint site or site collection. Allowed Values: A text string. Default Value: None Custom Attributes: No
Site URL	Definition: Specifies the URL for a new SharePoint site where you want to add or remove the associated item such as a SharePoint site, document library, site collection, user, and group. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: • http://[machine name]:[port]/sites/[site name] **Note:** You must include the **/sites** in the Site URL for the site to be created successfully. • $\{DocUrl\}
WebTemplate	Definition: Specifies the name of the SharePoint site template that is used to create the new SharePoint site or site collection. Allowed Values: The name of a SharePoint site template. Default Value: Team Site Custom Attributes:

Field Name	Definition
	No

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a SharePoint Site Collection

To create a new SharePoint site collection, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **New Site Collection** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following required properties for the **New Site Collection** AgileShape:

Field Name	Definition
CentralAdminUrl	Definition: Specifies the URL of the SharePoint central administration site. Using this site, you can control

Field Name	Definition
	and manage all SharePoint sites and related activities. Allowed Values: A valid SharePoint central administration site URL. Default Value: None Custom Attributes: No
OwnerEmail	Definition: Specifies the email address of the owner of the new SharePoint site collection. Allowed Values: A valid email address. Default Value: None Custom Attributes: No
OwnerLoginName	Definition: Specifies the user name of the owner of the new SharePoint site collection. Allowed Values: A user name, including the domain name, in the following format: [domain]\[user name] Default Value: None Custom Attributes: No Example: MyDomain\Administrator
OwnerName	Definition: Specifies the display name of the owner of the new SharePoint site collection.

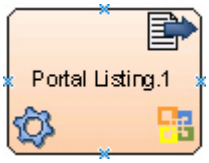
Field Name	Definition
	Allowed Values: A text string. Default Value: None Custom Attributes: No
SiteTitle	Definition: Specifies the title for the new SharePoint site or site collection. Allowed Values: A text string. Default Value: None Custom Attributes: No
Site URL	Definition: Specifies the URL for a new SharePoint site where you want to add or remove the associated item such as a SharePoint site, document library, site collection, user, and group. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: • http://[machine name]:[port]/sites/[site name] **Note:** You must include the **/sites** in the Site URL for the site to be created successfully. • $\{DocUrl\}

2. Complete any additional configuration for this AgileShape according to your requirements:

- AgilePart - Common Setup
- New Site Collection

Portal Listing

An AgilePart that adds a link to a SharePoint link library. This AgileShape is typically used with the SharePoint Portal site template.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Portal Listing** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Link LibraryName	Definition: Specifies the name of the SharePoint library where you want to add a new link. Allowed Values: A valid SharePoint library name. Default Value: Links - Specifies the name of a SharePoint list template. You can add a list of web pages to the link library created using this template. Custom Attributes: No
LinkURL	Definition: Specifies the URL of the link you want to add to the SharePoint link library.

Field Name	Definition
	Allowed Values: A valid URL. Default Value: None Custom Attributes: No Example: • http://www.agilepoint.com • http://www.yahoo.com
Notes	Definition: The information about the new portal link you want to provide. Allowed Values: A text string. Default Value: None Custom Attributes: No
Overwrite	Definition: Determines whether the AgileShape overwrites an existing link URL instead of creating a new one. Allowed Values: • **True** - The AgileShape overwrites an existing link. If you specify True and a link already exists, the AgileShape replaces an existing Link URL with the new link. This indicates that AgileShape updates the non-URL properties of the existing link. • **False** - The AgileShape creates a new link instead of overwriting an existing link. Default Value: True
SharePointPortalURL	Definition: Specifies the URL for your SharePoint site.

Field Name	Definition
	Allowed Values: A valid SharePoint site URL. Default Value: $SPServer Custom Attributes: Yes Example: http://[machine name]:[port]
Title	Definition: Specifies the title for the new portal link. Allowed Values: A text string. Default Value: None Custom Attributes: No

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Adding a Link to a SharePoint Link Library

To add a new link to a SharePoint link library, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Portal Listing** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following required properties for the **Portal Listing** AgileShape:

Field Name	Definition
Link LibraryName	Definition: Specifies the name of the SharePoint library where you want to add a new link. Allowed Values: A valid SharePoint library name. Default Value: Links - Specifies the name of a SharePoint list template. You can add a list of web pages to the link library created using this template. Custom Attributes: No
LinkURL	Definition: Specifies the URL of the link you want to add to the SharePoint link library. Allowed Values: A valid URL. Default Value: None Custom Attributes: No

Field Name	Definition
	Example: • http://www.agilepoint.com • http://www.yahoo.com
SharePointPortalURL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: $SPServer Custom Attributes: Yes Example: http://[machine name]:[port]
Title	Definition: Specifies the title for the new portal link. Allowed Values: A text string. Default Value: None Custom Attributes: No

2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Portal Listing

Publish

An AgileWork that is identical to the Manual AgileShape, except that its **Work To Perform** property defaults to the value **Publish**, and it has a different visual appearance in the process template. This AgileShape is provided for your convenience.

Note: This AgileShape has been deprecated. Beginning with AgilePoint BPMS v5.0 SP4 this AgileShape is available only through the Traditional AgileShape stencils, and not through the current stencils.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Publish** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Publish Content

An AgilePart that changes the status of a SharePoint file from Draft to Published.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Publish Content** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Document URL	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Remove SP Group

An AgilePart that deletes a SharePoint group.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Remove SP Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Group Configuration	Opens the Following Window: Remove Group Configuration Window Purpose of this Window: Specifies a SharePoint group to delete.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

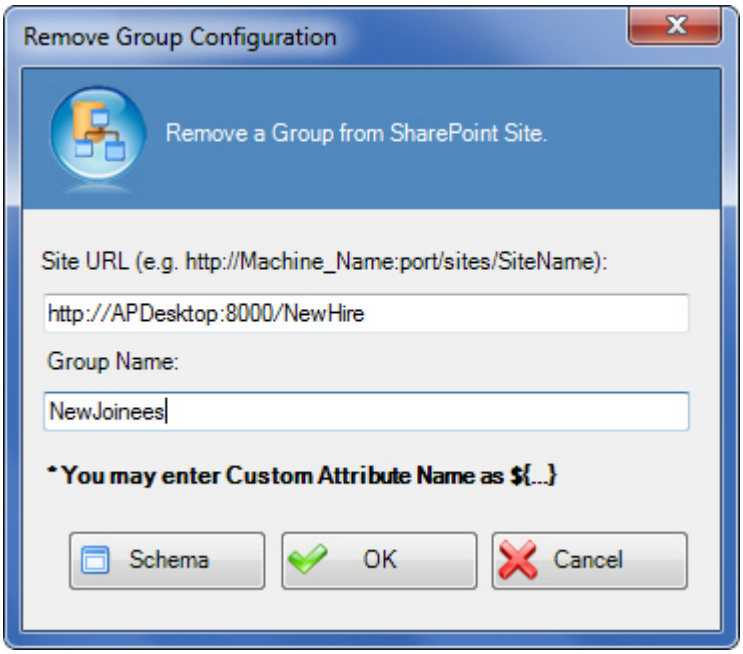
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Remove Group Configuration Window

Specifies a SharePoint group to delete.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Remove SP Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Group Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}

Field Name	Definition
Group Name	Definition: The name of the SharePoint group you want. Allowed Values: A valid SharePoint group name. Default Value: None Custom Attributes: Yes

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Removing a SharePoint Group

To remove a group from SharePoint, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Remove SP Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Group Configuration** field, click the **Ellipses** button.

Instructions

1. On the **Remove Group Configuration** window, complete the following required fields:

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site.

Field Name	Definition
	Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Group Name	Definition: The name of the SharePoint group you want. Allowed Values: A valid SharePoint group name. Default Value: None Custom Attributes: Yes

2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Remove SP Group

Remove User from SP Group

An AgilePart that removes a user from a SharePoint group.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Remove User from SP Group** AgileShape, and drop it on the process template.

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
RemoveUserFromGroupConfiguration	Opens the Following Window: Remove User From Group Configuration Window Purpose of this Window: Specifies a user to remove from a SharePoint group.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

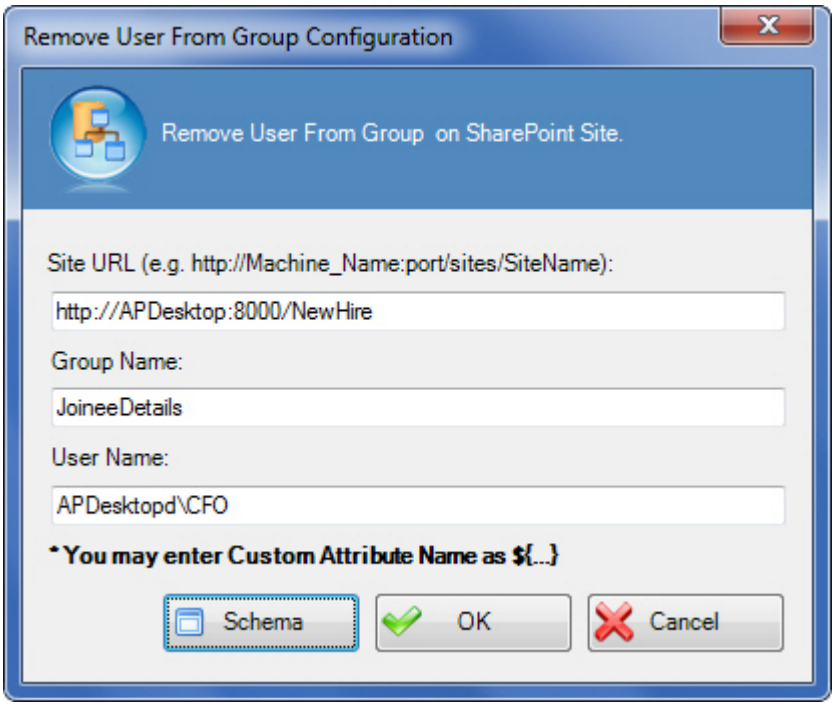
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Remove User From Group Configuration Window

Specifies a user to remove from a SharePoint group.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Remove User from SP Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **RemoveUserFromGroupConfiguration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes

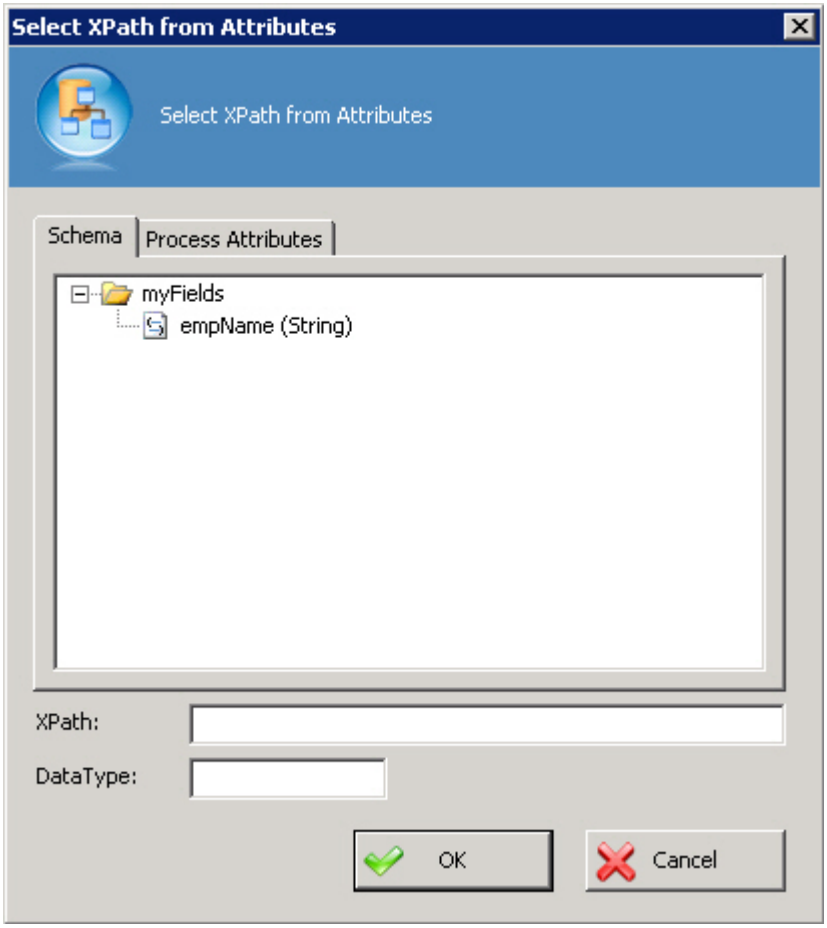
Field Name	Definition
	Example: http://mysharepoint:8000/sites/${mysite}
Group Name	Definition: The name of the SharePoint group you want. Allowed Values: A valid SharePoint group name. Default Value: None Custom Attributes: Yes
User Name	Definition: Specifies the user name to be removed from the SharePoint group. Allowed Values: A user name, including the domain name, in the following format: [domain]\[user name] Default Value: None Custom Attributes: Yes Example: MyDomain\Administrator
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.



Prerequisites

- The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the appropriate stencil.
3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the respective field/configuration window, do one of the following, as appropriate:
   - Type the characters **${** in the property box.
   - Click the **Ellipses** button.
   - Click the **Schema** button.

Field Definitions

Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Removing a User from a SharePoint Group

To remove a user from a SharePoint group, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Remove User from SP Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **RemoveUserFromGroupConfiguration** field, click the **Ellipses** button.

Instructions

1. On the **Remove User from Group Configuration** window, complete the following required fields:

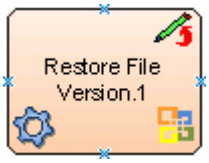
Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Group Name	Definition:

Field Name	Definition
	The name of the SharePoint group you want. Allowed Values: A valid SharePoint group name. Default Value: None Custom Attributes: Yes
User Name	Definition: Specifies the user name to be removed from the SharePoint group. Allowed Values: A user name, including the domain name, in the following format: [domain]\[user name] Default Value: None Custom Attributes: Yes Example: MyDomain\Administrator

2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Remove User From Group Configuration Window

Restore File Version

An AgilePart that restores a SharePoint file to a previous major or minor version number.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Restore File Version** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
RestoreFileVersionConfiguration	Opens the Following Window: Restore File Version Window Purpose of this Window: Specifies a version to restore for a SharePoint file.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

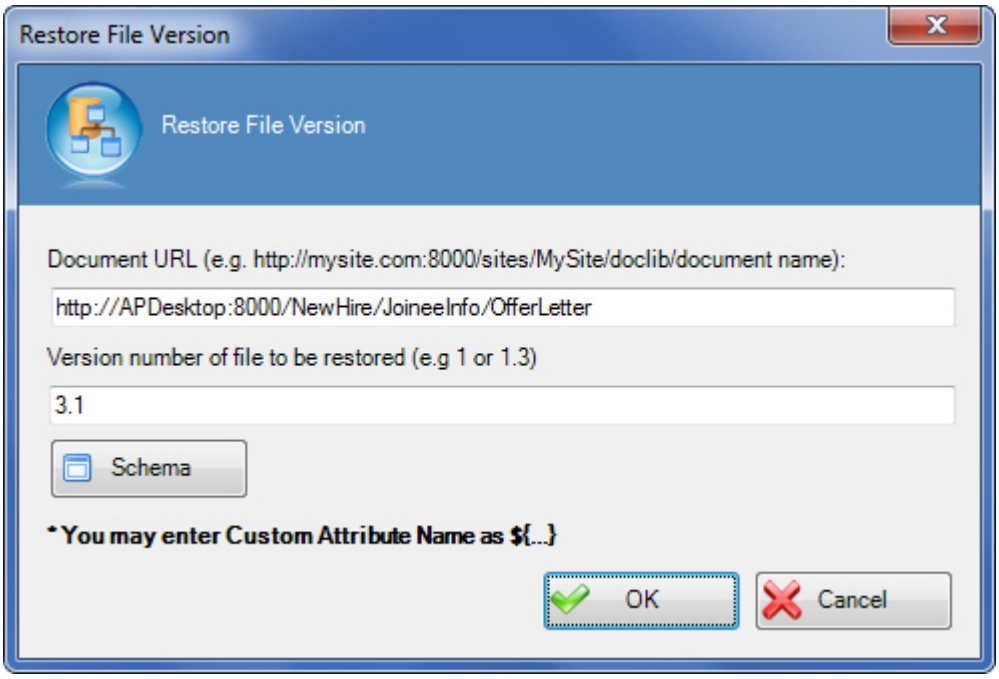
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Restore File Version Window

Specifies a version to restore for a SharePoint file.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Restore File Version** AgileShape, and drop it on the process template.
4. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Document URL	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes
Version number of file to be restored	Definition:

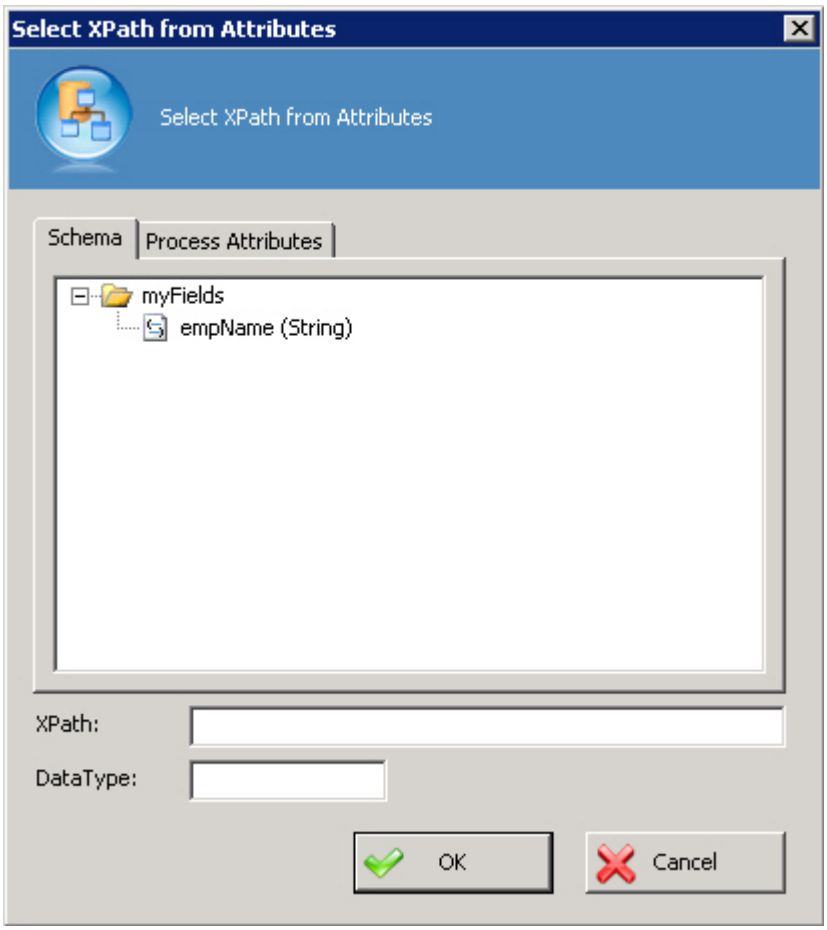
Field Name	Definition
	Specifies the major or minor file version you want to delete or restore. Allowed Values: A valid file version number. • **A major file version number** - A whole number • **A minor file version number** - [major version number].[minor version number] • **Blank (null)** - If you do not enter any number, the last number in the current version number is incremented. Default Value: None Custom Attributes: Yes Example: • A major file version number - 1 or 1.0 • A minor file version number - 1.3 In this example, 1 is the major version; 3 is the minor version.
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. **Note:** If the process template has an associated schema, the Schema button appears.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.



Prerequisites

- The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the appropriate stencil.
3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the respective field/configuration window, do one of the following, as appropriate:
   - Type the characters **${** in the property box.
   - Click the **Ellipses** button.
   - Click the **Schema** button.

Field Definitions

Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Restoring a Deleted Version of a SharePoint File

To restore, or undelete, a deleted a version of a SharePoint file, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Restore File Version** AgileShape, and drop it on the process template.
4. On the **Configuration** field, click the **Ellipses** button.

Instructions

1. On the **Restore File Version** window, enter the URL of the file whose version you want to restore:

Field Name	Definition
Document URL	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes

2. Enter the version number you want to restore.

   If your process has an XML schema, you can click the **Schema** button to select the file version from the schema.

Field Name	Definition
Version number of file to be restored	Definition: Specifies the major or minor file version you want to delete or restore. Allowed Values: A valid file version number. • **A major file version number** - A whole number • **A minor file version number** - [major version number].[minor version number] • **Blank (null)** - If you do not enter any number, the last number in the current version number is incremented. Default Value: None Custom Attributes: Yes Example: • A major file version number - 1 or 1.0 • A minor file version number - 1.3 In this example, 1 is the major version; 3 is the minor version.
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. **Note:** If the process template has an associated schema, the Schema button appears.

3. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup

Retrieve List Item

An AgilePart that retrieves list item field values to be updated in custom attributes, schema metadata, or SharePoint metadata.



Prerequisites

- Log on to SharePoint.

Good to Know

- If errors occur during the execution, a message will be written into the SharePoint Integration log file.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Retrieve List Item** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
ItemValues	Opens the Following Window: Configuration for Retrieving ListItem Fields Window Purpose of this Window: Determines how to retrieve list item field values to update custom attributes, schema metadata, or SharePoint metadata.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

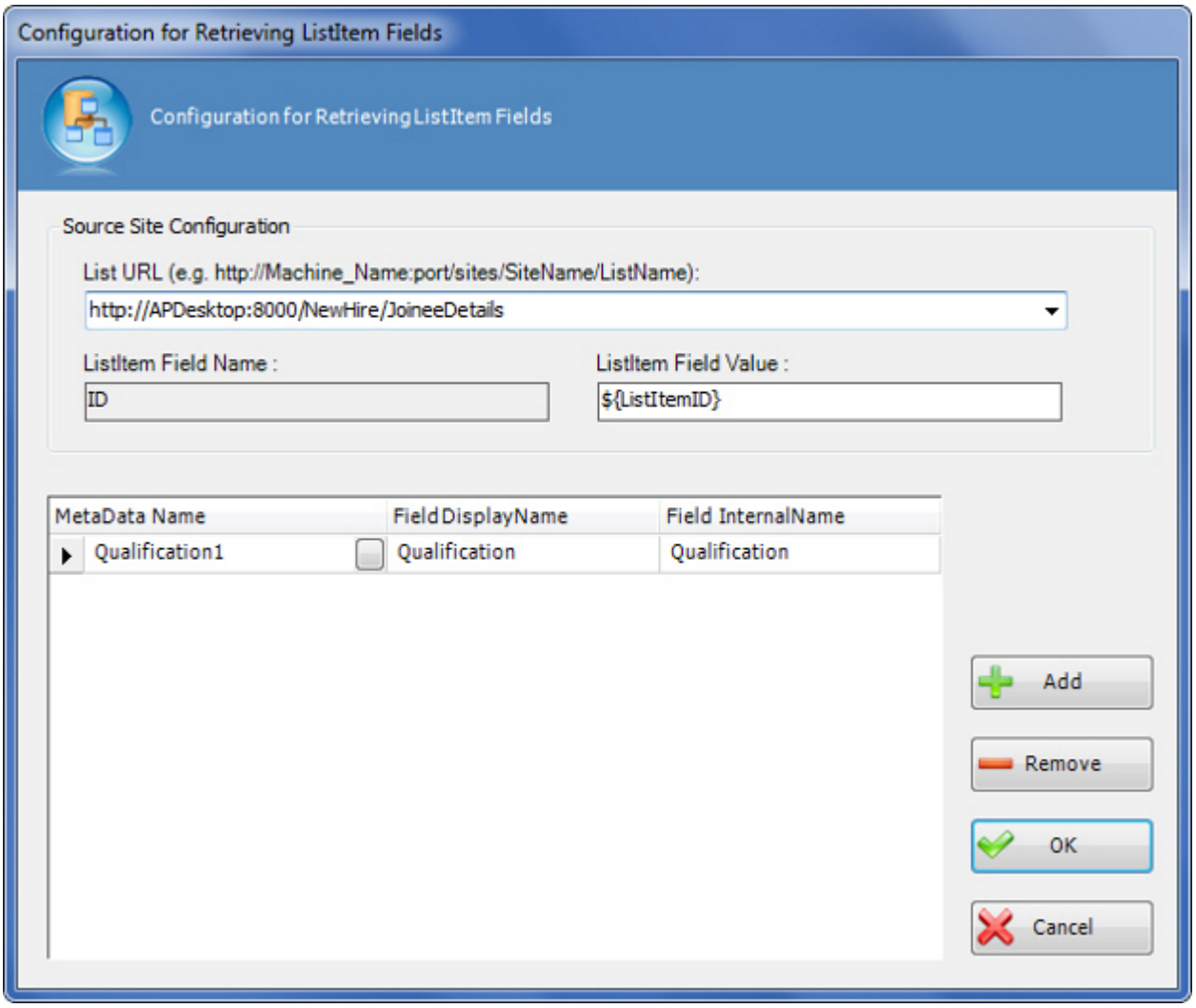
Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

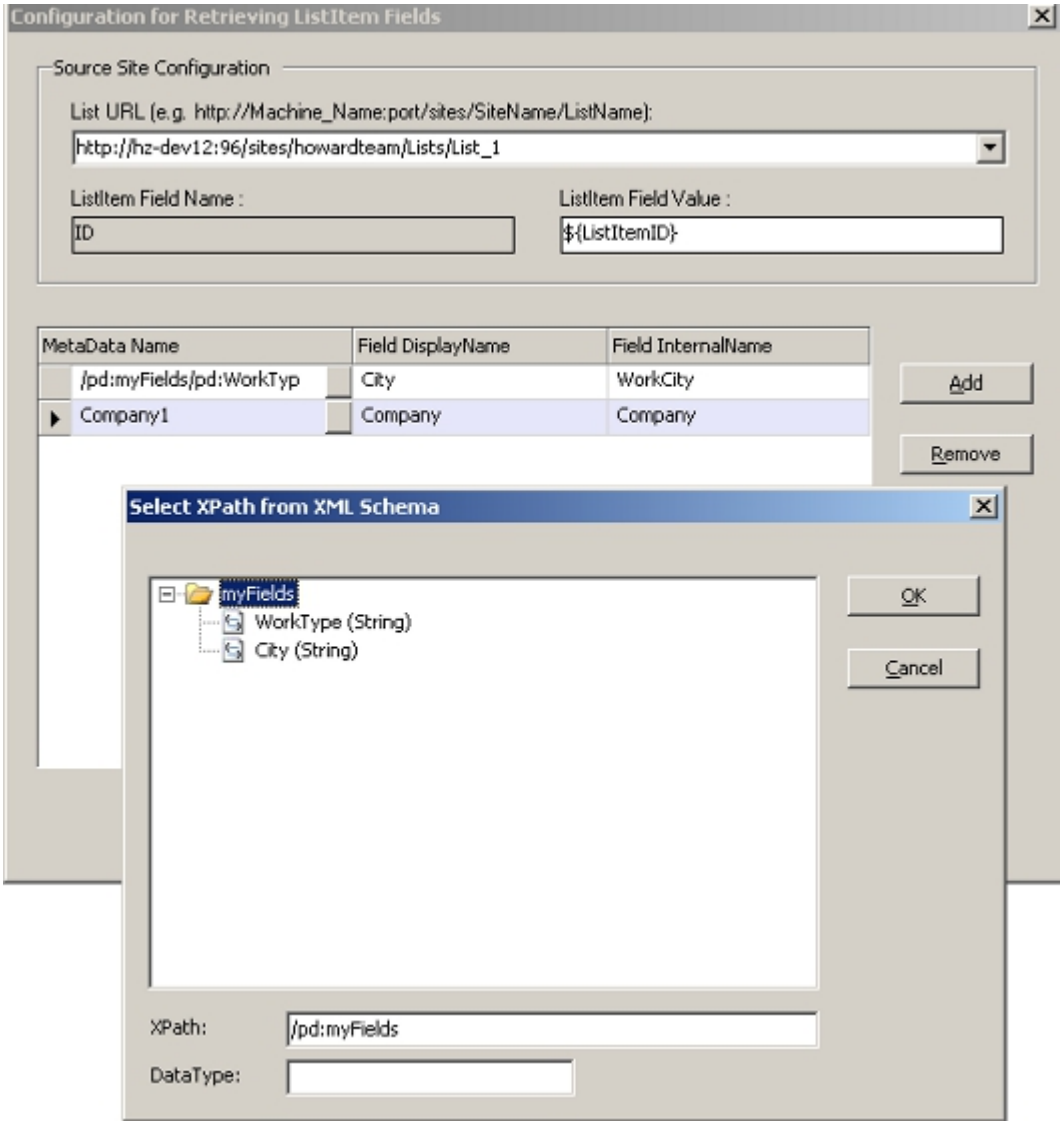
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration for Retrieving ListItem Fields Window

Determines how to retrieve list item field values to update custom attributes, schema metadata, or SharePoint metadata.



After the Source Site is configured, the configuration window will look similar to below.



The MetaData Name column is used to specify a custom attribute, schema metadata, or SharePoint metadata where the value from the list field that is retrieved will be updated to.

Note: In order to update the XML metadata with the retrieved field values, the AgilePoint Envision process template type must be either Microsoft InfoPath or Generic.

The MetaData Name can be configured as follows:

1. Use the Add button to select a SharePoint metadata item.
2. Input a custom attribute name (e.g. Company1).
3. Click the button at the right side of the field to select a schema metadata.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Retrieve List Item** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ItemValues** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
List URL	Definition: Specifies the SharePoint list URL you want. Allowed Values: A valid SharePoint list URL. **Note:** If you use a library URL, such as a document library URL or form library URL, instead of a list URL, an error occurs during execution. Default Value: ${DocUrl} Custom Attributes: Yes Example: • http://[machine name]:[port]/sites/[site name] • $\{DocUrl\}
ListItem Field Name	Definition: Specifies the name of a SharePoint list column. Allowed Values: Read only. "ID", the list column that specifies the unique list item ID.
ListItem Field Value	Definition: Specifies the SharePoint list column's value. This value can be used as a filter to limit the scope of the action.

Field Name	Definition
	Allowed Values: The list column's value. Default Value: ${ListItemID} Custom Attributes: Yes Example: • $\{ListItemID\} or $\{SubListItemID\} • A list item ID such as 9
Add	Opens the Following Window: Select SharePoint Library Column Window Purpose of this Window: Specifies a SharePoint library column.
MetaData Name	Definition: The name of the process variable you want to store the retrieved list item field values. The retrieved metadata values can be updated to a custom attribute, an XML schema element, or SharePoint metadata. Allowed Values: • A custom attribute • An XPath to a schema element To add XML metadata associated with the process model, click the button in the MetaData Name field. **Note:** In order to update the XML metadata with the retrieved field values, the AgilePoint Envision process template type must be either Microsoft InfoPath or Generic. • A SharePoint metadata Default Value: None However, when you add a field using the Add button, the MetaData Name is populated with the internal name of the SharePoint column.

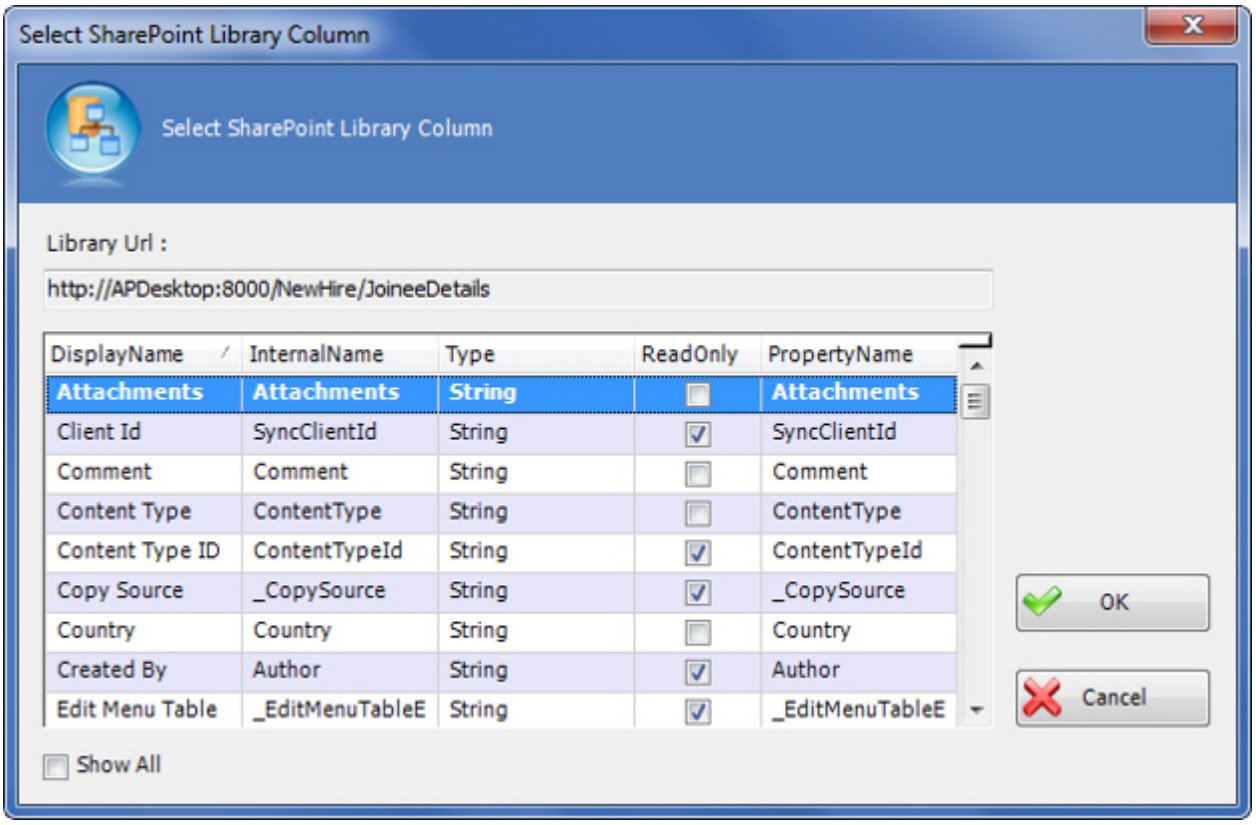
Field Name	Definition
	For example, Author1, where Author is the internal name of the SharePonit column named Author. Custom Attributes: Yes
Field DisplayName	Definition: Specifies the SharePoint column names for the specified list or library. Allowed Values: Read only. The values are populated when you click Add, and then select a list item on the Select SharePoint Library Column Window.
Field InternalName	Definition: Specifies the internal names of the SharePoint columns for the specified list or library. Allowed Values: Read only. The values are populated when you click Add, and then select a list item on the Select SharePoint Library Column Window.
Remove	Function: Deletes the selected row from the list.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select SharePoint Library Column Window

Specifies a SharePoint library column.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Retrieve List Item** or **Update Meta Data** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
   - **ItemValues**
   - **MetadataNameAndValues**
6. On one of the following windows, click **Add**. The specific windows that display vary, depending upon the fields of AgileShape you are using:
   - Configuration for Retrieving ListItem Fields Window
   - Name and Value Window

Field Definitions

Field Name	Definition
Library URL	Definition: Specifies the URL for the SharePoint library that contains the metadata attributes you want to update. Allowed Values: Read only.
DisplayName	Definition: Specifies the name of the SharePoint library column. Allowed Values: Read only.
InternalName	Definition: Specifies the column's internal name. Allowed Values: Read only.
Type	Definition: Specifies the column's data type. Allowed Values: Read only.
Read Only	Definition: Indicates whether the column's value can be changed when the process is running: • **Selected** - The column's value cannot be changed. • **Deselected** - The column's value is editable. Allowed Values: Read only. You cannot select or deselect the Read Only check box.
PropertyName	Definition:

Field Name	Definition
	Specifies the name of the property associated with the SharePoint library column. Allowed Values: Read only.
OK	Function: Completes the task, and opens the window where this **Select SharePoint Library Column** window was invoked to specify the metadata field: • Configuration for Retrieving ListItem Fields Window • Name and Value Window Note the following: • To specify the metadata field, select the field, and then click OK. • You can select only one field at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Single Condition

An AgilePart that specifies a process decision branch where the process follows one of two paths based on a single Boolean (true/false, yes/no) input value. This AgileShape is specifically for SharePoint processes.

Note: This AgileShape has been deprecated. Beginning with AgilePoint BPMS v5.0 SP4 this AgileShape is available only through the Traditional AgileShape stencils, and not through the current stencils.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Single Condition** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Property Binding	Opens the Following Window: New Condition Activity Window - Single Condition SharePoint AgileShape Purpose of this Window: Associates a Boolean condition with a data field, such as a custom attribute or schema element, for the purpose of routing a process based on the field value.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

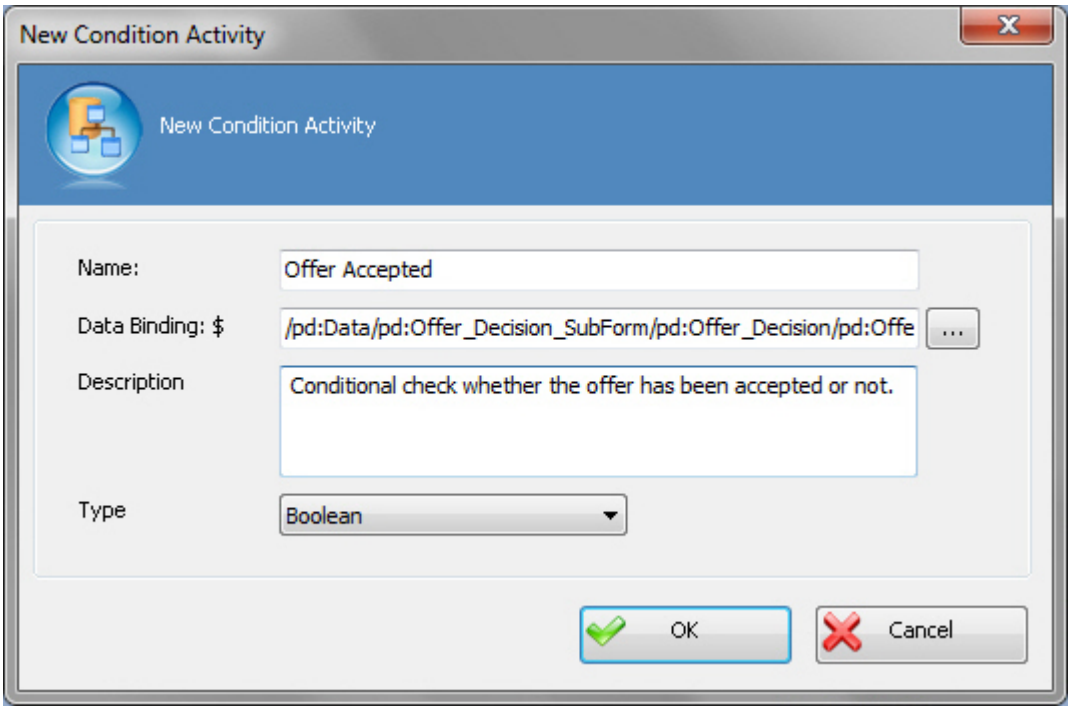
Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

New Condition Activity Window - Single Condition SharePoint AgileShape

Associates a Boolean condition with a data field, such as a custom attribute or schema element, for the purpose of routing a process based on the field value.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Single Condition** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Property Binding** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Name	Definition: The display name for the AgileShape. Allowed Values: A single line of text. Default Value: None Custom Attributes: No

Field Name	Definition
Data Binding	Definition: Specifies a data field (such as a schema element or custom attribute) used to evaluate the condition. For more information, see Data Binding. **Note:** On the Participants window, this field is not available for Generic process models. Allowed Values: A valid data binding expression. This could be a custom attribute name or an xpath to a schema element. Default Value: None Custom Attributes: Yes
Description	Definition: A free text description of the condition. Allowed Values: Multiple lines of text. Default Value: None Custom Attributes: No
Type	Definition: The data type for the data binding expression. Allowed Values: Boolean Default Value: Boolean

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Submit

An AgileWork that is essentially identical to the Manual AgileShape, except that its **Work To Perform** property defaults to the value **Submit**, and it has a different visual appearance in the process template.

Note: This AgileShape has been deprecated. Beginning with AgilePoint BPMS v5.0 SP4 this AgileShape is available only through the Traditional AgileShape stencils, and not through the current stencils.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Submit** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Submit File to Record Center

An AgilePart that stores a specified file in a SharePoint Record Center.



Prerequisites

- Log on to SharePoint.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Submit File to Record Center** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Record Center Configuration	Opens the Following Window: Submit File To Record Center Configuration Window Purpose of this Window: Specifies how a file is submitted to a SharePoint Record Center.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

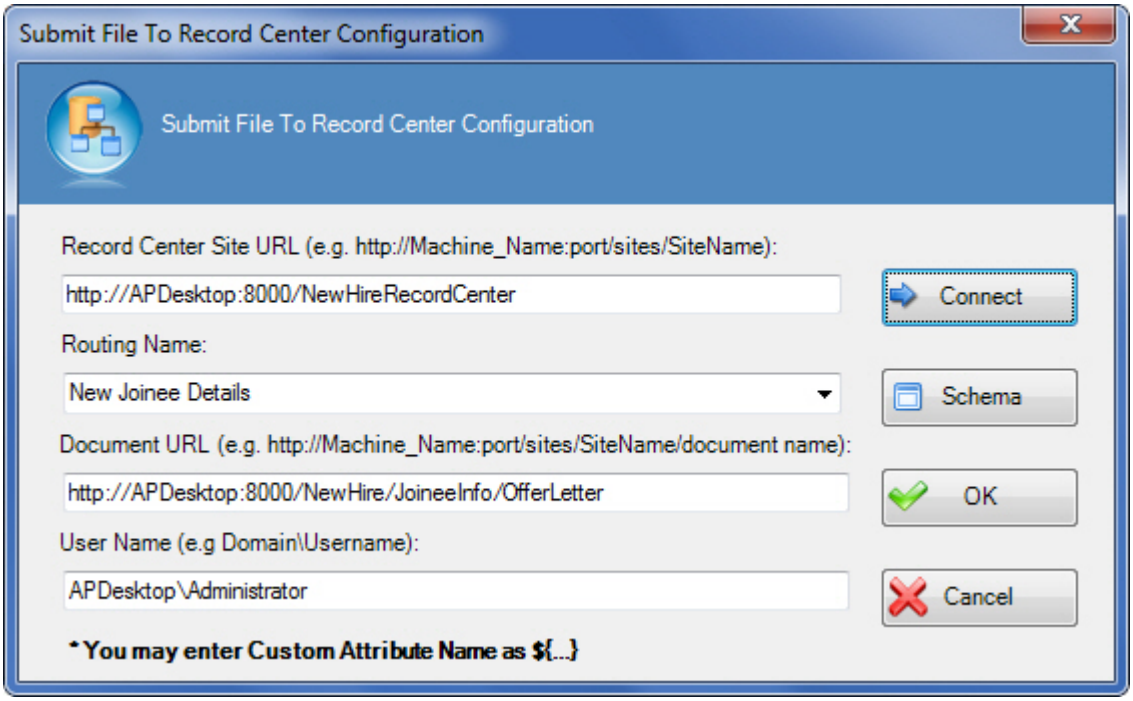
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Submit File To Record Center Configuration Window

Specifies how a file is submitted to a SharePoint Record Center.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Submit File to Record Center** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Record Center Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Record Center Site URL	Definition: Specifies the URL of the SharePoint Record Center site where you want to store the files.

Field Name	Definition
	Allowed Values: A valid SharePoint Record Center site URL. Default Value: None Custom Attributes: Yes
Connect	Function: Retrieves the list of routing names for the specified SharePoint Record Center site.
Routing Name	Definition: Specifies the routing name to be used to submit the file to the SharePoint Record Center. A routing name is a record routing rule that is set up on the SharePoint Record Center to facilitate records management. Each routing rule maps the records to the destination location on the Record Center site based on content type. Allowed Values: A routing name. Default Value: None Custom Attributes: Yes
Document URL	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes
User Name	Definition:

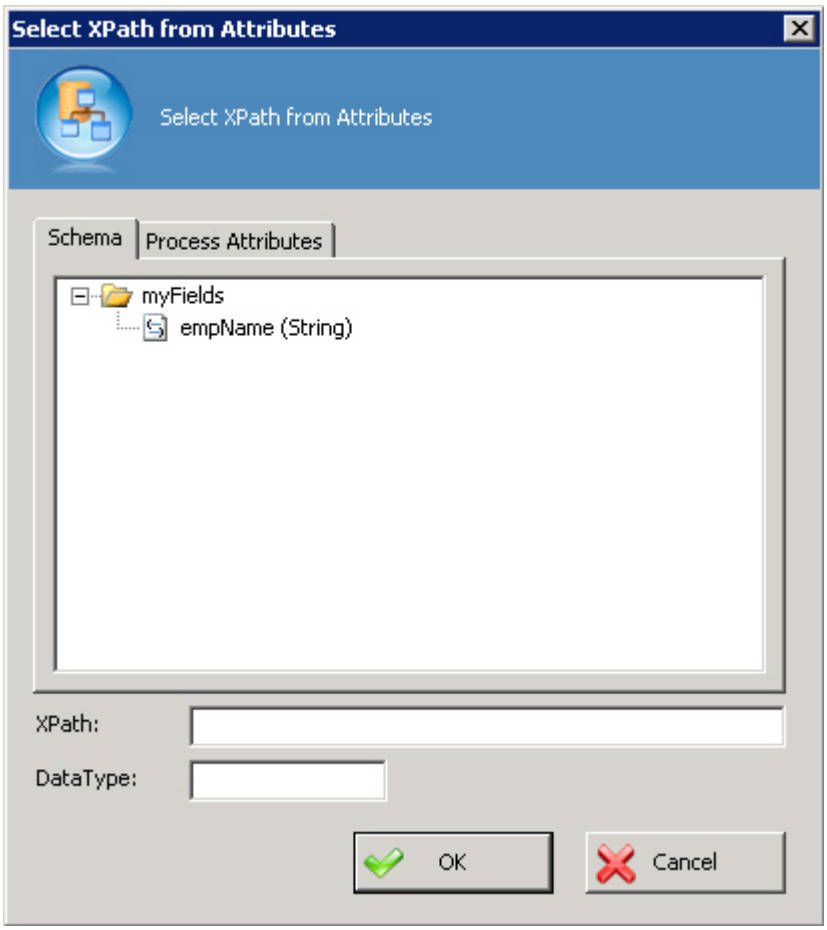
Field Name	Definition
	The user name you want to associate with the action. If the current user does not have access to the Record Center site, then the Login window opens. This user impersonation feature switches users at runtime to access the Record Center. **Note:** The user must be a member of the Records Center Web Service Submitters group in SharePoint. Allowed Values: A user name, including the domain name, in the following format: [domain]\[user name] Default Value: None Custom Attributes: Yes Example: MyDomain\Administrator
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.



Prerequisites

- The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the appropriate stencil.
3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the respective field/configuration window, do one of the following, as appropriate:
   - Type the characters **${** in the property box.
   - Click the **Ellipses** button.
   - Click the **Schema** button.

Field Definitions

Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Submitting a File to a SharePoint Record Center

To submit a file to a SharePoint Record Center, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Submit File to Record Center** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Record Center Configuration** field, click the **Ellipses** button.

Instructions

1. On the **Submit File To Record Center Configuration** window, enter the URL for your SharePoint record center.
2. Click **Connect**.
3. Complete the following fields as required for your file submission:

Field Name	Definition
Routing Name	Definition: Specifies the routing name to be used to submit the file to the SharePoint Record Center. A routing name is a record routing rule that is set up on the SharePoint Record Center to facilitate records management. Each routing rule maps the records to the destination location on the Record Center site based on content type. Allowed Values: A routing name. Default Value:

Field Name	Definition
	None Custom Attributes: Yes
Document URL	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes
User Name	Definition: The user name you want to associate with the action. If the current user does not have access to the Record Center site, then the Login window opens. This user impersonation feature switches users at runtime to access the Record Center. **Note:** The user must be a member of the Records Center Web Service Submitters group in SharePoint. Allowed Values: A user name, including the domain name, in the following format: [domain]\[user name] Default Value: None Custom Attributes: Yes Example: MyDomain\Administrator

4. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup

Undo Check Out File

An AgilePart that reverses a document check out from SharePoint.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Undo Check Out File** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Document URL	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Canceling a SharePoint File Checkout

To cancel, or undo, a SharePoint file checkout, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Undo Check Out File** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. In the properties for the **Undo File Checkout** AgileShape, enter the file URL:

Field Name	Definition
Document URL	Definition: The URL of your document or file — for example, the file you want to add, delete, or check out. Allowed Values: A valid URL. Default Value: None Custom Attributes: Yes

2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup

Update InfoPath

An AgilePart that updates the XML data in an InfoPath form.



Prerequisites

- This AgileShape can only be used when working with a Microsoft InfoPath process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Update InfoPath** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
InfoPathFileURL	Definition: Specifies the URL of the InfoPath form in Microsoft SharePoint. Allowed Values: A valid InfoPath form URL. Default Value: $DocUrl Custom Attributes: Yes
XPathAndValues	Opens the Following Window: XPath and Value Window Purpose of this Window: Specifies values for one or more of the data elements in the XML of the InfoPath form.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

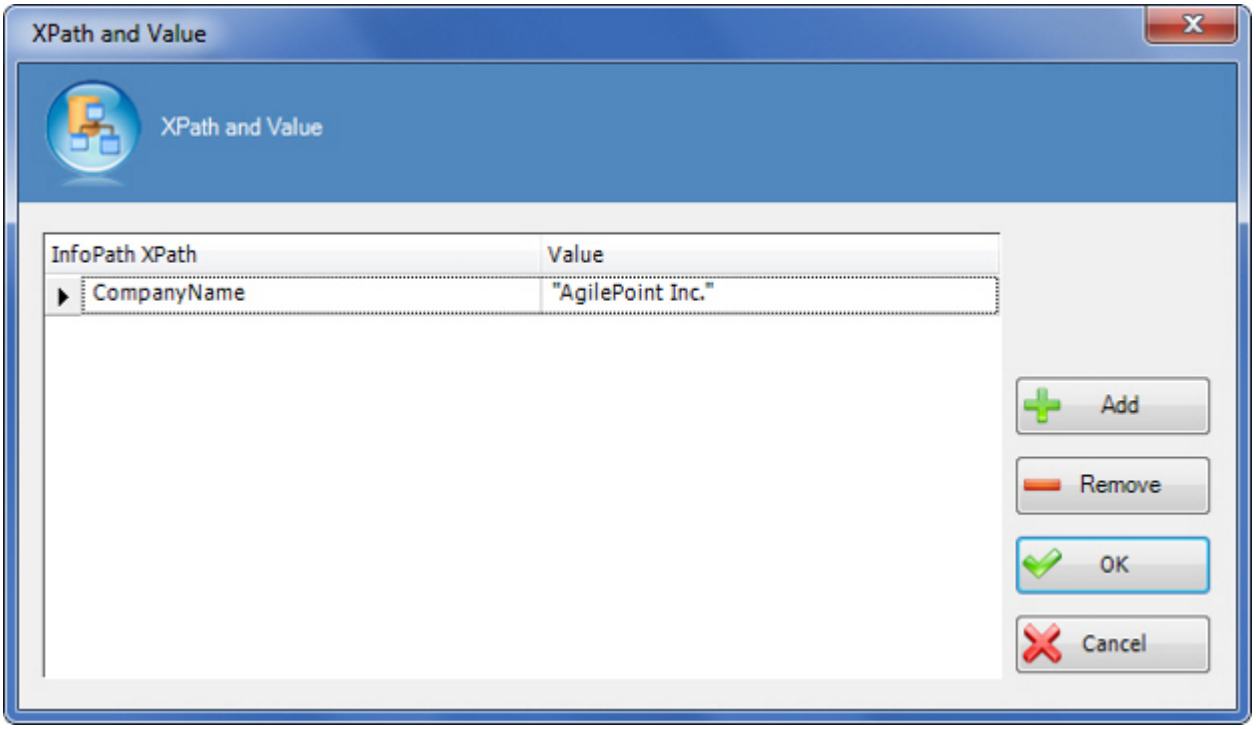
Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

XPath and Value Window

Specifies values for one or more of the data elements in the XML of the InfoPath form.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.

3. On the **SharePoint** stencil, drag the **Update InfoPath** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **XPathAndValues** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Add	Function: Opens the schema of the associated InfoPath form to select the XML data element. Then, adds a row to specify a new value for the selected data element of the InfoPath form. Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.
InfoPath XPath	Definition: Specifies the XML data element of the InfoPath form you want to set a new value. Allowed Values: A valid data element in the XML. Default Value: None Custom Attributes: Yes
Value	Definition: The new value for the XML data element of the InfoPath form. Allowed Values: A valid column value. Default Value: None However, when you add a row by using the Add button, the Value field is populated with the data type of the selected data element, such as {Decimal} or {String}. Set the actual value.

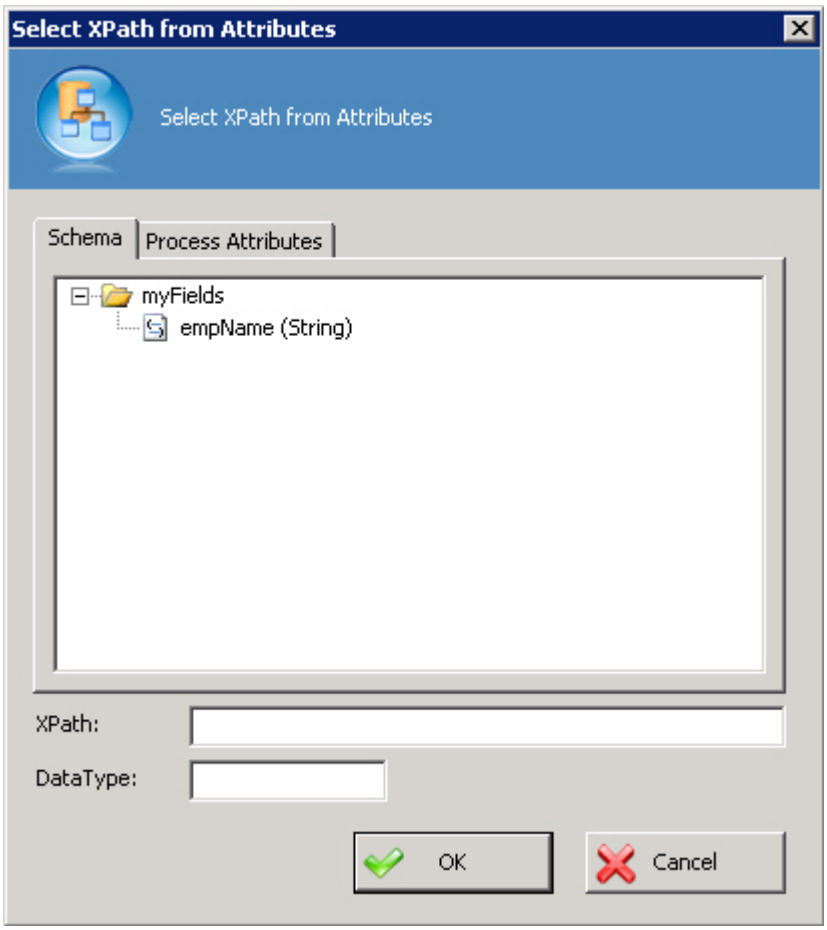
Field Name	Definition
	Custom Attributes: No
Remove	Function: Deletes the selected row from the list.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.



Prerequisites

- The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the appropriate stencil.
3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the respective field/configuration window, do one of the following, as appropriate:
   - Type the characters **${** in the property box.
   - Click the **Ellipses** button.
   - Click the **Schema** button.

Field Definitions

Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition:

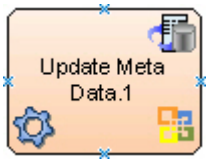
Field Name	Definition
	Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Update Meta Data

An AgilePart that updates metadata in SharePoint.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Update Meta Data** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
MetadataNameAndValues	Opens the Following Window: Name and Value Window Purpose of this Window: Specifies a value for a field you want to update in a SharePoint library and folder.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

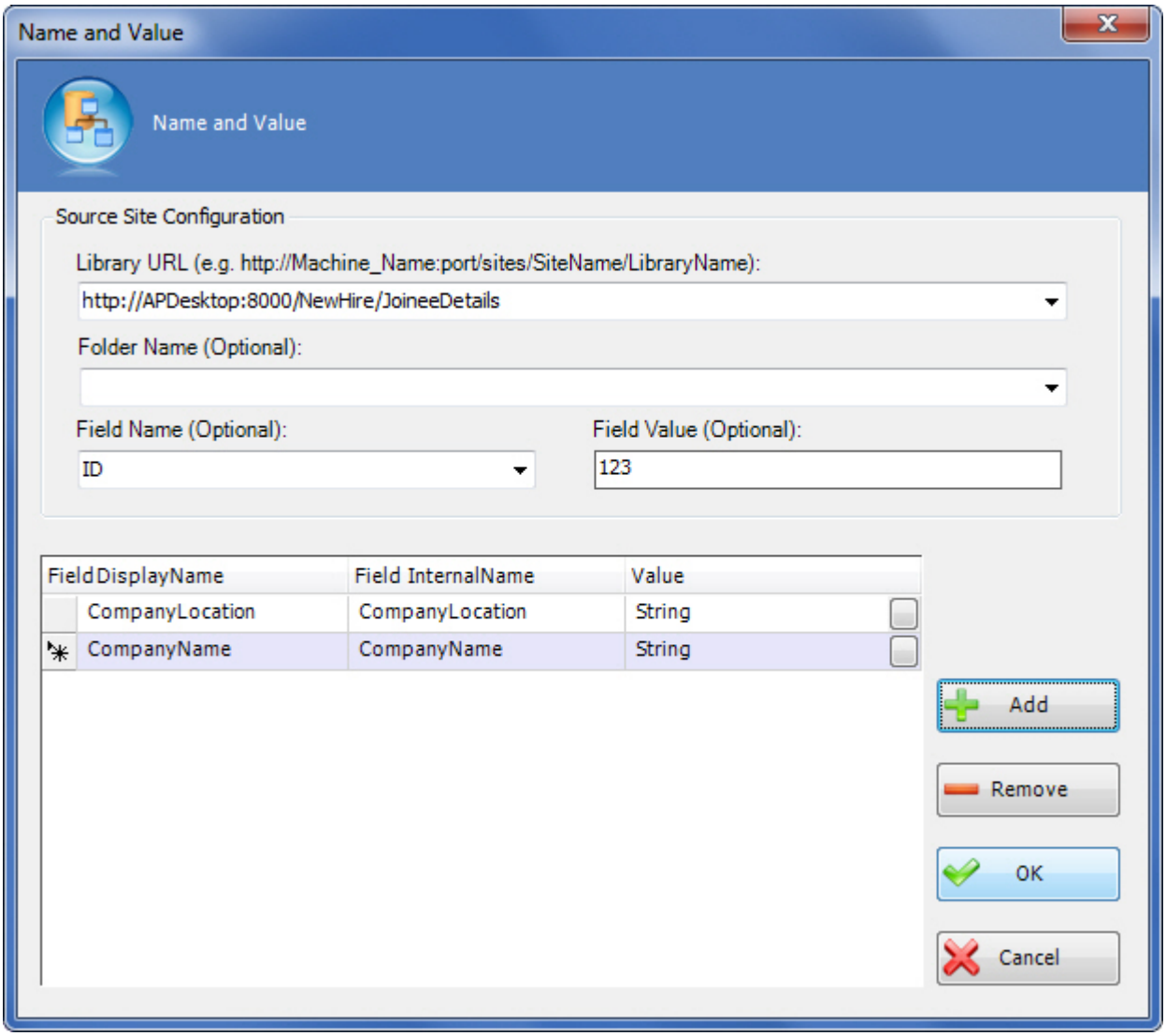
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Name and Value Window

Specifies a value for a field you want to update in a SharePoint library and folder.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Update Meta Data** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **MetadataNameAndValues** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Library URL	Definition:

Field Name	Definition
	Specifies the URL for the SharePoint library that contains the metadata attributes you want to update. Enter a valid SharePoint URL, and then expand the Library URL list to select the list or library URL you want. This action populates the fields with the correct values for the specified SharePoint library. Allowed Values: A valid SharePoint library URL. • You must enter an actual URL if you want to retrieve the metadata associated with the library URL at design-time to update the values. • You can also use a custom attribute to specify the URL at runtime. Default Value: ${DocUrl} Custom Attributes: Yes
Folder Name	Definition: Specifies the name of a SharePoint folder. The folder contains the metadata attributes you want to update. Allowed Values: The name of your SharePoint folder. Default Value: None Custom Attributes: No
Field Name	Definition: Specifies the name of the SharePoint column you want to restrict the metadata update. Allowed Values: The name of your SharePoint list column. Default Value: "ID", the list column that specifies the unique list item ID. Custom Attributes:

Field Name	Definition
	No
Field Value	Definition: Specifies the SharePoint column's value. This indicates that you can restrict the metadata update by the value specified. Allowed Values: The list column's value. Note the following: • If you want to clear a value, specify **NULL**. • And, if you leave the Field Value property empty, the AgileShape updates all records in the SharePoint library. Default Value: ${ListItemID} Custom Attributes: Yes
Add	Opens the Following Window: Select SharePoint Library Column Window Purpose of this Window: Specifies a SharePoint library column.
Remove	Function: Deletes the selected row from the list.
Field DisplayName	Definition: Specifies the SharePoint column names for the specified list or library. Allowed Values: Read only. The values are populated when you click Add, and then select a list item on the Select SharePoint Library Column Window.
Field InternalName	Definition: Specifies the internal names of the SharePoint columns for the specified list or library. Allowed Values:

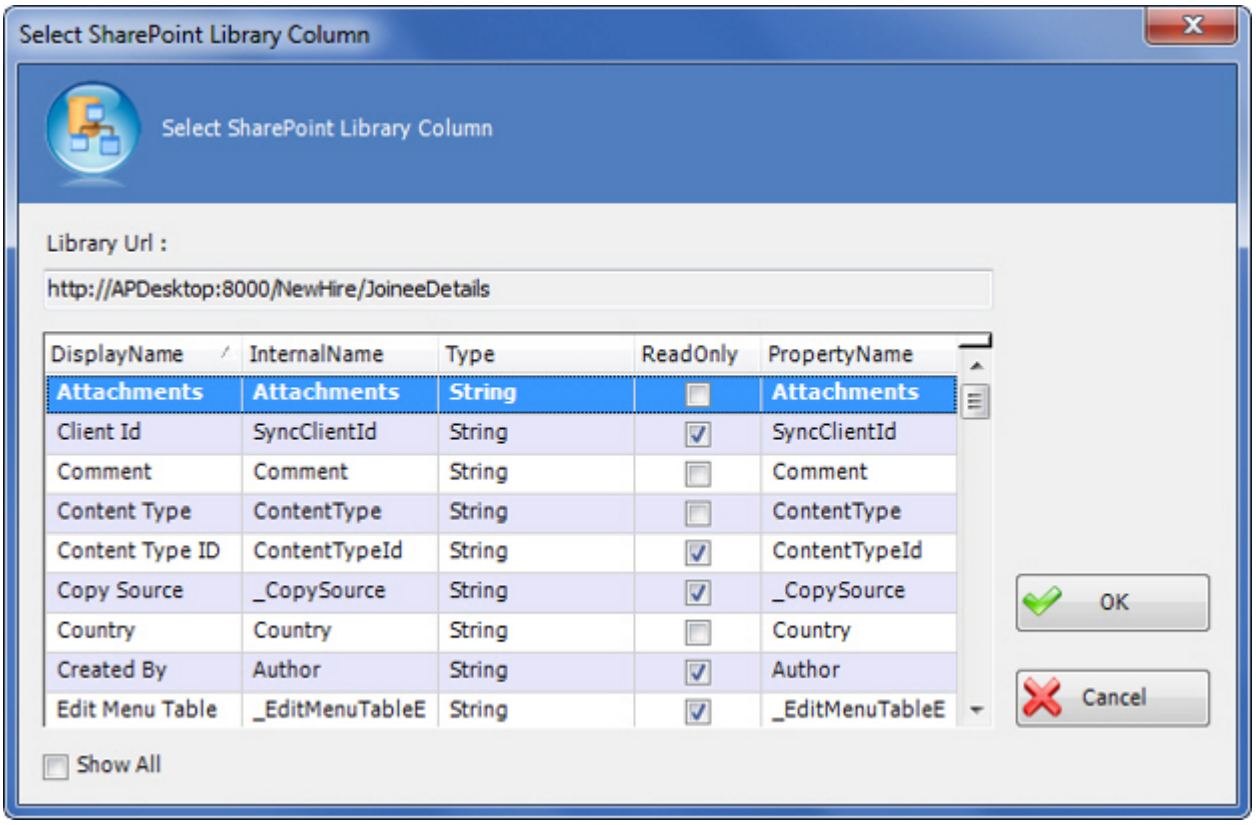
Field Name	Definition
	Read only. The values are populated when you click Add, and then select a list item on the Select SharePoint Library Column Window.
Value	Definition: Specifies the value to be updated for the SharePoint column. Allowed Values: • A valid column value. • An XPath to a schema element. To add XML metadata associated with the process model, click the button in the Value field. Default Value: None. However, when you add a SharePoint column in the list by using the Add button, the Value field is populated with the column's data type. Set the actual value. Custom Attributes: Yes

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select SharePoint Library Column Window

Specifies a SharePoint library column.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Retrieve List Item** or **Update Meta Data** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
   - **ItemValues**
   - **MetadataNameAndValues**
6. On one of the following windows, click **Add**. The specific windows that display vary, depending upon the fields of AgileShape you are using:
   - Configuration for Retrieving ListItem Fields Window
   - Name and Value Window

Field Definitions

Field Name	Definition
Library URL	Definition: Specifies the URL for the SharePoint library that contains the metadata attributes you want to update. Allowed Values: Read only.
DisplayName	Definition: Specifies the name of the SharePoint library column. Allowed Values: Read only.
InternalName	Definition: Specifies the column's internal name. Allowed Values: Read only.
Type	Definition: Specifies the column's data type. Allowed Values: Read only.
Read Only	Definition: Indicates whether the column's value can be changed when the process is running: • **Selected** - The column's value cannot be changed. • **Deselected** - The column's value is editable. Allowed Values: Read only. You cannot select or deselect the Read Only check box.
PropertyName	Definition:

Field Name	Definition
	Specifies the name of the property associated with the SharePoint library column. Allowed Values: Read only.
OK	Function: Completes the task, and opens the window where this **Select SharePoint Library Column** window was invoked to specify the metadata field: • Configuration for Retrieving ListItem Fields Window • Name and Value Window Note the following: • To specify the metadata field, select the field, and then click OK. • You can select only one field at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Modifying Fields in a SharePoint Library or List

To modify fields in a SharePoint library or list, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Update Meta Data** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **MetadataNameAndValues** field, click the **Ellipses** button.

Instructions

1. On the **Name and Value** window, select the URL for your SharePoint library:

Field Name	Definition
Library URL	Definition: Specifies the URL for the SharePoint library that contains the metadata attributes you want to update. Enter a valid SharePoint URL, and then expand the Library URL list to select the list or library URL you want. This action populates the fields with the correct values for the specified SharePoint library. Allowed Values: A valid SharePoint library URL. • You must enter an actual URL if you want to retrieve the metadata associated with the library URL at design-time to update the values. • You can also use a custom attribute to specify the URL at runtime. Default Value: ${DocUrl} Custom Attributes: Yes

2. Complete the following fields as required for your update:

Field Name	Definition
Folder Name	Definition: Specifies the name of a SharePoint folder. The folder contains the metadata attributes you want to update. Allowed Values: The name of your SharePoint folder. Default Value: None Custom Attributes: No
Field Name	Definition: Specifies the name of the SharePoint column you want to restrict the metadata update.

Field Name	Definition
	Allowed Values: The name of your SharePoint list column. Default Value: "ID", the list column that specifies the unique list item ID. Custom Attributes: No
Field Value	Definition: Specifies the SharePoint column's value. This indicates that you can restrict the metadata update by the value specified. Allowed Values: The list column's value. Note the following: • If you want to clear a value, specify **NULL**. • And, if you leave the Field Value property empty, the AgileShape updates all records in the SharePoint library. Default Value: ${ListItemID} Custom Attributes: Yes

3. If you want to add a column from the existing SharePoint columns, do the following:
   a. Click **Add**.
   b. Select the column you want.
   c. Click **OK**.
4. If you want to remove a column from the list of SharePoint columns, do the following:
   a. Select the column you want.
   b. Click **Remove**.
5. On the **Name and Value** window, complete the following fields to modify your columns:

Field Name	Definition
Field DisplayName	Definition:

Field Name	Definition
	Specifies the SharePoint column names for the specified list or library. Allowed Values: Read only. The values are populated when you click Add, and then select a list item on the Select SharePoint Library Column Window.
Field InternalName	Definition: Specifies the internal names of the SharePoint columns for the specified list or library. Allowed Values: Read only. The values are populated when you click Add, and then select a list item on the Select SharePoint Library Column Window.
Value	Definition: Specifies the value to be updated for the SharePoint column. Allowed Values: • A valid column value. • An XPath to a schema element. To add XML metadata associated with the process model, click the button in the Value field. Default Value: None. However, when you add a SharePoint column in the list by using the Add button, the Value field is populated with the column's data type. Set the actual value. Custom Attributes: Yes

6. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup

Update SP Group

An AgilePart that updates the settings for a SharePoint Group.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Update SP Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Group Configuration	Opens the Following Window: Update Group Configuration Window Purpose of this Window: Specifies the information to update for a SharePoint group.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

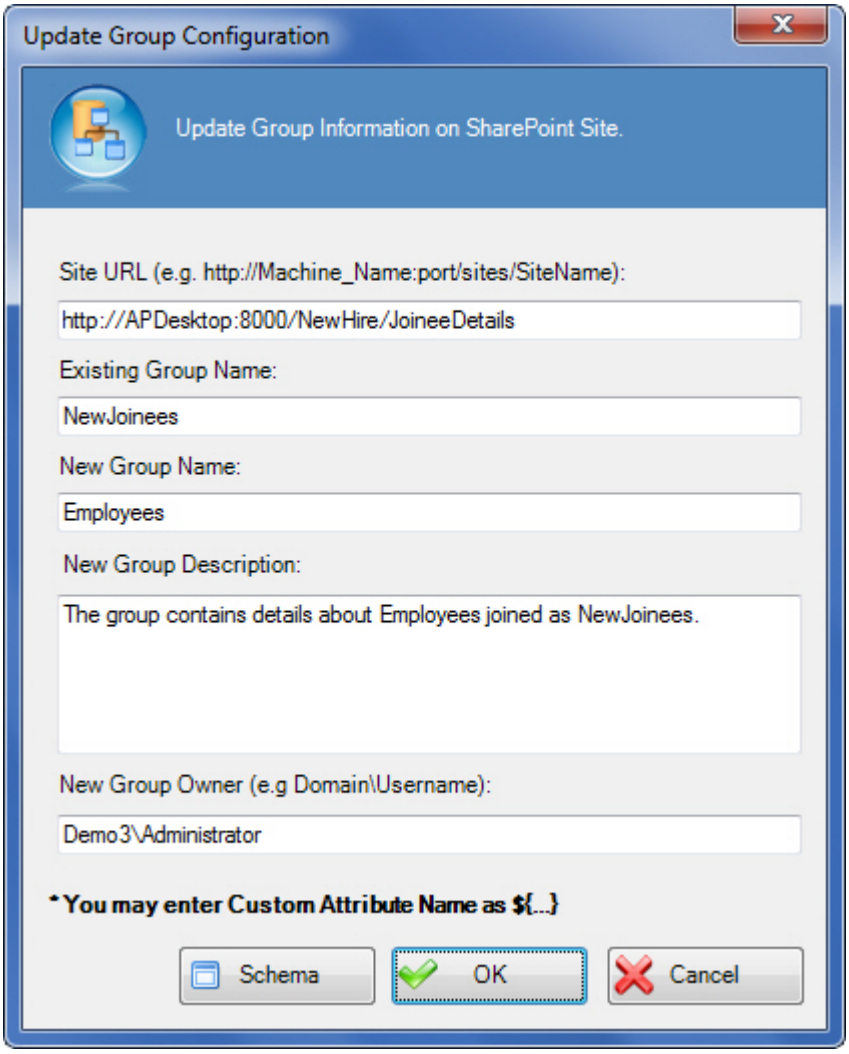
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Update Group Configuration Window

Specifies the information to update for a SharePoint group.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Update SP Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Group Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Existing Group Name	Definition: Specifies the name of the SharePoint group you want to update. Allowed Values: The name of an existing SharePoint group. Default Value: None Custom Attributes: Yes
New Group Name	Definition: Specifies the target name for the SharePoint group - in other words, the name to which you want to change the group. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes

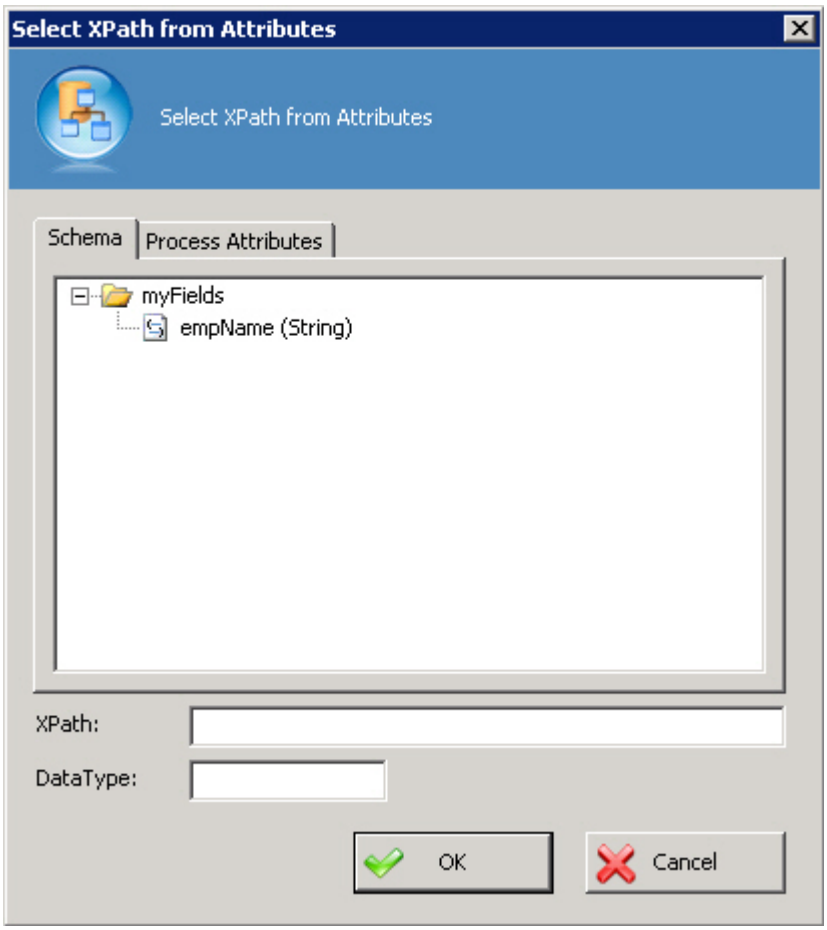
Field Name	Definition
New Group Description	Definition: Specifies a new description to overwrite the existing group description. Allowed Values: Multiple line of text. Default Value: None Custom Attributes: Yes
New Group Owner	Definition: Specifies the name of the SharePoint user you want to be the new owner of your group. Allowed Values: A user name, including the domain name, in the following format: [domain]\[user name] Default Value: None Custom Attributes: Yes Example: MyDomain\Administrator
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.



Prerequisites

- The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the appropriate stencil.
3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the respective field/configuration window, do one of the following, as appropriate:
   - Type the characters **${** in the property box.
   - Click the **Ellipses** button.
   - Click the **Schema** button.

Field Definitions

Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Modifying a SharePoint Group

To modify, or update, an existing SharePoint group, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

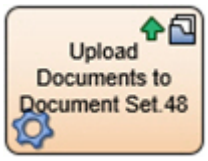
1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Update SP Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Group Configuration** field, click the **Ellipses** button.

Instructions

1. On the Update Group Configuration Window, modify the field values according to your requirements. All fields are optional.
2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup

Upload Documents to Document Set

An AgilePart that uploads one or more documents from local machine to specified document set of a SharePoint document library.



Prerequisites

- An environment using SharePoint 2013 and the CSOM AgileConnector.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Upload Documents to Document Set** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: Upload Document Set Configuration Window Purpose of this Window: Specifies the details for uploading one or more documents to the document set.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

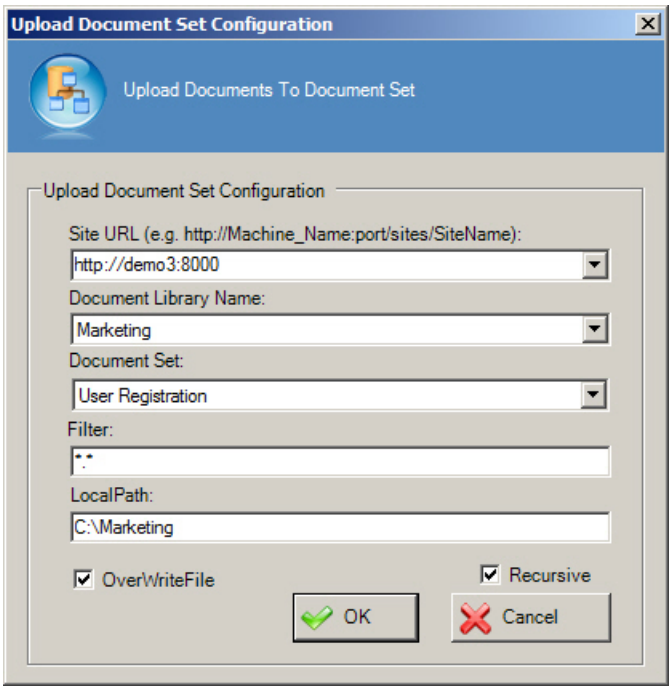
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Upload Document Set Configuration Window

Specifies the details for uploading one or more documents to the document set.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Upload Documents to Document Set** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **UploadDocSetConfiguration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example:

Field Name	Definition
	http://mysharepoint:8000/sites/${mysite}
Document Library Name	Definition: Specifies the name of the SharePoint document library. Allowed Values: A valid SharePoint document library name. Default Value: None Custom Attributes: Yes
Document Set	Definition: Specifies the name of the document set. Allowed Values: The name of your document set. Default Value: None Custom Attributes: Yes
Filter	Definition: Specifies the file name or a set of files expressed using the filter expression you want to search within the specified source location. For example, files to be downloaded by the Download Files AgilePart, to be uploaded by the Upload Files AgilePart, or to be converted to PDF by the PDF Converter AgilePart. Allowed Values: • A file name. • A filter string that uses asterisks (*) as wildcards. Default Value: None Custom Attributes: No Example:

Field Name	Definition
	Following are some examples of filter expressions: • ***.*** - All files are searched. • ***.xml*** - The files that have the **.xml** file extension are searched. • ***.doc*** - The files that have the **.doc** file extension are searched. • **MyFile.xml** - Only the specific file MyFile.xml is searched. The filter action is performed at the source location, that vary depending upon the AgileShape.
LocalPath	Definition: Specifies the location of the file system folder on the local computer where the AgileShape performs the certain action such as uploading or downloading files. This property defines the source location for the files to be uploaded and the destination location for the files to be downloaded. Allowed Values: A file path relative to the AgilePoint Server application's root directory. Default Value: None Custom Attributes: No Example: • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the file once downloaded is to be located at: c:\Inetpub\wwwroot\AgilePointServer\files\MyFile.txt Then, the LocalPath property must be set to the following value: files • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the file once downloaded is to be located at:

Field Name	Definition
	c:\Inetpub\wwwroot\AgilePointServer\files\temp\MyFile.txt Then, the LocalPath property must be set to the following value: files\temp
OverWriteFile	Definition: Specifies whether the AgileShape overwrites the files that exist in the specified destination. Allowed Values: • **Deselected** - The AgileShape does not overwrite existing files. • **Selected** - The AgileShape overwrites files i with the same name in the destination. Default Value: Deselected
Recursive	Definition: Determines whether the AgileShape's specified action — such as copying, uploading, or deleting — is recursive. In other words, it determines whether the action is repeated in subfolders of the target folder or document library. Allowed Values: • **Deselected** - The AgileShape performs the action only on the files located at the specified source folder. Files within subfolders aren't affected. • **Selected** - The AgileShape performs the action on the files located at the specified source folder, as well as the files that are located within the subfolders. Default Value: Deselected

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Uploading Documents to Document Set

To upload documents from the AgilePoint Server machine to a document set, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Upload Documents to Document Set** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **UploadDocSetConfiguration** field, click the **Ellipses** button.

Instructions

1. On the **Upload Document Set Configuration** window, complete the following fields as required:

Field Name	Definition
Site URL	Definition: Specifies the URL for your SharePoint site. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: http://mysharepoint:8000/sites/${mysite}
Document Library Name	Definition: Specifies the name of the SharePoint document library. Allowed Values: A valid SharePoint document library name.

Field Name	Definition
	Default Value: None Custom Attributes: Yes
Document Set	Definition: Specifies the name of the document set. Allowed Values: The name of your document set. Default Value: None Custom Attributes: Yes
LocalPath	Definition: Specifies the location of the file system folder on the local computer where the AgileShape performs the certain action such as uploading or downloading files. This property defines the source location for the files to be uploaded and the destination location for the files to be downloaded. Allowed Values: A file path relative to the AgilePoint Server application's root directory. Default Value: None Custom Attributes: No Example: • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the file once downloaded is to be located at: c:\Inetpub\wwwroot\AgilePointServer\files\MyFile.txt

Field Name	Definition
	Then, the LocalPath property must be set to the following value: files • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the file once downloaded is to be located at: c:\Inetpub\wwwroot\AgilePointServer\files\temp\MyFile.txt Then, the LocalPath property must be set to the following value: files\temp

2. Complete any additional configuration for this AgileShape according to your requirements:
   - Upload Documents to Document Set
   - AgilePart - Common Setup

Upload Files

An AgilePart that uploads files from the local file system on the AgilePoint Server machine to SharePoint.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Upload Files** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
DeleteFileAfterUpload	Definition: Specifies whether to delete the files from the source directory after upload.

Field Name	Definition
	Allowed Values: • **True** - The AgileShape deletes the files from the source folder and sub folders after uploading to SharePoint. • **False** - The AgileShape does not delete the files from the source folder and sub folders after uploading to SharePoint. Default Value: False Custom Attributes: Yes
DestinationURL	Definition: Specifies the destination URL for the SharePoint document library or sub folder where the files are uploaded. Allowed Values: A valid SharePoint document library or folder URL. Default Value: None Custom Attributes: No Example: • http://[machine name]:[port]/sites/[site name]/[document library name] • http://[machine name]:[port]/sites/[site name]/[document library name]/[folder name]
Filter	Definition: Specifies the file name or a set of files expressed using the filter expression you want to search within the specified source location. For example, files to be downloaded by the Download Files AgilePart, to be uploaded by the Upload Files AgilePart, or to be converted to PDF by the PDF Converter AgilePart. Allowed Values: • A file name. • A filter string that uses asterisks (*) as wildcards. Default Value:

Field Name	Definition
	None Custom Attributes: No Example: Following are some examples of filter expressions: • ***.*** - All files are searched. • ***.xml*** - The files that have the **.xml** file extension are searched. • ***.doc*** - The files that have the **.doc** file extension are searched. • **MyFile.xml** - Only the specific file MyFile.xml is searched. The filter action is performed at the source location, that vary depending upon the AgileShape.
LocalPath	Definition: Specifies the location of the file system folder on the local computer where the AgileShape performs the certain action such as uploading or downloading files. This property defines the source location for the files to be uploaded and the destination location for the files to be downloaded. Allowed Values: A file path relative to the AgilePoint Server application's root directory. Default Value: None Custom Attributes: No Example: • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the file once downloaded is to be located at: c:\Inetpub\wwwroot\AgilePointServer\files\MyFile.txt Then, the LocalPath property must be set to the following value:

Field Name	Definition
	files • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the file once downloaded is to be located at: c:\Inetpub\wwwroot\AgilePointServer\files\temp\MyFile.txt Then, the LocalPath property must be set to the following value: files\temp
OverWriteFile	Definition: Specifies whether the AgileShape overwrites the files if they already exist at the specified destination location. Allowed Values: • **False** - The AgileShape does not overwrite any existing file. • **True** - The AgileShape overwrites the file if it exists with the same name at the destination location. Default Value: False
Recursive	Definition: Determines whether the AgileShape's specified action - such as copying, uploading, or deleting - is recursive. In other words, it determines whether the action is repeated in subfolders of the target folder or document library. Allowed Values: • **False** - The AgileShape performs the action only on the files located at the specified source folder. Files within subfolders aren't affected. • **True** - The AgileShape performs the action on the files located at the specified source folder, as well as the files that are located within the subfolders. Default Value: False

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Uploading Files to SharePoint

To upload files from the AgilePoint Server machine to a SharePoint library or folder, do the following.

Prerequisites

- A process model that uses a SharePoint compatible process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. On the **SharePoint** stencil, drag the **Download Files** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following required properties for the **Upload Files** AgileShape:

Field Name	Definition
DestinationURL	Definition: Specifies the destination URL for the SharePoint document library or sub folder where the files are uploaded. Allowed Values:

Field Name	Definition
	A valid SharePoint document library or folder URL. Default Value: None Custom Attributes: No Example: • http://[machine name]:[port]/sites/[site name]/[document library name] • http://[machine name]:[port]/sites/[site name]/[document library name]/[folder name]
LocalPath	Definition: Specifies the location of the file system folder on the local computer where the AgileShape performs the certain action such as uploading or downloading files. This property defines the source location for the files to be uploaded and the destination location for the files to be downloaded. Allowed Values: A file path relative to the AgilePoint Server application's root directory. Default Value: None Custom Attributes: No Example: • If AgilePoint Server is installed at: c:\Inetpub\wwwroot\AgilePointServer\ And, the file once downloaded is to be located at: c:\Inetpub\wwwroot\AgilePointServer\files\MyFile.txt Then, the LocalPath property must be set to the following value: files • If AgilePoint Server is installed at:

Field Name	Definition
	c:\Inetpub\wwwroot\AgilePointServer\ And, the file once downloaded is to be located at: c:\Inetpub\wwwroot\AgilePointServer\files\temp\MyFile.txt Then, the LocalPath property must be set to the following value: files\temp

2. Complete any additional configuration for this AgileShape according to your requirements:
   - Upload Files
   - AgilePart - Common Setup

Advanced Extension

This section describes the AgileShapes in the Advanced Extension stencil.

C#

An AgilePart that adds managed custom code using the C# programming language.



Good to Know

- You can use custom classes with this AgileShape. For more information, see Setting Up Custom Classes in C# and Visual Basic

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Advanced Extension** stencil.
3. On the **Advanced Extension** stencil, drag the **Managed Code C#** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
CodeSnippet	Opens the Following Window: Managed Code CSharp Snippet Window Purpose of this Window: Builds and compiles the managed code snippet.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

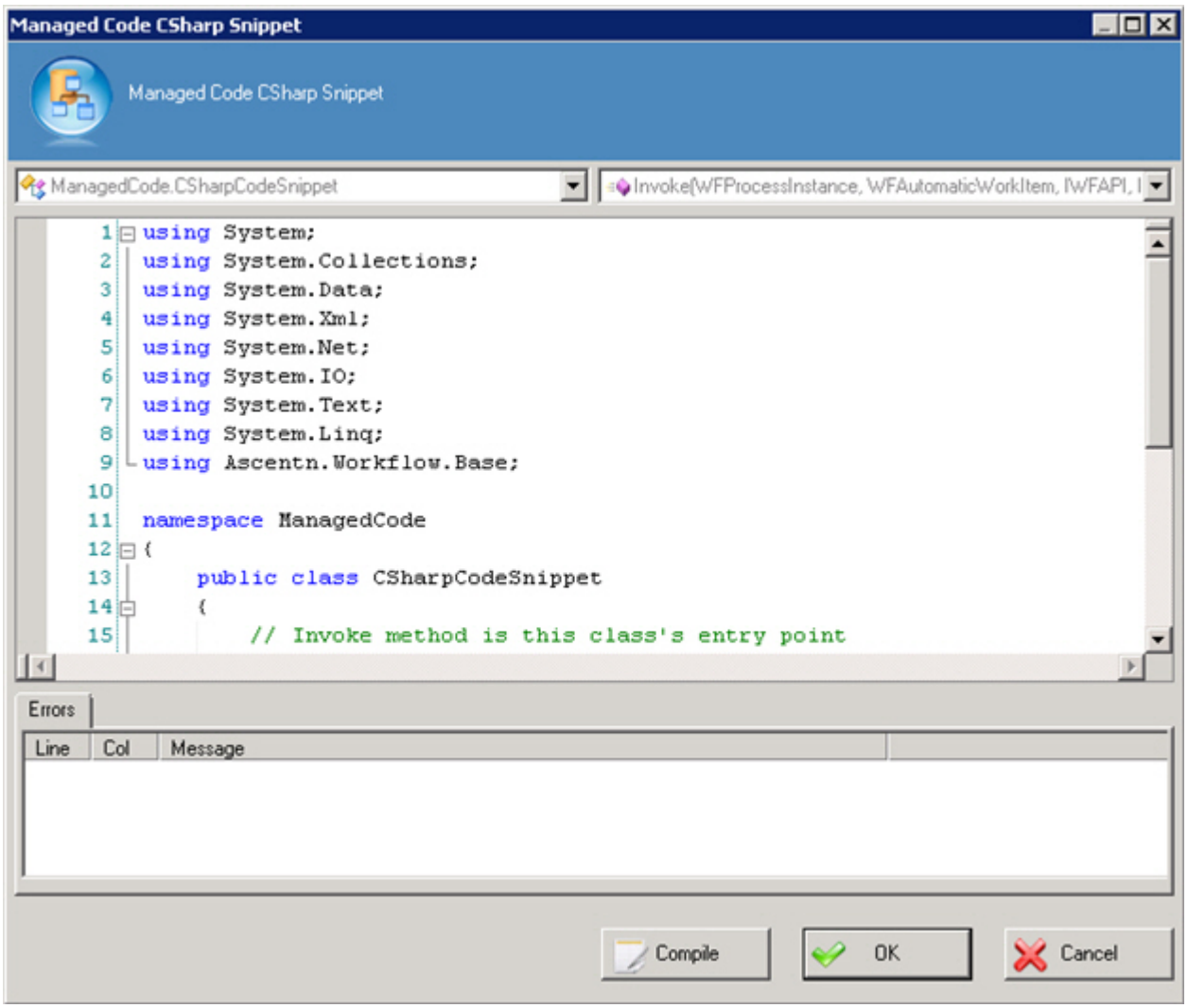
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Managed Code CSharp Snippet Window

Builds and compiles the managed code snippet.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Advanced Extension** stencil.
3. On the **Advanced Extension** stencil, drag the **Managed Code C#** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **CodeSnippet** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Class Name List	Definition:

Field Name	Definition
	Specifies the list of classes in the managed C# code window. Allowed Values: Read only.
Method Name List	Definition: Displays the list of methods in the selected class. Allowed Values: Read only.
Managed Code Snippet	Definition: Specifies your C# code in the editor. Allowed Values: A valid C# code snippet. Default Value: None Custom Attributes: No
Errors	Definition: Displays the list of errors identified during code complication. Allowed Values: Read only.

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Setting Up Custom Classes in C# and Visual Basic

The Managed Code C# and Managed Code VB AgileParts allow developers to add custom classes to their code snippets. To set up support for custom classes, do the following.

Instructions

1. Create a custom assembly as a class library using managed code C# or managed code VB.
2. Deploy the custom assembly to the GAC on all AgilePoint Server and Envision machines.
3. In a text editor, create a new file.

4. In the text file, paste the following:

```
<?xml version="1.0" encoding="utf-8" ?>
   <configuration>
      <assemblies>
         <Assembly>Infragistics2.WebUI.Misc.v8.1,
            Version=8.1.20081.1000, Culture=neutral,
            PublicKeyToken=7dd5c3163f2cd0cb
         </Assembly>
      </assemblies>
   </configuration>
```

5. Replace the information in the **<Assembly>** element with the correct information for your assembly. You can add as many Assembly nodes as required.
6. Save the file with the name **CustomAssembly.xml**.
7. Place a copy of the file in all of the following locations:
   - The root installation folder for AgilePoint Server.
   - The GAC of the AgilePoint Server machine.

     This information refers to the assembly **Infragistics2.WebUI.Misc.v8.1.dll**, and not to the CustomAssembly.xml file.
   - The root installation folder for each AgilePoint Envision instance where the custom classes will be used.
   - The GAC of each AgilePoint Envision machine.

     This information refers to the assembly **Infragistics2.WebUI.Misc.v8.1.dll**, and not to the CustomAssembly.xml file.

External Command

An AgilePart that specifies a command line action, such as a DOS or UNIX command, that is initiated from a process.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Advanced Extension** stencil.
3. On the **Advanced Extension** stencil, drag the **External Command** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: Configuration for Calling External Command Window Purpose of this Window: Specifies the details for calling an external command.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

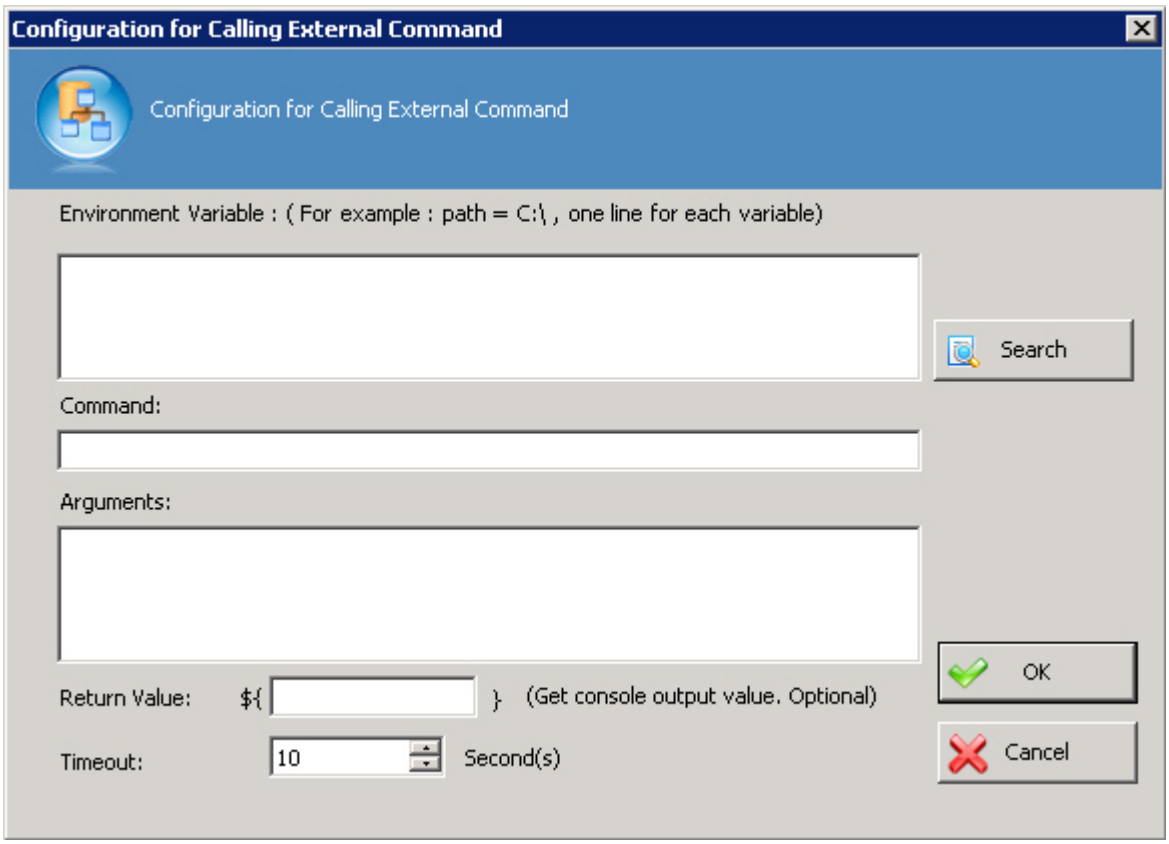
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Calling External Command Window

Specifies the details for calling an external command.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Advanced Extension** stencil.
3. On the **Advanced Extension** stencil, drag the **External Command** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Environment Variable	Definition: Specifies set of dynamic named values that affects the way running processes will behave on a computer. Allowed Values: A valid existing or defined environment variable in the system.

Field Name	Definition
	Default Value: None Custom Attributes: No Example: Path
Command	Definition: Specifies command or executable to run. Allowed Values: A valid command or executable name. Default Value: None Custom Attributes: Yes Example: CMD
Arguments	Definition: Specifies the parameters required to complete the command. Allowed Values: A valid argument for the specified command. Default Value: None Custom Attributes: Yes Example: DIR
Return Value	Definition: Stores output in specified custom attribute. Allowed Values: A valid custom attribute name. Default Value:

Field Name	Definition
	None Custom Attributes: Yes Example: OutputCustAttr
Timeout	Definition: Specifies the time to complete execution of the specified command. Allowed Values: Numeric number in seconds. Default Value: 10 Custom Attributes: No

Java

This AgileShape can be used to run a Java application.

Note: This AgileShape has been deprecated. Beginning with AgilePoint BPMS v5.0 SP4 this AgileShape is available only through the Traditional AgileShape stencils, and not through the current stencils.

Note: The Java AgilePart can only integrate with Java startup classes.

Note: The Java runtime environment must be installed on the process participant's machine.

Properties for This AgilePart

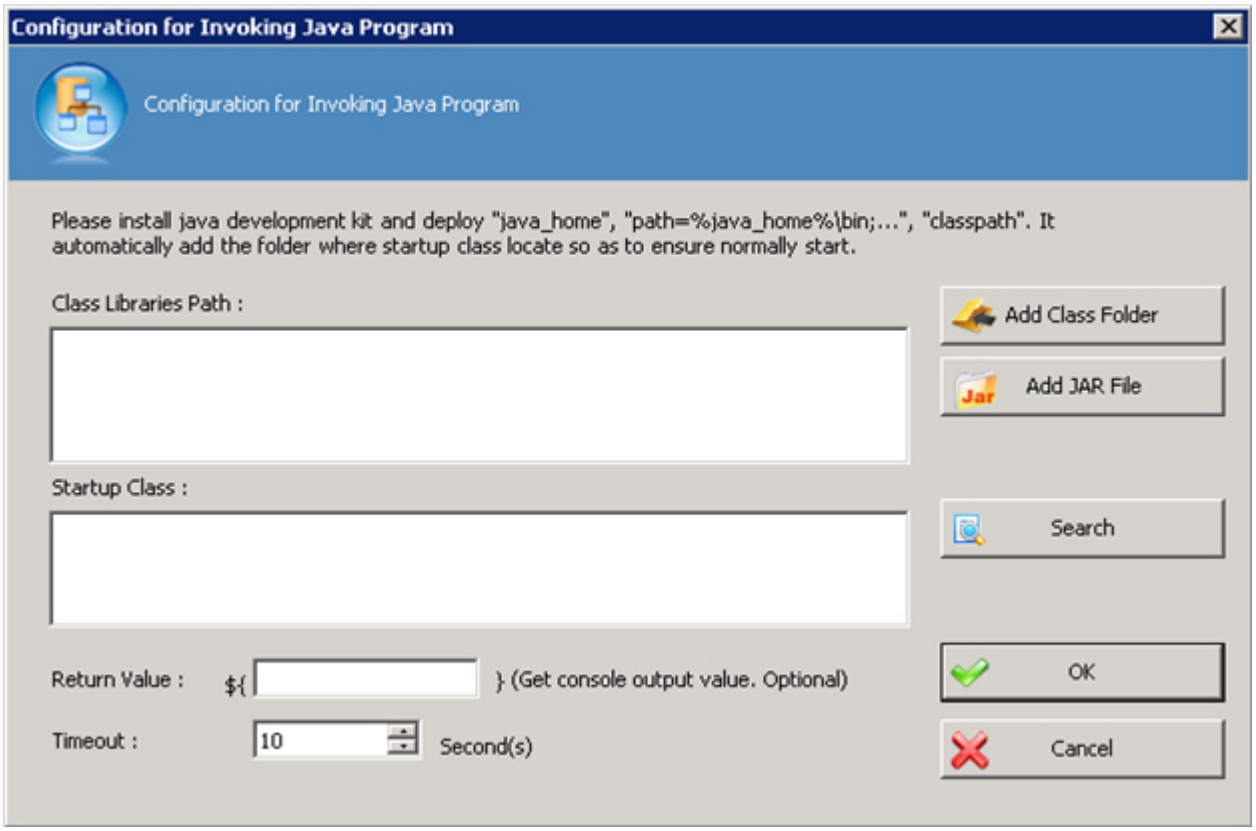
Field Name	Definition
Configure	Opens the Configuration for Invoking Java Program Window dialog box, where you can configure the details for invoking the Java program.

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Configuration for Invoking Java Program Window

This window allows the process modeler to configure the details for invoking the Java program.



1. Click the **Search** button to add a class that contains the main method for the startup class. It automatically adds the folder where the startup class is located to ensure normal startup as shown above.
2. Add all the libraries and/or class folders that the startup class requires by clicking either the **Add Class Folder** or **Add External JAR** button.
3. Enter a custom parameter name for the output value in the **"Return Value"** text box. This is an optional step and only returns the console output value.
4. To limit the run time, input the number of seconds before timeout.
5. Click **OK** when finished with the configuration.

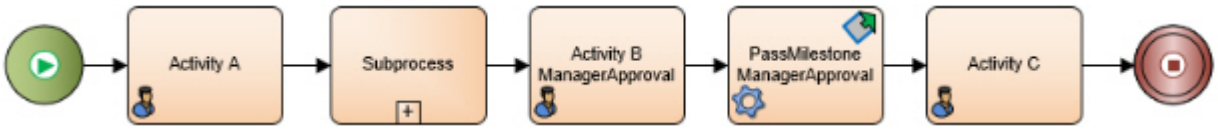
Pass Milestone

An AgilePart that , when used in conjunction with the Pass Milestone AgilePart,enables processes to wait for an event that is not within the direct process flow, and then continue once the event is complete. For example, if an activity cannot start within a process until an approval occurs in a subprocess, there is now a way to regulate the process flow based on that event. The Pass Milestone and Wait for Milestone AgileParts work together in a caller/listener model to support this functionality.

Example

Activity E in a sub process must wait for wait for a manager approval activity in its parent process before proceeding. A **Wait for Milestone** shape is placed before **Activity E** in the sub process, and a Pass Milestone shape is added to the parent process after the ManagerApproval activity. By assigning the same **Name** value (**ManagerApproval**) to the Pass Milestone and **Wait for Milestone** shapes, the two are established in a caller/listener relationship.

Parent Process



Sub Process





Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Advanced Extension** stencil.
3. On the **Advanced Extension** stencil, drag the **PassMilestone** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Name	Definition:

Field Name	Definition
	A name that identifies the Pass Milestone for use with the Wait for Milestone AgilePart. Allowed Values: A valid name for the Pass Milestone shape Default Value: PassMilestone.1 Custom Attributes: No

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Sequential Workflow

This AgileShape can be used to expose your Microsoft Windows Workflow Foundation assets at the AgilePoint process layer.



Note: This AgileShape has been deprecated. Beginning with AgilePoint BPMS v5.0 SP4 this AgileShape is available only through the Traditional AgileShape stencils, and not through the current stencils.

Properties for This AgilePart

Field Name	Definition
Configure	Opens the Workflow Foundation Assembly dialog box, where you can configure the details for invoking Windows Workflow Foundation activities.
Timeout	Default value: 600

Field Name	Definition
	Specifies the maximum amount of time (in seconds) that should be allowed for the completion of the web service call for this AgileShape.

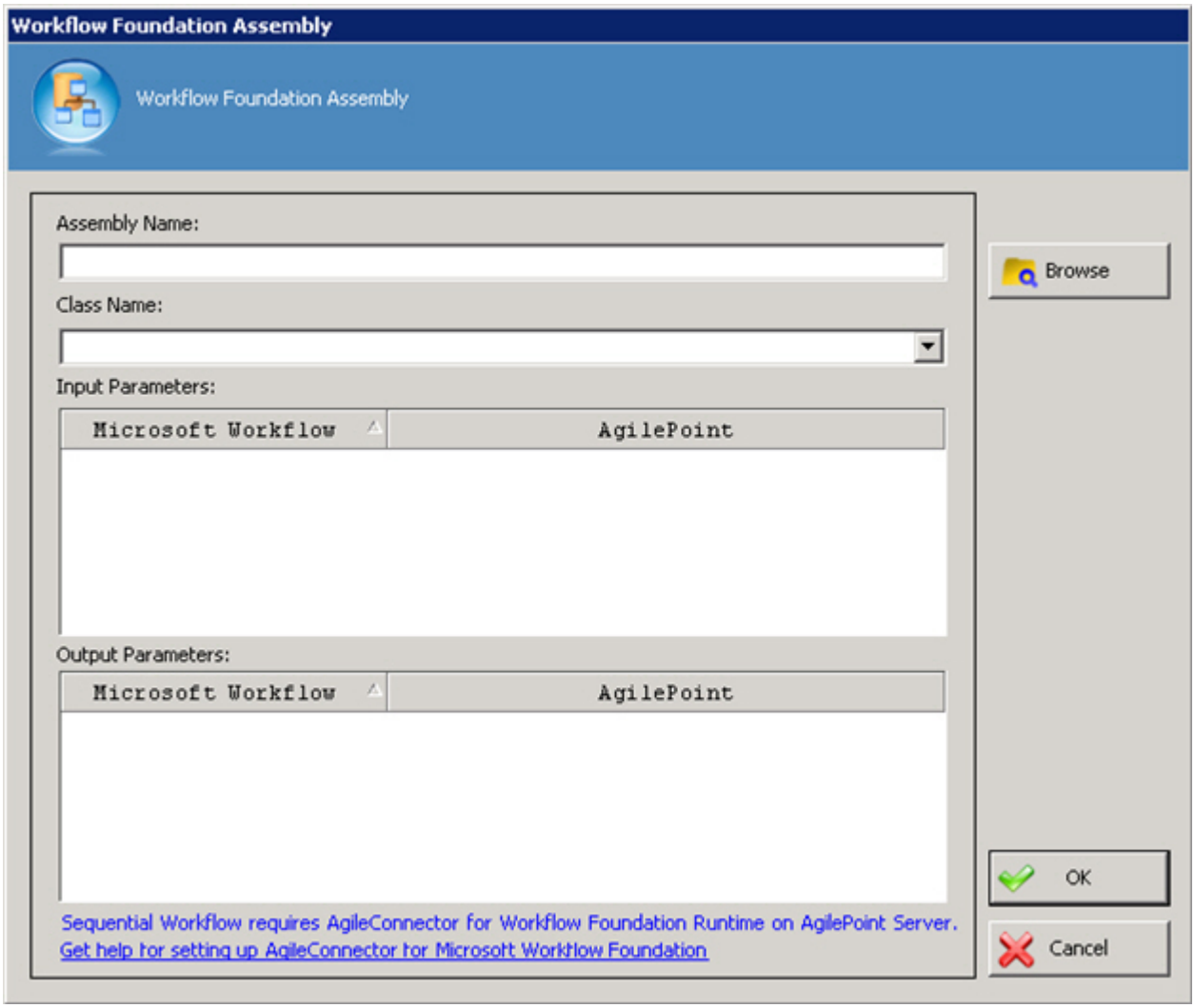
Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Workflow Foundation Assembly Window

This window allows the process modeler to configure the details for invoking Windows Workflow Foundation activities.

1. Click the **Ellipses** button to open the Workflow Foundation Assembly window.



Note: The Sequential Workflow should be built and its assembly needs to be generated before this AgilePart can be configured.

2. Click **Browse**, the following two choices are available:
   - Workflow Assembly in a folder
   - Workflow Assembly in GAC

   The Sequential Workflow assembly can be either in the GAC or in a folder. If it is in a folder, it will be added into the GAC automatically when the Sequential Workflow AgilePart is configured.
3. Choose a workflow assembly.
4. Configure the "Input Parameters" and "Output Parameters".
5. Click **OK**.

VB

An AgilePart that adds managed custom code using the Visual Basic coding language.



Good to Know

- You can use custom classes with this AgileShape. For more information, see Setting Up Custom Classes in C# and Visual Basic

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Advanced Extension** stencil.
3. On the **Advanced Extension** stencil, drag the **Managed Code VB** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
CodeSnippet	Opens the Following Window: Managed Code VB Snippet Window Purpose of this Window:

Field Name	Definition
	Sets up and compiles the Visual Basic managed code snippet.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

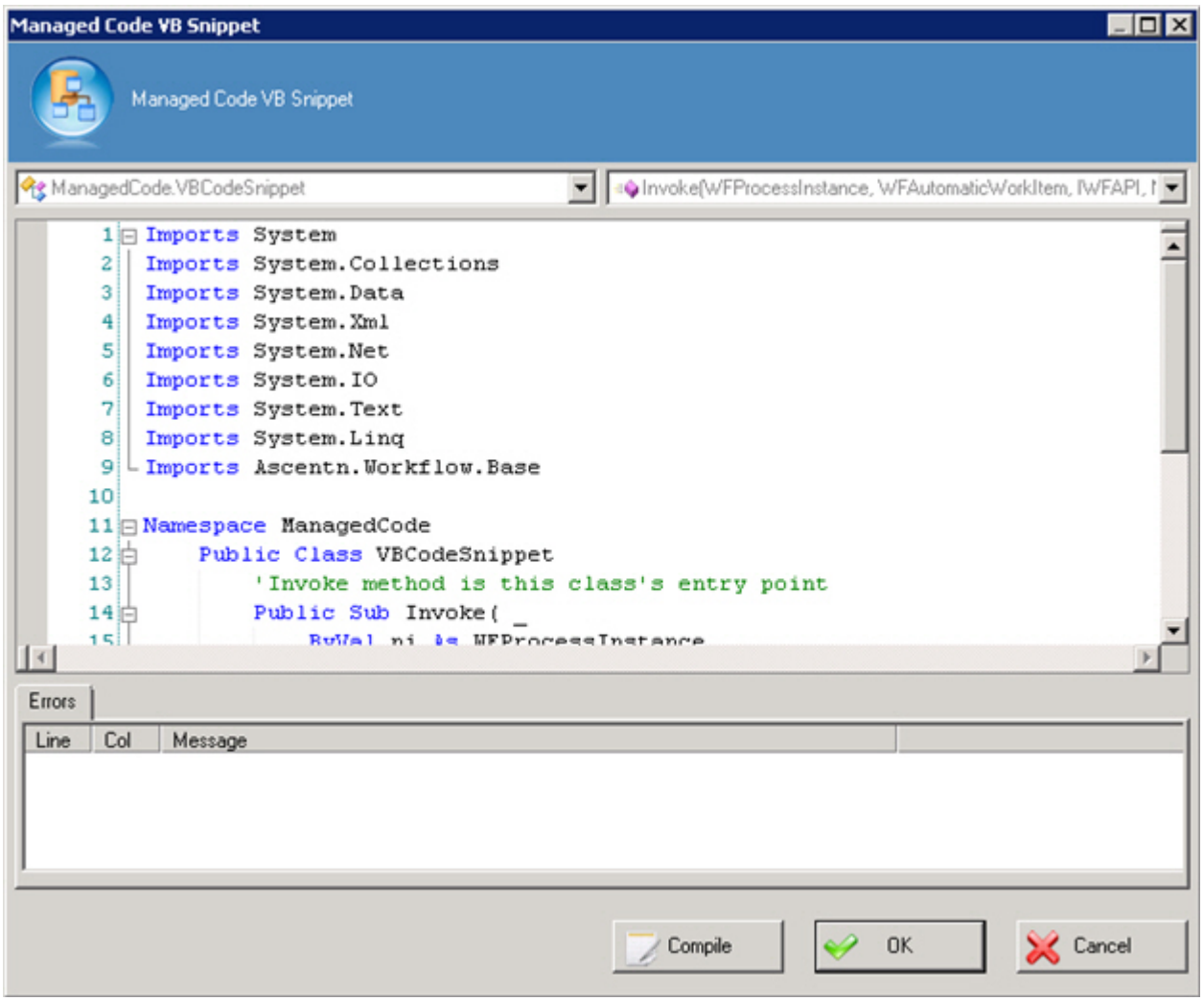
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Managed Code VB Snippet Window

Sets up and compiles the Visual Basic managed code snippet.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Advanced Extension** stencil.
3. On the **Advanced Extension** stencil, drag the **Managed Code VB** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **CodeSnippet** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Class Name List	Definition: Displays the list of Visual Basic classes.

Field Name	Definition
	Allowed Values: Read only.
Method Name List	Definition: Displays the list of methods in the selected class. Allowed Values: Read only.
Managed Code Snippet	Definition: Allows you to write Visual Basic code in the editor. Allowed Values: Valid Visual Basic software code. Default Value: None Custom Attributes: No
Errors	Definition: Displays the list of errors identified during code complication. Allowed Values: Read only.

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Setting Up Custom Classes in C# and Visual Basic

The Managed Code C# and Managed Code VB AgileParts allow developers to add custom classes to their code snippets. To set up support for custom classes, do the following.

Instructions

1. Create a custom assembly as a class library using managed code C# or managed code VB.
2. Deploy the custom assembly to the GAC on all AgilePoint Server and Envision machines.
3. In a text editor, create a new file.
4. In the text file, paste the following:

```
<?xml version="1.0" encoding="utf-8" ?>
   <configuration>
      <assemblies>
```

```
        <Assembly>Infragistics2.WebUI.Misc.v8.1,
           Version=8.1.20081.1000, Culture=neutral,
           PublicKeyToken=7dd5c3163f2cd0cb
        </Assembly>
     </assemblies>
  </configuration>
```

5. Replace the information in the **<Assembly>** element with the correct information for your assembly. You can add as many Assembly nodes as required.
6. Save the file with the name **CustomAssembly.xml**.
7. Place a copy of the file in all of the following locations:
   - The root installation folder for AgilePoint Server.
   - The GAC of the AgilePoint Server machine.

     This information refers to the assembly **Infragistics2.WebUI.Misc.v8.1.dll**, and not to the CustomAssembly.xml file.
   - The root installation folder for each AgilePoint Envision instance where the custom classes will be used.
   - The GAC of each AgilePoint Envision machine.

     This information refers to the assembly **Infragistics2.WebUI.Misc.v8.1.dll**, and not to the CustomAssembly.xml file.

Wait For Milestone

An AgilePart that, when used in conjunction with the Pass Milestone AgileSha[e, can enable a process to wait for an event that is not within the direct process flow, and then continue once the event is complete.

For example, if an activity cannot start within a process until an approval occurs in a subprocess, there is now a way to regulate the process flow based on that event. The Pass Milestone and Wait for Milestone AgileParts work together in a caller/listener model to support this functionality.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Advanced Extension** stencil.
3. On the **Advanced Extension** stencil, drag the **WaitForMilestone** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: Wait For Milestone Configuration Window Purpose of this Window: Specifies the event for which you want the process to wait.
Number	Definition: Specifies the number of Milestones to be passed in order to complete the Wait Milestone activity. Allowed Values: Any integer. Default Value: 1 Custom Attributes: No

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

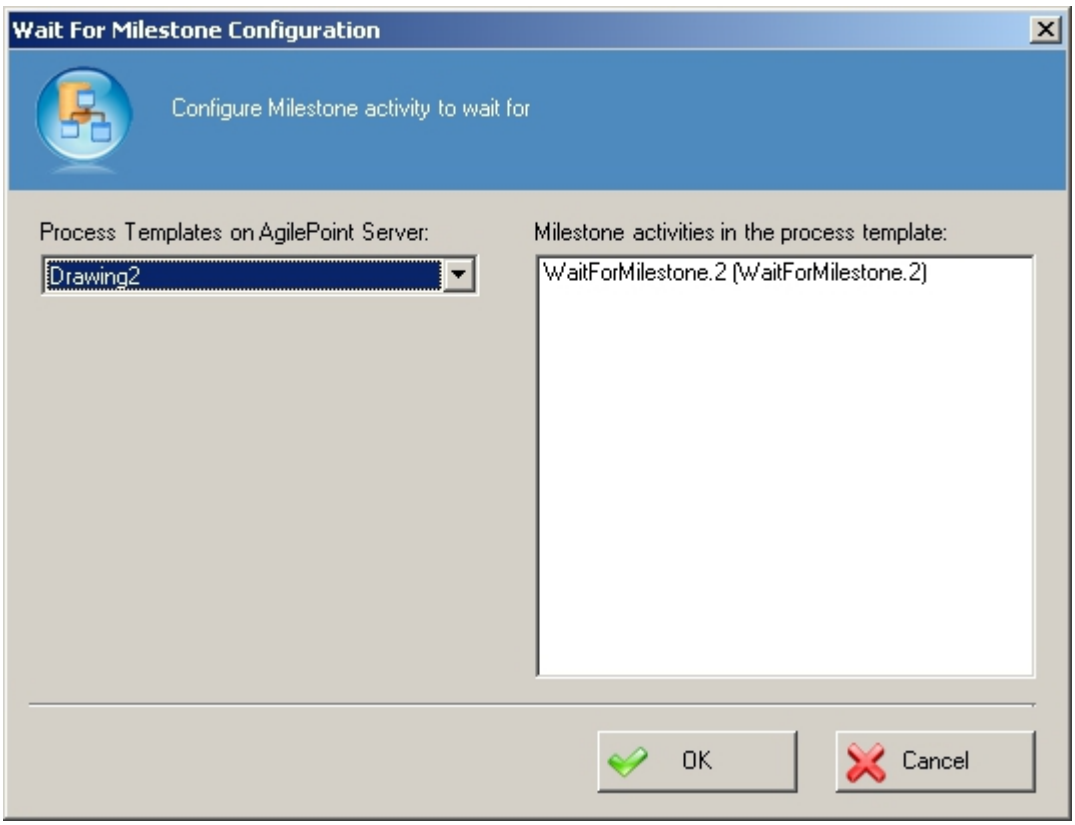
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Wait For Milestone Configuration Window

Specifies the event for which you want the process to wait.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Advanced Extension** stencil.
3. On the **Advanced Extension** stencil, drag the **WaitForMilestone** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Process Templates on AgilePoint Server	Definition: Specifies the process template with the Pass Milestone shape for which you want the current shape to wait.

Field Name	Definition
	Allowed Values: A valid process model name. Default Value: None Custom Attributes: No
Milestone activities in the process template	Definition: Specifies the Pass Milestone shape for which you want to wait. Allowed Values: A Pass Milestone name in the list. Default Value: None Custom Attributes: No

WF Rule

Note: This AgileShape has been deprecated. Beginning with AgilePoint BPMS v5.0 SP4 this AgileShape is available only through the Traditional AgileShape stencils, and not through the current stencils.

Web Services

This section describes the AgileShapes in the Web Services stencil.

Web Service

An AgilePart that calls a web service method from an AgilePoint process. You can select and configure the method call by connecting to a web service URI.

Good to Know

- You cannot use overloaded methods or circular type refs.



Prerequisites

- A valid Web Service — for example a live, valid WSDL file.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. On the **Web Services** stencil, drag the **Web Service** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: Web Service Configuration Window Purpose of this Window: Specifies the web service method to call at runtime.
Credential	Opens the Following Window: Login Window Purpose of this Window: Specifies the authentication credentials to run a web service method at runtime.
Proxy	Opens the Following Window: Configure Proxy Server Window Purpose of this Window: Specifies a proxy server used to connect to the web service. This bypasses the permission constraints on the local machine at runtime.
Timeout	Definition: Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape.

Field Name	Definition
	Allowed Values: Any positive integer. Default Value: 600 Custom Attributes: No
XmlSerializeReturnValue	Definition: Determines whether to serialize as XML the data returned by the web service method called by the AgileShape. Allowed Values: • **False** - The return value is stored into the custom attribute exactly as returned by the web service. • **True** - The return value is serialized into an XML string before being stored into the custom attribute exactly as returned by the web service. Default Value: False

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

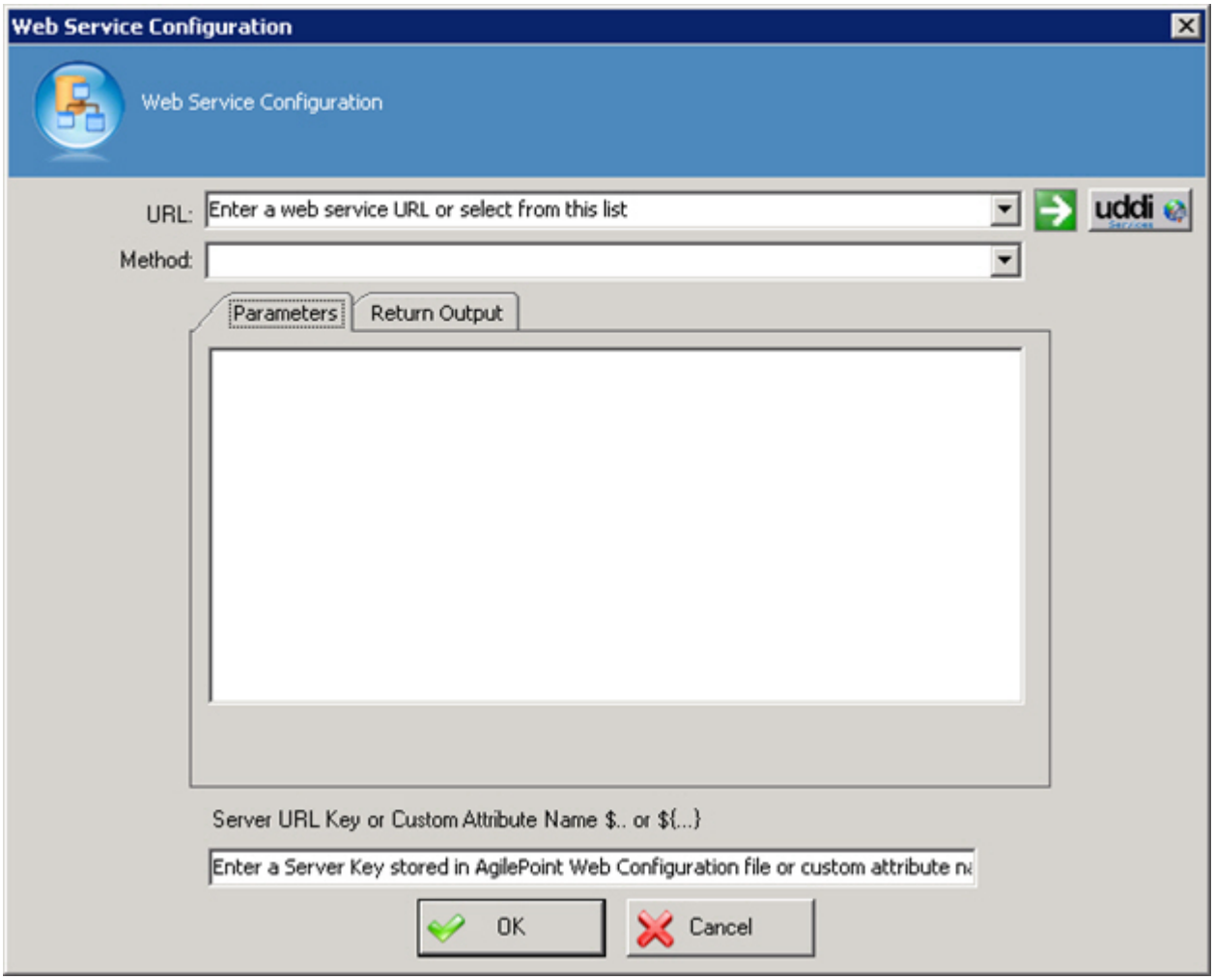
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Web Service Configuration Window

Specifies the web service method to call at runtime.



Prerequisites

- A valid Web Service — for example a live, valid WSDL file.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. On the **Web Services** stencil, drag the **Web Service** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
uddi	Opens the Following Window: Web Service Explorer Window Purpose of this Window: Finds and selects a web service using the Universal Description Discovery and Integration (UDDI) standard.
URL	Definition: Specifies the URL of the web service to which you want to connect at design time. This web service is used to populate the Method list. This may be the production URL for your web service, or it may be a URL in a development environment. Allowed Values: A valid web service URL. Default Value: None Custom Attributes: No
Connect	Function: Retrieves the list of methods for the specified web service.
Method	Definition: Specifies the name of the method you want to call. Allowed Values: Any method name. Default Value: None Custom Attributes: No
Parameters	Definition:

Field Name	Definition
	Specifies the values for the parameters. Allowed Values: A parameter value or variable. Note the following: • You can change the value by double-clicking the parameter name. You may need pause briefly between clicks for the field to enter edit mode. • You can use an XPath to a schema element as a parameter value if the process has the associated schema. Default Value: A custom attribute based on the parameter name. Custom Attributes: Yes
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. **Note:** If the process template has an associated schema, the Schema button appears.
Return Output	Definition: Specifies the expected return data. Allowed Values: A parameter value or variable. You can change the value by double-clicking the parameter name. **Note:** You may need pause briefly between clicks for the field to enter edit mode. Default Value: A custom attribute based on the parameter name. Custom Attributes: Yes

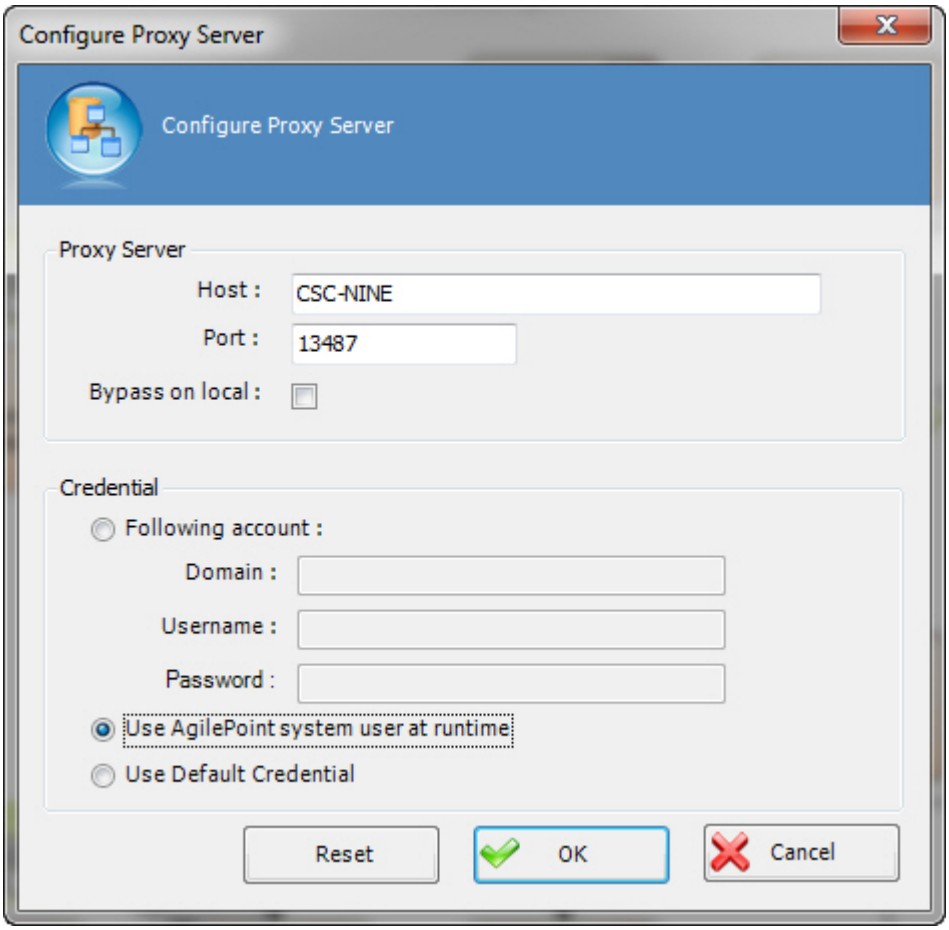
Field Name	Definition
Serialize Return as XML String	Definition: Determines whether to serialize as XML the data returned by the web service method called by the AgileShape. Allowed Values: • **False** - The return value is stored into the custom attribute exactly as returned by the web service. • **True** - The return value is serialized into an XML string before being stored into the custom attribute exactly as returned by the web service. Default Value: False
Server URL Key or Custom Attribute Name	Definition: Specifies the location of the web service to which you want to connect at runtime. This is the location of the web service in your production environment. Allowed Values: • **A web service URL** - The URL of your production web service. • **A custom attribute** - A custom attribute that stores the web service URL. • **A shared custom attribute** - A shared custom attribute that stores the web service URL. Default Value: None Custom Attributes: Yes

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Configure Proxy Server Window

Specifies a proxy server used to connect to the web service. This bypasses the permission constraints on the local machine at runtime.



Prerequisites

- A valid Web Service — for example a live, valid WSDL file.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. On the **Web Services** stencil, drag the **Web Service** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Proxy** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Host	Definition: Specifies the proxy server name.

Field Name	Definition
	Allowed Values: A valid proxy server name. Default Value: None Custom Attributes: Yes
Port	Definition: Specifies the port number of the proxy server. Allowed Values: A valid port number. Default Value: 80 Custom Attributes: No
Bypass on local	Definition: Specifies whether to bypass the proxy server when the web service exists on the local network. If you select this option, the proxy server is bypassed for the local address, and the client machine connects directly to the web service. Allowed Values: • **Deselected** - The proxy server is not bypassed. • **Selected** - The proxy server is bypassed. Default Value: Deselected
Following account	Definition: Authenticates using the credentials you specify. Allowed Values: • **Selected** - The domain, username and password fields are enabled to fetch the input from an user. • **Deselected** - Specifies that the logon as current user (AD2008R2\Administrator) option is enabled. Default Value:

Field Name	Definition
	Deselected
Domain	Definition: The authentication domain for the web service. Allowed Values: A valid domain. Default Value: None Custom Attributes: No
User Name	Definition: Specifies the user name for the web service. Allowed Values: A valid user name. Default Value: None Custom Attributes: No
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes
Use AgilePoint System User at Runtime	Definition: Specifies whether to use the AgilePoint system user account (usually the same as the AgilePoint Service account) for the action when the process is running. Allowed Values: • **Selected** - Uses the AgilePoint system user account for the action at runtime.

Field Name	Definition
	• **Deselected** - Uses the credentials specified on this window at runtime. Default Value: Deselected Custom Attributes: No
Use Default Credential	Definition: Authenticates using the local machine's Windows user account. This option can be used with Windows authentication only.

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Calling a Web Service Method from a Process

To associate a method call with the Web Service AgileShape, do the following.

Prerequisites

- A valid Web Service — for example a live, valid WSDL file.

Good to Know

- In some cases, the **type** of the object instance returned by a web method may need to implement the IConvertible interface in order for the web method to be used with the Web Service AgileShape.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. On the **Web Services** stencil, drag the **Web Service** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configuration** field, click the **Ellipses** button.

Instructions

1. On the Web Service Configuration Window, in the **URL** field enter the URL of the web service to which you want to connect, and click the **Connect** button.
2. If you want to connect to a different web service at runtime, in the **Server URL Key or Custom Attribute Name** field, enter the URL, or a custom attribute that represents this value.
3. In the **Method** list, select your web method.

4. Complete any additional configuration for this AgileShape according to your requirements:
   - Web Service Configuration Window
   - Web Service
   - AgilePart - Common Setup

Web Service Extension (WSE)

An AgilePart that accesses a web service and its methods that are registered in AgilePoint Envision. The Web Service Extension uses SOAP calls over HTTP and allows for schema mapping between the AgilePoint application schema and the web method's request schema.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. On the **Web Services** stencil, drag the **WSE (Web Service Extension)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: • WebService Configuration Window - Request Tab - Configures the request settings for a web service method call using the WSE AgileShape. • WebService Configuration Window - Response Tab - Configures the response settings for a web service method call using the WSE AgileShape. • WebService Configuration Window - Security Tab - Configures the security settings for a web service method call using the WSE AgileShape.
Credential	Opens the Following Window: Login Window Purpose of this Window:

Field Name	Definition
	Specifies the authentication credentials to run a web service method at runtime.
NeedCallback	Definition: Determines whether the AgileShape exits immediately after invoking the web service method, or waits until the activity's status is explicitly updated to Complete. Allowed Values: • **False** - The AgileShape invokes its associated .NET method synchronously. The AgileShape exits immediately after invoking the web service method. • **True** - The AgileShape invokes its associated .NET method asynchronously. The AgileShape exits only after the activity's status is explicitly updated at runtime. This explicit update can be performed manually using AgilePoint Enterprise Manager or automatically by an external system — for example, through a separate application that uses the AgilePoint API to programmatically update the activity's status. Default Value: False Custom Attributes: No
Proxy	Definition: Specifies a proxy server used to connect to the web service. This bypasses the permission constraints on the local machine at runtime. Allowed Values: A valid proxy server. Default Value: None Custom Attributes: No Example: http://agilepoint/InternalProxy
Timeout	Definition:

Field Name	Definition
	Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape. Allowed Values: Any positive integer. Default Value: 600 Custom Attributes: No

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

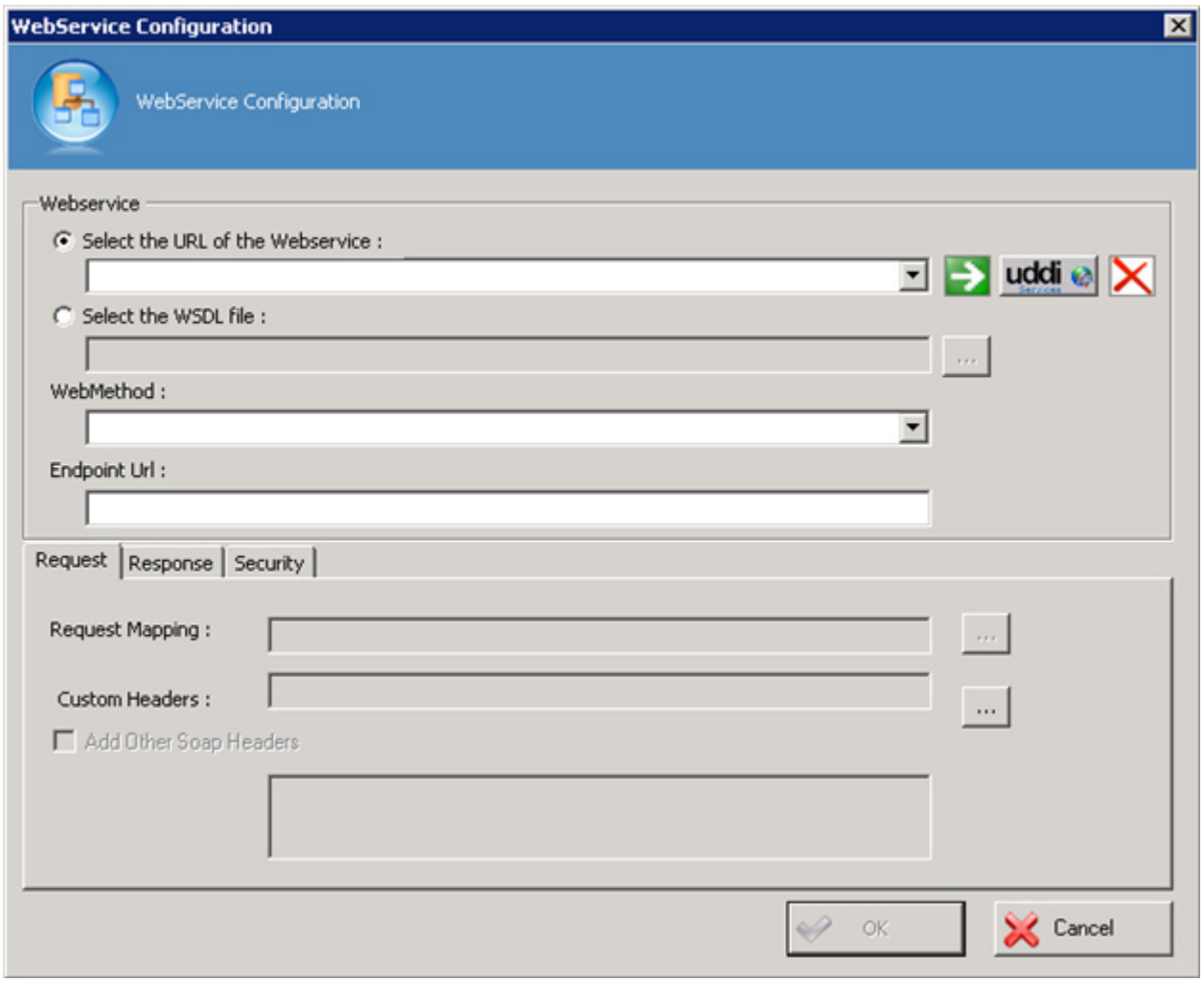
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

WebService Configuration Window - Request Tab

Configures the request settings for a web service method call using the WSE AgileShape.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. On the **Web Services** stencil, drag the **WSE (Web Service Extension)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Select the URL of the web service	Definition: Specifies the URL of your web service.

Field Name	Definition
	Allowed Values: A valid web service URL. Default Value: None Custom Attributes: No
uddi	Opens the Following Window: Web Service Explorer Window Purpose of this Window: Finds and selects a web service using the Universal Description Discovery and Integration (UDDI) standard.
Select the WSDL file	Definition: Determines whether to use a WSDL file to access the web service method. Allowed Values: • **Deselected** - Specifies to use the URL of your web service. • **Selected** - Specifies to use the WSDL file to access your web service method. Use the Ellipses button to browse the WSDL file. Once you select the WSDL file, the correct values are populated in the fields, such as web service method names. Default Value: Deselected
Connect	Function: Retrieves the list of methods and the endpoint URL for the specified web service.
WebMethod	Definition: Specifies the name of the method you want to call. Allowed Values: A valid web method name defined in the specified WCF or web service. Default Value:

Field Name	Definition
	None Example: StartProcInst
Endpoint Url	Definition: Specifies the URL of the endpoint of the web service or WCF service you want to connect. Allowed Values: A valid endpoint URL. Default Value: None However, once a web service is connected, the endpoint URL is populated, if it is defined in the WSDL file. Custom Attributes: No
Request Mapping	Definition: Maps the web service request to the AgilePoint process schema. This is required only if the request is passing values to the web method as parameters as data that comes from the process model schema. Allowed Values: Click the Ellipses button to open the Schema Mapper Window. Use this window to map the request to your process schema. Default Value: None
Custom Headers	Definition: Specifies the custom headers required for the web service. Custom headers contain application-specific information in the SOAP header. Custom headers are mostly used to provide security information, such as authentication credentials. Allowed Values:

<table>
<tr><th>Field Name</th><th>Definition</th></tr>
<tr><td></td><td>Read only - A message is displayed if the custom headers are set for the web service.

Use the Ellipses button to display the custom headers set for the web service.

Example:

<table><tr><th>Custom Header</th><th>Value</th></tr><tr><td>WSClietInfo.AppName</td><td>AgilePoint Envision</td></tr><tr><td>WSClietInfo.UserName</td><td>Ap13\Administrator</td></tr><tr><td>WSClietInfo.Locale</td><td>en-us</td></tr></table></td></tr>
<tr><td>Add Other Soap Headers</td><td>Definition:

Determines whether other SOAP headers are to be added.

Allowed Values:

• Deselected - Other SOAP headers are not added.
• Selected - Other SOAP headers are added.

When you select the option, the text box becomes available allowing you to specify the required SOAP headers.

Default Value:

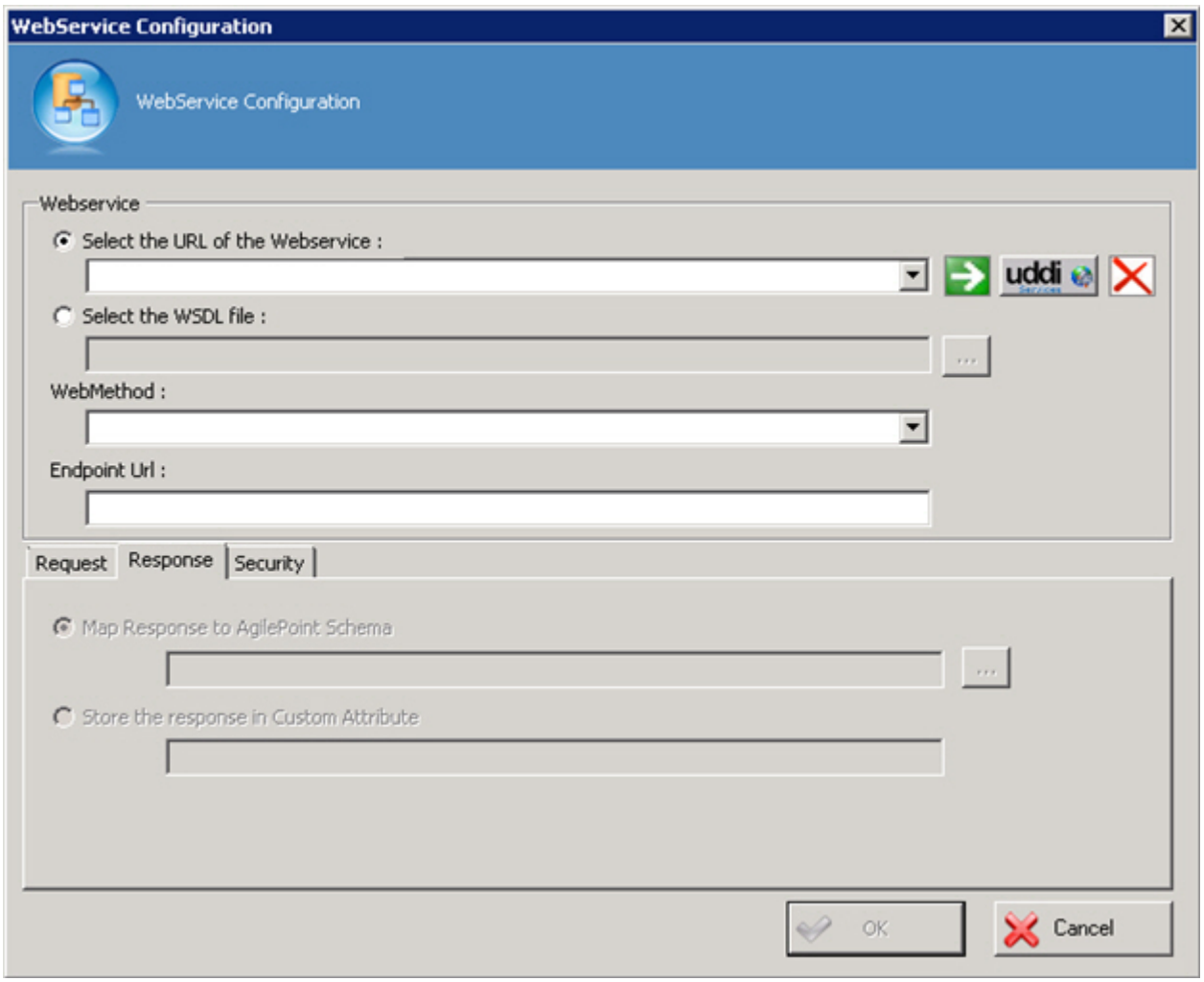
Selected</td></tr>
</table>

Common Configuration Tasks

- Data Binding
- Using Process Attributes

WebService Configuration Window - Response Tab

Configures the response settings for a web service method call using the WSE AgileShape.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. On the **Web Services** stencil, drag the **WSE (Web Service Extension)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
uddi	Opens the Following Window: Web Service Explorer Window

Field Name	Definition
	Purpose of this Window: Finds and selects a web service using the Universal Description Discovery and Integration (UDDI) standard.
Select the URL of the web service	Definition: Specifies the URL of your web service. Allowed Values: A valid web service URL. Default Value: None Custom Attributes: No
Select the WSDL file	Definition: Determines whether to use a WSDL file to access the web service method. Allowed Values: • **Deselected** - Specifies to use the URL of your web service. • **Selected** - Specifies to use the WSDL file to access your web service method. Use the Ellipses button to browse the WSDL file. Once you select the WSDL file, the correct values are populated in the fields, such as web service method names. Default Value: Deselected
Connect	Function: Retrieves the list of methods and the endpoint URL for the specified web service.
WebMethod	Definition: Specifies the name of the method you want to call. Allowed Values: A valid web method name defined in the specified WCF or web service. Default Value:

Field Name	Definition
	None Example: StartProcInst
Endpoint Url	Definition: Specifies the URL of the endpoint of the web service or WCF service you want to connect. Allowed Values: A valid endpoint URL. Default Value: None However, once a web service is connected, the endpoint URL is populated, if it is defined in the WSDL file. Custom Attributes: No
Map Response to AgilePoint Schema	Definition: Determines whether the web service response is mapped to the AgilePoint schema. Allowed Values: Click the Ellipses button to open the Schema Mapper Window. Use this window to map the response to your process schema. Default Value: None
Store the response in Custom Attribute	Definition: Specifies the name of the custom attribute that is used to store the response to a method call. The call may be to a web service, Web Service Extension, WCF service, or web application, depending upon the context. Allowed Values: A custom attribute. Default Value: None

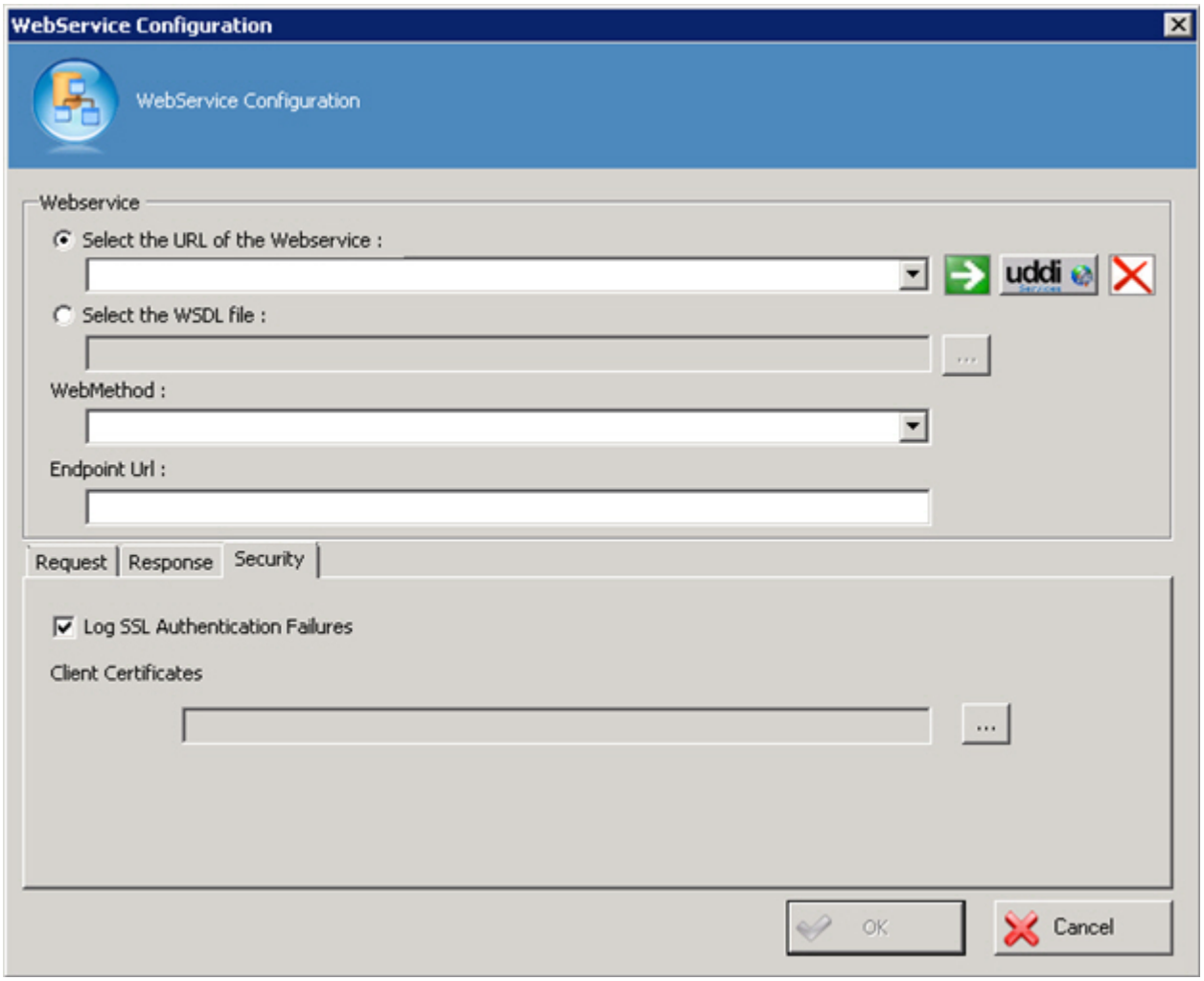
Field Name	Definition
	Custom Attributes: Yes Example: ${GroupMembers}

Common Configuration Tasks

- Data Binding
- Using Process Attributes

WebService Configuration Window - Security Tab

Configures the security settings for a web service method call using the WSE AgileShape.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. On the **Web Services** stencil, drag the **WSE (Web Service Extension)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
uddi	Opens the Following Window: Web Service Explorer Window Purpose of this Window: Finds and selects a web service using the Universal Description Discovery and Integration (UDDI) standard.
Select the URL of the web service	Definition: Specifies the URL of your web service. Allowed Values: A valid web service URL. Default Value: None Custom Attributes: No
Select the WSDL file	Definition: Determines whether to use a WSDL file to access the web service method. Allowed Values: • **Deselected** - Specifies to use the URL of your web service. • **Selected** - Specifies to use the WSDL file to access your web service method. Use the Ellipses button to browse the WSDL file. Once you select the WSDL file, the correct values are populated in the fields, such as web service method names.

Field Name	Definition
	Default Value: Deselected
Connect	Function: Retrieves the list of methods and the endpoint URL for the specified web service.
WebMethod	Definition: Specifies the name of the method you want to call. Allowed Values: A valid web method name defined in the specified WCF or web service. Default Value: None Example: StartProcInst
Endpoint Url	Definition: Specifies the URL of the endpoint of the web service or WCF service you want to connect. Allowed Values: A valid endpoint URL. Default Value: None However, once a web service is connected, the endpoint URL is populated, if it is defined in the WSDL file. Custom Attributes: No
Log SSL Authentication Failures	Definition: Determines whether to log SSL Client authentication failure. Allowed Values: • **Selected** - Errors occurring due to the SSL authentication failure are recorded in an AgilePoint server log. For more information, see Where Are the AgilePoint Logs? in the Documentation Library.

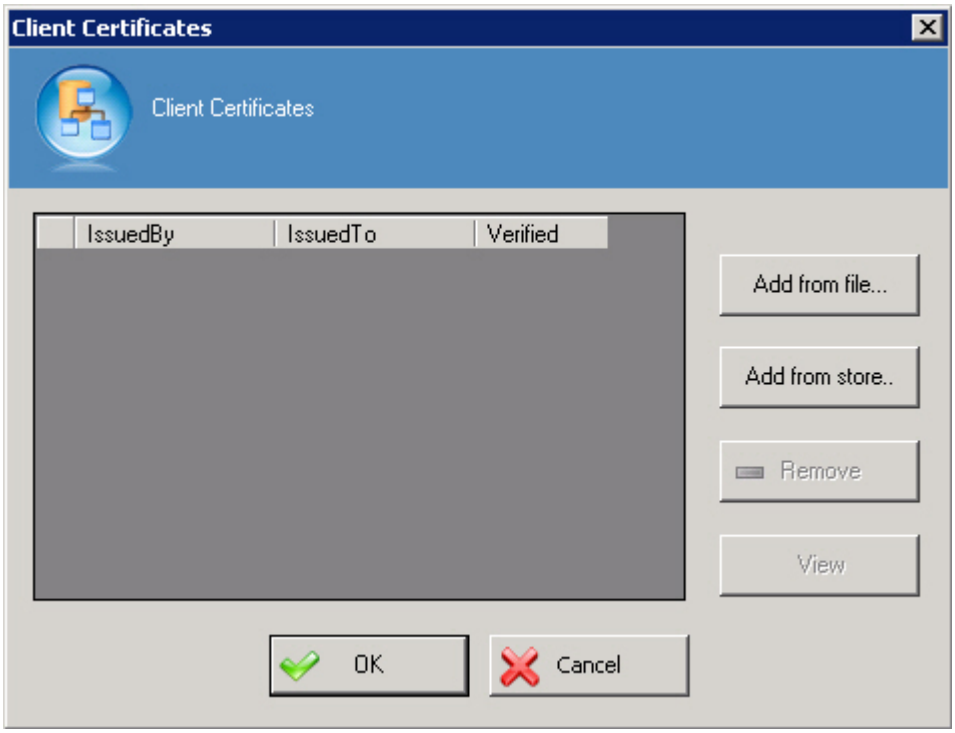
Field Name	Definition
	• **Deselected** - Errors occurring due to the SSL authentication failure are not logged. Default Value: Selected
Client Certificates	Opens the Following Window: Client Certificates Window Purpose of this Window: Manages client certificates for web service authentication.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Client Certificates Window

Manages client certificates for web service authentication.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. On the **Web Services** stencil, drag the **WSE (Web Service Extension)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. Under the WebService Configuration Window - Security Tab, click the **Client Certificates** Ellipses button.

Field Definitions

Field Name	Definition
Add from file	Function: Adds a certificate file from your computer. Browse the required file.
Add from store	Opens the Following Window: Select Client Certificates Window Purpose of this Window: Selects a client certificate on your machine's local client certificates store.
IssuedBy	Definition: Specifies the name of the issuer of the certificate - the certificate issuing authority. Allowed Values: Read only. The values are populated when you add a client certificate.
IssuedTo	Definition: Specifies the domain name the certificate has been issued. Allowed Values: Read only. The values are populated when you add a client certificate.
Verified	Definition:

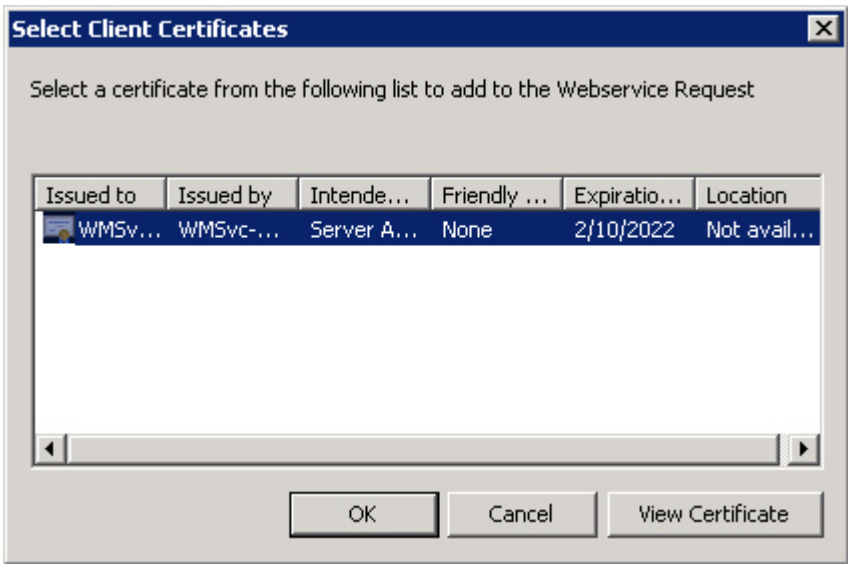
Field Name	Definition
	Indicates whether the client certificate is verified: • **Selected** - The client certificate is verified. • **Deselected** - The client certificate is not verified. Allowed Values: Read only. The values are populated when you add a client certificate. You cannot select or deselect the Verified check box.
Remove	Function: Deletes the selected row from the Client Certificates list.
View	Function: Displays the detailed information about the SSL certificate, such as the domain name, the validity period, and the issuer.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select Client Certificates Window

Selects a client certificate on your machine's local client certificates store.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. On the **Web Services** stencil, drag the **WSE (Web Service Extension)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. Under the WebService Configuration Window - Security Tab, click the **Client Certificates** Ellipses button.
7. On the Client Certificates Window, click **Add from store**.

Field Definitions

Field Name	Definition
Issued to	Definition: Specifies the domain name the certificate has been issued. Allowed Values: Read only.
Issued by	Definition: Specifies the name of the issuer of the certificate - the certificate issuing authority. Allowed Values:

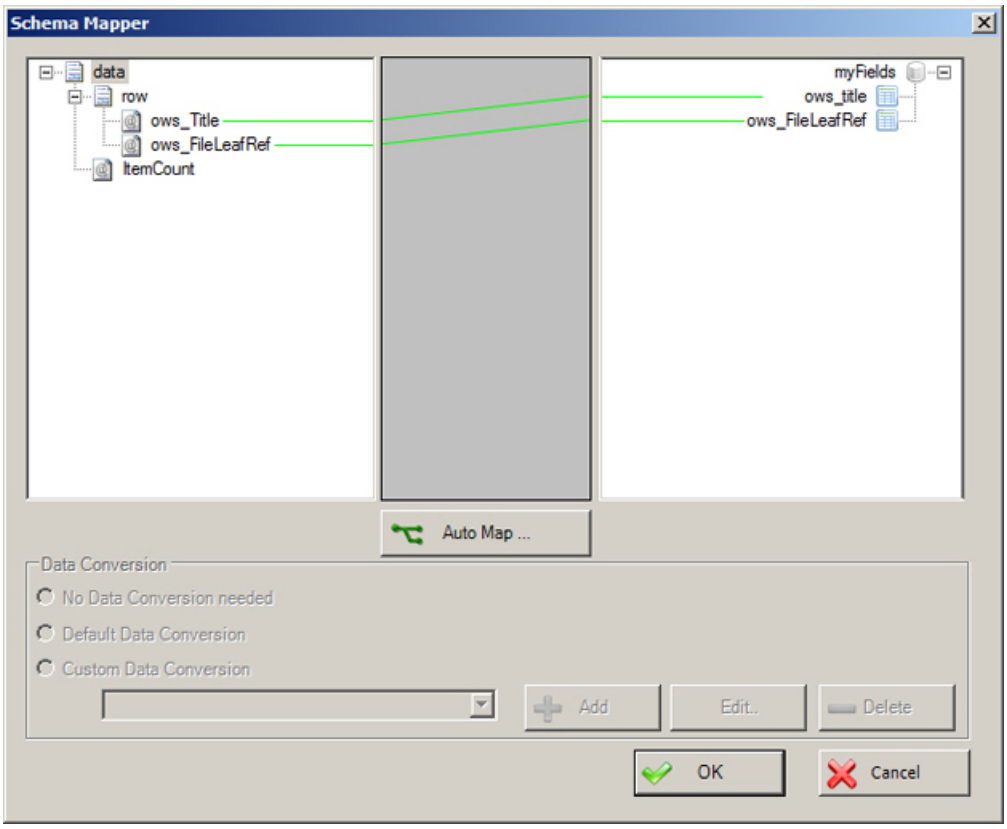
Field Name	Definition
	Read only.
Intended Purposes	Definition: Specifies the purpose of the certificate, such as Server authentication. Allowed Values: Read only.
Friendly Name	Definition: Specifies the friendly name for the certificate. Allowed Values: Read only.
Expiration Date	Definition: Specifies the date when the certificate validity is terminated. Allowed Values: Read only.
Location	Definition: Specifies the information about the geographical location your organization is registered. Allowed Values: Read only.
View Certificate	Function: Displays the detailed information about the SSL certificate, such as the domain name, the validity period, and the issuer.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Schema Mapper Window

Maps SharePoint fields, form fields, web methods, or other input sources to an XML schema.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **SharePoint**
   - **Web Services**
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **CAML Query**
   - **WSE (Web Service Extension)**
   - **WCF (Windows Communication Foundation)**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The fields that display vary, depending upon the AgsileShape you are using. For example, **Configure**.
6. On one of the following windows, under the **Output Mapping** or **Request/Response** tab, click the **Ellipses** button:
   - CAML Query Builder Configuration Window - Output Mapping Tab
   - WebService Configuration Window - Request Tab
   - WebService Configuration Window - Response Tab
   - Configuration for WCF Service Window - Request Tab

- Configuration for WCF Service Window - Response Tab

Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options:

- **Reset All Mappings** - Deletes all mappings that have been made in the Schema Mapper for this activity.
- **Remove Invalid Mappings only** - Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same.
- **Cancel** - Aborts opening the Schema Mapper window.

Field Definitions

Field Name	Definition
Mapping Schemas for Request/Response and Process Model	Definition: Maps the schemas for a service's request or response and the AgilePoint schema: • CAML query schema for a response and AgilePoint schema • WSE service schema for a request/response and the AgilePoint schema • WCF service schema for a request/response and the AgilePoint schema The source and the destination schemas are displayed in a tree-view structure in the left and right panes. Allowed Values: Read only - However, the drag and drop operations are supported to map the schemas. Drag a data node from the source schema pane to the destination schema pane: • Green line - The data type of source and destination nodes matches. • Blue line - The data type of source and destination nodes doesn't match. The data conversion is required to map the schemas. • Red line - Specifies that the custom data conversion is required.
Automap	Function: Maps all fields in the data source and the process schema that have the same name.
No Data Conversion needed	Definition:

Field Name	Definition
	Determines whether the data conversion is not required between the source and the destination schema data fields. Allowed Values: • **Deselected** - Data conversion is required between the schema data fields. • **Selected** - Data conversion is not required between the schema data fields. Default Value: None However, the No Data Conversion needed option is selected if the data type of the source and destination schema data fields matches.
Default Data Conversion	Definition: Determines whether the default data conversion is required between the source and the destination schema fields. Allowed Values: • **Deselected** - Default data conversion is not required between the schema data fields. • **Selected** - Default data conversion is required between the schema data fields. Default Value: None However, the Default Data Conversion option is selected if the data type of the source and destination schema fields doesn't match.
Custom Data Conversion	Definition: Determines whether the custom data conversion is required. You can create your own data conversion types by using the Add button. Allowed Values: • **Deselected** - Custom data conversion is not required. • **Selected** - Custom data conversion is required. Default Value: Deselected
Add	Opens the Following Window:

Field Name	Definition
	Custom Mapping Code Window Purpose of this Window: Specifies custom C# code that can be used to map fields to an XML schema.
Edit	Opens the Following Window: Custom Mapping Code Window Purpose of this Window: Specifies custom C# code that can be used to map fields to an XML schema.
Delete	Function: Deletes the selected custom data conversion from the list.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Calling a Method from a Web Service Extension

To call a method from a Web Service Extension (WSE), do the following.

Prerequisites

- A valid Web Service — for example a live, valid WSDL file.

Good to Know

- In some cases, the **type** of the object instance returned by a web method may need to implement the IConvertible interface in order for the web method to be used with the Web Service AgileShape.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. On the **Web Services** stencil, drag the **WSE (Web Service Extension)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Instructions

1. To select your web service, do one of the following.
   - To use a web service url:
     1. On the WebService Configuration Window, click **Select the URL of the Webservice**.
     2. In **Select the URL of the Webservice** field, enter the URL for your web service, and click the connect button.
   - To use a WSDL file:
     1. Click **Select the WSDL file**.
     2. On **Select the WSDL file** field, click the **Ellipses** button.
     3. Select your WSDL file.
     4. Click the connect button.
2. In the **WebMethod** list, select your web method.
3. If you want to map the outbound data for the web service call to your process schema, on the **Request** tab, complete the following field.

Field Name	Definition
Request Mapping	Definition: Maps the web service request to the AgilePoint process schema. This is required only if the request is passing values to the web method as parameters as data that comes from the process model schema. Allowed Values: Click the Ellipses button to open the Schema Mapper Window. Use this window to map the request to your process schema. Default Value: None

4. If you want to map inbound data retrieved from the web service call to your process, click the **Response** tab, and then do one of the following:
   - To map the response to your AgilePoint schema, complete the following field.

Field Name	Definition
Map Response to AgilePoint Schema	Definition: Determines whether the web service response is mapped to the AgilePoint schema.

Field Name	Definition
	Allowed Values: Click the Ellipses button to open the Schema Mapper Window. Use this window to map the response to your process schema. Default Value: None

- To map the response to a custom attribute, complete the following field.

Field Name	Definition
Store the response in Custom Attribute	Definition: Specifies the name of the custom attribute that is used to store the response to a method call. The call may be to a web service, Web Service Extension, WCF service, or web application, depending upon the context. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes Example: ${GroupMembers}

5. Complete any additional configuration for this AgileShape according to your requirements:
   - Web Service Extension (WSE)
   - WebService Configuration Window - Request Tab
   - WebService Configuration Window - Response Tab
   - WebService Configuration Window - Security Tab
   - AgilePart - Common Setup

Windows Communication Foundation (WCF)

An AgilePart that calls services that use Windows Communication Foundation (WCF).



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. On the **Web Services** stencil, drag the **WCF (Windows Communication Foundation)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: • Configuration for WCF Service Window - Request Tab - Sets up communication with a WCF service. • Configuration for WCF Service Window - Response Tab - This dialog box enables you to configure communication with a WCF service.
Credential	Opens the Following Window: Login Window Purpose of this Window: Specifies the authentication credentials to run a web service method at runtime.
NeedCallback	Definition: Determines whether the AgileShape exits immediately after invoking the web service method, or waits until the activity's status is explicitly updated to Complete. Allowed Values: • **False** - The AgileShape invokes its associated .NET method synchronously. The AgileShape exits immediately after invoking the web service method. • **True** - The AgileShape invokes its associated .NET method asynchronously. The AgileShape exits only after the activity's status

Field Name	Definition
	is explicitly updated at runtime. This explicit update can be performed manually using AgilePoint Enterprise Manager or automatically by an external system — for example, through a separate application that uses the AgilePoint API to programmatically update the activity's status. Default Value: False Custom Attributes: No
Timeout	Definition: Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape. Allowed Values: Any positive integer. Default Value: 600 Custom Attributes: No

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

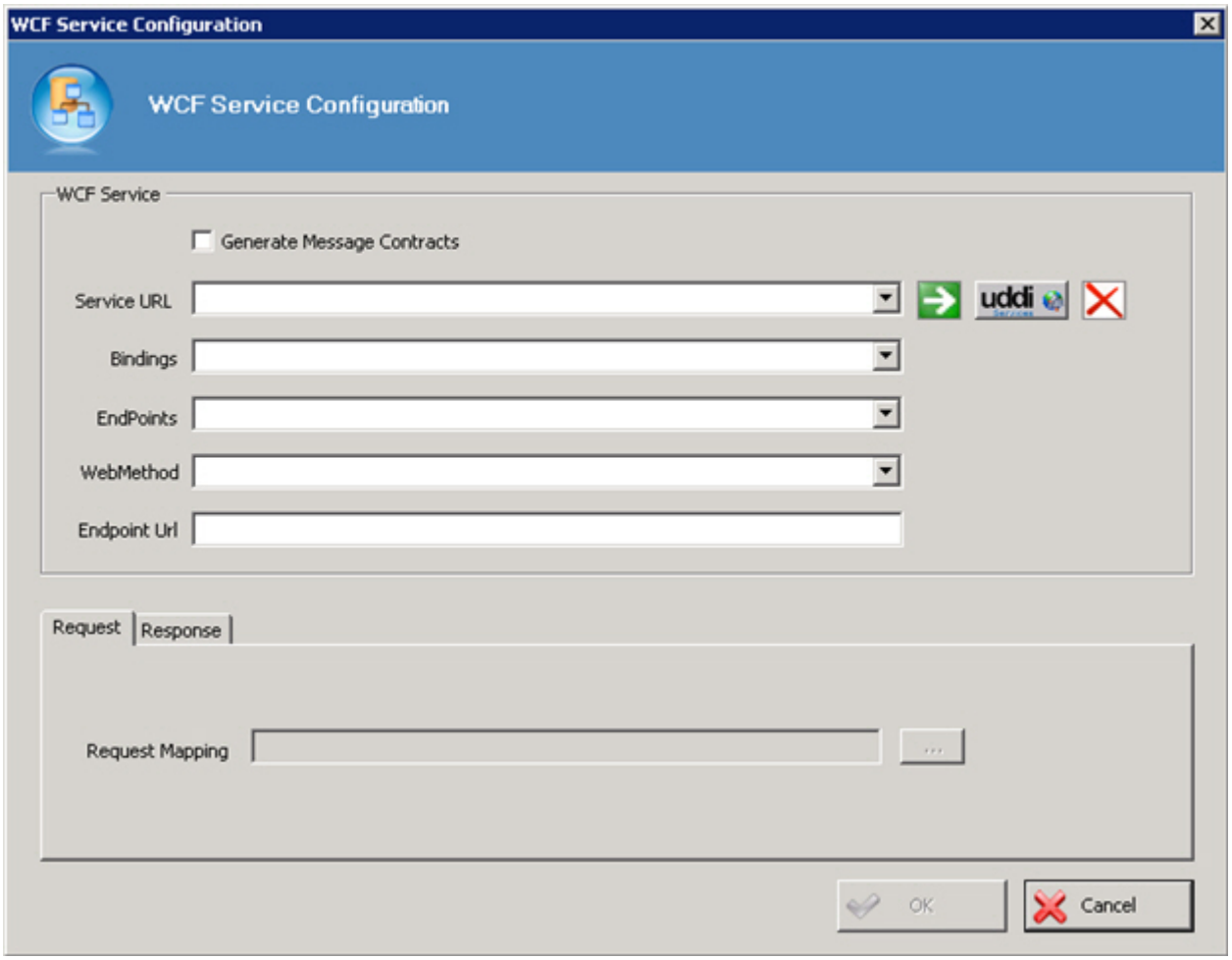
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for WCF Service Window - Request Tab

Sets up communication with a WCF service.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. On the **Web Services** stencil, drag the **WCF (Windows Communication Foundation)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Generate Message Contracts	Definition: Determines whether to generate a message contract for the method you are calling. Allowed Values: • **Deselected** - Message contracts are not generated. • **Selected** - Message contracts are generated. Default Value: Deselected
uddi	Opens the Following Window: WCF Service Explorer Window Purpose of this Window: Finds and selects a WCF service using the Universal Description Discovery and Integration (UDDI) standard.
Service URL	Definition: Specifies the URL of your WCF service. Allowed Values: A valid WCF service URL. Default Value: None Custom Attributes: No Example: • http://demo3:80/agilepointserver/admin.sbc?wsdl In this example, SBC is the extension name for the WCF services, and ?WSDL is the query string that contains all the information such as method names of the specific WCF service. However, you can leave the extension name in the URL, as follows: http://demo3:80/agilepointserver/admin?wsdl

Field Name	Definition
Connect	Function: Retrieves the list of methods, data bindings, and service endpoints for the specified WCF service.
Bindings	Definition: Specifies the data binding you want to use. The binding defines the communication details required to connect to the WCF endpoint. Allowed Values: • WSHttpBinding • NetTcpBinding • BasicHttpBinding Default Value: None
Endpoints	Definition: Specifies the WCF service endpoint you want to connect. Endpoints provide access to the WCF service data. Allowed Values: A list of Endpoints populated from the WSDL file of the WCF service. Default Value: None Example: NetTcpBinding_IWCFWorkflowService
WebMethod	Definition: Specifies the name of the method you want to call. Allowed Values: A valid web method name defined in the specified WCF or web service. Default Value: None Example: StartProcInst

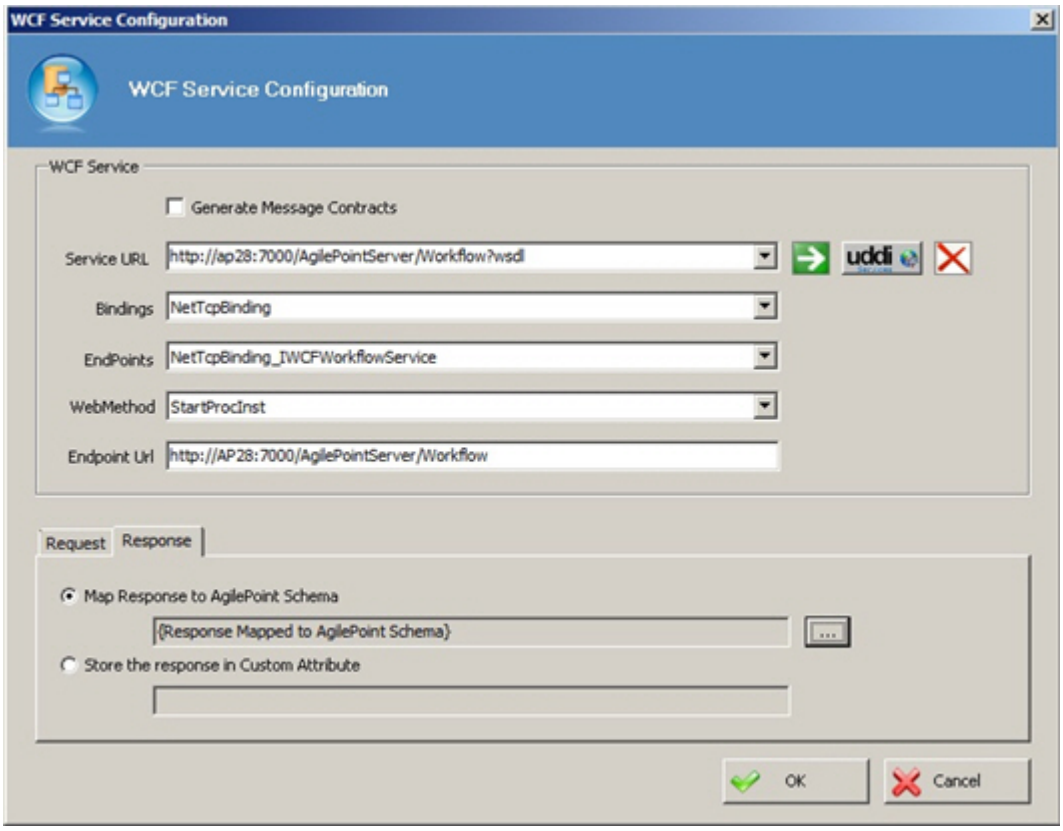
Field Name	Definition
Endpoint Url	Definition: Specifies the URL of the endpoint of the web service or WCF service you want to connect. Allowed Values: A valid WCF service URL or custom attribute. Default Value: None Custom Attributes: No Example: http://CSC-NINE:7002/AgilePointServer/Workflow
Request Mapping	Definition: Specifies whether the request is mapped to the WCF service schema. This is required only if the request is passing values to the web method via parameters as data that comes from the process model schema. Allowed Values: Click the Ellipses button to open the Schema Mapper Window. Use this window to map the request to your process schema. Default Value: None

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Configuration for WCF Service Window - Response Tab

This dialog box enables you to configure communication with a WCF service.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. On the **Web Services** stencil, drag the **WCF (Windows Communication Foundation)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Generate Message Contracts	Definition: Determines whether to generate a message contract for the method you are calling. Allowed Values: • **Deselected** - Message contracts are not generated. • **Selected** - Message contracts are generated.

Field Name	Definition
	Default Value: Deselected
uddi	Opens the Following Window: WCF Service Explorer Window Purpose of this Window: Finds and selects a WCF service using the Universal Description Discovery and Integration (UDDI) standard.
Service URL	Definition: Specifies the URL of your WCF service. Allowed Values: A valid WCF service URL. Default Value: None Custom Attributes: No Example: • http://demo3:80/agilepointserver/admin.sbc?wsdl In this example, SBC is the extension name for the WCF services, and ?WSDL is the query string that contains all the information such as method names of the specific WCF service. However, you can leave the extension name in the URL, as follows: http://demo3:80/agilepointserver/admin?wsdl
Connect	Function: Retrieves the list of methods, data bindings, and service endpoints for the specified WCF service.
Bindings	Definition: Specifies the data binding you want to use. The binding defines the communication details required to connect to the WCF endpoint. Allowed Values: • WSHttpBinding

Field Name	Definition
	• NetTcpBinding • BasicHttpBinding Default Value: None
Endpoints	Definition: Specifies the WCF service endpoint you want to connect. Endpoints provide access to the WCF service data. Allowed Values: A list of Endpoints populated from the WSDL file of the WCF service. Default Value: None Example: NetTcpBinding_IWCFWorkflowService
WebMethod	Definition: Specifies the name of the method you want to call. Allowed Values: A valid web method name defined in the specified WCF or web service. Default Value: None Example: StartProcInst
Endpoint Url	Definition: Specifies the URL of the endpoint of the web service or WCF service you want to connect. Allowed Values: A valid WCF service URL or custom attribute. Default Value: None Custom Attributes: No

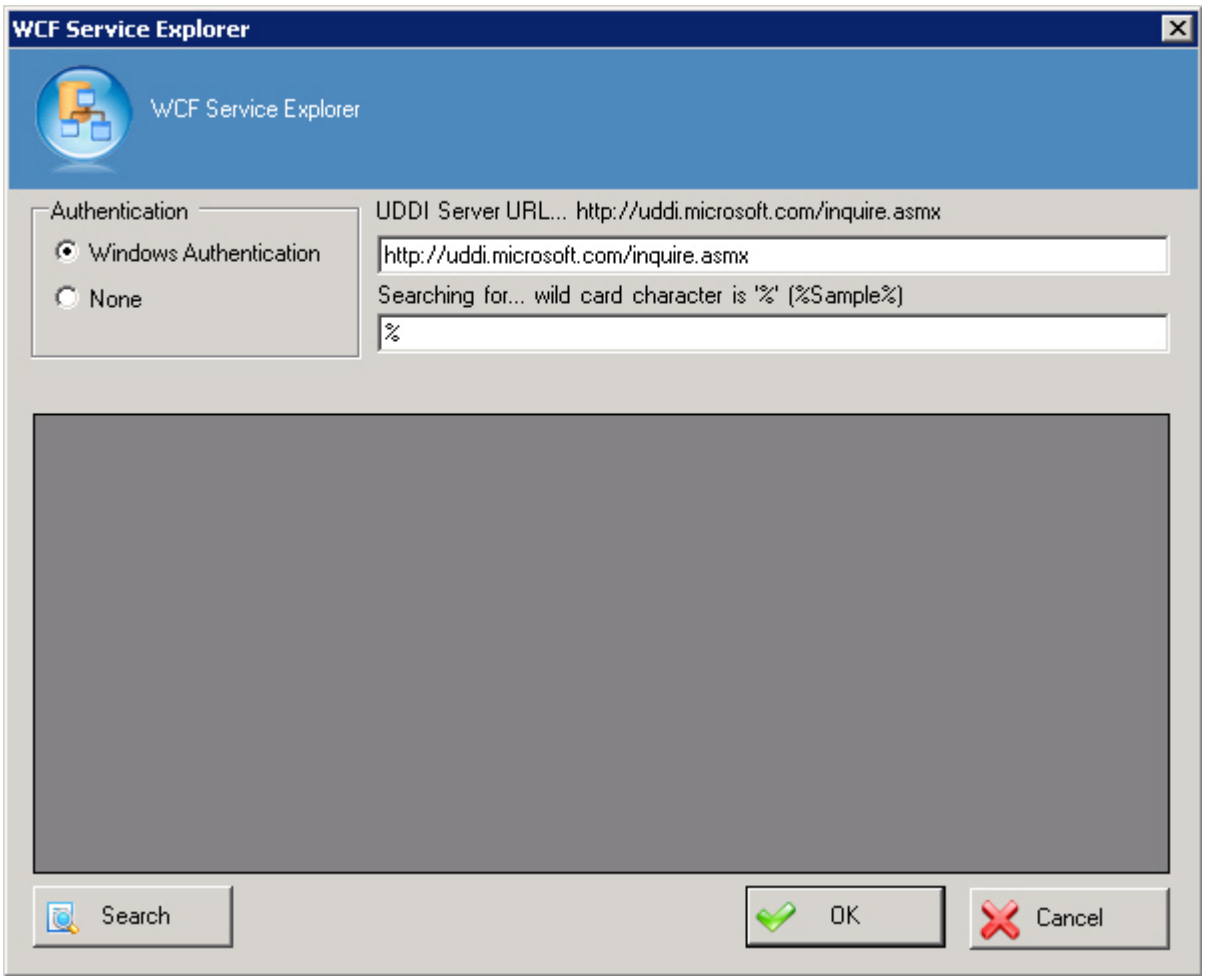
Field Name	Definition
	Example: http://CSC-NINE:7002/AgilePointServer/Workflow
Map Response to AgilePoint Schema	Definition: Maps the data returned from a WCF service call to your process schema. Allowed Values: Click the Ellipses button to open the Schema Mapper Window. Use this window to map the response to your process schema. Default Value: None
Store the response in Custom Attribute	Definition: Specifies the name of the custom attribute that is used to store the response to a method call. The call may be to a web service, Web Service Extension, WCF service, or web application, depending upon the context. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes Example: ${GroupMembers}

Common Configuration Tasks

- Data Binding
- Using Process Attributes

WCF Service Explorer Window

Finds and selects a WCF service using the Universal Description Discovery and Integration (UDDI) standard.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. On the **Web Services** stencil, drag the **WCF (Windows Communication Foundation)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the configuration window, click **uddi**:

Field Definitions

Field Name	Definition
Windows Authentication	Definition: Specifies whether to use the Windows system user credentials to access the UDDI Server. Allowed Values:

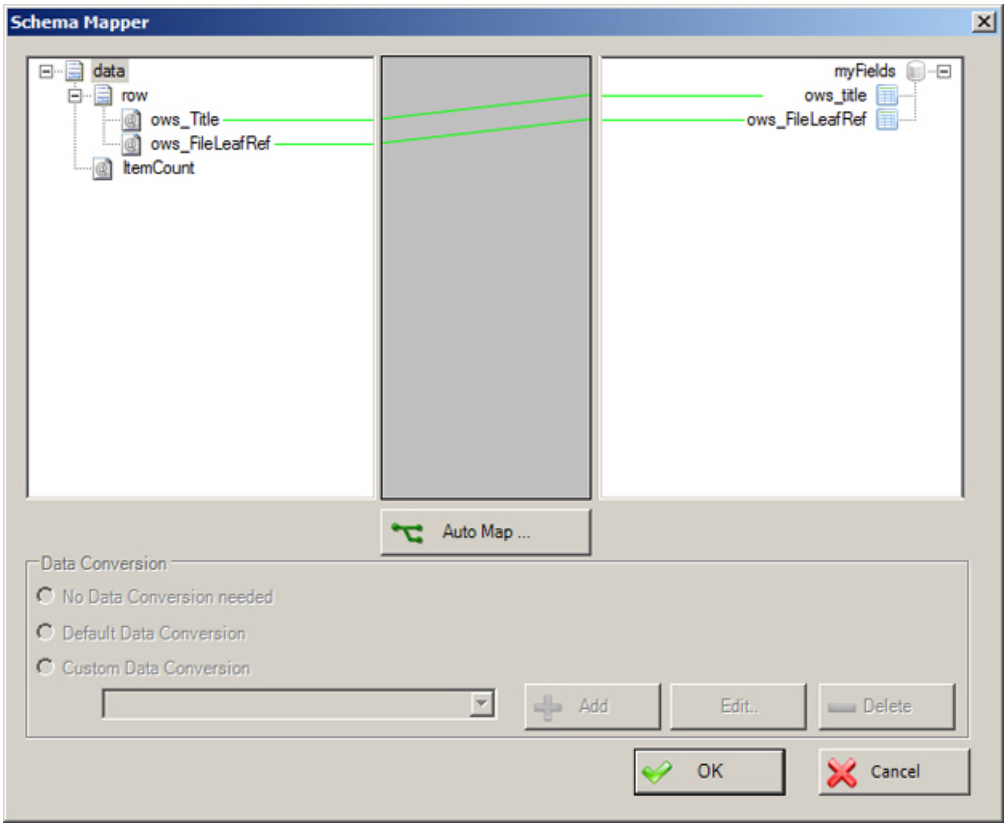
Field Name	Definition
	• **Windows Authentication** - Windows authentication is used. • **None** - User authentication is not required to access the UDDI Server. Default Value: Windows
UDDI Server URL	Definition: Specifies the UDDI server URL where your web service or WCF service is registered. Allowed Values: A valid UDDI server URL. Default Value: http://uddi.microsoft.com/inquire.asmx Custom Attributes: No
Searching for	Definition: Specifies the web service or WCF service you want to search on the UDDI server using the filter expression. Allowed Values: A text string used to filter the results. You can use % as a wildcard. Default Value: % Custom Attributes: No
Search	Function: Locates the specified web service or WCF service on the UDDI server.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Schema Mapper Window

Maps SharePoint fields, form fields, web methods, or other input sources to an XML schema.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **SharePoint**
   - **Web Services**
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **CAML Query**
   - **WSE (Web Service Extension)**
   - **WCF (Windows Communication Foundation)**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The fields that display vary, depending upon the AgsileShape you are using. For example, **Configure**.
6. On one of the following windows, under the **Output Mapping** or **Request/Response** tab, click the **Ellipses** button:
   - CAML Query Builder Configuration Window - Output Mapping Tab

- WebService Configuration Window - Request Tab
- WebService Configuration Window - Response Tab
- Configuration for WCF Service Window - Request Tab
- Configuration for WCF Service Window - Response Tab

Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options:

- **Reset All Mappings** - Deletes all mappings that have been made in the Schema Mapper for this activity.
- **Remove Invalid Mappings only** - Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same.
- **Cancel** - Aborts opening the Schema Mapper window.

Field Definitions

Field Name	Definition
Mapping Schemas for Request/Response and Process Model	Definition: Maps the schemas for a service's request or response and the AgilePoint schema: • CAML query schema for a response and AgilePoint schema • WSE service schema for a request/response and the AgilePoint schema • WCF service schema for a request/response and the AgilePoint schema The source and the destination schemas are displayed in a tree-view structure in the left and right panes. Allowed Values: Read only - However, the drag and drop operations are supported to map the schemas. Drag a data node from the source schema pane to the destination schema pane: • Green line - The data type of source and destination nodes matches. • Blue line - The data type of source and destination nodes doesn't match. The data conversion is required to map the schemas. • Red line - Specifies that the custom data conversion is required.
Automap	Function:

Field Name	Definition
	Maps all fields in the data source and the process schema that have the same name.
No Data Conversion needed	Definition: Determines whether the data conversion is not required between the source and the destination schema data fields. Allowed Values: • **Deselected** - Data conversion is required between the schema data fields. • **Selected** - Data conversion is not required between the schema data fields. Default Value: None However, the No Data Conversion needed option is selected if the data type of the source and destination schema data fields matches.
Default Data Conversion	Definition: Determines whether the default data conversion is required between the source and the destination schema fields. Allowed Values: • **Deselected** - Default data conversion is not required between the schema data fields. • **Selected** - Default data conversion is required between the schema data fields. Default Value: None However, the Default Data Conversion option is selected if the data type of the source and destination schema fields doesn't match.
Custom Data Conversion	Definition: Determines whether the custom data conversion is required. You can create your own data conversion types by using the Add button. Allowed Values: • **Deselected** - Custom data conversion is not required. • **Selected** - Custom data conversion is required.

Field Name	Definition
	Default Value: Deselected
Add	Opens the Following Window: Custom Mapping Code Window Purpose of this Window: Specifies custom C# code that can be used to map fields to an XML schema.
Edit	Opens the Following Window: Custom Mapping Code Window Purpose of this Window: Specifies custom C# code that can be used to map fields to an XML schema.
Delete	Function: Deletes the selected custom data conversion from the list.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Calling a Method from a WCF Service

To call a method from a Windows Communication Foundation (WCF) service, do the following.

Prerequisites

- A valid WCF Service.

Good to Know

- In some cases, the **type** of the object instance returned by a web method may need to implement the IConvertible interface in order for the web method to be used with the Web Service AgileShape.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.

3. On the **Web Services** stencil, drag the **WCF (Windows Communication Foundation)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the WCF Service Configuration Window, in the **Service URL** field, enter the URL of your WCF Service, and click the connect button.
2. Complete the following fields to set up your web method call:

Field Name	Definition
Bindings	Definition: Specifies the data binding you want to use. The binding defines the communication details required to connect to the WCF endpoint. Allowed Values: • WSHttpBinding • NetTcpBinding • BasicHttpBinding Default Value: None
Endpoints	Definition: Specifies the WCF service endpoint you want to connect. Endpoints provide access to the WCF service data. Allowed Values: A list of Endpoints populated from the WSDL file of the WCF service. Default Value: None Example: NetTcpBinding_IWCFWorkflowService
WebMethod	Definition: Specifies the name of the method you want to call. Allowed Values:

Field Name	Definition
	A valid web method name defined in the specified WCF or web service. Default Value: None Example: StartProcInst
Endpoint Url	Definition: Specifies the URL of the endpoint of the web service or WCF service you want to connect. Allowed Values: A valid WCF service URL or custom attribute. Default Value: None Custom Attributes: No Example: http://CSC-NINE:7002/AgilePointServer/Workflow

3. If you want to map the outbound data for the WCF service call to your process schema, on the **Request** tab, complete the following field.

Field Name	Definition
Request Mapping	Definition: Specifies whether the request is mapped to the WCF service schema. This is required only if the request is passing values to the web method via parameters as data that comes from the process model schema. Allowed Values: Click the Ellipses button to open the Schema Mapper Window. Use this window to map the request to your process schema. Default Value: None

4. If you want to map inbound data retrieved from the WCF service call to your process, click the **Response** tab, and then do one of the following:
   - To map the response to your AgilePoint schema, complete the following field.

Field Name	Definition
Map Response to AgilePoint Schema	Definition: Maps the data returned from a WCF service call to your process schema. Allowed Values: Click the Ellipses button to open the Schema Mapper Window. Use this window to map the response to your process schema. Default Value: None

   - To map the response to a custom attribute, complete the following field.

Field Name	Definition
Store the response in Custom Attribute	Definition: Specifies the name of the custom attribute that is used to store the response to a method call. The call may be to a web service, Web Service Extension, WCF service, or web application, depending upon the context. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes Example: ${GroupMembers}

5. Complete any additional configuration for this AgileShape according to your requirements:
   - Windows Communication Foundation (WCF)
   - Configuration for WCF Service Window - Request Tab
   - Configuration for WCF Service Window - Response Tab
   - AgilePart - Common Setup

Exchange Server

This section describes the AgileShapes in the Exchange Server stencil.

Create Appointment

An AgilePart that creates an appointment on a user's Microsoft Outlook calendar.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Exchange Server** stencil.
3. On the **Exchange Server** stencil, drag the **Create Appointment** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Authentication	Definition: Configure an authentication mode. Allowed Values: • **SystemUser** - Performs authentication using configured system user account. • **SpecifiedUserAccount** - Specifies particular user credential to authenticate. Default Value: SpecifiedUserAccount
Configure	Opens the Following Window: • Appointment Schedule for Exchange Server Window - Authentication Tab - Specifies the configuration for the Create Appointment AgileShape.

Field Name	Definition
	• Appointment Schedule for Exchange Server Window - Appointment Tab - Specifies the configuration for the Create Appointment AgileShape.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

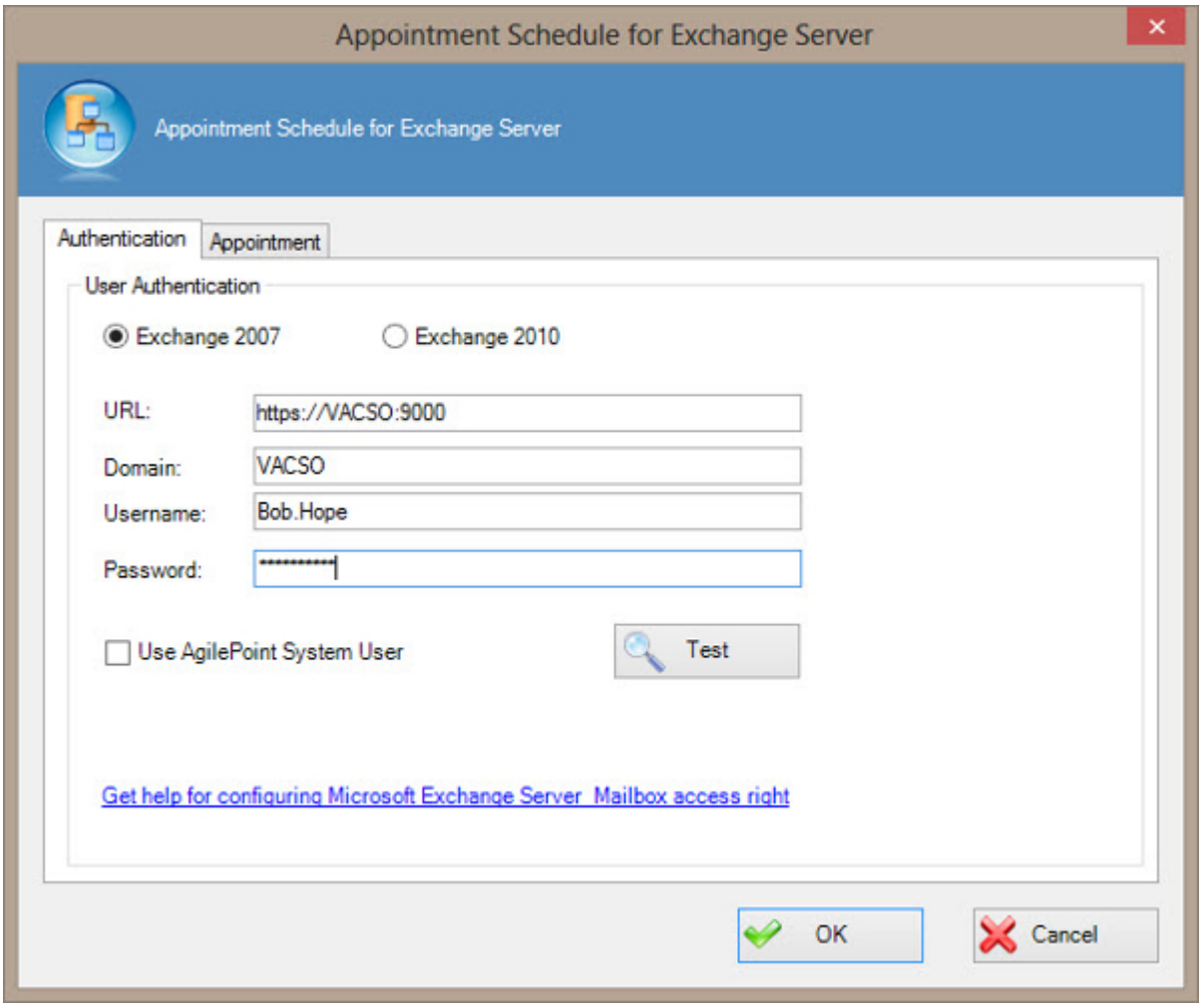
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Appointment Schedule for Exchange Server Window - Authentication Tab

Specifies the configuration for the Create Appointment AgileShape.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Exchange Server** stencil.
3. On the **Exchange Server** stencil, drag the **Create Appointment** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

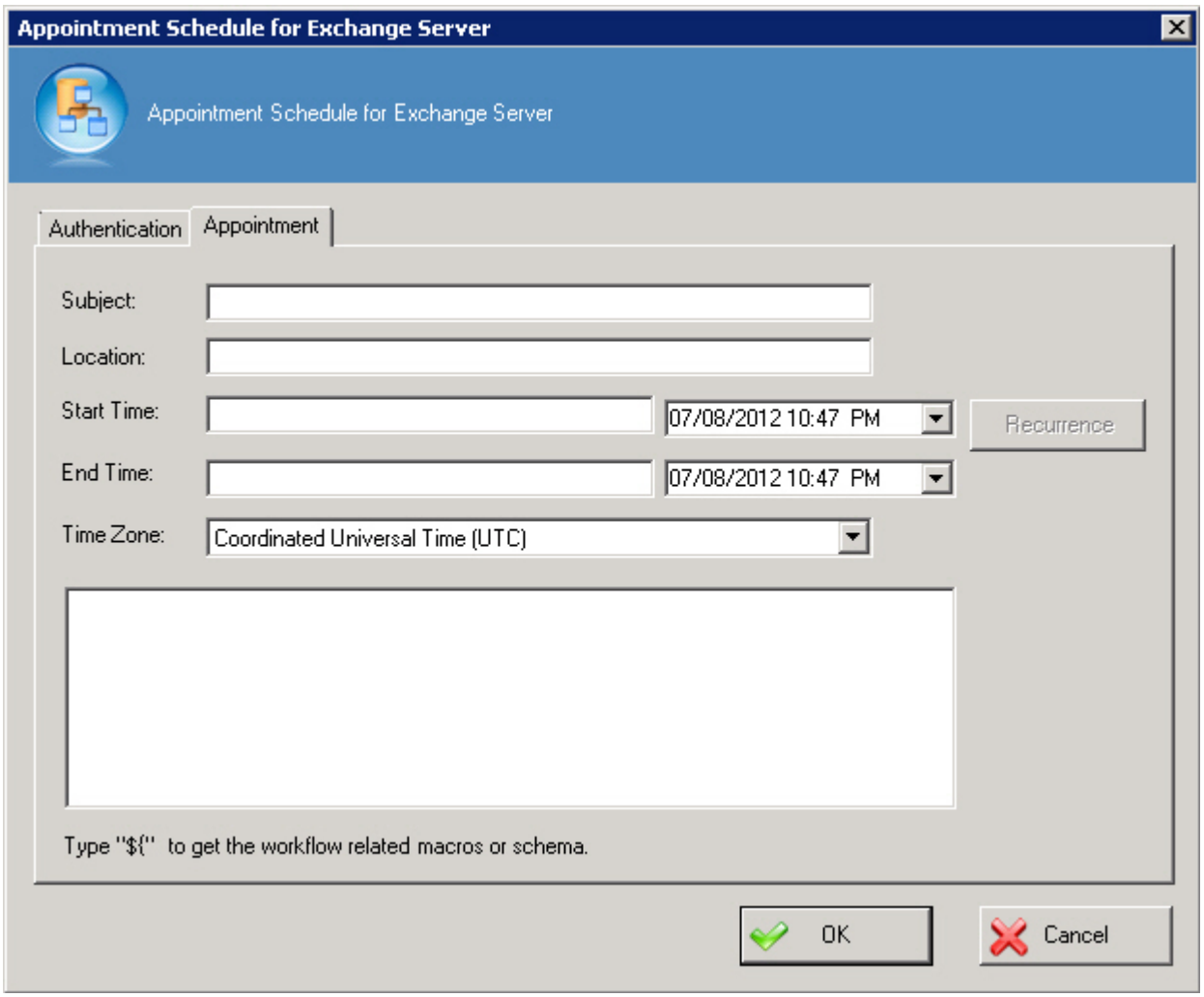
Field Name	Definition
Exchange 2007 or Exchange 2010	Definition: Specifies the version of your Microsoft Exchange Server.

Field Name	Definition
	Allowed Values: • **Exchange 2007** - Enables to configure this AgileShape to access Exchange Server 2007. • **Exchange 2010** - Enables to configure this AgileShape to access Exchange Server 2010. Default Value: Exchange 2007
URL	Definition: Specifies the Exchange Server URL. Allowed Values: • **Exchange 2007** - https://[machine name]:[port] • **Exchange 2010** - https://[machine name]:[port]/EWS/Exchange.asmx Default Value: https://[MachineName]:[Port] Custom Attributes: Yes Example: • **Exchange 2007** - https://mydomain.com:2030 • **Exchange 2010** - https://mydomain.com:2030/EWS/Exchange.asmx
Domain	Definition: Determines that a specified account to use to access the Exchange Server. Allowed Values: A valid domain name for user to be specified. Default Value: None Custom Attributes: Yes
Username	Definition: The user name for an Exchange Server administrator. Allowed Values:

Field Name	Definition
	A valid user name. Default Value: None Custom Attributes: No
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes
Use AgilePoint System User	Definition: Specifies to use the AgilePoint System User credentials to access the Exchange Server. The credentials and URL can be verified by clicking the **Test** button. The **Test** button is disabled if Use **AgilePoint System User** is checked. In both cases, make sure that the user has proper access rights to the Exchange Server. Allowed Values: • **Deselected** - Specifies particular user credential to authenticate. • **Selected** - Performs authentication using configured system user account. Default Value: Deselected

Appointment Schedule for Exchange Server Window - Appointment Tab

Specifies the configuration for the Create Appointment AgileShape.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Exchange Server** stencil.
3. On the **Exchange Server** stencil, drag the **Create Appointment** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Subject	Definition: The details about the appointment or meeting.

Field Name	Definition
	Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes Example: [Example]
Location	Definition: Specifies location for the appointment. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes
Start Time	Definition: Specifies starting date and time of the appointment or event. Allowed Values: A valid date and time. Default Value: None Custom Attributes: Yes Example: 6/12/2013 7:18:11 AM
End Time	Definition: Specifies ending date and time of the appointment or event. Allowed Values: A valid date and time.

Field Name	Definition
	Default Value: None Custom Attributes: Yes
Time Zone	Definition: Select time zone for the appointment. Allowed Values: A valid time zone. Default Value: Coordinated Universal Time (UTC) Custom Attributes: No
Body	Definition: The body of the email. Accepts custom attributes and schema by typing ${. Allowed Values: Multi-line of text. Default Value: None Custom Attributes: Yes Example: [Example]

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating an Appointment in Microsoft Exchange Server

To create an appointment in Microsoft Exchange Server, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Exchange Server** stencil.

3. On the **Exchange Server** stencil, drag the **Create Appointment** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the **Appointment Schedule for Exchange Server** window, click the Authentication tab.
2. On the **Authentication** tab, complete the fields as required to set up your Exchange Server authentication.
3. Click the Appointment tab.
4. On the **Appointment** tab, complete the fields as required to set up your Exchange Server appointment.
5. Complete any additional configuration for this AgileShape according to your requirements:
   - Appointment Schedule for Exchange Server Window - Authentication Tab
   - Appointment Schedule for Exchange Server Window - Appointment Tab
   - Create Appointment
   - AgilePart - Common Setup

Create Meeting

An AgilePart that creates a meeting on a user's Microsoft Outlook calendar



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Exchange Server** stencil.
3. On the **Exchange Server** stencil, drag the **Create Meeting** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Authentication	Definition: Configure an authentication mode. Allowed Values:

Field Name	Definition
	• **SystemUser** - Performs authentication using configured system user account. • **SpecifiedUserAccount** - Specifies particular user credential to authenticate. Default Value: SpecifiedUserAccount
Configure	Opens the Following Window: • Meeting Schedule for Exchange Server Window - Authentication Tab - Specifies the authentication mode to be used to access the Exchange Server and schedule the appointment and the appointment details. • Meeting Schedule for Exchange Server Window - Meeting Tab - Specifies the authentication mode to be used to access the Exchange Server and schedule the appointment and the appointment details.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

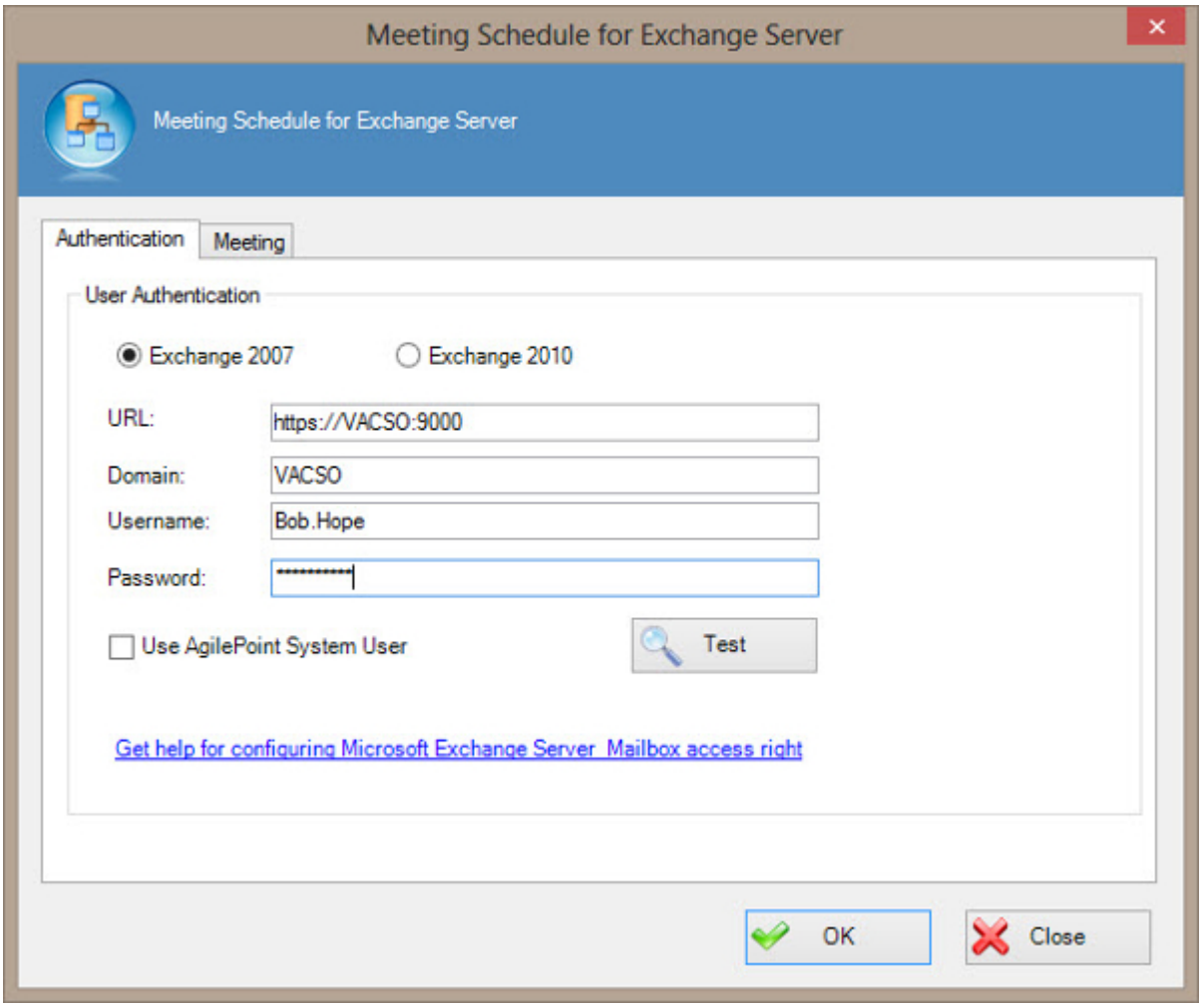
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Meeting Schedule for Exchange Server Window - Authentication Tab

Specifies the authentication mode to be used to access the Exchange Server and schedule the appointment and the appointment details.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Exchange Server** stencil.
3. On the **Exchange Server** stencil, drag the **Create Meeting** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

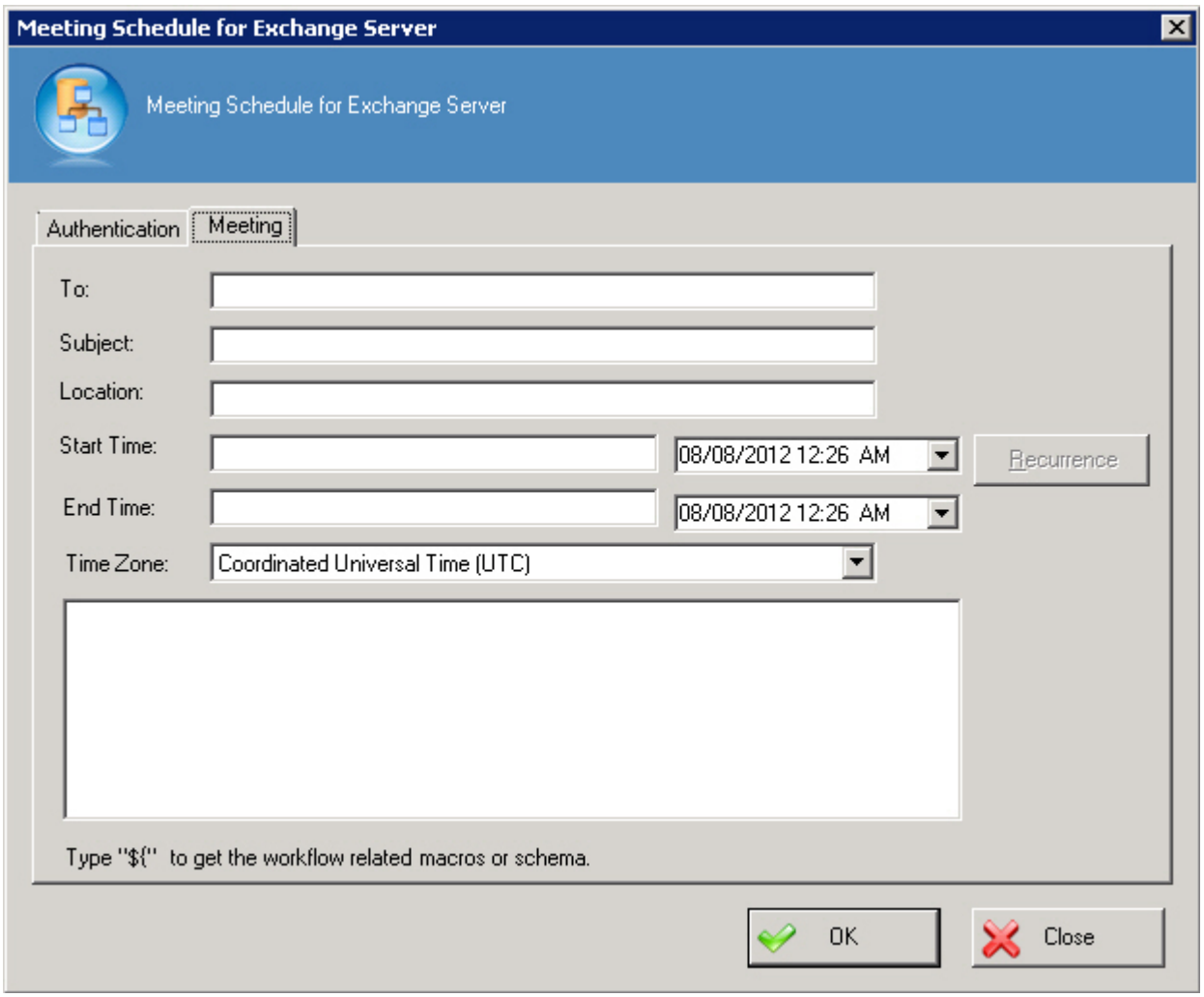
Field Name	Definition
Exchange 2007 or Exchange 2010	Definition: Specifies the version of your Microsoft Exchange Server. Allowed Values:

Field Name	Definition
	• **Exchange 2007** - Enables to configure this AgileShape to access Exchange Server 2007. • **Exchange 2010** - Enables to configure this AgileShape to access Exchange Server 2010. Default Value: Exchange 2007
URL	Definition: Specifies the Exchange Server URL. Allowed Values: • **Exchange 2007** - https://[machine name]:[port] • **Exchange 2010** - https://[machine name]:[port]/EWS/Exchange.asmx Default Value: https://[MachineName]:[Port] Custom Attributes: Yes Example: • **Exchange 2007** - https://mydomain.com:2030 • **Exchange 2010** - https://mydomain.com:2030/EWS/Exchange.asmx
Domain	Definition: Determines that a specified account to use to access the Exchange Server. Allowed Values: A valid domain name for user to be specified. Default Value: None Custom Attributes: Yes
Username	Definition: The user name for an Exchange Server administrator. Allowed Values: A valid user name.

Field Name	Definition
	Default Value: None Custom Attributes: No
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes
Use AgilePoint System User	Definition: Specifies to use the AgilePoint System User credentials to access the Exchange Server. The credentials and URL can be verified by clicking the **Test** button. The **Test** button is disabled if Use **AgilePoint System User** is checked. In both cases, make sure that the user has proper access rights to the Exchange Server. Allowed Values: • **Deselected** - Specifies particular user credential to authenticate. • **Selected** - Performs authentication using configured system user account. Default Value: Deselected

Meeting Schedule for Exchange Server Window - Meeting Tab

Specifies the authentication mode to be used to access the Exchange Server and schedule the appointment and the appointment details.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Exchange Server** stencil.
3. On the **Exchange Server** stencil, drag the **Create Meeting** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
To	Definition: The details about the appointment or meeting. Allowed Values:

Field Name	Definition
	A valid email address. Default Value: None Custom Attributes: Yes Example: [Example]
Subject	Definition: The details about the appointment or meeting. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes Example: [Example]
Location	Definition: Specifies location for the appointment. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes
Start Time	Definition: Specifies starting date and time of the appointment or event. Allowed Values: A valid date and time. Default Value: None

Field Name	Definition
	Custom Attributes: Yes Example: 6/12/2013 7:18:11 AM
End Time	Definition: Specifies ending date and time of the appointment or event. Allowed Values: A valid date and time. Default Value: None Custom Attributes: Yes
Time Zone	Definition: Select time zone for the appointment. Allowed Values: A valid time zone. Default Value: Coordinated Universal Time (UTC) Custom Attributes: No
Body	Definition: The body of the email. Accepts custom attributes and schema by typing ${. Allowed Values: Multi-line of text. Default Value: None Custom Attributes: Yes Example: [Example]

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a Meeting in Microsoft Exchange Server

To create a meeting in Microsoft Exchange Server, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Exchange Server** stencil.
3. On the **Exchange Server** stencil, drag the **Create Meeting** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the **Meeting Schedule for Exchange Server** window, click the Authentication tab.
2. On the **Authentication** tab, complete the fields as required to set up your Exchange Server authentication.
3. Click the Meeting tab.
4. Complete the fields as required to set up your Exchange Server meeting.
5. Complete any additional configuration for this AgileShape according to your requirements:
   - Meeting Schedule for Exchange Server Window - Authentication Tab
   - Meeting Schedule for Exchange Server Window - Meeting Tab
   - Create Meeting
   - AgilePart - Common Setup

Yammer

This section describes the AgileShapes in the Yammer stencil.

Post Message

An AgilePart that posts a private message to a specified user or a group.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Post Message** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Credential	Opens the Following Window: Yammer Credentials Window Purpose of this Window: Specifies the unique identifiers for the Yammer application.
Message	Opens the Following Window: • Create a Message - Send Private Message Tab - Sets up a message to send to a specified individual. • Create a Message - Post in a Group Tab - Sets up a message to send to a specified group.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

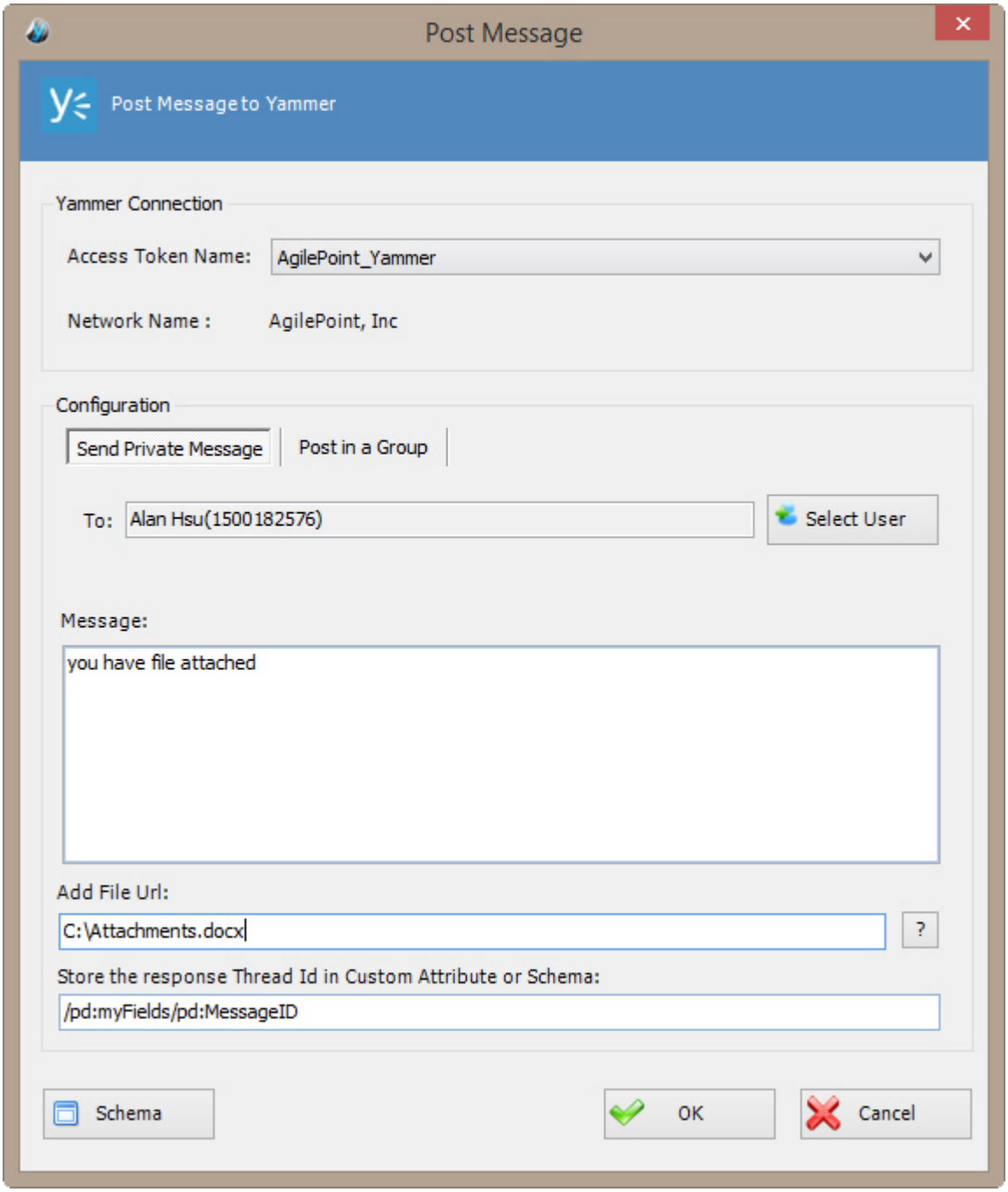
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Create a Message - Send Private Message Tab

Sets up a message to send to a specified individual.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Post Message** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Message** field, click the **Ellipses** button.
6. Click the **Send Private Message** tab.

Field Definitions

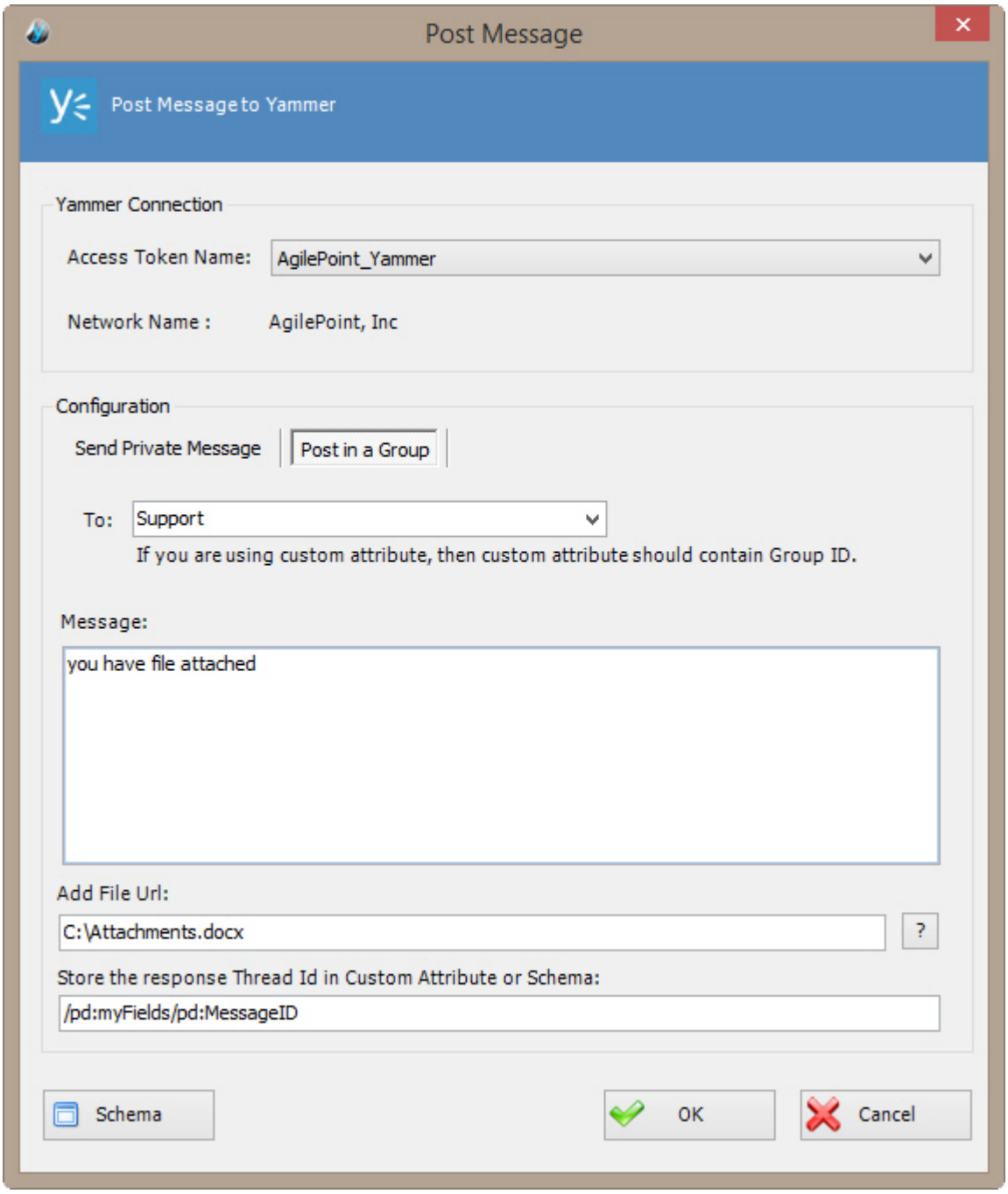
Field Name	Definition
Access Token Name	Definition: Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces. Default Value: None Custom Attributes: No
To	Definition: Specifies the user name from the Select Participants Window. Allowed Values: • A Yammer user ID. Click the **Select User** button to select. • An AgilePoint user name. • A custom attribute that represents a Yammer user ID or AgilePoint user name. Default Value: None Custom Attributes: Yes
Select User	Opens the Following Window: Select Participants Window

Field Name	Definition
	Purpose of this Window: Specifies a Yammer user.
Message	Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes
Add File Url	Definition: Specifies the absolute path of the attachment file. Allowed Values: An absolute path and file name on the AgilePoint Server or SharePoint Server. Multiple attachments are not supported. Default Value: None Custom Attributes: Yes Example: • c:\My Documents\sample1.doc • ${HomeDirectory}\sample2.doc • http://demo3:8000/DocumentLib1/sample3.doc
Store the response Thread Id in Custom Attribute or Schema	Definition: Specifies the name of the custom attribute that is used to store the response Thread ID. The Thread ID is an identifier used to track a Yammer conversation thread. Allowed Values: A custom attribute. Default Value: None

Field Name	Definition
	Custom Attributes: Yes Example: /pd:myFields/pd:ThreadID

Create a Message - Post in a Group Tab

Sets up a message to send to a specified group.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Post Message** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Message** field, click the **Ellipses** button.

6. Click the **Post in a Group** tab.

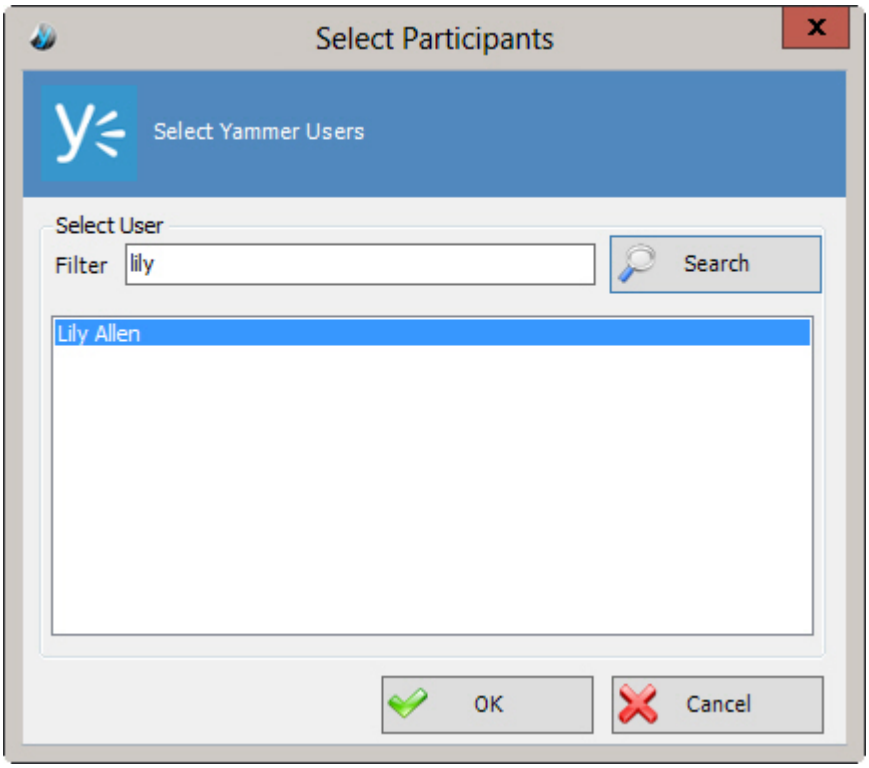
Field Definitions

Field Name	Definition
Access Token Name	Definition: Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces. Default Value: None Custom Attributes: No
Post in a Group	Definition: Post the message to a group.
To	Definition: Specifies a group name from the list. Allowed Values: A valid group name. Default Value: None Custom Attributes: Yes
Message	Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes
Add File Url	Definition:

Field Name	Definition
	Specifies the absolute path of the attachment file. Allowed Values: An absolute path and file name on the AgilePoint Server or SharePoint Server. Multiple attachments are not supported. Default Value: None Custom Attributes: Yes Example: • c:\My Documents\sample1.doc • ${HomeDirectory}\sample2.doc • http://demo3:8000/DocumentLib1/sample3.doc
Store the response Thread Id in Custom Attribute or Schema	Definition: Specifies the name of the custom attribute that is used to store the response Thread ID. The Thread ID is an identifier used to track a Yammer conversation thread. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes Example: /pd:myFields/pd:ThreadID

Select Participants Window

Specifies a Yammer user.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. >On the **Yammer** stencil, drag one of the following AgileShapes, and drop it on the process template:
   - **Post Message**
   - **Post Attachment**
4. On the **Yammer** stencil, drag the **Post Message** AgileShape, and drop it on the process template.
5. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
6. On the **Message** field, click the **Ellipses** button.
7. In one of the following windows, click **Select User**. The specific windows that display vary, depending upon the AgileShape you are using:
   - **Post Message**
   - **Post File Attachment**

Field Definitions

Field Name	Definition
Filter	Definition:

Field Name	Definition
	Specifies the user name to search within Yammer network. Allowed Values: A single line of text. You can use asterisks (*) as wildcards. Default Value: None Custom Attributes: Yes Example: The following are some examples of filter expressions: • ***** - All user names are searched. • **a*** - All user names that start with the letter *a*. • ***a*** - All user names that contain the letter *a*.
Search	Function: Performs search operation based on the specified criteria.

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Sending a Message in Yammer

To send a message in Yammer to a specified user or a group, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Post Message** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Message** field, click the **Ellipses** button.

Instructions

1. Do one of the following:
   - To send a message to an individual user, click the **Send Private Message** tab, and complete the following fields as required.

Field Name	Value
To	Definition: Specifies the user name from the Select Participants Window. Allowed Values: • A Yammer user ID. Click the **Select User** button to select. • An AgilePoint user name. • A custom attribute that represents a Yammer user ID or AgilePoint user name. Default Value: None Custom Attributes: Yes
Message	Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes

- To send a message to a group, click the **Post in a Group** tab, and complete the following fields as required.

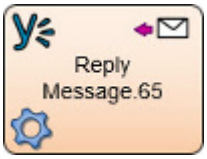
Field Name	Value
To	Definition: Specifies a group name from the list. Allowed Values: A valid group name. Default Value: None Custom Attributes:

Field Name	Value
	Yes
Message	Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes

2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Create a Message - Send Private Message Tab
   - Create a Message - Post in a Group Tab
   - Post Message
   - Select Participants Window
   - Yammer Credentials Window

Reply Message

An AgilePart that post a reply to a specified message thread in Yammer.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Reply Message** AgileShape, and drop it on the process template.

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Credential	Opens the Following Window: Yammer Credentials Window Purpose of this Window: Specifies the unique identifiers for the Yammer application.
Message	Opens the Following Window: Reply to Posted Message Window Purpose of this Window: Post a reply to a specified message thread in Yammer.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

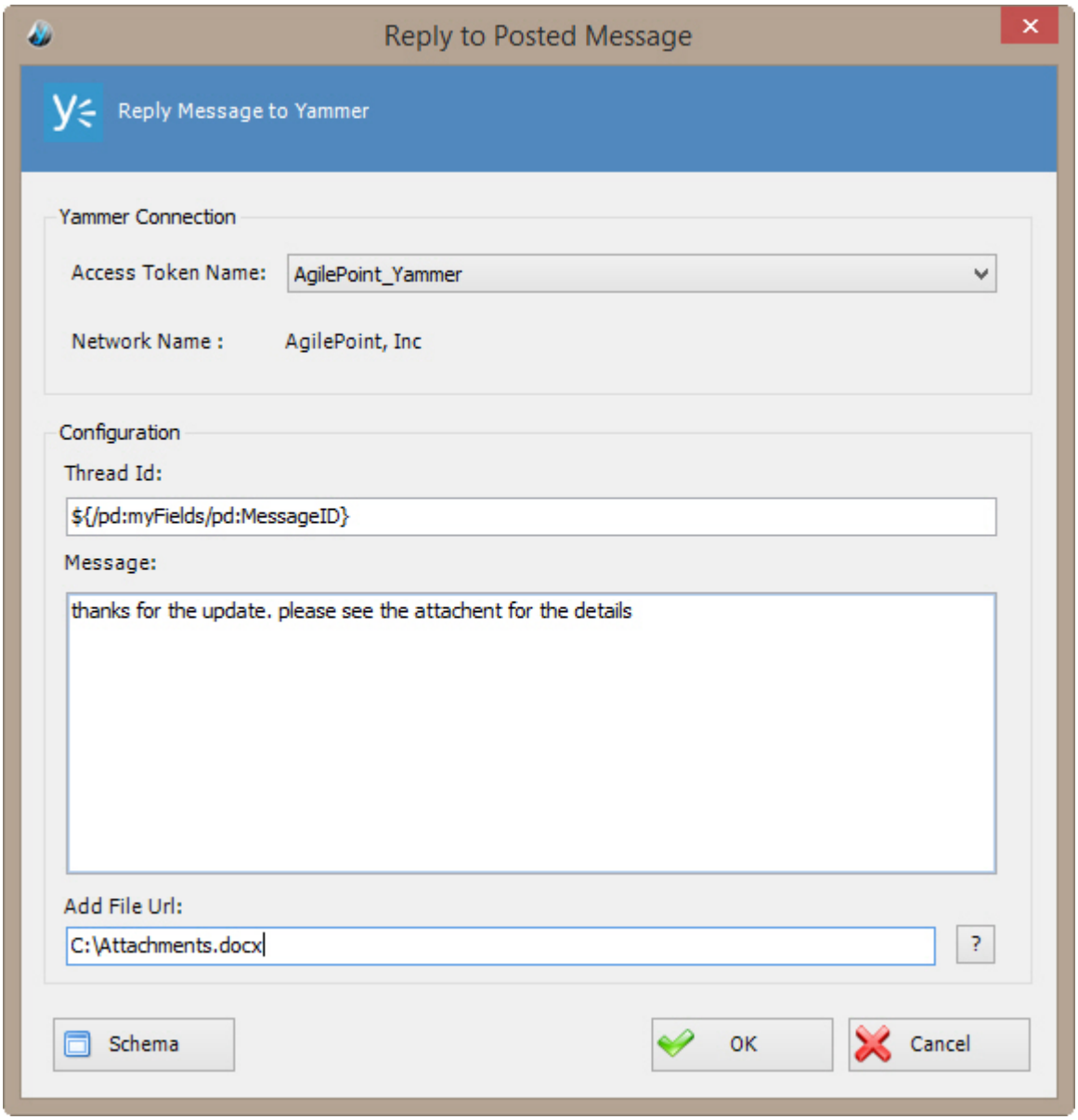
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Reply to Posted Message Window

Post a reply to a specified message thread in Yammer.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Reply Message** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Message** field, click the **Ellipses** button.

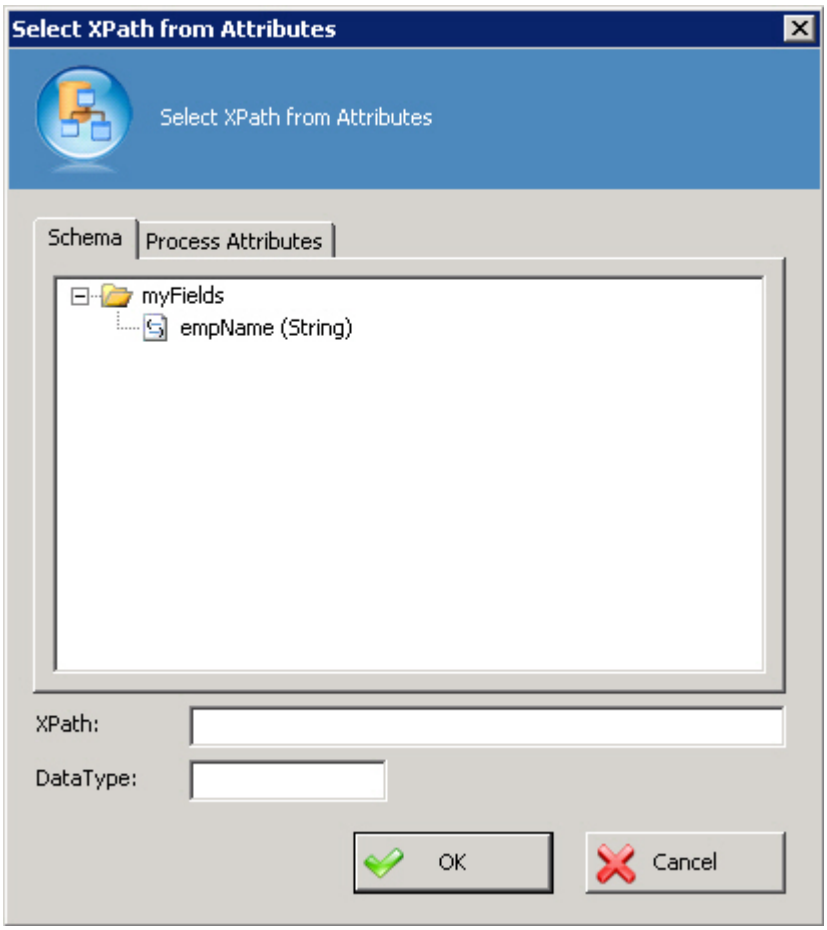
Field Definitions

Field Name	Definition
Access Token Name	Definition: Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces. Default Value: None Custom Attributes: No
Thread Id	Definition: Specifies the ID of the Yammer message thread to which you want to post a reply message. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes Example: ${/pd:myFields/pd:ThreadID}
Message	Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes
Add File Url	Definition:

Field Name	Definition
	Specifies the absolute path of the attachment file. Allowed Values: An absolute path and file name on the AgilePoint Server or SharePoint Server. Multiple attachments are not supported. Default Value: None Custom Attributes: Yes Example: • c:\My Documents\sample1.doc • ${HomeDirectory}\sample2.doc • http://demo3:8000/DocumentLib1/sample3.doc
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.



Prerequisites

- The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the appropriate stencil.
3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the respective field/configuration window, do one of the following, as appropriate:
   - Type the characters **${** in the property box.
   - Click the **Ellipses** button.
   - Click the **Schema** button.

Field Definitions

Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Replying to a Message in Yammer

To reply to a message Yammer in a Yammer thread, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Reply Message** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Message** field, click the **Ellipses** button.

Instructions

1. On the **Reply to Posted Message** window, complete the following fields as required:

Field Name	Value
Thread Id	Definition: Specifies the ID of the Yammer message thread to which you want to post a reply message. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes Example: ${/pd:myFields/pd:ThreadID}
Message	Definition: Specifies the content of the message. Allowed Values:

Field Name	Value
	Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes

2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Reply Message
   - Reply to Posted Message Window
   - Yammer Credentials Window

Post Attachment

An AgilePart that posts an attachment to a specified user or a group.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Post Attachment** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Credential	Opens the Following Window: Yammer Credentials Window

Field Name	Definition
	Purpose of this Window: Specifies the unique identifiers for the Yammer application.
Attachments	Opens the Following Window: • Post File Attachment - Send Private Attachment Tab - Specifies an attachment and a single recipient. • Post File Attachment - Post in a Group Tab - Specifies a group to send an attachment.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

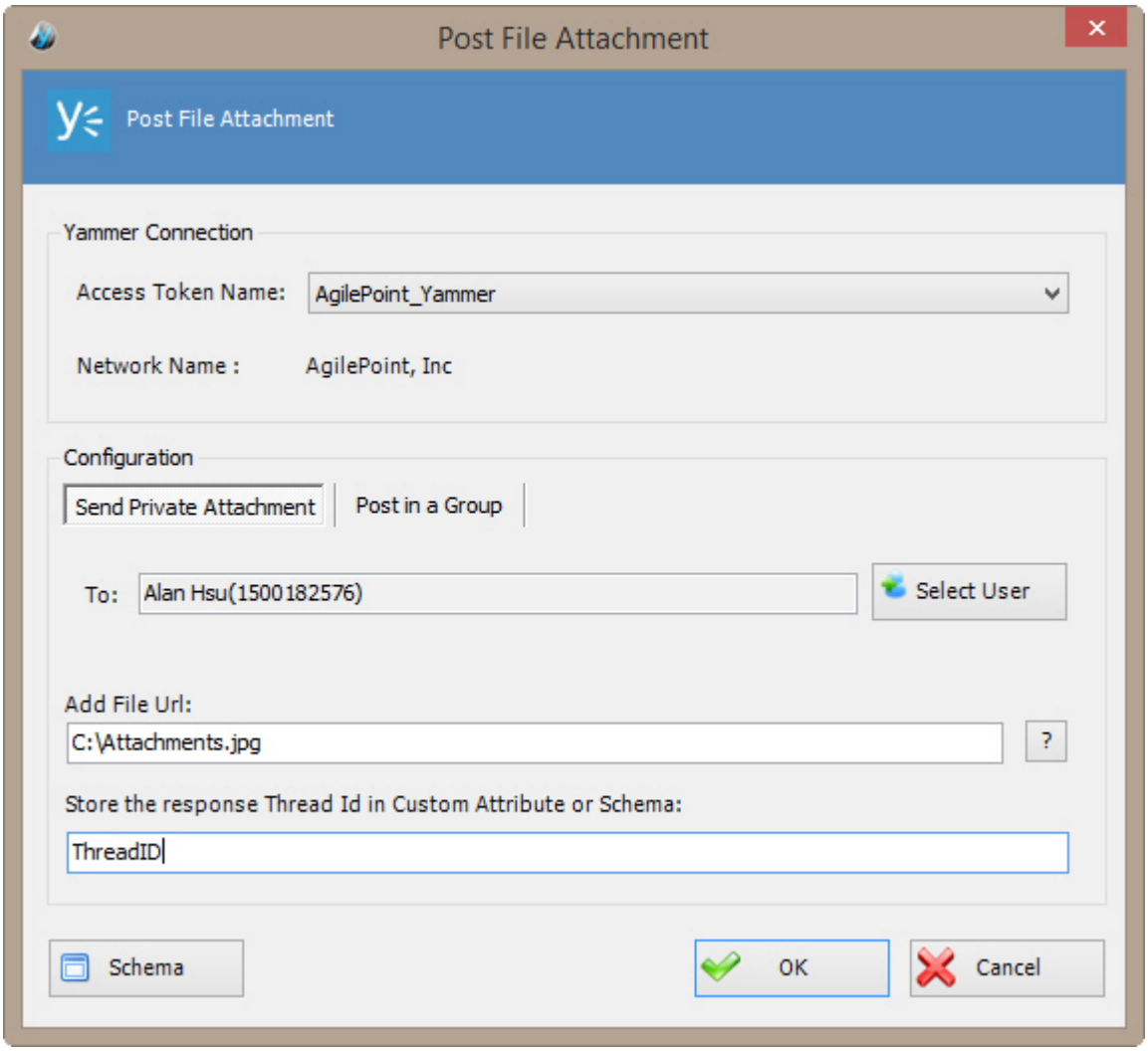
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Post File Attachment - Send Private Attachment Tab

Specifies an attachment and a single recipient.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Post Attachment** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Attachment** field, click the **Ellipses** button.
6. Click the **Send Private Attachment** tab.

Field Definitions

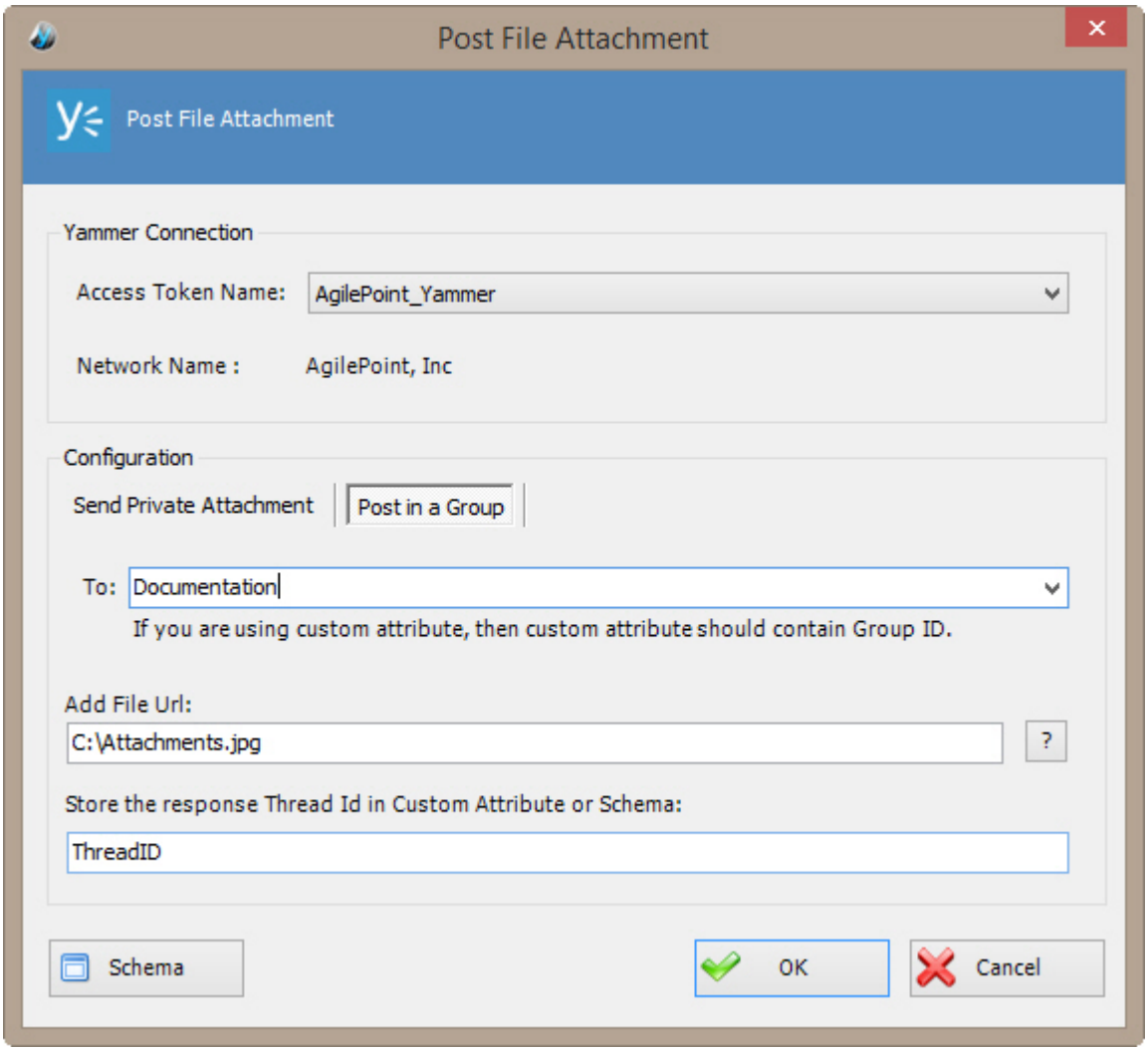
Field Name	Definition
Access Token Name	Definition:

Field Name	Definition
	Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces. Default Value: None Custom Attributes: No
Send Private Attachment	Definition: Post an attachment to a specified user.
To	Definition: Specifies the user name from the Select Participants Window. Allowed Values: • A Yammer user ID. Click the **Select User** button to select. • An AgilePoint user name. • A custom attribute that represents a Yammer user ID or AgilePoint user name. Default Value: None Custom Attributes: Yes
Select User	Opens the Following Window: Select Participants Window Purpose of this Window: Specifies a Yammer user.
Add File Url	Definition: Specifies the absolute path of the attachment file. Allowed Values: An absolute path and file name on the AgilePoint Server or SharePoint Server. Multiple attachments are not supported.

Field Name	Definition
	Default Value: None Custom Attributes: Yes Example: • c:\My Documents\sample1.doc • ${HomeDirectory}\sample2.doc • http://demo3:8000/DocumentLib1/sample3.doc
Store the response Thread Id in Custom Attribute or Schema	Definition: Specifies the name of the custom attribute that is used to store the response Thread ID. The Thread ID is an identifier used to track a Yammer conversation thread. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes Example: /pd:myFields/pd:ThreadID
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Post File Attachment - Post in a Group Tab

Specifies a group to send an attachment.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Post Attachment** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Attachment** field, click the **Ellipses** button.
6. Click the **Post in a Group** tab.

Field Definitions

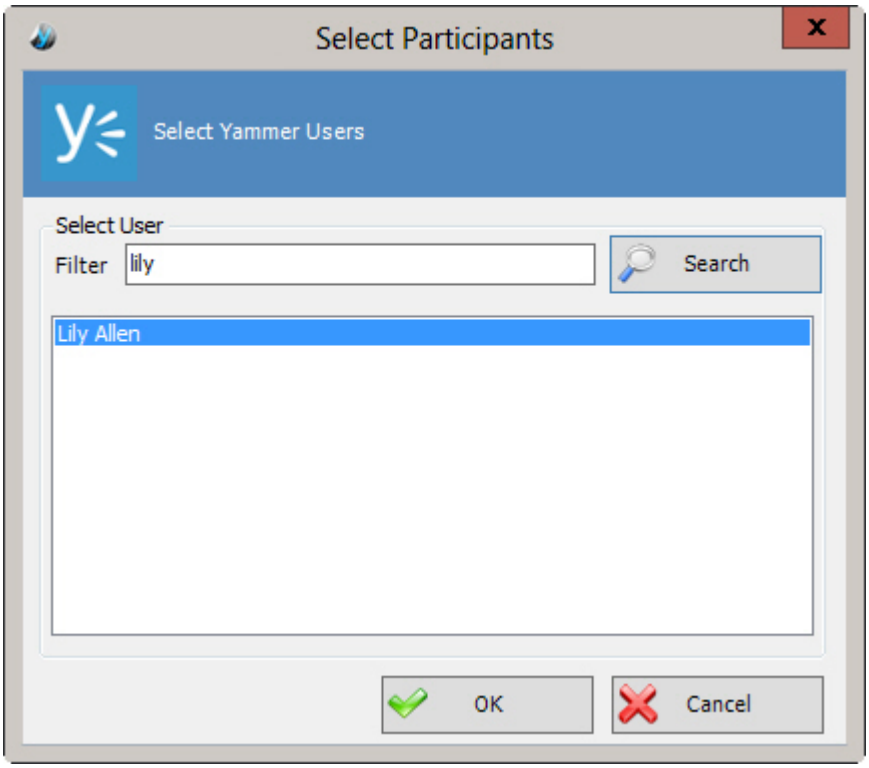
Field Name	Definition
Access Token Name	Definition:

Field Name	Definition
	Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces. Default Value: None Custom Attributes: No
Post in a Group	Definition: Post an attachment to a group.
To	Definition: Specifies a group name from the list. Allowed Values: A valid group name. Default Value: None Custom Attributes: Yes
Add File Url	Definition: Specifies the absolute path of the attachment file. Allowed Values: An absolute path and file name on the AgilePoint Server or SharePoint Server. Multiple attachments are not supported. Default Value: None Custom Attributes: Yes Example: • c:\My Documents\sample1.doc • ${HomeDirectory}\sample2.doc • http://demo3:8000/DocumentLib1/sample3.doc

Field Name	Definition
Store the response Thread Id in Custom Attribute or Schema	Definition: Specifies the name of the custom attribute that is used to store the response Thread ID. The Thread ID is an identifier used to track a Yammer conversation thread. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes Example: /pd:myFields/pd:ThreadID
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Select Participants Window

Specifies a Yammer user.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. >On the **Yammer** stencil, drag one of the following AgileShapes, and drop it on the process template:
   - **Post Message**
   - **Post Attachment**
4. On the **Yammer** stencil, drag the **Post Message** AgileShape, and drop it on the process template.
5. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
6. On the **Message** field, click the **Ellipses** button.
7. In one of the following windows, click **Select User**. The specific windows that display vary, depending upon the AgileShape you are using:
   - **Post Message**
   - **Post File Attachment**

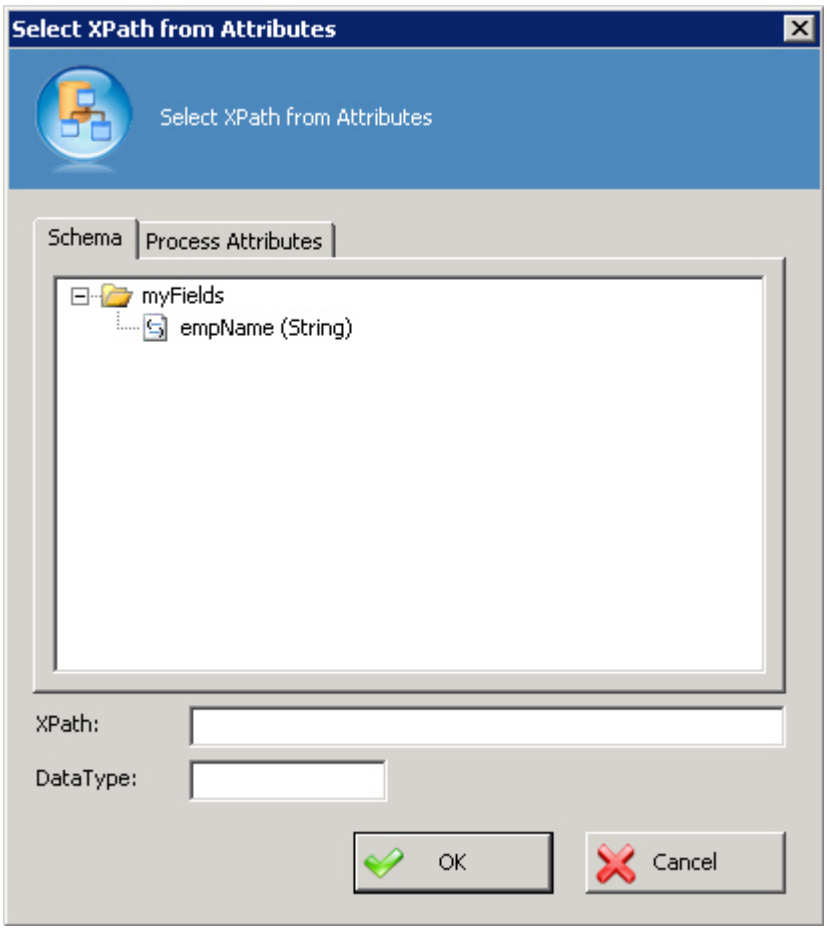
Field Definitions

Field Name	Definition
Filter	Definition:

Field Name	Definition
	Specifies the user name to search within Yammer network. Allowed Values: A single line of text. You can use asterisks (*) as wildcards. Default Value: None Custom Attributes: Yes Example: The following are some examples of filter expressions: • ***** - All user names are searched. • **a*** - All user names that start with the letter *a*. • ***a*** - All user names that contain the letter *a*.
Search	Function: Performs search operation based on the specified criteria.

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.



Prerequisites

- The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the appropriate stencil.
3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the respective field/configuration window, do one of the following, as appropriate:
   - Type the characters **${** in the property box.
   - Click the **Ellipses** button.
   - Click the **Schema** button.

Field Definitions

Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Sending an File Attachment in Yammer

To send a file attachment to a specified user or a group, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Post Attachment** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Attachment** field, click the **Ellipses** button.

Instructions

1. Do one of the following:
   - To send an attachment to an individual user, click the **Send Private Attachment** tab, and complete the following fields as required.

Field Name	Value
To	Definition: Specifies the user name from the Select Participants Window. Allowed Values: • A Yammer user ID. Click the **Select User** button to select. • An AgilePoint user name. • A custom attribute that represents a Yammer user ID or AgilePoint user name. Default Value: None Custom Attributes: Yes
Add File Url	Definition:

Field Name	Value
	Specifies the absolute path of the attachment file. Allowed Values: An absolute path and file name on the AgilePoint Server or SharePoint Server. Multiple attachments are not supported. Default Value: None Custom Attributes: Yes Example: • c:\My Documents\sample1.doc • ${HomeDirectory}\sample2.doc • http://demo3:8000/DocumentLib1/sample3.doc
Store the response Thread Id in Custom Attribute or Schema	Definition: Specifies the name of the custom attribute that is used to store the response Thread ID. The Thread ID is an identifier used to track a Yammer conversation thread. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes Example: /pd:myFields/pd:ThreadID

- To send an attachment to a group, click the **Post in a Group** tab, and complete the following fields as required:

Field Name	Value
To	Definition: Specifies a group name from the list.

Field Name	Value
	Allowed Values: A valid group name. Default Value: None Custom Attributes: Yes
Add File Url	Definition: Specifies the absolute path of the attachment file. Allowed Values: An absolute path and file name on the AgilePoint Server or SharePoint Server. Multiple attachments are not supported. Default Value: None Custom Attributes: Yes Example: • c:\My Documents\sample1.doc • ${HomeDirectory}\sample2.doc • http://demo3:8000/DocumentLib1/sample3.doc
Store the response Thread Id in Custom Attribute or Schema	Definition: Specifies the name of the custom attribute that is used to store the response Thread ID. The Thread ID is an identifier used to track a Yammer conversation thread. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes Example:

Field Name	Value
	/pd:myFields/pd:ThreadID

2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Post Attachment
   - Post File Attachment - Send Private Attachment Tab
   - Post File Attachment - Post in a Group Tab
   - Yammer Credentials Window

Invite User

An AgilePart that sends an invitation to specified users to join your Yammer network.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Invite User** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Credential	Opens the Following Window: Yammer Credentials Window Purpose of this Window: Specifies the unique identifiers for the Yammer application.

Field Name	Definition
Invitations	Opens the Following Window: Invite User Window Purpose of this Window: Sends an invitation to the users to join the current Yammer network.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

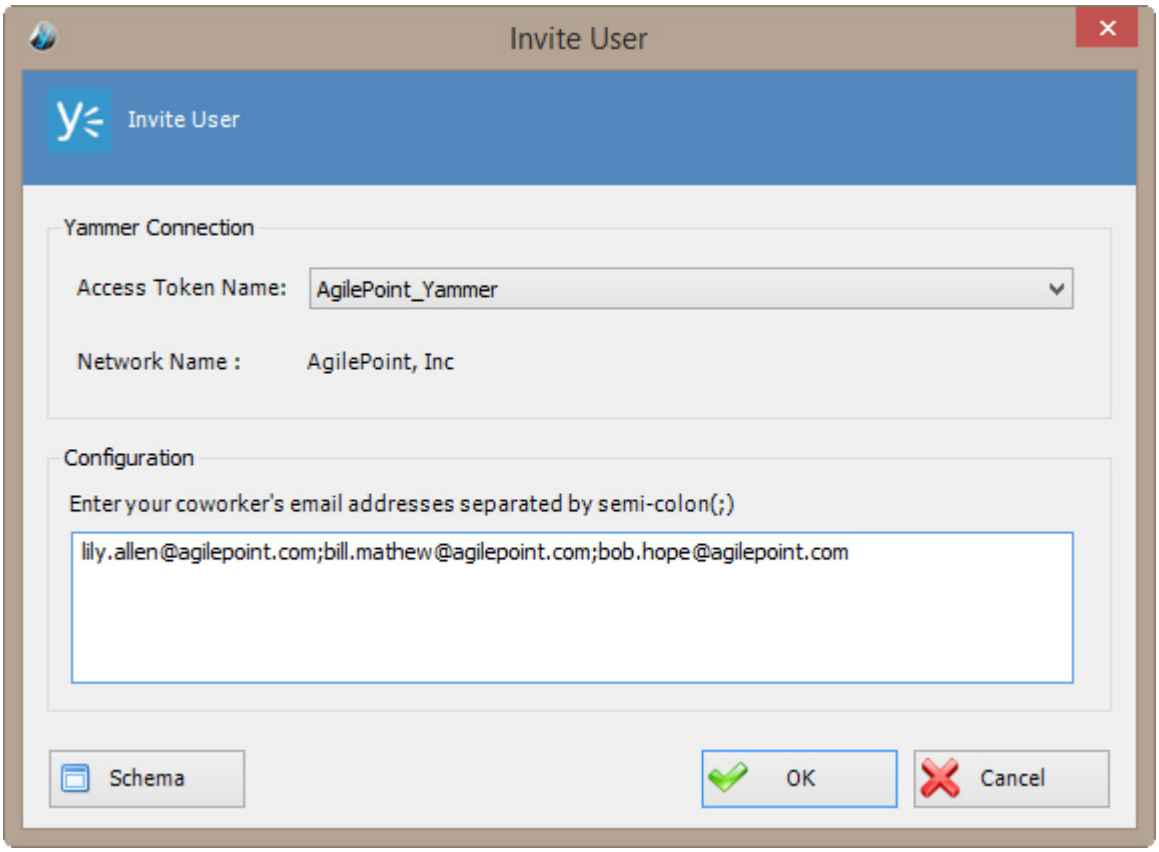
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Invite User Window

Sends an invitation to the users to join the current Yammer network.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Invite User** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Invitations** field, click the **Ellipses** button.

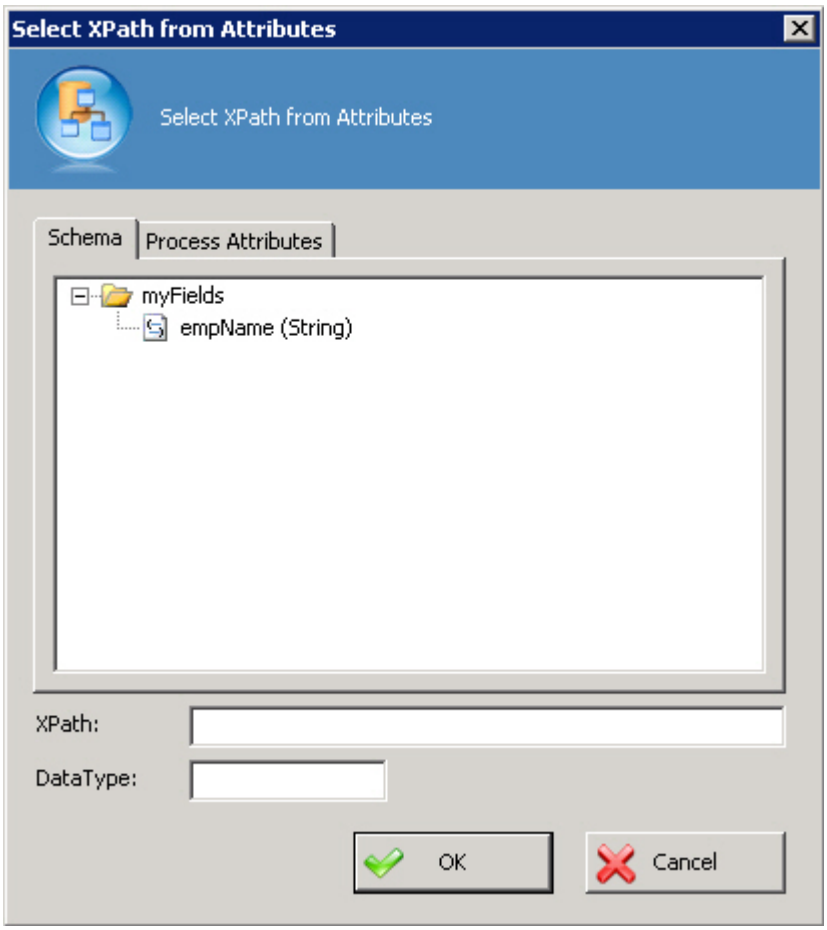
Field Definitions

Field Name	Definition
Access Token Name	Definition: Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces. Default Value: None

Field Name	Definition
	Custom Attributes: No
Enter your coworker's email addresses separated by semi-colon (;)	Definition: Specifies the email addresses for people you want to invite as Yammer users. Allowed Values: One or more valid email addresses. Multiple email addresses must be separated with a semicolon (;). Default Value: None Custom Attributes: Yes
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.



Prerequisites

- The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the appropriate stencil.
3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the respective field/configuration window, do one of the following, as appropriate:
   - Type the characters **${** in the property box.
   - Click the **Ellipses** button.
   - Click the **Schema** button.

Field Definitions

Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Inviting a User in Yammer

To send an invitation to the users to join the current Yammer network, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Invite User** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Invitations** field, click the **Ellipses** button.

Instructions

1. On the **Invite User** window, complete the following field as required:

Field Name	Definition
Enter your coworker's email addresses separated by semi-colon (;)	Definition: Specifies the email addresses for people you want to invite as Yammer users. Allowed Values: One or more valid email addresses. Multiple email addresses must be separated with a semicolon (;). Default Value: None Custom Attributes: Yes

2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Invite User
   - Invite User Window

- Yammer Credentials Window

Create User

An AgilePart that creates a user in your Yammer network.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Create User** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Credential	Opens the Following Window: Yammer Credentials Window Purpose of this Window: Specifies the unique identifiers for the Yammer application.
User	Opens the Following Window: • Create User Window - Specifies the user information for the user you want to create. • Create User Window - Profile Tab - Specifies the profile information for the user you want to create. • Create User Window - Contact Tab - Specifies the contact information for the user you want to create.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

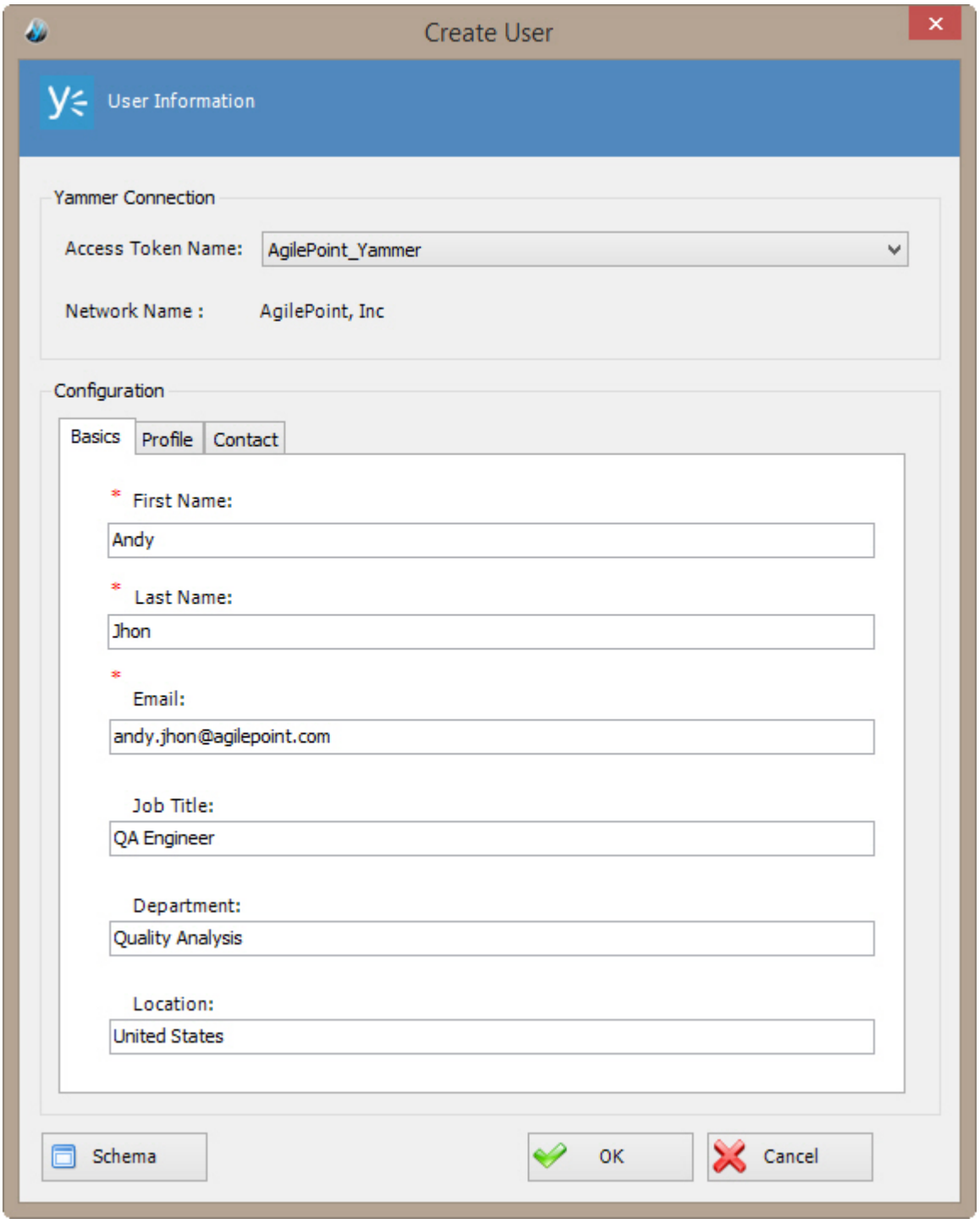
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Create User Window

Specifies the user information for the user you want to create.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Create User** AgileShape, and drop it on the process template.

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **User** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Access Token Name	Definition: Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces. Default Value: None Custom Attributes: No
First Name	Definition: The user's first name. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes
Last Name	Definition: The user's last name. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes
E-mail	Definition: The user's email address.

Field Name	Definition
	Allowed Values: A valid email address. Default Value: None Custom Attributes: Yes
Job Title	Definition: Specifies the job title of the user. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes
Location	Definition: Specifies location of the user. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes
Other Tabs	Definition: Other tabs on this window provide more detailed information about the user, such as information about their family, and contact information. You can populate these fields with text or custom attributes.

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Creating a User in Yammer

To create a user in your Yammer network, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Create User** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **User** field, click the **Ellipses** button.

Instructions

1. Complete the following fields as required.

Field Name	Value
First Name	Definition: The user's first name. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes
Last Name	Definition: The user's last name. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes
E-mail	Definition: The user's email address. Allowed Values: A valid email address. Default Value: None

Field Name	Value
	Custom Attributes: Yes

2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Create User
   - Create User Window
   - Yammer Credentials Window

Update User

An AgilePart that updates information for a Yammer network user.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Active Directory** stencil.
3. On the **Active Directory** stencil, drag the **Update User** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Credential	Opens the Following Window: Yammer Credentials Window Purpose of this Window: Specifies the unique identifiers for the Yammer application.

Field Name	Definition
User	Opens the Following Window: • Update User Window - Updates the information for a Yammer user. • Update User Window - Profile Tab - Updates the existing profile information of the user. • Update User Window - Contact Tab - Updates the existing contact information of the user.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

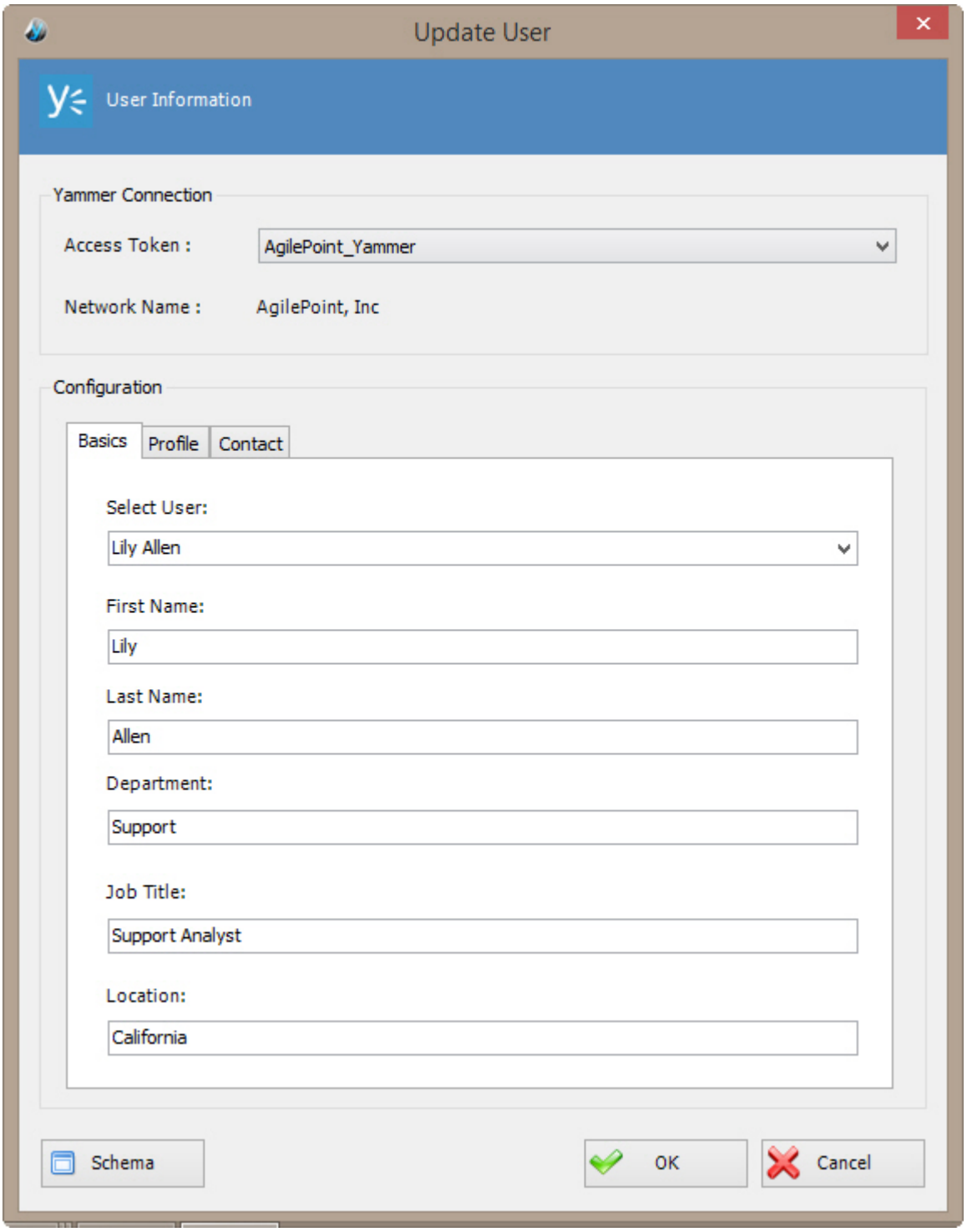
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Update User Window

Updates the information for a Yammer user.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **UdateUser** AgileShape, and drop it on the process template.

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **User** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Access Token Name	Definition: Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces. Default Value: None Custom Attributes: No
Select User	Definition: Specifies the user name you want to associate with the action from the list. Allowed Values: A user name. Default Value: None Custom Attributes: No
First Name	Definition: The user's first name. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes
Last Name	Definition: The user's last name.

Field Name	Definition
	Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes
E-mail	Definition: The user's email address. Allowed Values: A valid email address. Default Value: None Custom Attributes: Yes
Job Title	Definition: Specifies the job title of the user. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes
Location	Definition: Specifies location of the user. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes
Other Tabs	Definition:

Field Name	Definition
	Other tabs on this window provide more detailed information about the user, such as information about their family, and contact information. You can populate these fields with text or custom attributes.

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Updating a Yammer User

To update the information for a Yammer user, do the following.

Navigation

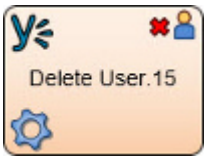
1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **UdateUser** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **User** field, click the **Ellipses** button.

Instructions

1. On the **Update User** window, modify the user information as required.
2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Update User
   - Update User Window
   - Yammer Credentials Window

Delete User

An AgilePart that deletes a user from your Yammer network.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Delete User** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Credential	Opens the Following Window: Yammer Credentials Window Purpose of this Window: Specifies the unique identifiers for the Yammer application.
User	Opens the Following Window: Delete User Purpose of this Window: An AgilePart that deletes a user from your Yammer network.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

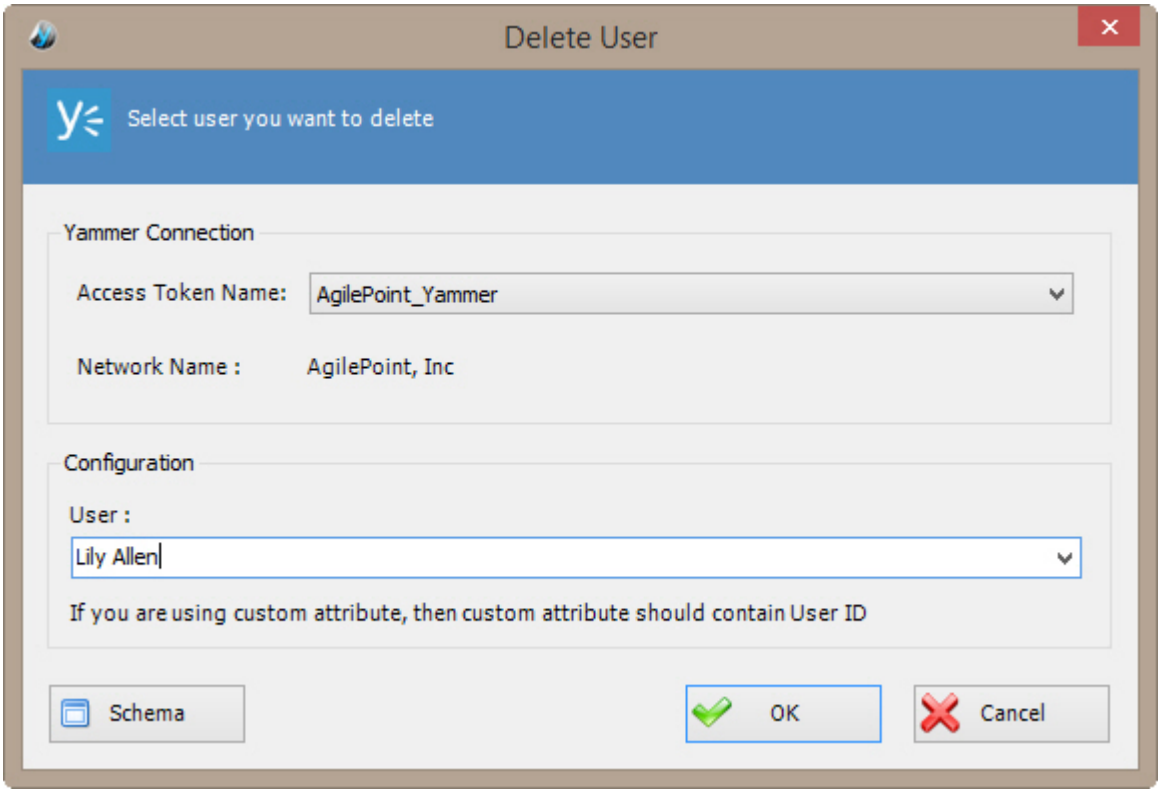
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Delete User Window

Specifies the user to remove from your Yammer network.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Delete User** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **User** field, click the **Ellipses** button.

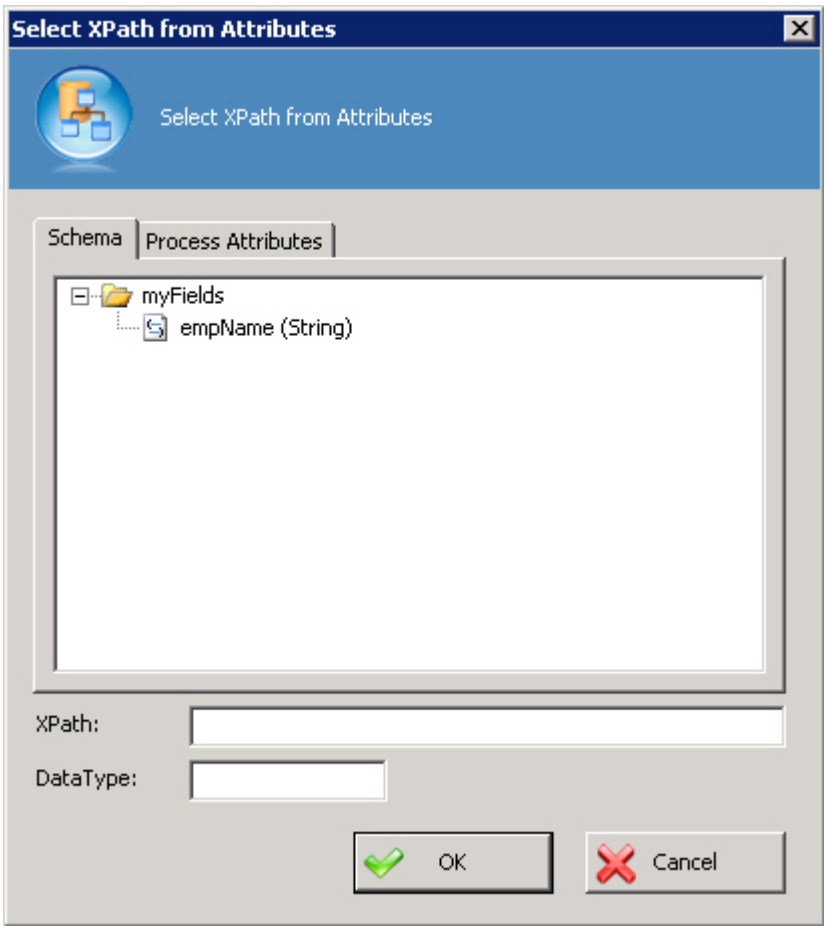
Field Definitions

Field Name	Definition
Access Token Name	Definition: Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces.

Field Name	Definition
	Default Value: None Custom Attributes: No
User	Definition: Specifies the user name you want to associate with the action. Allowed Values: A user name. Default Value: None Custom Attributes: Yes
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.



Prerequisites

- The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the appropriate stencil.
3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the respective field/configuration window, do one of the following, as appropriate:
   - Type the characters **${** in the property box.
   - Click the **Ellipses** button.
   - Click the **Schema** button.

Field Definitions

Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Deleting a User in Yammer

To delete a user from your Yammer network, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the **Delete User** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **User** field, click the **Ellipses** button.

Instructions

1. On the **Delete User** window, select the user you want to delete from the **User** list.
2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Delete User
   - Delete User Window
   - Yammer Credentials Window

Chatter

This section describes the AgileShapes in the Chatter stencil.

Comment Chatter Feed

An AgilePart that posts a comment to a specified thread in a Chatter feed.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. On the **Chatter** stencil, drag the **Comment Chatter Feed** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: Comment to Chatter Feed Window Purpose of this Window: Sets up a comment in a Chatter feed.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

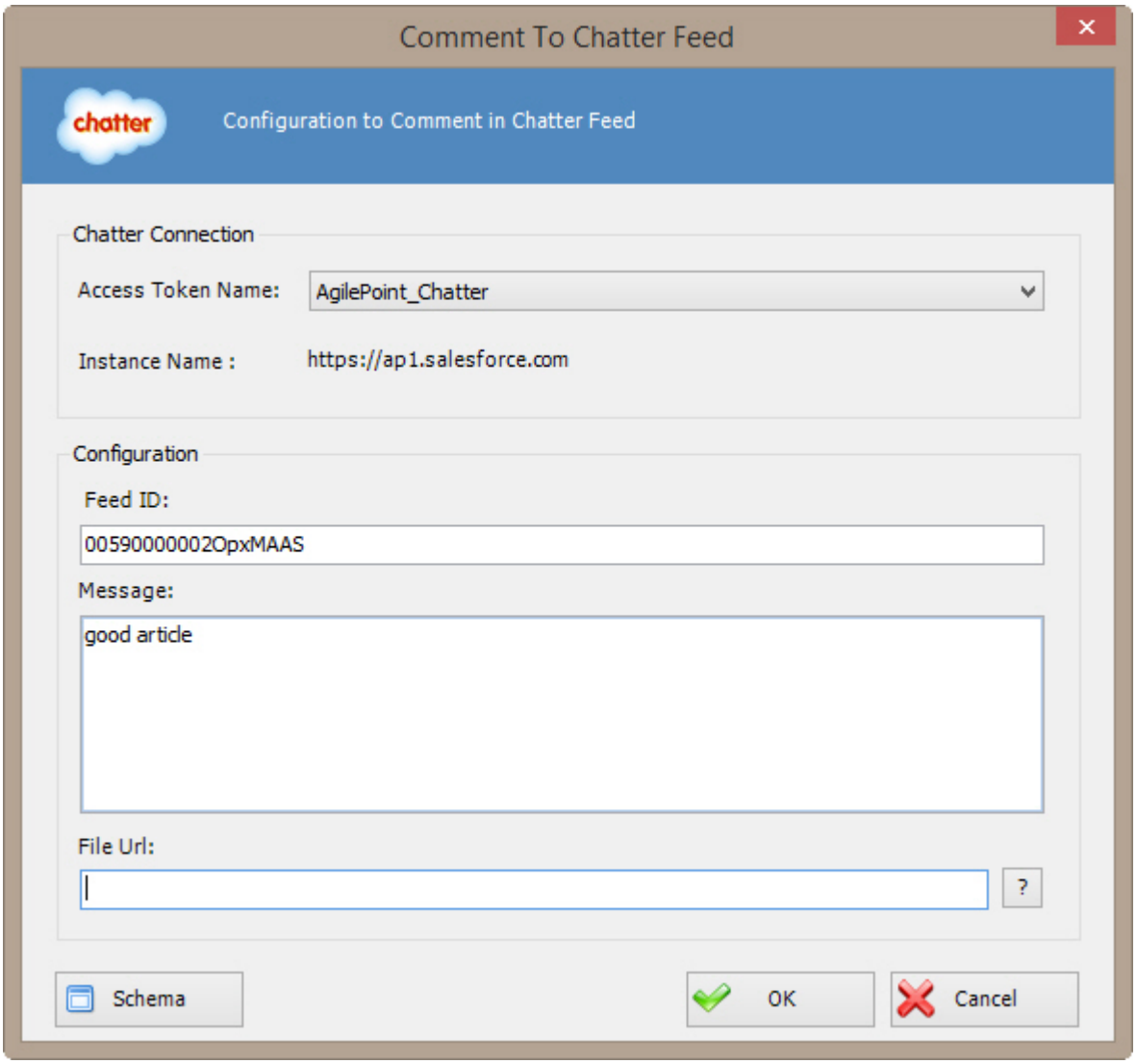
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Comment to Chatter Feed Window

Sets up a comment in a Chatter feed.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. On the **Chatter** stencil, drag the **Comment Chatter Feed** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Access Token Name	Definition:

Field Name	Definition
	Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces. Default Value: None Custom Attributes: No
Feed ID	Definition: Specifies the ID of the Chatter message thread to which you want to post your comment. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes Example: ${/pd:myFields/pd:FeedID}
Message	Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes
File Url	Definition: Specifies the absolute path of the attachment file. Allowed Values: An absolute path and file name on the AgilePoint Server or SharePoint Server. Multiple attachments are not supported.

Field Name	Definition
	Default Value: None Custom Attributes: Yes Example: • c:\My Documents\sample1.doc • ${HomeDirectory}\sample2.doc • http://demo3:8000/DocumentLib1/sample3.doc
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Create Chatter Group

An AgilePart that creates a new group in your Chatter network.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. On the **Chatter** stencil, drag the **Create Chatter Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: Create Group in Chatter Window Purpose of this Window: Specifies the group you want to create in your Chatter network.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

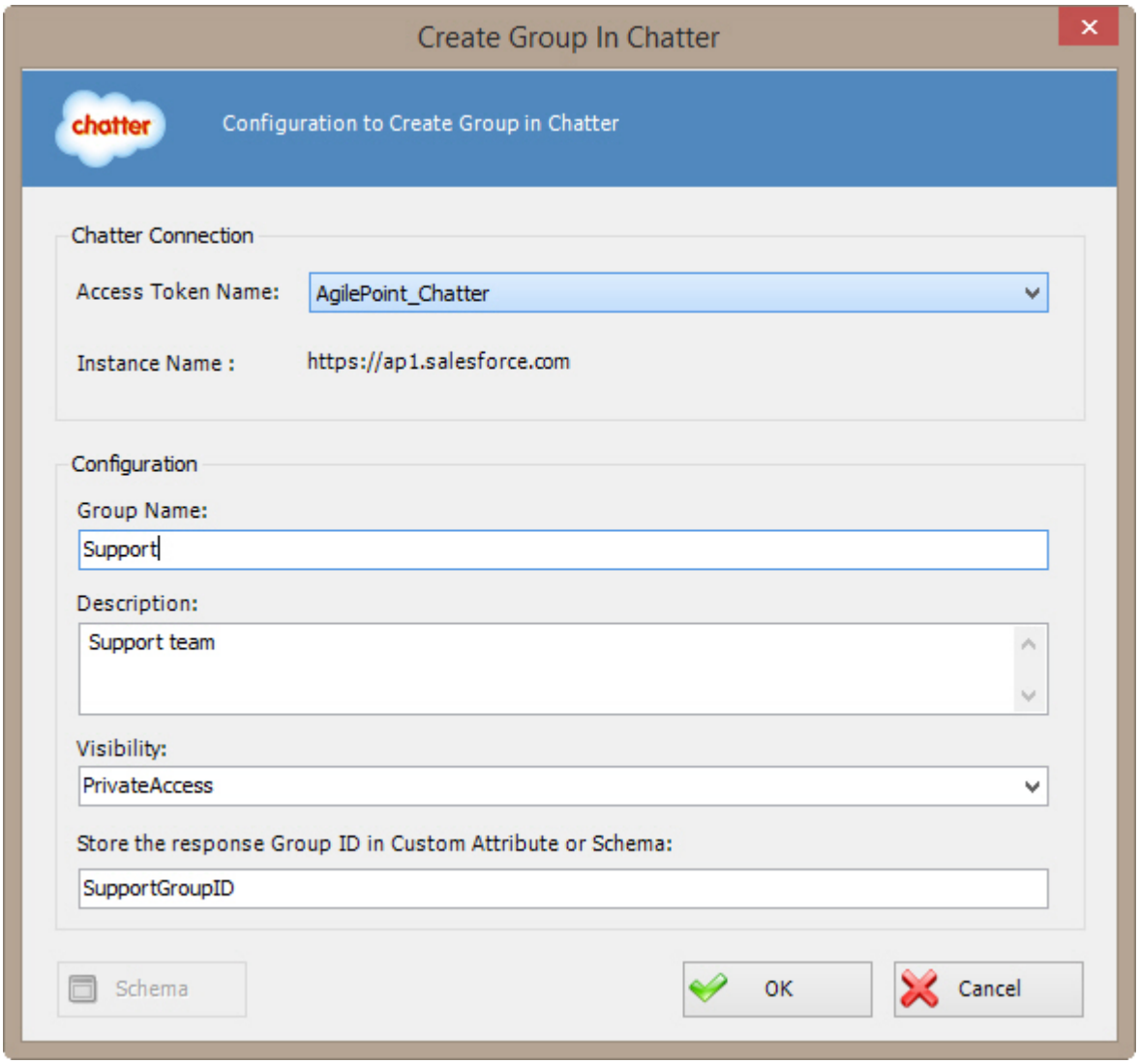
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Create Group in Chatter Window

Specifies the group you want to create in your Chatter network.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. On the **Chatter** stencil, drag the **Create Chatter Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Access Token Name	Definition:

Field Name	Definition
	Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces. Default Value: None Custom Attributes: No
Group Name	Definition: Specifies the name of your Chatter group. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes
Description	Definition: A free text description of the group.
Visibility	Definition: Specifies whether anyone or only members of the group can see and add posts, comments, and files. Allowed Values: • **PublicAccess** - Anyone can see and add posts, comments, and files. • **PrivateAccess** - Only group members can see and add posts, comments, and files. Default Value: None Custom Attributes: No
Store the response Group ID in Custom Attribute or Schema	Definition: Specifies the name of the custom attribute that is used to store the response Group ID.

Field Name	Definition
	The Group ID is an identifier used to track a Chatter conversation thread. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes Example: /pd:myFields/pd:GroupID
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Delete Chatter Group

An AgilePart that removes a specified group from your Chatter network.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. On the **Chatter** stencil, drag the **Delete Chatter Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: Delete Group in Chatter Window Purpose of this Window: Deletes a specified group from your Chatter network.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

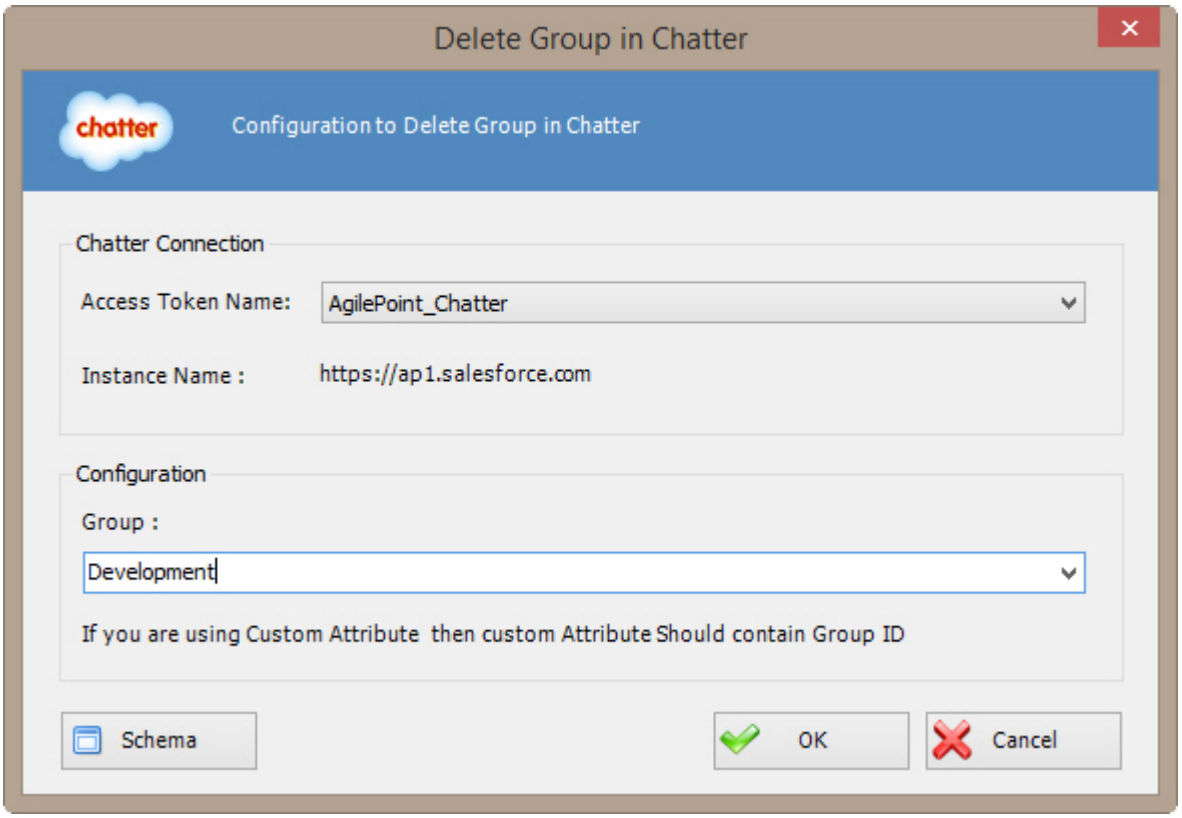
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Delete Group in Chatter Window

Deletes a specified group from your Chatter network.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. On the **Chatter** stencil, drag the **Delete Chatter Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Access Token Name	Definition: Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces. Default Value: None

Field Name	Definition
	Custom Attributes: No
Group	Definition: Specifies the name of your group. Allowed Values: A group name. Default Value: None Custom Attributes: Yes
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Join Chatter Group

An AgilePart that adds users to a group in your Chatter network.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. On the **Chatter** stencil, drag the **Join Chatter Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: Join Group in Chatter Window Purpose of this Window: Specifies the users you want to add to a group in your Chatter network.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

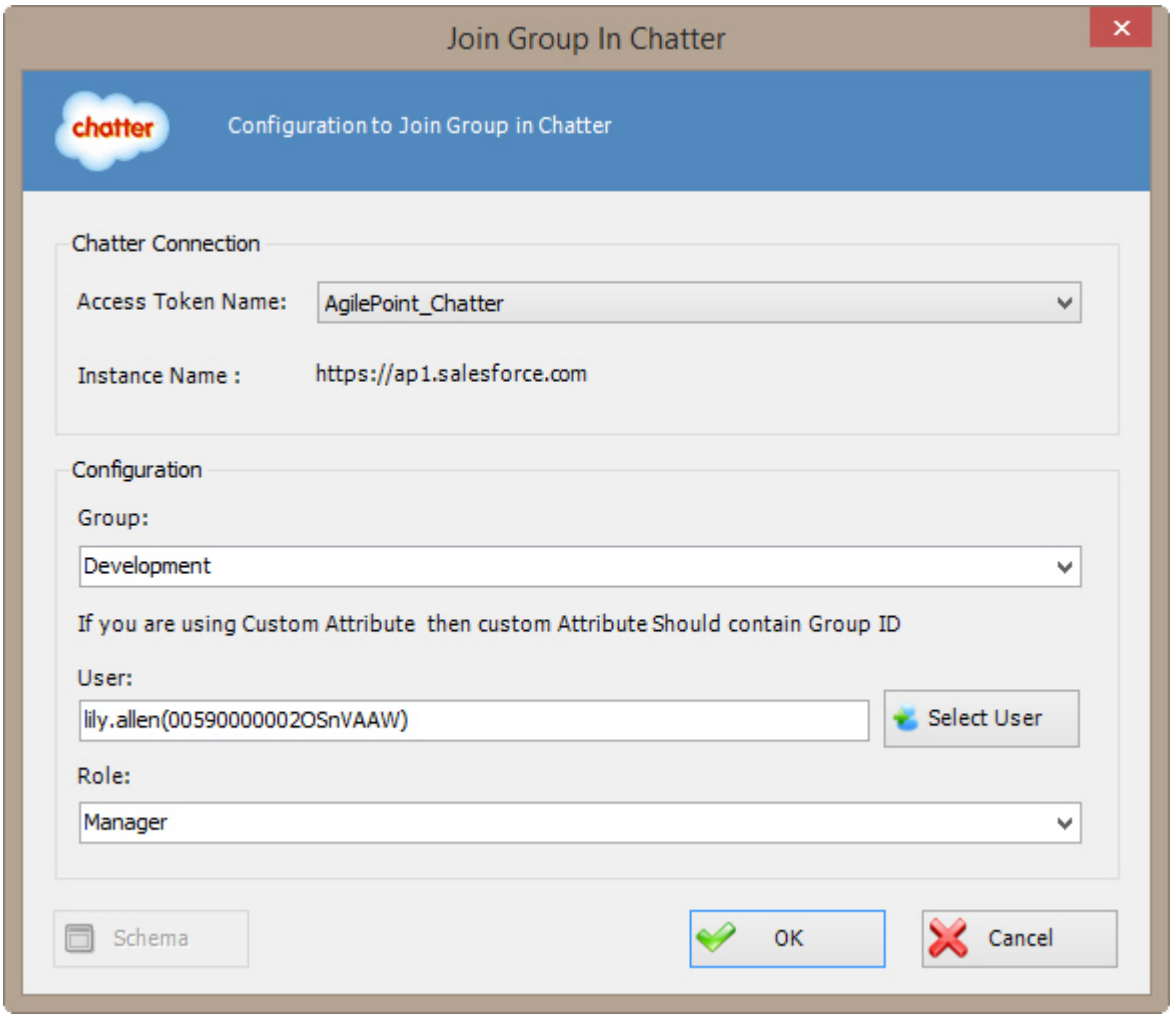
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Join Group in Chatter Window

Specifies the users you want to add to a group in your Chatter network.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. On the **Chatter** stencil, drag the **Join Chatter Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

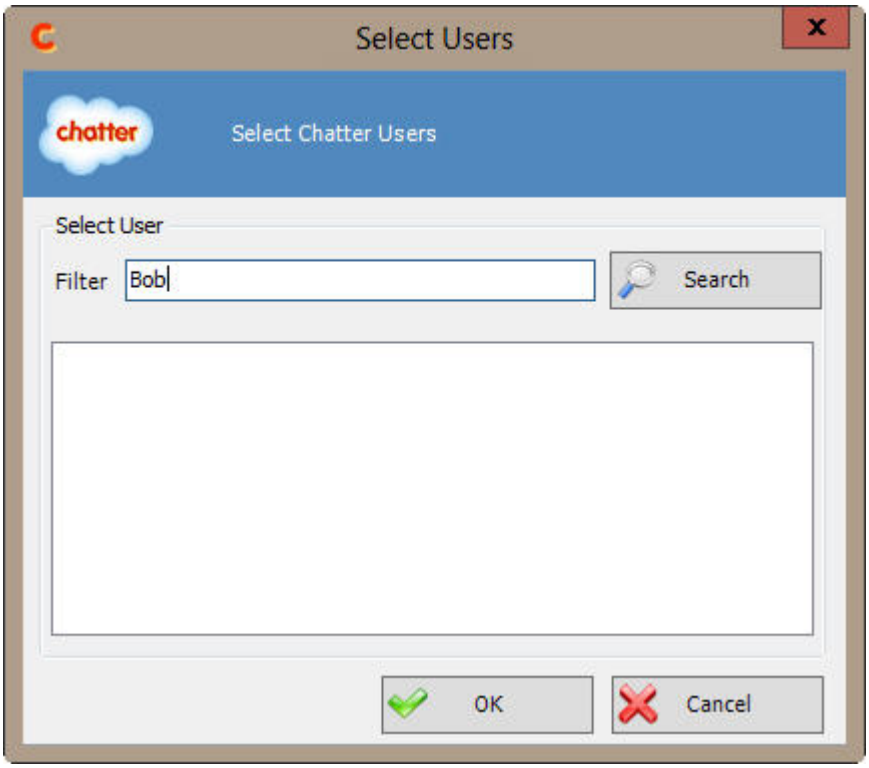
Field Name	Definition
Access Token Name	Definition: Specifies the unique name for your connection to the enterprise social application.

Field Name	Definition
	Allowed Values: An alphanumeric string with no spaces. Default Value: None Custom Attributes: No
Group	Definition: Specifies the name of your group. Allowed Values: A group name. Default Value: None Custom Attributes: Yes
User	Definition: Specifies the user name from the Select Users Window. Allowed Values: • A Chatter user ID. Click the **Select User** button to select. • An AgilePoint user name. • A custom attribute that represents a Chatter user ID or AgilePoint user name. Default Value: None Custom Attributes: Yes Example: • MyChatterId • demo3\lallen • ${/pd:myFields/pd:UserID}
Select User	Opens the Following Window: Select Users Window

Field Name	Definition
	Purpose of this Window: Specifies a Chatter user.
Role	Definition: Specifies the role of the user. Allowed Values: A valid role. Default Value: None Custom Attributes: Yes
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Select Users Window

Specifies a Chatter user.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. >On the **Chatter** stencil, drag one of the following AgileShapes, and drop it on the process template:
   - **Join Chatter Group**
   - **Post Feed to Chatter User**
   - **Send or Reply Chatter Message**
   - **Update User Profile**
4. On the **Chatter** stencil, drag the **Join Chatter Group** AgileShape, and drop it on the process template.
5. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
6. On the **Configure** field, click the **Ellipses** button.
7. In one of the following windows, click **Select User**. The specific windows that display vary, depending upon the AgileShape you are using:
   - **Join Group in Chatter**
   - **Post Feed to Chatter User**
   - **Send/Reply Message in Chatter**
   - **Update User Profile in Chatter**

Field Definitions

Field Name	Definition
Filter	Definition: Specifies the user name to search within Chatter network. Allowed Values: A single line of text. You can use asterisks (*) as wildcards. Default Value: None Custom Attributes: Yes Example: The following are some examples of filter expressions: • ***** - All user names are searched. • **a*** - All user names that start with the letter *a*. • ***a*** - All user names that contain the letter *a*.
Search	Function: Performs search operation based on the specified criteria.

Post Feed to Chatter Group

An AgilePart that posts a Chatter feed to a specified group.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. On the **Chatter** stencil, drag the **Post Feed to Chatter Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: Post Feed to Group of Chatter Window Purpose of this Window: Specifies a Chatter feed to post to a group.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

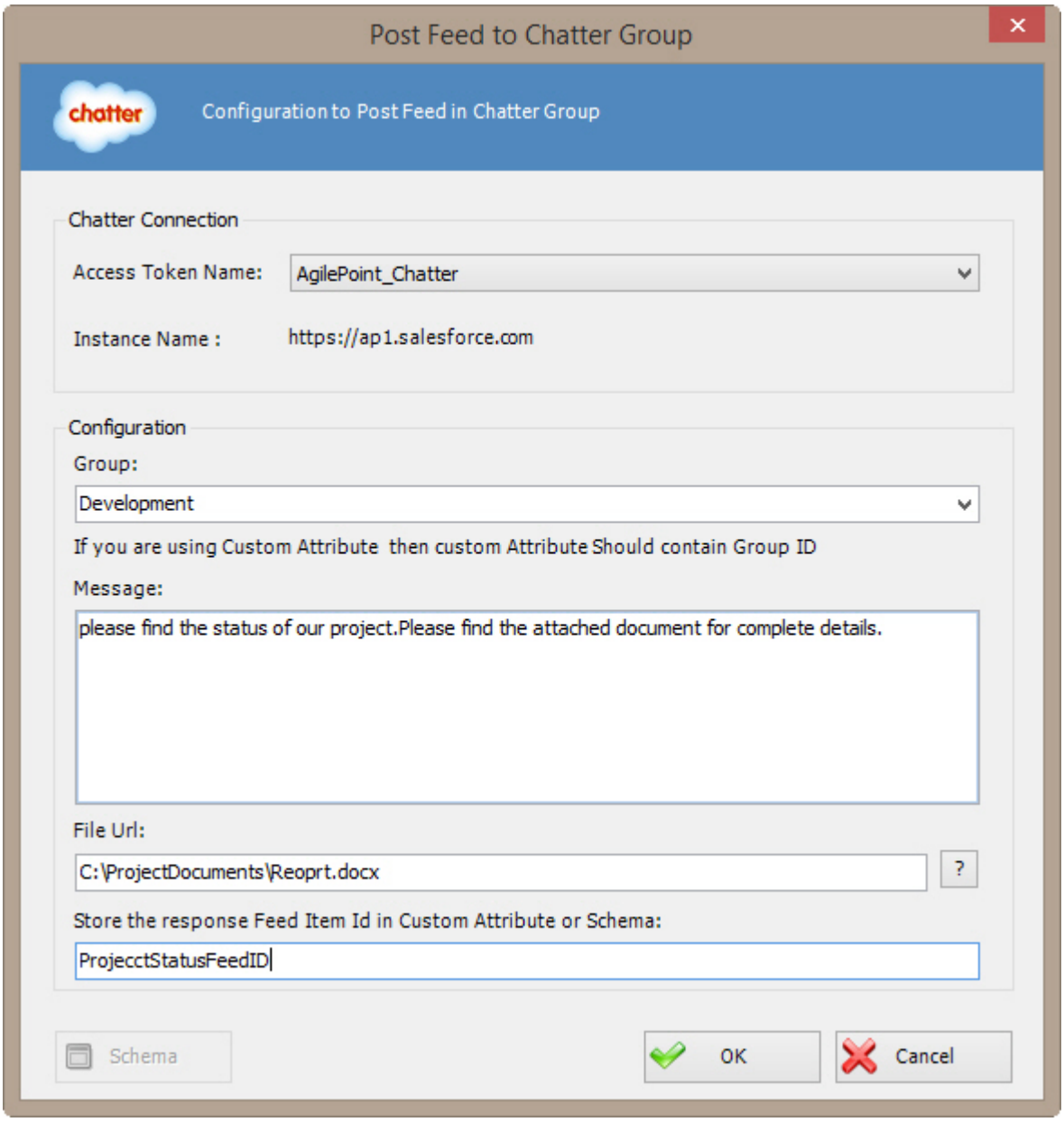
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Post Feed to Group of Chatter Window

Specifies a Chatter feed to post to a group.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. On the **Chatter** stencil, drag the **Post Feed to Chatter Group** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Access Token Name	Definition: Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces. Default Value: None Custom Attributes: No
Group	Definition: Specifies the name of your group. Allowed Values: A group name. Default Value: None Custom Attributes: Yes
Message	Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes
File Url	Definition: Specifies the absolute path of the attachment file. Allowed Values:

Field Name	Definition
	An absolute path and file name on the AgilePoint Server or SharePoint Server. Multiple attachments are not supported. Default Value: None Custom Attributes: Yes Example: • c:\My Documents\sample1.doc • ${HomeDirectory}\sample2.doc • http://demo3:8000/DocumentLib1/sample3.doc
Store the response Feed Item Id in Custom Attribute or Schema	Definition: Specifies the name of the custom attribute that is used to store the response Feed Item Id. The Feed Item Id is an identifier used to track a Chatter conversation thread. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes Example: /pd:myFields/pd:FeedItemID
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Post Feed to Chatter User

An AgilePart that posts a specified Chatter feed to a Chatter user.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. On the **Chatter** stencil, drag the **Post Feed to Chatter User** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: Post Feed to Chatter User Window Purpose of this Window: Specifies a Chatter feed to post to a Chatter user.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

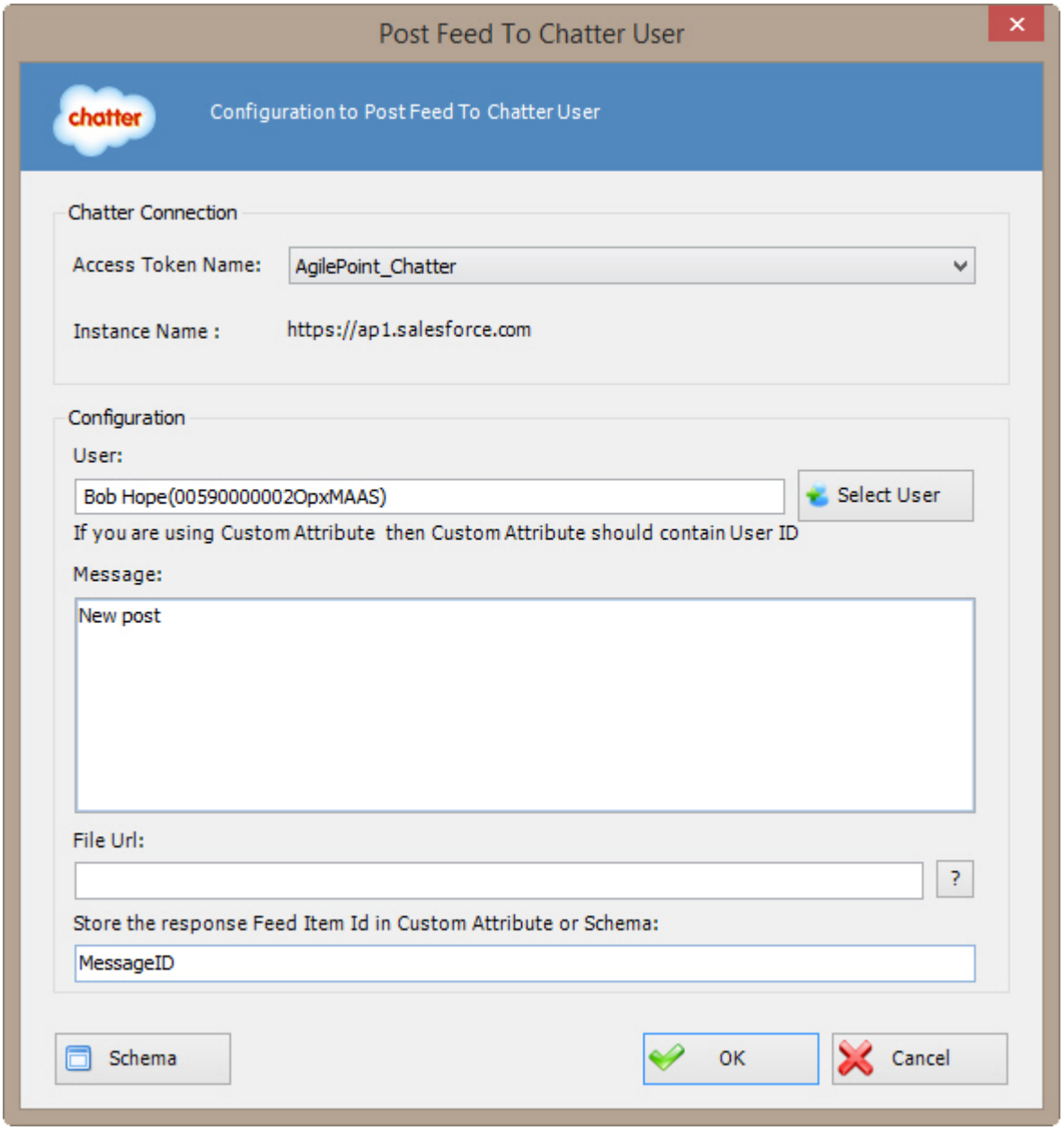
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Post Feed to Chatter User Window

Specifies a Chatter feed to post to a Chatter user.



Navigation

1. In AgilePoint Envision, open a process template.

2. Navigate to the **Chatter** stencil.
3. On the **Chatter** stencil, drag the **Post Feed to Chatter User** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

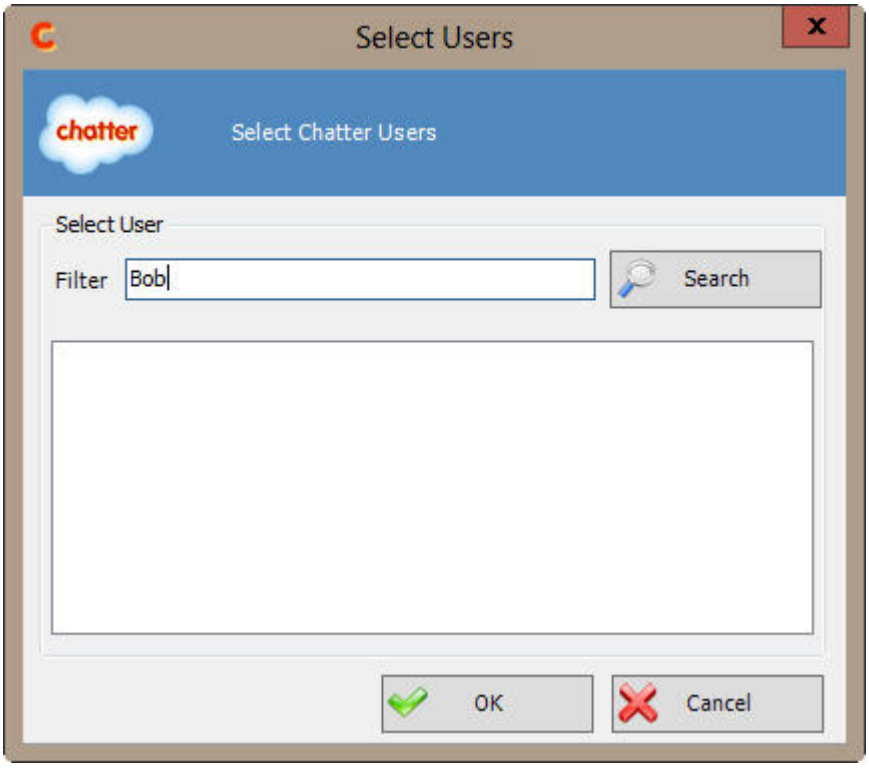
Field Name	Definition
Access Token Name	Definition: Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces. Default Value: None Custom Attributes: No
User	Definition: Specifies the user name from the Select Users Window. Allowed Values: • A Chatter user ID. Click the **Select User** button to select. • An AgilePoint user name. • A custom attribute that represents a Chatter user ID or AgilePoint user name. Default Value: None Custom Attributes: Yes Example: • MyChatterId • demo3\lallen • ${/pd:myFields/pd:UserID}
Select User	Opens the Following Window:

Field Name	Definition
	Select Users Window Purpose of this Window: Specifies a Chatter user.
Message	Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes
File Url	Definition: Specifies the absolute path of the attachment file. Allowed Values: An absolute path and file name on the AgilePoint Server or SharePoint Server. Multiple attachments are not supported. Default Value: None Custom Attributes: Yes Example: • c:\My Documents\sample1.doc • ${HomeDirectory}\sample2.doc • http://demo3:8000/DocumentLib1/sample3.doc
Store the response Feed Item Id in Custom Attribute or Schema	Definition: Specifies the name of the custom attribute that is used to store the response Feed Item Id. The Feed Item Id is an identifier used to track a Chatter conversation thread. Allowed Values: A custom attribute. Default Value:

Field Name	Definition
	None Custom Attributes: Yes Example: /pd:myFields/pd:FeedItemID
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Select Users Window

Specifies a Chatter user.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.

3. >On the **Chatter** stencil, drag one of the following AgileShapes, and drop it on the process template:
   - **Join Chatter Group**
   - **Post Feed to Chatter User**
   - **Send or Reply Chatter Message**
   - **Update User Profile**
4. On the **Chatter** stencil, drag the **Join Chatter Group** AgileShape, and drop it on the process template.
5. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
6. On the **Configure** field, click the **Ellipses** button.
7. In one of the following windows, click **Select User**. The specific windows that display vary, depending upon the AgileShape you are using:
   - **Join Group in Chatter**
   - **Post Feed to Chatter User**
   - **Send/Reply Message in Chatter**
   - **Update User Profile in Chatter**

Field Definitions

Field Name	Definition
Filter	Definition: Specifies the user name to search within Chatter network. Allowed Values: A single line of text. You can use asterisks (*) as wildcards. Default Value: None Custom Attributes: Yes Example: The following are some examples of filter expressions: • ***** - All user names are searched. • **a*** - All user names that start with the letter *a*. • ***a*** - All user names that contain the letter *a*.
Search	Function:

Field Name	Definition
	Performs search operation based on the specified criteria.

Send or Reply Chatter Message

An AgilePart that sends a private message in Chatter.



Prerequisites

- The user interface for this feature is available in English only.
- AgilePoint Server installed in Windows Service mode.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. On the **Chatter** stencil, drag the **Send or Reply Chatter Message** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: Send/Reply Message in Chatter Window Purpose of this Window: Specifies a private message in Chatter.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

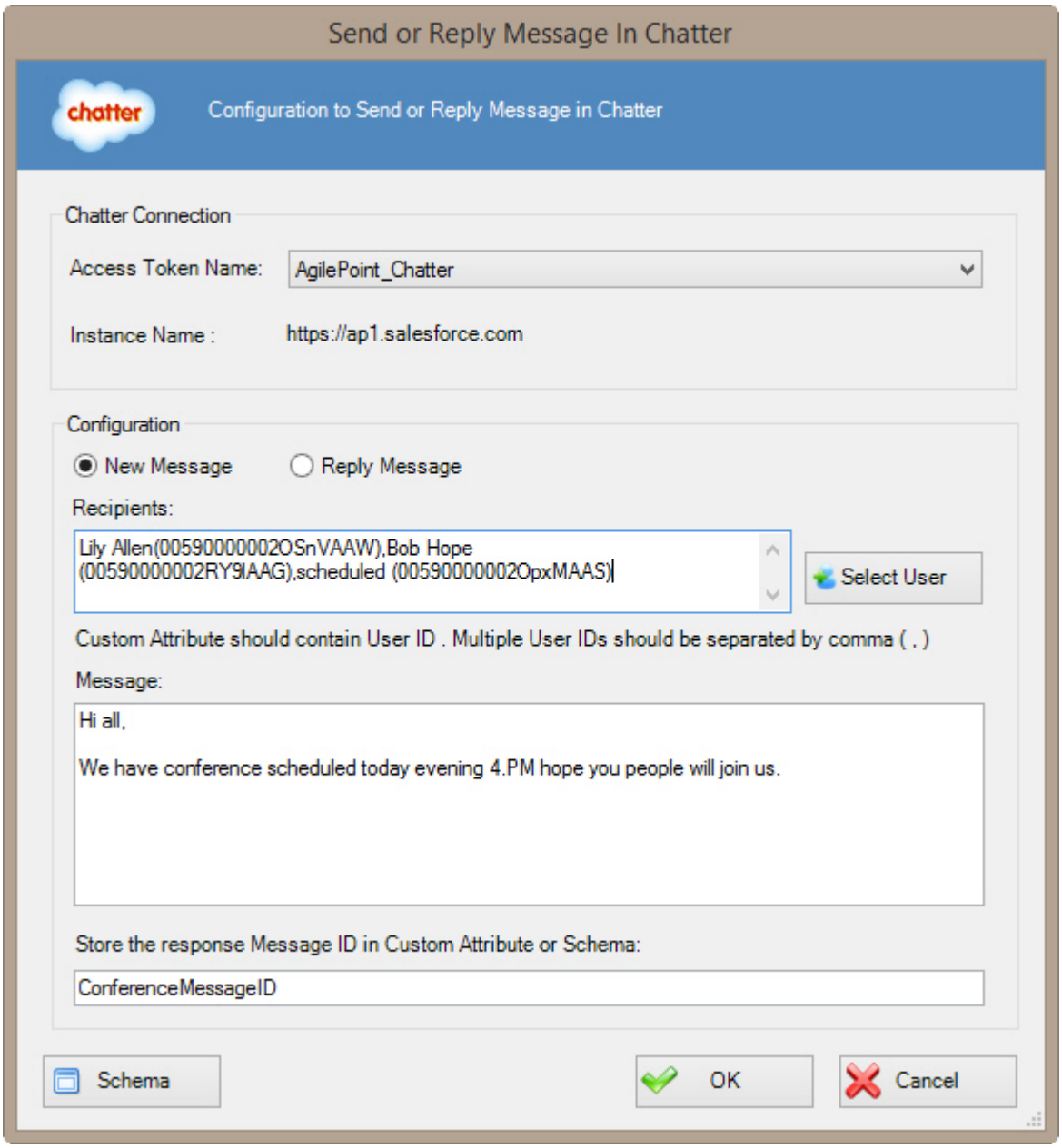
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Send/Reply Message in Chatter Window

Specifies a private message in Chatter.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. On the **Chatter** stencil, drag the **Send or Reply Chatter Message** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

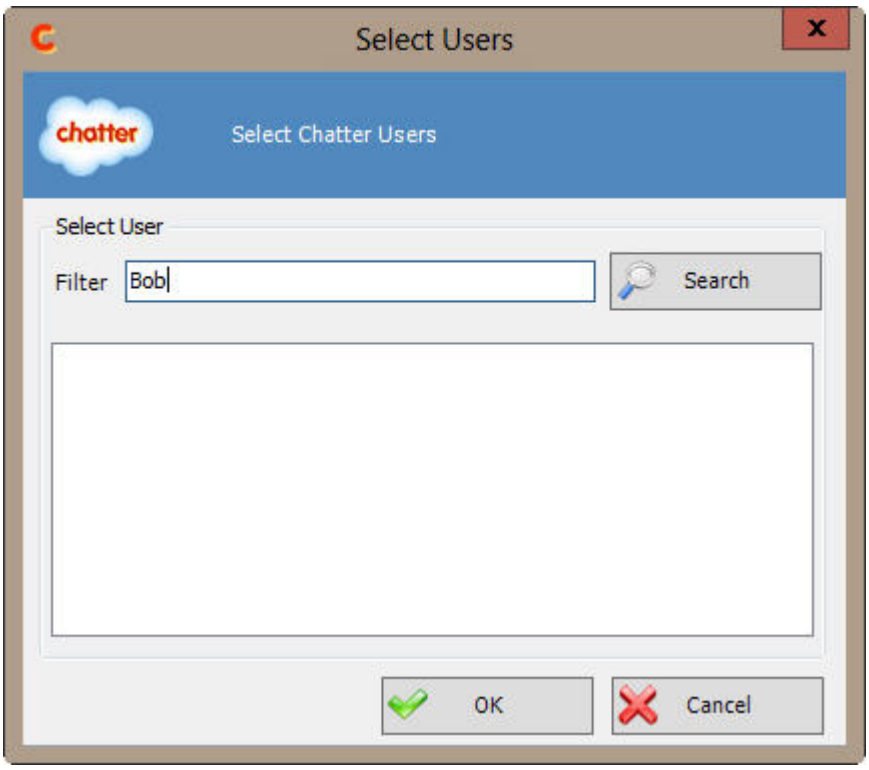
Field Definitions

Field Name	Definition
Access Token Name	Definition: Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces. Default Value: None Custom Attributes: No
New Message / Reply Message	Definition: Specifies whether to post a new message or reply to a specified message. Allowed Values: • **New Message** - Sends a new message. • **Reply Message** - Sends a reply to a specified message. Default Value: New Message
Recipients / Reply Message To	Definition: Specifies the user name or message ID you want to associate with the action. Allowed Values: • **Recipients** - Specifies the user name from the Select Users Window to which you want to post a new message. • **Reply Message To** - Specifies the ID of the Chatter message thread to which you want to post a reply message. Default Value: Recipients Custom Attributes: Yes

Field Name	Definition
Select User	Opens the Following Window: Select Users Window Purpose of this Window: Specifies a Chatter user.
Message	Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes
Store the response Message ID in Custom Attribute or Schema	Definition: Specifies the name of the custom attribute that is used to store the response Message ID. The Message ID is an identifier used to track a Chatter conversation thread. Allowed Values: A custom attribute. Default Value: None Custom Attributes: Yes Example: /pd:myFields/pd:MessageID
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Select Users Window

Specifies a Chatter user.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. >On the **Chatter** stencil, drag one of the following AgileShapes, and drop it on the process template:
   - **Join Chatter Group**
   - **Post Feed to Chatter User**
   - **Send or Reply Chatter Message**
   - **Update User Profile**
4. On the **Chatter** stencil, drag the **Join Chatter Group** AgileShape, and drop it on the process template.
5. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
6. On the **Configure** field, click the **Ellipses** button.
7. In one of the following windows, click **Select User**. The specific windows that display vary, depending upon the AgileShape you are using:
   - **Join Group in Chatter**
   - **Post Feed to Chatter User**
   - **Send/Reply Message in Chatter**

- **Update User Profile in Chatter**

Field Definitions

Field Name	Definition
Filter	Definition: Specifies the user name to search within Chatter network. Allowed Values: A single line of text. You can use asterisks (*) as wildcards. Default Value: None Custom Attributes: Yes Example: The following are some examples of filter expressions: • ***** - All user names are searched. • **a*** - All user names that start with the letter *a*. • ***a*** - All user names that contain the letter *a*.
Search	Function: Performs search operation based on the specified criteria.

Update User Profile

An AgilePart that modifies the description of a Chatter network user.



Prerequisites

- The user interface for this feature is available in English only.

- AgilePoint Server installed in Windows Service mode.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. On the **Chatter** stencil, drag the **Update User Profile** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: Update User Profile in Chatter Window Purpose of this Window: Specifies the description to modify for a Chatter user.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

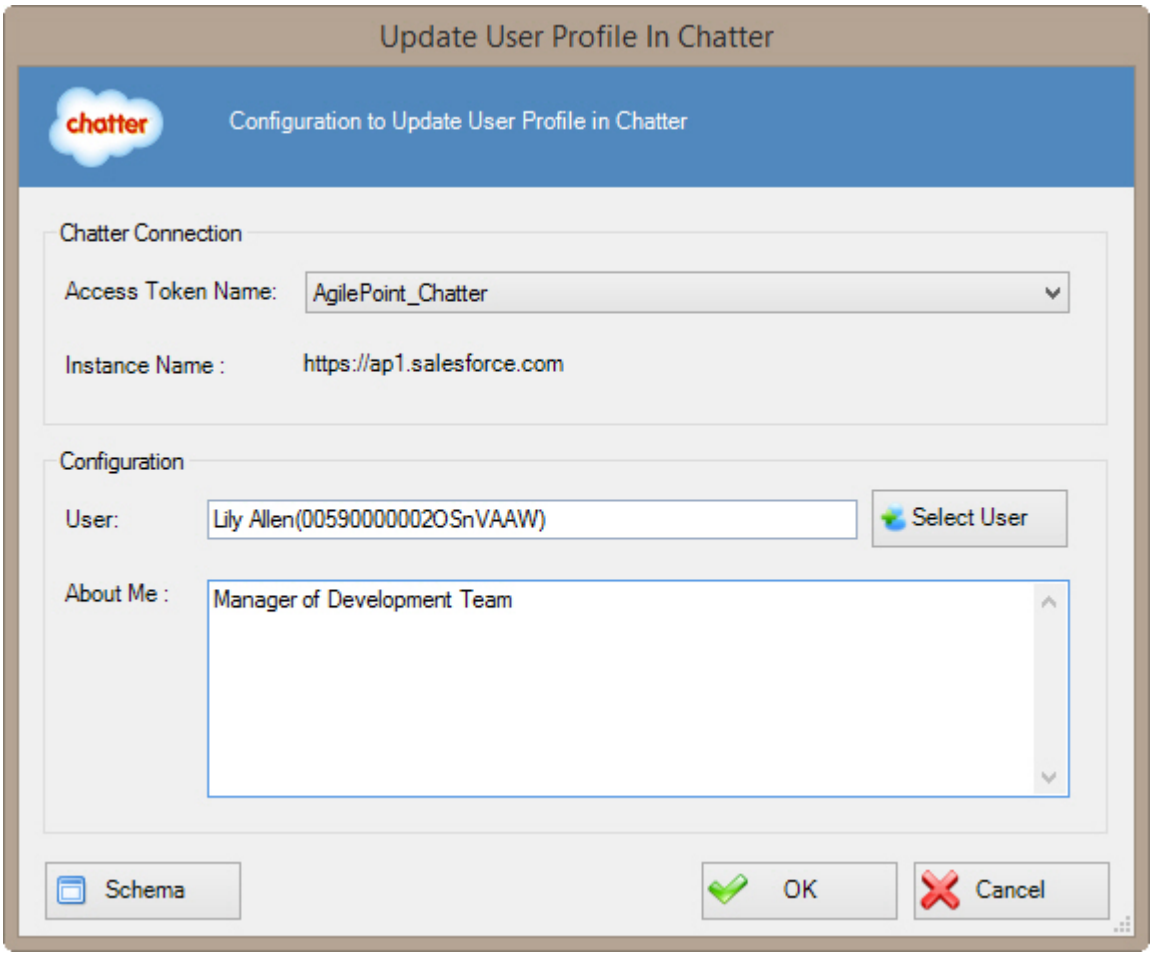
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Update User Profile in Chatter Window

Specifies the description to modify for a Chatter user.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. On the **Chatter** stencil, drag the **Update User Profile** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

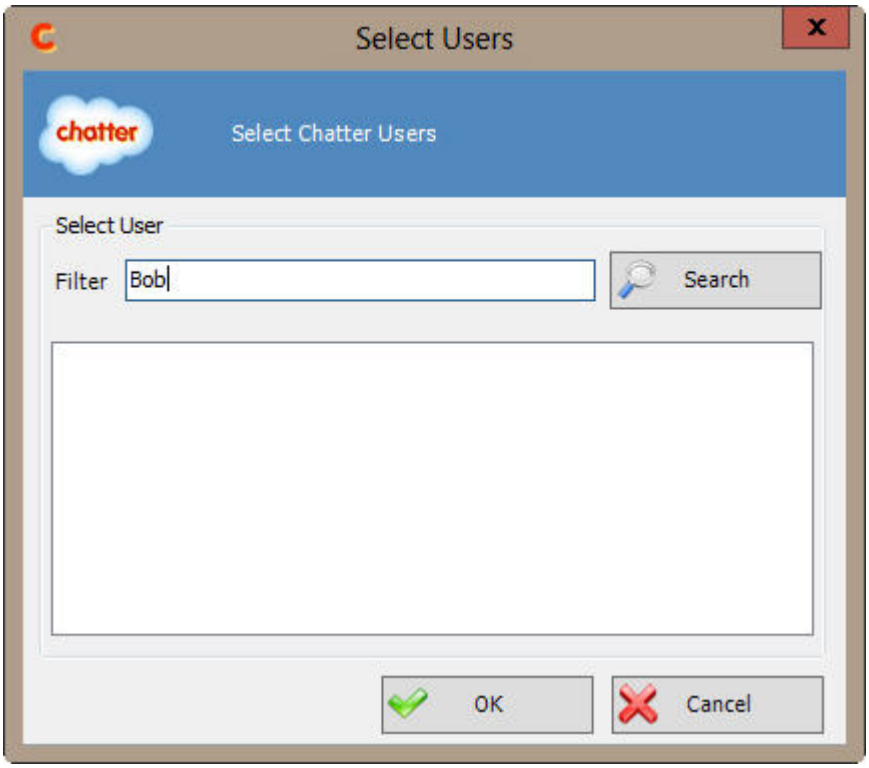
Field Name	Definition
Access Token Name	Definition: Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces.

Field Name	Definition
	Default Value: None Custom Attributes: No
User	Definition: Specifies the user name from the Select Users Window. Allowed Values: • A Chatter user ID. Click the **Select User** button to select. • An AgilePoint user name. • A custom attribute that represents a Chatter user ID or AgilePoint user name. Default Value: None Custom Attributes: Yes Example: • MyChatterId • demo3\lallen • ${/pd:myFields/pd:UserID}
Select User	Opens the Following Window: Select Users Window Purpose of this Window: Specifies a Chatter user.
About Me	Definition: Specifies a user description. Allowed Values: Multiple lines of text. Default Value: None Custom Attributes: Yes

Field Name	Definition
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.

Select Users Window

Specifies a Chatter user.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. >On the **Chatter** stencil, drag one of the following AgileShapes, and drop it on the process template:
   - **Join Chatter Group**
   - **Post Feed to Chatter User**
   - **Send or Reply Chatter Message**
   - **Update User Profile**

4. On the **Chatter** stencil, drag the **Join Chatter Group** AgileShape, and drop it on the process template.
5. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
6. On the **Configure** field, click the **Ellipses** button.
7. In one of the following windows, click **Select User**. The specific windows that display vary, depending upon the AgileShape you are using:
   - **Join Group in Chatter**
   - **Post Feed to Chatter User**
   - **Send/Reply Message in Chatter**
   - **Update User Profile in Chatter**

Field Definitions

Field Name	Definition
Filter	Definition: Specifies the user name to search within Chatter network. Allowed Values: A single line of text. You can use asterisks (*) as wildcards. Default Value: None Custom Attributes: Yes Example: The following are some examples of filter expressions: • ***** - All user names are searched. • **a*** - All user names that start with the letter *a*. • ***a*** - All user names that contain the letter *a*.
Search	Function: Performs search operation based on the specified criteria.

Database

This section describes the AgileShapes in the Database stencil.

Batch Insert

An AgilePart that inserts multiple new database records into a database table.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Batch Insert** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
DatabaseType	Definition: Specifies the type of database to be used. Allowed Values: • **SqlServer** • **Oracle** Default Value: SqlServer
InsertXMLRepeatingDescriptor	Opens the Following Window: Configuration for Batch Inserting Database Record Window Purpose of this Window: Specifies where and how to insert the new database records into the database.
Timeout	Definition: Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape.

Field Name	Definition
	Allowed Values: Any positive integer. Default Value: 600 Custom Attributes: No

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

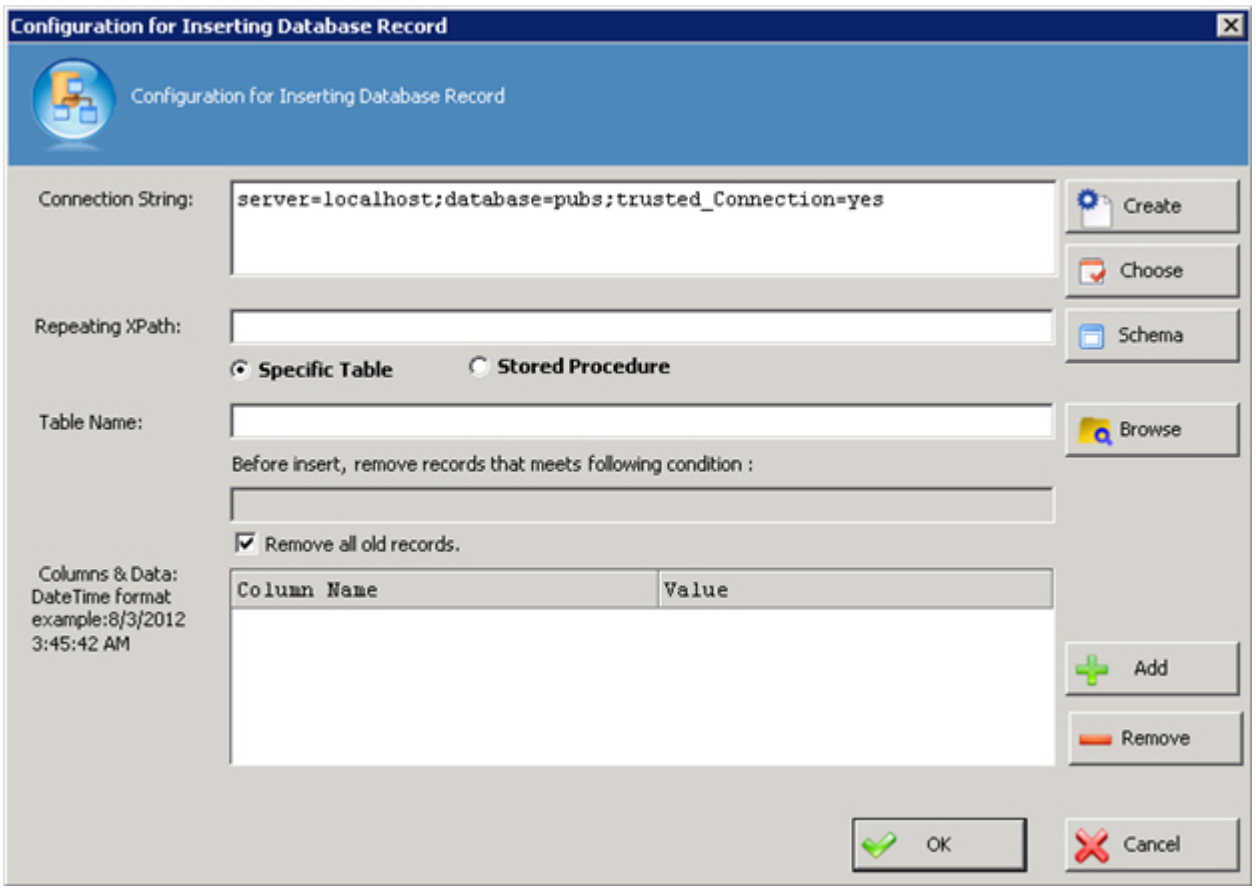
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Batch Inserting Database Record Window

Specifies where and how to insert the new database records into the database.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Batch Insert** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **InsertXMLRepeatingDescriptor** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Connection String	Definition: Specifies the connection string that is used to connect to the database. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string.

Field Name	Definition
	Allowed Values: A valid SQL connection string. Default Value: server=myserver;database=pubs;trusted_Connection=yes Custom Attributes: Yes Example: server=DataServer;database=StoreDb;trusted_Connection=yes
Create	Opens the Following Window: Database Connection Configuration Window Purpose of this Window: Creates a connection string with specified information.
Choose	Opens the Following Window: Browse Custom Attributes Window Purpose of this Window: Specifies a connection string from a list of shared custom attributes.
RepeatingXPath	Definition: Specifies an XPath to a root of repeating element in a schema where all the data are stored. These data will be inserted into the database during insert operation. Allowed Values: A valid XPath to a repeating xml node. Default Value: None Custom Attributes: Yes Example: /pd:myFields/pd:PersonalDetails
Specific Table / Stored Procedure	Definition:

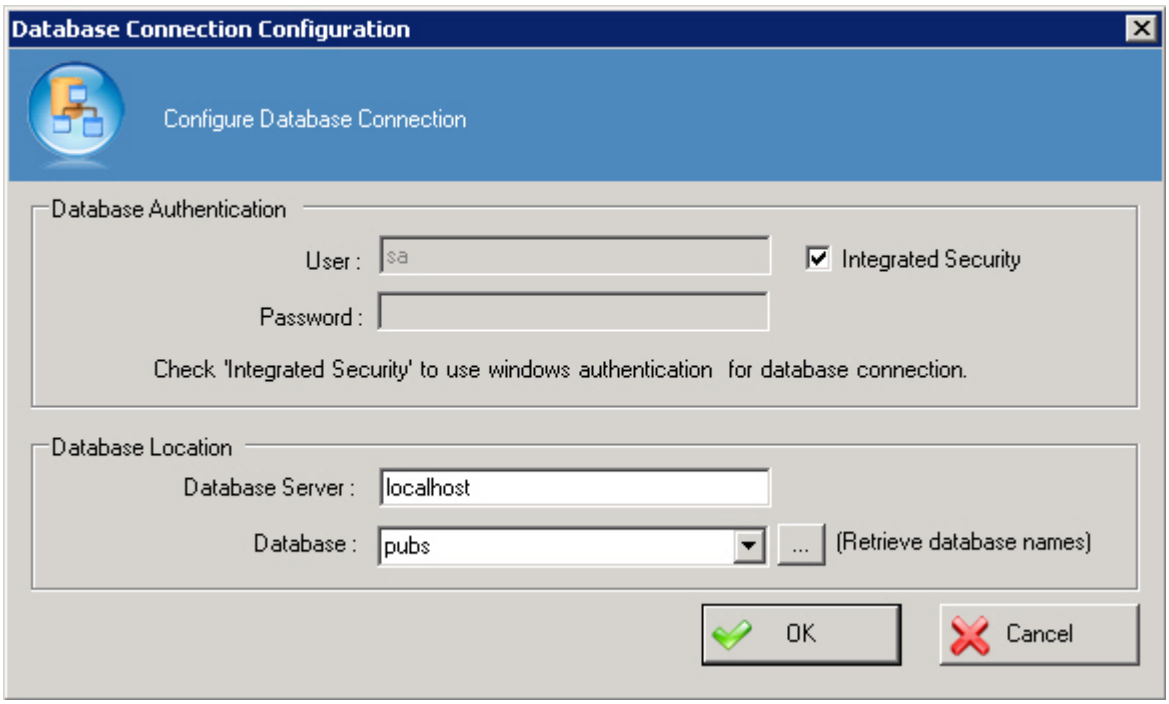
Field Name	Definition
	Specifies whether to insert the data into a specified table, or using a stored procedure. Allowed Values: • **Specific Table** - Inserts the data into a specified database table. • **Stored Procedure** - Inserts the data using a stored procedure. Default Value: Specific Table
Table Name	Definition: Specifies the name of the database table where this AgileShape inserts the record. Allowed Values: A valid database table name. Default Value: None Custom Attributes: Yes
Stored Procedure	Definition: Specifies the stored procedure name and parameters to execute at runtime. Allowed Values: A valid SQL stored procedure execute statement. Default Value: None Custom Attributes: Yes Example: EXECUTE [dbo].[InsertBillItem] @ItemName
Browse	Function: Enables you to find the associated item. Purpose of this Window:

Field Name	Definition
	Specifies a particular database table from the database.
Remove all old records	Definition: Removes all the old records from the database. Allowed Values: • **Selected** - Enables the remove all old records option. • **Deselected** - Removes the record which satisfies the specified condition. Default Value: Selected
Before insert, remove records that meets following condition	Definition: Removes the records from the database that satisfies the specified condition. This remove operation is performed before insert operation. Allowed Values: A valid SQL condition after WHERE clause. Default Value: None Custom Attributes: No
Column Name	Definition: Specifies the name of the column in the database. Allowed Values: A valid column name from the particular table in the database. Default Value: None Custom Attributes: No Example: CustomerName
Value	Definition:

Field Name	Definition
	Specifies an XPath to a single node inside the given repeating Xpath. Allowed Values: A valid XPath. Default Value: None Custom Attributes: Yes Example: ${/pd:AgilePoint/pd:Products/pd:ComponentName}
Add	Function: Creates new mapping to a database table column from the schema.
Remove	Function: Removes the mapping from the database table column.

Database Connection Configuration Window

Creates a connection string with specified information.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. In one of the following windows, click **Create**. The specific windows that display vary, depending upon the AgileShape you are using:
   - Configuration for Inserting Database Record Window
   - Configuration for Batch Inserting Database Record Window
   - Configuration for Updating Database Record(s) Window
   - Configuration for Deleting Database Record(s) Window
   - Configuration for Stored Procedure or Generic SQL Window
   - Database Queries Window
   - Database Stored Procedure Window

Field Definitions

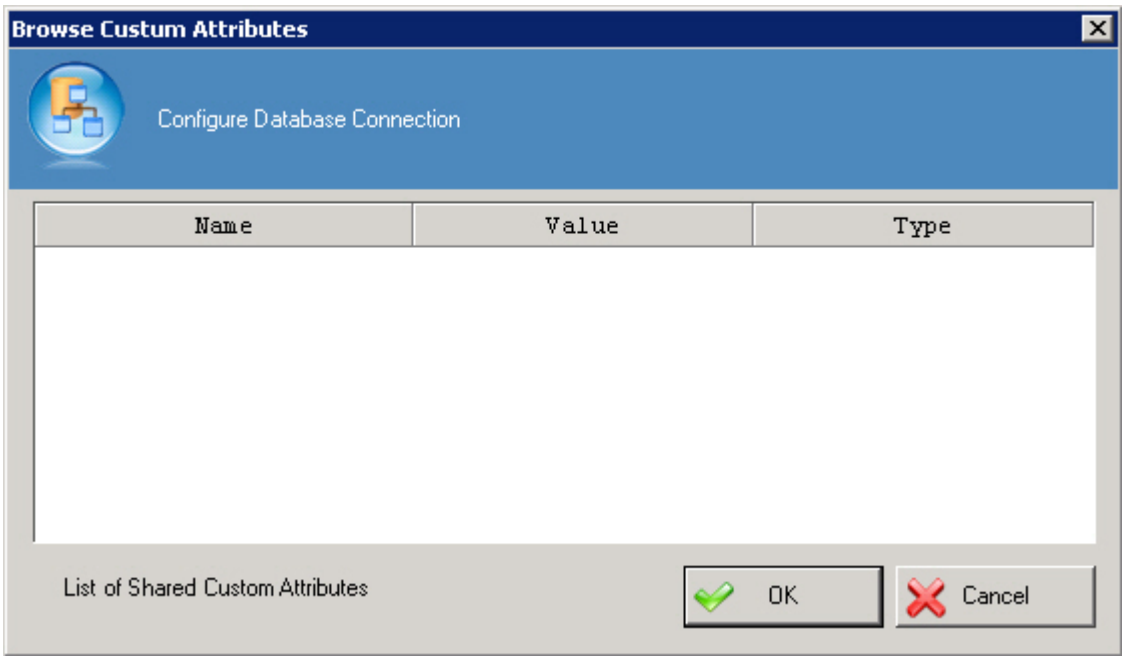
Field Name	Definition
User	Definition:

Field Name	Definition
	The user name for the database account AgilePoint Server uses to connect to the database. Allowed Values: A valid user name for the database. Default Value: sa
Password	Definition: Specifies a password for the specified user. Allowed Values: A valid password. Default Value: None Custom Attributes: No
Integrated Security	Definition: When integrated security is selected, the current windows account credentials are used for authentication. Allowed Values: • **Selected** - The windows account credentials are used for authentication automatically. • **Deselected** - The user and password fields are enabled for database authentication. Default Value: Selected
Database Server	Definition: Specifies a database server name that provides database services. Allowed Values: A valid database server name. Default Value: localhost Custom Attributes:

Field Name	Definition
	No
Database	Definition: List all the database names that are available for the authenticated user. Allowed Values: • A valid database server host name. • A valid IP address. Default Value: pubs Custom Attributes: No

Browse Custom Attributes Window

Specifies a connection string from a list of shared custom attributes.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag any AgileShape and drop it on the process template.

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. In one of the following windows, click **Choose**. The specific windows that display vary, depending upon the AgileShape you are using:
   - Configuration for Inserting Database Record Window
   - Configuration for Batch Inserting Database Record Window
   - Configuration for Updating Database Record(s) Window
   - Configuration for Deleting Database Record(s) Window
   - Configuration for Stored Procedure or Generic SQL Window
   - Database Queries Window
   - Database Stored Procedure Window
7. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

Field Name	Definition
Name	Definition: Specifies the name of custom attribute. Allowed Values: Read only.
Value	Definition: This field contains the value of the shared custom attribute. Allowed Values: Read only.
Type	Definition: Specifies the data type of the shared custom attributes. Allowed Values: Read only.

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Inserting Multiple Database Records into a Database Table

To insert multiple new database records into a database table, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Batch Insert** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **InsertXMLRepeatingDescriptor** field, click the **Ellipses** button.

Instructions

1. To set up your database connection, on the **Configuration for Inserting Database Record** window, complete the following field as required.

Field Name	Value
Connection String	Definition: Specifies the connection string that is used to connect to the database. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. Allowed Values: A valid SQL connection string. Default Value: server=myserver;database=pubs;trusted_Connection=yes Custom Attributes: Yes Example: server=DataServer;database=StoreDb;trusted_Connection=yes

2. To insert the data in a database table, do one of the following.
   - To insert the data into a table:
     1. Select **Specific Table**.
     2. On the **Table Name** field, click **Browse**.
     3. Select the database table name as required.
     4. In the **Column & Data** section, click **Add**.
     5. Complete the following fields as required.

Field Name	Value
Column Name	Definition: Specifies the name of the column in the database. Allowed Values: A valid column name from the particular table in the database. Default Value: None Custom Attributes: No Example: CustomerName
Value	Definition: Specifies an XPath to a single node inside the given repeating Xpath. Allowed Values: A valid XPath. Default Value: None Custom Attributes: Yes Example: ${/pd:AgilePoint/pd:Products/pd:ComponentName}

- To use a stored procedure:
  1. Select **Stored Procedure**.
  2. Complete the following field as required.

Field Name	Value
Stored Procedure	Definition: Specifies the stored procedure name and parameters to execute at runtime.

Field Name	Value
	Allowed Values: A valid SQL stored procedure execute statement. Default Value: None Custom Attributes: Yes Example: EXECUTE [dbo].[InsertBillItem] @ItemName

3. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Browse Custom Attributes Window
   - Batch Insert
   - Configuration for Batch Inserting Database Record Window
   - Database Connection Configuration Window

Delete Records

An AgilePart that deletes multiple existing database records in a database table.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Delete Records** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
DatabaseType	Definition:

Field Name	Definition
	Specifies the type of database to be used. Allowed Values: • **SqlServer** • **Oracle** Default Value: SqlServer
InsertXMLRepeatingDescriptor	Opens the Following Window: Configuration for Deleting Database Record(s) Window Purpose of this Window: Specifies where and how to delete the records from the database.
Timeout	Definition: Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape. Allowed Values: Any positive integer. Default Value: 600 Custom Attributes: No

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding

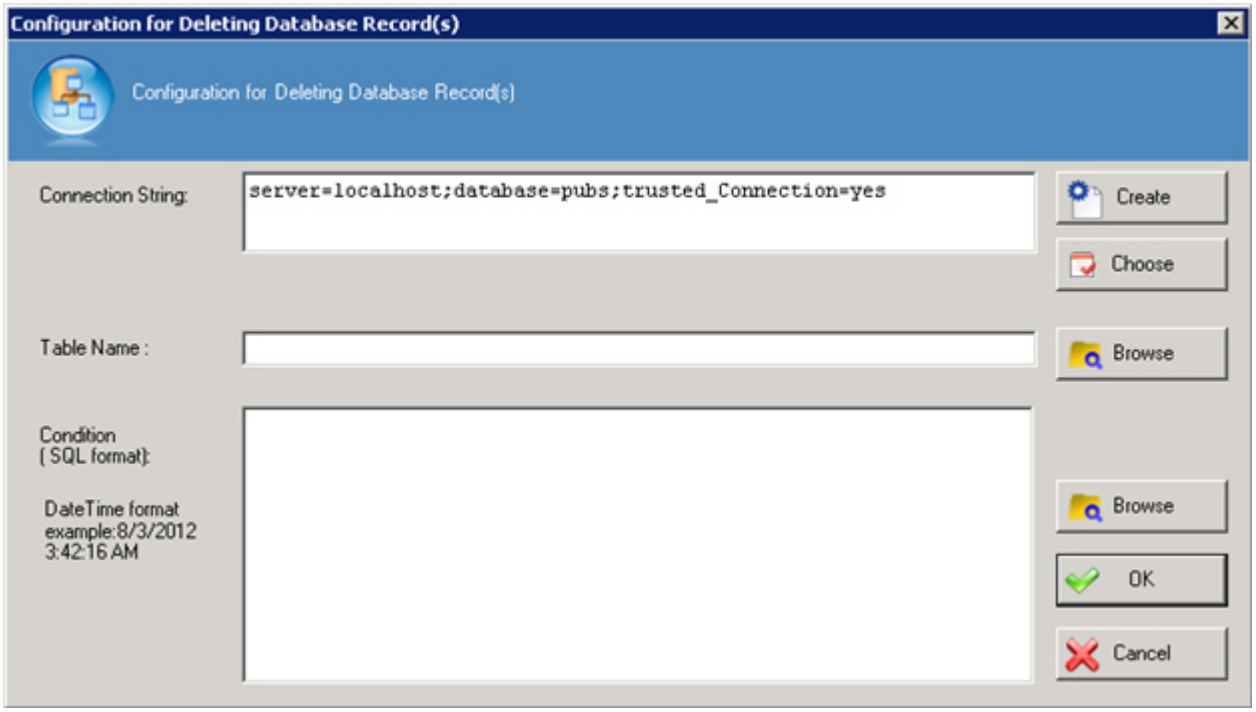
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Deleting Database Record(s) Window

Specifies where and how to delete the records from the database.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Delete Records** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

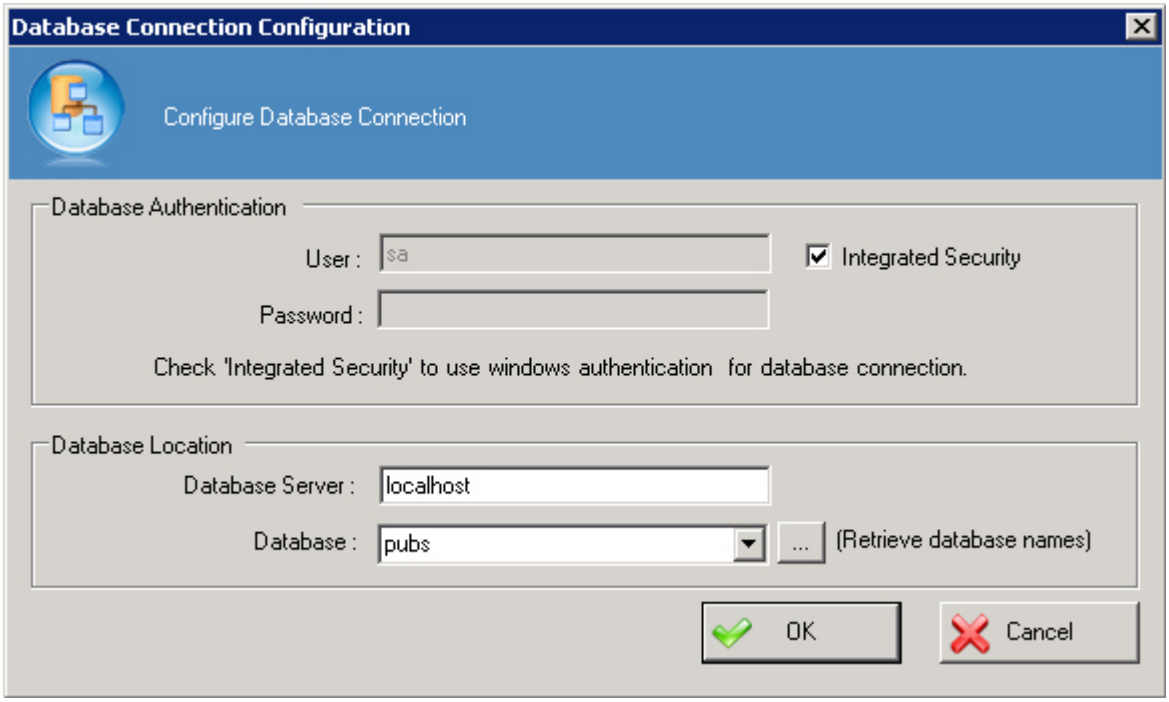
Field Name	Definition
Connection String	Definition: Specifies the connection string that is used to connect to the database.

Field Name	Definition
	• Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. Allowed Values: A valid SQL connection string. Default Value: server=myserver;database=pubs;trusted_Connection=yes Custom Attributes: Yes Example: server=DataServer;database=StoreDb;trusted_Connection=yes
Table Name	Definition: Specify the name of table from which the database records has to be deleted. Allowed Values: A valid database table name. Default Value: None Custom Attributes: Yes
Browse	Function: Enables you to find the associated item. Purpose of this Window: Specifies a particular database table from the database.
Condition	Definition: The SQL WHERE clause that defines which database records should be updated. Allowed Values: A valid SQL WHERE clause. Default Value: None

Field Name	Definition
	Custom Attributes: No Example: InvoiceNumber <= 3452
Create	Opens the Following Window: Database Connection Configuration Window Purpose of this Window: Creates a connection string with specified information.
Choose	Opens the Following Window: Browse Custom Attributes Window Purpose of this Window: Specifies a connection string from a list of shared custom attributes.

Database Connection Configuration Window

Creates a connection string with specified information.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. In one of the following windows, click **Create**. The specific windows that display vary, depending upon the AgileShape you are using:
   - Configuration for Inserting Database Record Window
   - Configuration for Batch Inserting Database Record Window
   - Configuration for Updating Database Record(s) Window
   - Configuration for Deleting Database Record(s) Window
   - Configuration for Stored Procedure or Generic SQL Window
   - Database Queries Window
   - Database Stored Procedure Window

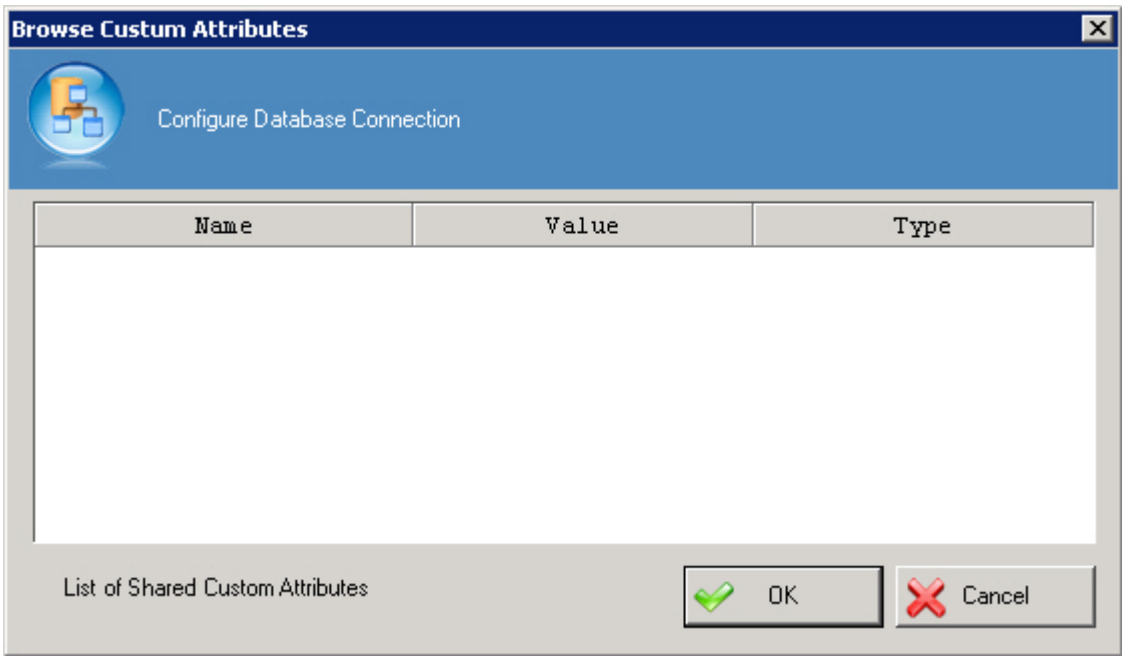
Field Definitions

Field Name	Definition
User	Definition: The user name for the database account AgilePoint Server uses to connect to the database. Allowed Values: A valid user name for the database. Default Value: sa
Password	Definition: Specifies a password for the specified user. Allowed Values: A valid password. Default Value: None Custom Attributes: No

Field Name	Definition
Integrated Security	Definition: When integrated security is selected, the current windows account credentials are used for authentication. Allowed Values: • **Selected** - The windows account credentials are used for authentication automatically. • **Deselected** - The user and password fields are enabled for database authentication. Default Value: Selected
Database Server	Definition: Specifies a database server name that provides database services. Allowed Values: A valid database server name. Default Value: localhost Custom Attributes: No
Database	Definition: List all the database names that are available for the authenticated user. Allowed Values: • A valid database server host name. • A valid IP address. Default Value: pubs Custom Attributes: No

Browse Custom Attributes Window

Specifies a connection string from a list of shared custom attributes.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. In one of the following windows, click **Choose**. The specific windows that display vary, depending upon the AgileShape you are using:
   - Configuration for Inserting Database Record Window
   - Configuration for Batch Inserting Database Record Window
   - Configuration for Updating Database Record(s) Window
   - Configuration for Deleting Database Record(s) Window
   - Configuration for Stored Procedure or Generic SQL Window
   - Database Queries Window
   - Database Stored Procedure Window
7. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

Field Name	Definition
Name	Definition:

Field Name	Definition
	Specifies the name of custom attribute. Allowed Values: Read only.
Value	Definition: This field contains the value of the shared custom attribute. Allowed Values: Read only.
Type	Definition: Specifies the data type of the shared custom attributes. Allowed Values: Read only.

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Deleting Records from a Database

To delete records from a database, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Delete Records** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the **Configuration for Deleting Database Record(s)** window, complete the following fields as required.

Field Name	Value
Connection String	Definition: Specifies the connection string that is used to connect to the database. • Click **Choose** to select a connection string from the list of shared custom attributes

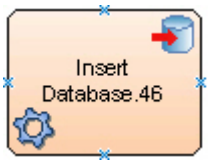
Field Name	Value
	(defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. Allowed Values: A valid SQL connection string. Default Value: server=myserver;database=pubs;trusted_Connection=yes Custom Attributes: Yes Example: server=DataServer;database=StoreDb;trusted_Connection=yes
Table Name	Definition: Specify the name of table from which the database records has to be deleted. Allowed Values: A valid database table name. Default Value: None Custom Attributes: Yes
Condition	Definition: The SQL WHERE clause that defines which database records should be updated. Allowed Values: A valid SQL WHERE clause. Default Value: None Custom Attributes: No Example: InvoiceNumber <= 3452

2. Complete any additional configuration for this AgileShape according to your requirements:

- AgilePart - Common Setup
- Browse Custom Attributes Window
- Configuration for Deleting Database Record(s) Window
- Database Connection Configuration Window
- Delete Records

Insert Database

An AgilePart that inserts a new database record into a database table.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Insert Database** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: Configuration for Inserting Database Record Window Purpose of this Window: Specifies where and how to insert the new database records into the database.
DatabaseType	Definition: Specifies the type of database to be used. Allowed Values: • **SqlServer** • **Oracle** Default Value:

Field Name	Definition
	SqlServer
Timeout	Definition: Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape. Allowed Values: Any positive integer. Default Value: 600 Custom Attributes: No

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

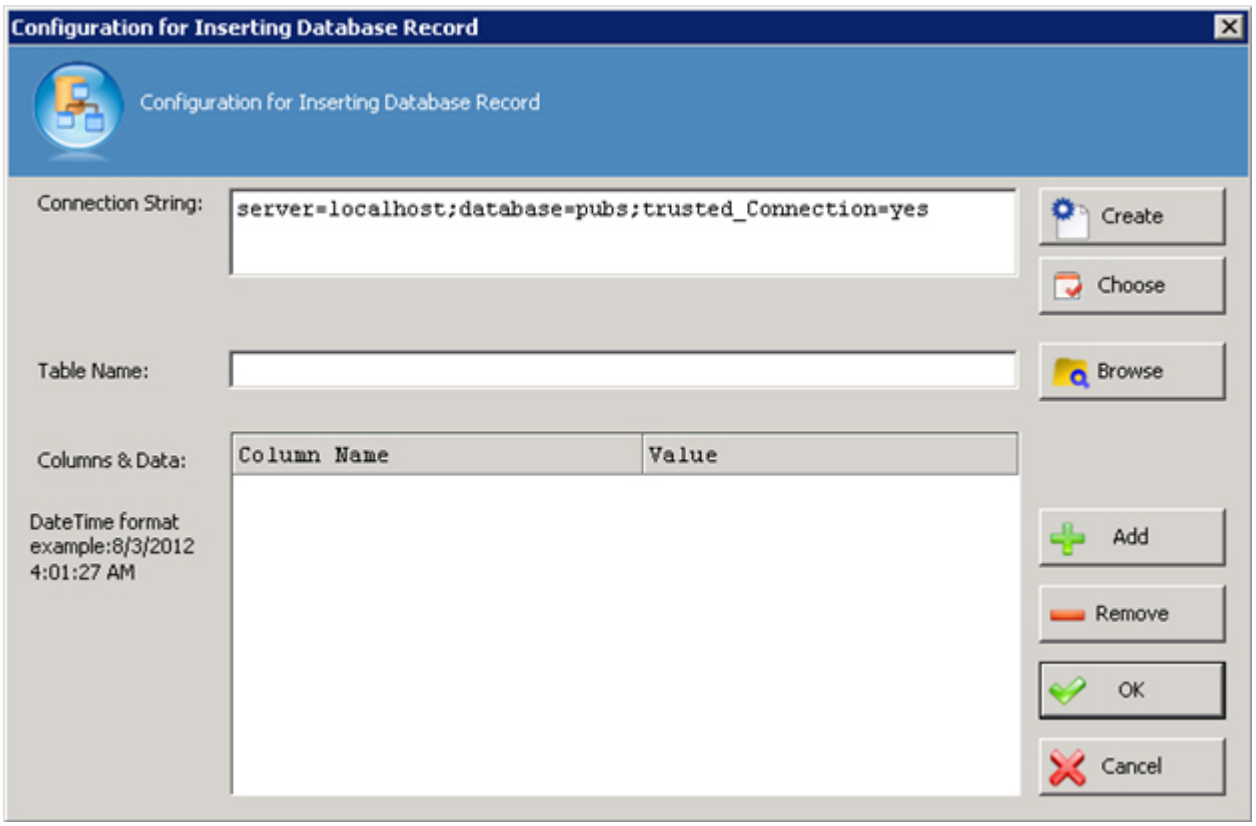
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Inserting Database Record Window

Specifies where and how to insert the new database records into the database.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Insert Database** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

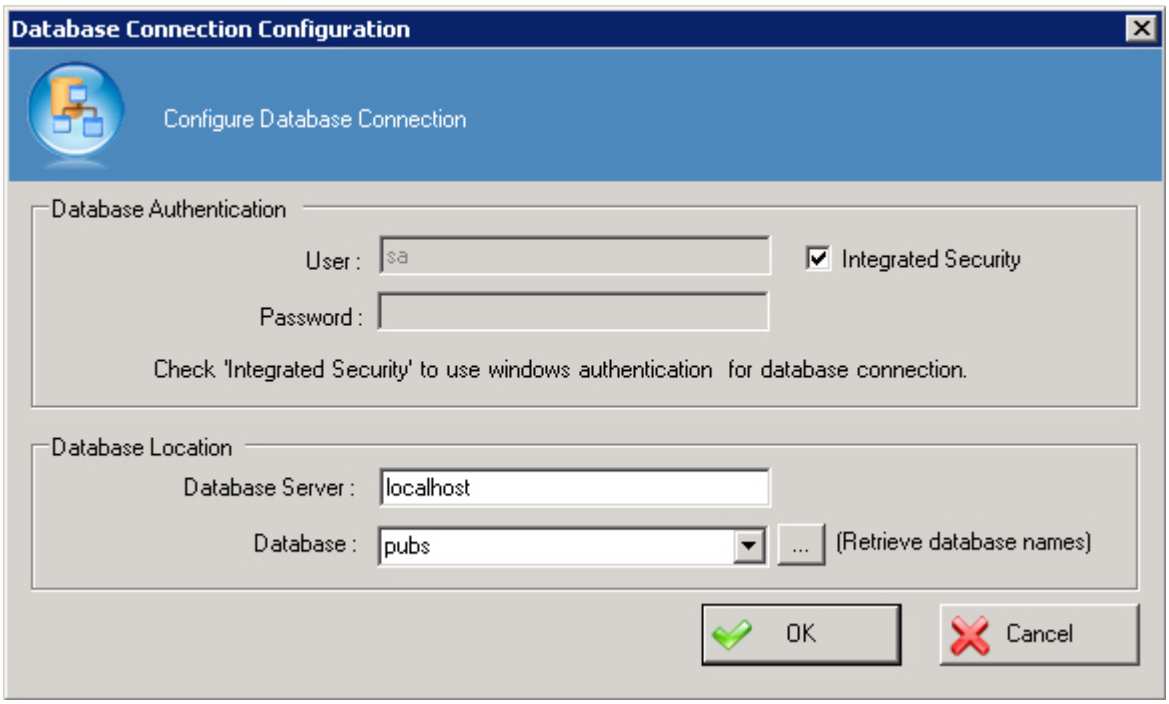
Field Name	Definition
Connection String	Definition: Specifies the connection string that is used to connect to the database. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. Allowed Values:

Field Name	Definition
	A valid SQL connection string. Default Value: server=myserver;database=pubs;trusted_Connection=yes Custom Attributes: Yes Example: server=DataServer;database=StoreDb;trusted_Connection=yes
Create	Opens the Following Window: Database Connection Configuration Window Purpose of this Window: Creates a connection string with specified information.
Choose	Opens the Following Window: Browse Custom Attributes Window Purpose of this Window: Specifies a connection string from a list of shared custom attributes.
Table Name	Definition: Specifies the name of the database table where this AgileShape inserts the record. Allowed Values: A valid database table name. Default Value: None Custom Attributes: Yes Example:
Column Name	Definition: Specifies the name of the column in the database. Allowed Values: A valid column name from the particular table in the database.

Field Name	Definition
	Default Value: None Custom Attributes: No Example: CustomerName
Value	Definition: Specifies an XPath to a single node inside the given repeating Xpath. Allowed Values: A valid XPath. Default Value: None Custom Attributes: Yes Example: ${/pd:AgilePoint/pd:Products/pd:ComponentName}
Add	Function: Creates new mapping to a database table column from the schema.
Remove	Function: Removes the mapping from the database table column.

Database Connection Configuration Window

Creates a connection string with specified information.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. In one of the following windows, click **Create**. The specific windows that display vary, depending upon the AgileShape you are using:
   - Configuration for Inserting Database Record Window
   - Configuration for Batch Inserting Database Record Window
   - Configuration for Updating Database Record(s) Window
   - Configuration for Deleting Database Record(s) Window
   - Configuration for Stored Procedure or Generic SQL Window
   - Database Queries Window
   - Database Stored Procedure Window

Field Definitions

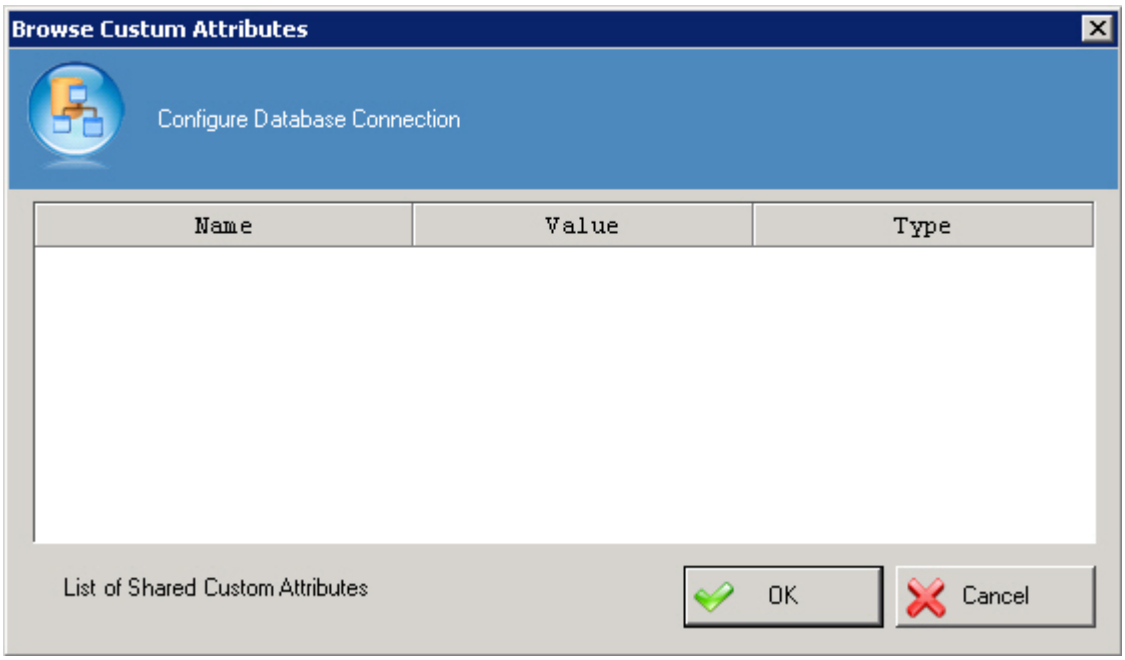
Field Name	Definition
User	Definition:

Field Name	Definition
	The user name for the database account AgilePoint Server uses to connect to the database. Allowed Values: A valid user name for the database. Default Value: sa
Password	Definition: Specifies a password for the specified user. Allowed Values: A valid password. Default Value: None Custom Attributes: No
Integrated Security	Definition: When integrated security is selected, the current windows account credentials are used for authentication. Allowed Values: • **Selected** - The windows account credentials are used for authentication automatically. • **Deselected** - The user and password fields are enabled for database authentication. Default Value: Selected
Database Server	Definition: Specifies a database server name that provides database services. Allowed Values: A valid database server name. Default Value: localhost Custom Attributes:

Field Name	Definition
	No
Database	Definition: List all the database names that are available for the authenticated user. Allowed Values: • A valid database server host name. • A valid IP address. Default Value: pubs Custom Attributes: No

Browse Custom Attributes Window

Specifies a connection string from a list of shared custom attributes.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag any AgileShape and drop it on the process template.

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. In one of the following windows, click **Choose**. The specific windows that display vary, depending upon the AgileShape you are using:
   - Configuration for Inserting Database Record Window
   - Configuration for Batch Inserting Database Record Window
   - Configuration for Updating Database Record(s) Window
   - Configuration for Deleting Database Record(s) Window
   - Configuration for Stored Procedure or Generic SQL Window
   - Database Queries Window
   - Database Stored Procedure Window
7. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

Field Name	Definition
Name	Definition: Specifies the name of custom attribute. Allowed Values: Read only.
Value	Definition: This field contains the value of the shared custom attribute. Allowed Values: Read only.
Type	Definition: Specifies the data type of the shared custom attributes. Allowed Values: Read only.

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Inserting a New Database Records into a Database

To insert new database records in a database table, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Insert Database** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the **Configuration for Inserting Database Record** window, complete the following fields as required.

Field Name	Value
Connection String	Definition: Specifies the connection string that is used to connect to the database. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. Allowed Values: A valid SQL connection string. Default Value: server=myserver;database=pubs;trusted_Connection=yes Custom Attributes: Yes Example: server=DataServer;database=StoreDb;trusted_Connection=yes
Table Name	Definition: Specifies the name of the database table where this AgileShape inserts the record. Allowed Values: A valid database table name. Default Value: None Custom Attributes:

Field Name	Value
	Yes Example:

2. In the **Column & Data** section, click **Add**.
3. Complete the following fields as required.

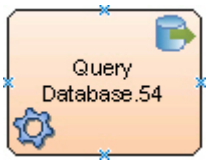
Field Name	Value
Column Name	Definition: Specifies the name of the column in the database. Allowed Values: A valid column name from the particular table in the database. Default Value: None Custom Attributes: No Example: CustomerName
Value	Definition: Specifies an XPath to a single node inside the given repeating Xpath. Allowed Values: A valid XPath. Default Value: None Custom Attributes: Yes Example: ${/pd:AgilePoint/pd:Products/pd:ComponentName}

4. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Browse Custom Attributes Window
   - Configuration for Inserting Database Record Window

- Database Connection Configuration Window
- Insert Database

Query Database

An AgilePart that retrieves database data by executing dynamic SQL statements or calling stored procedures.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Query Database** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: Opens the one of the following windows, depending upon the setting of the **SQL Type** field: • Database Queries Window - Specifies where and how the data is retrieved from the database, when using a SQL query. • Database Stored Procedure Window - Specifies where and how the data is retrieved from the database, when using a stored procedure
DatabaseType	Definition: Specifies the type of database to be used. Allowed Values: • **SqlServer** • **Oracle** Default Value: SqlServer

Field Name	Definition
ReturnFirstRow	Definition: Specifies the AgileShape that always return the first record from the database table. Allowed Values: • **False** - Fetches the last record from the database table. • **True** - Fetches the first record from the database table. Default Value: False
SQLType	Definition: Specifies whether to retrieve the data from the database using a stored procedure, or using (one or more) dynamic SQL statements. Allowed Values: • **SQL** - Data is retrieved from the database using one or more dynamic SQL statements. If the SqlType property is set to SQL when you click the **Ellipses** button, it will open a configuration window. • **StoredProcedure** - Data is retrieved from the database using a stored procedure. Default Value: SQL
Timeout	Definition: Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape. Allowed Values: Any positive integer. Default Value: 600 Custom Attributes: No
IgnoreFailedQuery	Definition:

Field Name	Definition
	Specifies whether the AgileShape continues making database queries if one of the database queries throws an error. Allowed Values: • **False** - The AgileShape stops making database queries when an error is thrown. • **True** - If a database query throws an error, the AgileShape continues making queries. Default Value: False

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

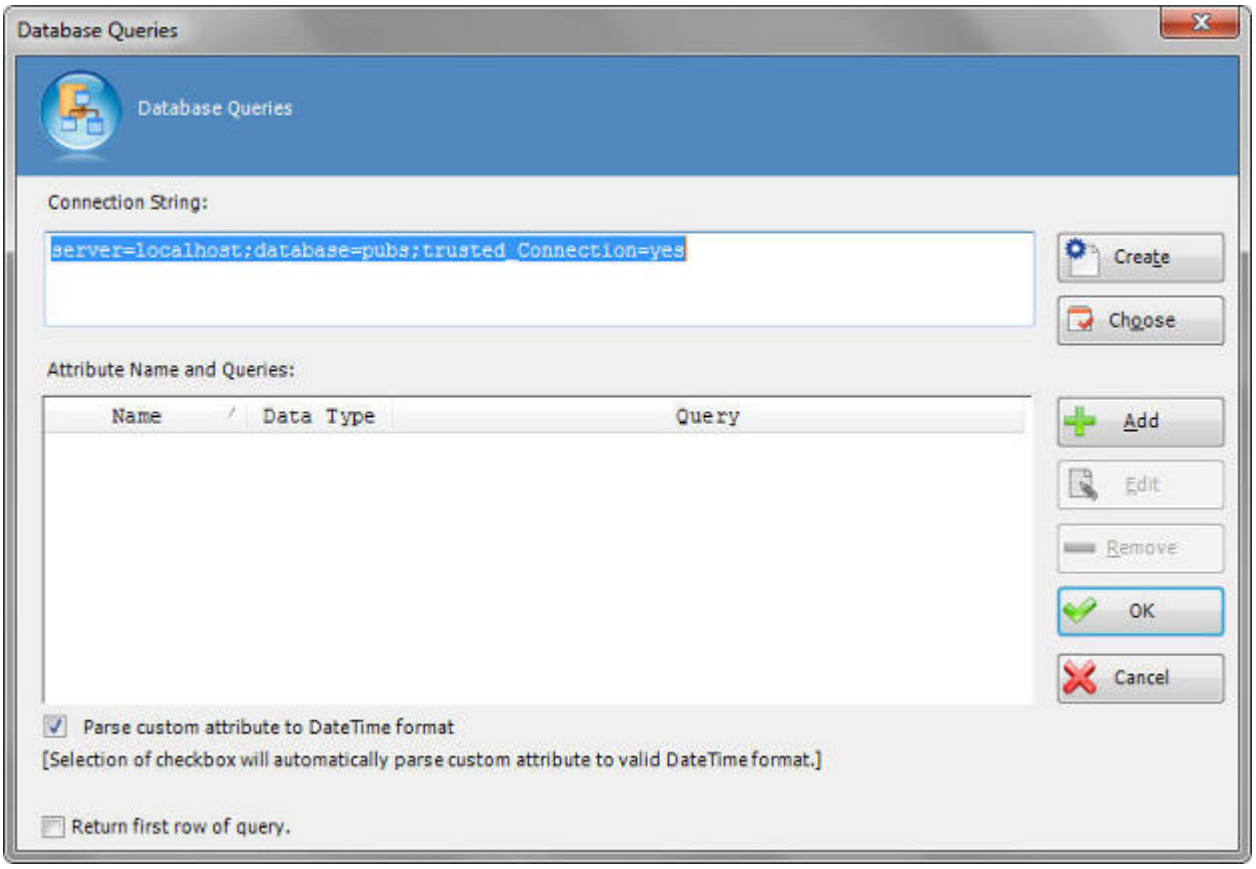
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Database Queries Window

Specifies where and how the data is retrieved from the database, when using a SQL query.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Query Database** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **SQLType** list, select **SQL**.
6. On the **Configure** field, click the **Ellipses** button.

Field Definitions

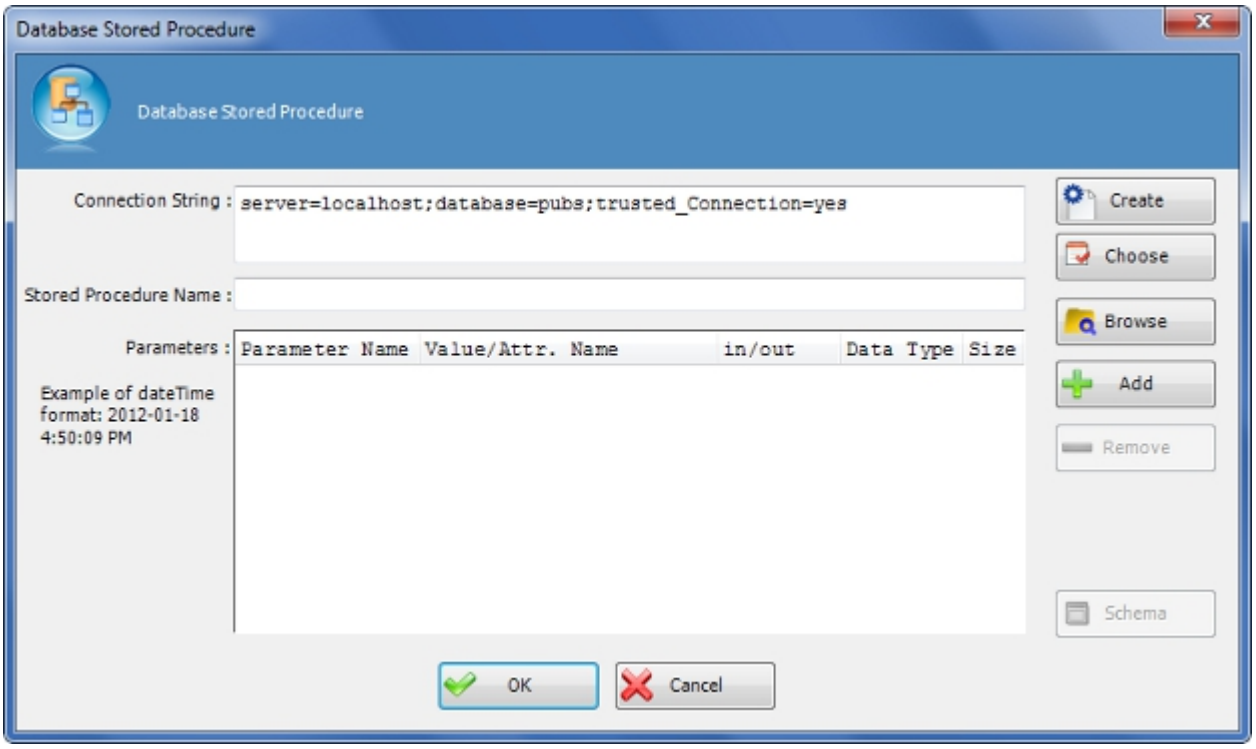
Field Name	Definition
Connection String	Definition: Specifies the connection string that is used to connect to the database. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string.

Field Name	Definition
	Allowed Values: A valid SQL connection string. Default Value: server=myserver;database=pubs;trusted_Connection=yes Custom Attributes: Yes Example: server=DataServer;database=StoreDb;trusted_Connection=yes
Create	Opens the Following Window: Database Connection Configuration Window Purpose of this Window: Creates a connection string with specified information.
Choose	Opens the Following Window: Browse Custom Attributes Window Purpose of this Window: Specifies a connection string from a list of shared custom attributes.
Add	Opens the Following Window: Custom Attribute and Query Window Purpose of this Window: Specifies adding or editing the SQL query which are executed at runtime.
Edit	Opens the Following Window: Custom Attribute and Query Window Purpose of this Window: Specifies adding or editing the SQL query which are executed at runtime.
Remove	Function: Removes the particular SQL query from the existing list of queries.
Parse custom attribute to DateTime format	Definition:

Field Name	Definition
	Parses a specified custom attribute to a valid DateTime format. Allowed Values: • **Selected** - Parses the custom attribute to DateTime format. • **Deselected** - The custom attribute remains in its default data format. Default Value: Selected
Return first row of query	Definition: Specifies which record to be fetch from the database. Allowed Values: • **Selected** - Specifies to fetch the first record in the database column. • **Deselected** - The query fetches the last record. Default Value: Deselected

Database Stored Procedure Window

Specifies where and how the data is retrieved from the database, when using a stored procedure



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Query Database** AgileShape, and drop it on the process template.
4. On the **SQL Type** list, select **Stored Procedure**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Connection String	Definition: Specifies the connection string that is used to connect to the database. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. Allowed Values: A valid SQL connection string. Default Value:

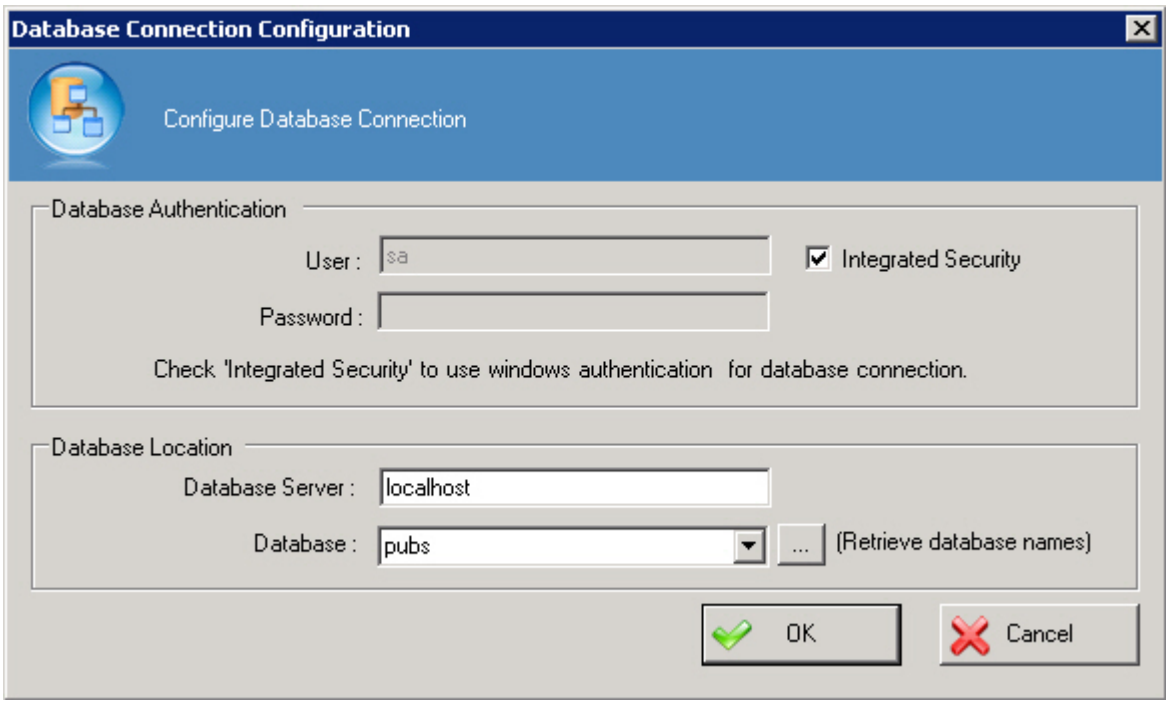
Field Name	Definition
	server=myserver;database=pubs;trusted_Connection=yes Custom Attributes: Yes Example: server=DataServer;database=StoreDb;trusted_Connection=yes
Create	Opens the Following Window: Database Connection Configuration Window Purpose of this Window: Creates a connection string with specified information.
Choose	Opens the Following Window: Browse Custom Attributes Window Purpose of this Window: Specifies a connection string from a list of shared custom attributes.
Stored Procedure Name	Definition: The name of the stored procedure. Allowed Values: A valid stored procedure name. Default Value: None Custom Attributes: Yes Example: GetUserDetail
Parameter Name	Definition: The parameters for the stored procedure. Allowed Values: A valid parameter for specified stored procedure. Default Value: None Custom Attributes:

Field Name	Definition
	Yes Example: OrderNumber
Value/Attr Name	Definition: The value of the parameters for the stored procedure. Allowed Values: A valid value for the specified parameter. Default Value: System.String Custom Attributes: Yes
in/out	Definition: Specifies the in/out parameters for the stored procedure. Allowed Values: • **Input** - Specifies that the parameter is an input value for the stored procedure. • **Output** - Specifies that the parameter is an output value for the stored procedure. • **InputOuput** - Specifies that the parameter can be input/output value for the stored procedure. • **ReturnValue** - Specifies that the parameter is a return value for the stored procedure. Default Value: None Custom Attributes: No
Data Type	Definition: Specifies the SQL server data type of the specified parameter for the stored procedure. Allowed Values: • **Bit** • **Decimal** • **Float**

Field Name	Definition
	• **DateTime** • **VarChar** • **Binary** • **Integer** Default Value: None Custom Attributes: Yes
Size	Definition: Specifies size of input parameter for the stored procedure. Allowed Values: • **Integer Number** Default Value: None Custom Attributes: No
Add	Function: Adds new parameter for the stored procedure.

Database Connection Configuration Window

Creates a connection string with specified information.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. In one of the following windows, click **Create**. The specific windows that display vary, depending upon the AgileShape you are using:
   - Configuration for Inserting Database Record Window
   - Configuration for Batch Inserting Database Record Window
   - Configuration for Updating Database Record(s) Window
   - Configuration for Deleting Database Record(s) Window
   - Configuration for Stored Procedure or Generic SQL Window
   - Database Queries Window
   - Database Stored Procedure Window

Field Definitions

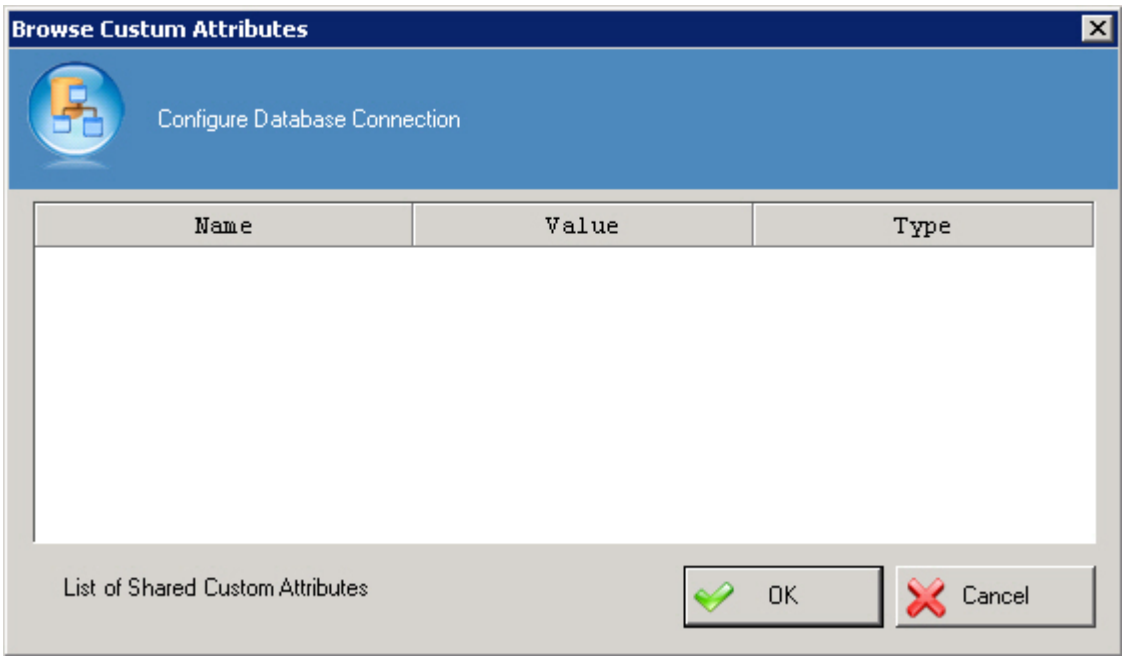
Field Name	Definition
User	Definition:

Field Name	Definition
	The user name for the database account AgilePoint Server uses to connect to the database. Allowed Values: A valid user name for the database. Default Value: sa
Password	Definition: Specifies a password for the specified user. Allowed Values: A valid password. Default Value: None Custom Attributes: No
Integrated Security	Definition: When integrated security is selected, the current windows account credentials are used for authentication. Allowed Values: • **Selected** - The windows account credentials are used for authentication automatically. • **Deselected** - The user and password fields are enabled for database authentication. Default Value: Selected
Database Server	Definition: Specifies a database server name that provides database services. Allowed Values: A valid database server name. Default Value: localhost Custom Attributes:

Field Name	Definition
	No
Database	Definition: List all the database names that are available for the authenticated user. Allowed Values: • A valid database server host name. • A valid IP address. Default Value: pubs Custom Attributes: No

Browse Custom Attributes Window

Specifies a connection string from a list of shared custom attributes.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag any AgileShape and drop it on the process template.

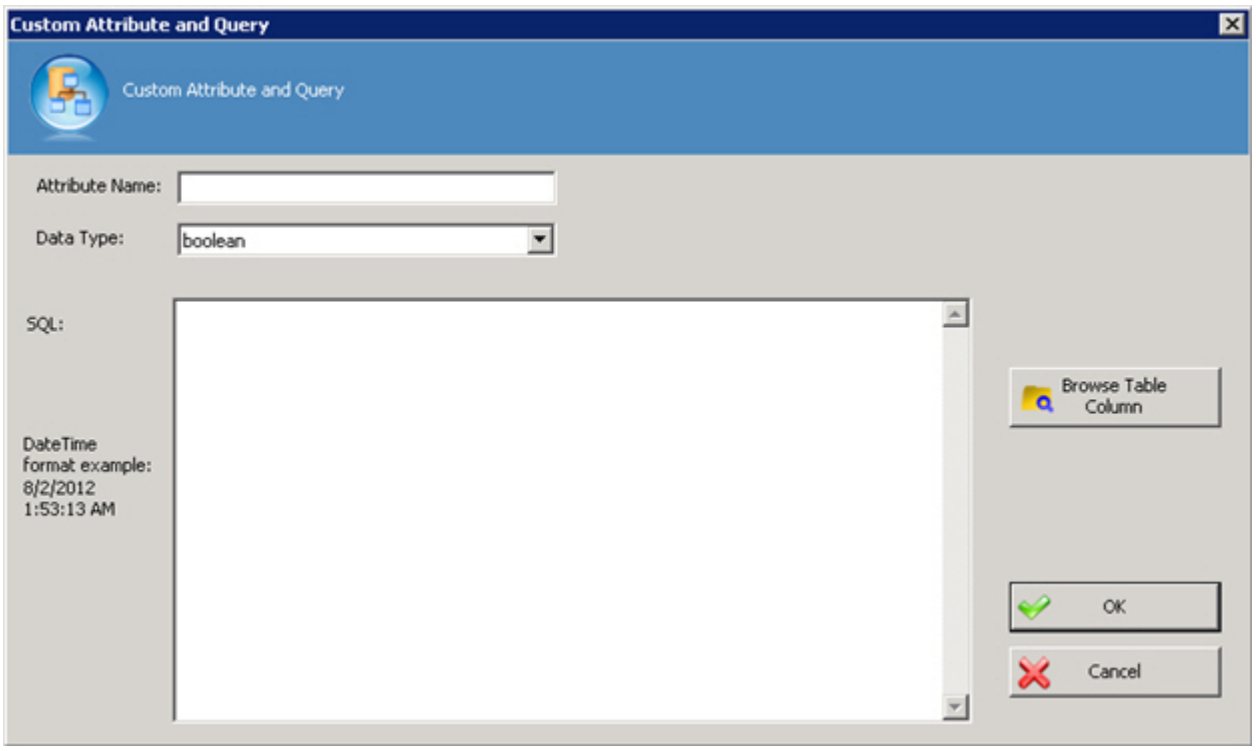
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. In one of the following windows, click **Choose**. The specific windows that display vary, depending upon the AgileShape you are using:
   - Configuration for Inserting Database Record Window
   - Configuration for Batch Inserting Database Record Window
   - Configuration for Updating Database Record(s) Window
   - Configuration for Deleting Database Record(s) Window
   - Configuration for Stored Procedure or Generic SQL Window
   - Database Queries Window
   - Database Stored Procedure Window
7. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

Field Name	Definition
Name	Definition: Specifies the name of custom attribute. Allowed Values: Read only.
Value	Definition: This field contains the value of the shared custom attribute. Allowed Values: Read only.
Type	Definition: Specifies the data type of the shared custom attributes. Allowed Values: Read only.

Custom Attribute and Query Window

Specifies adding or editing the SQL query which are executed at runtime.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Query Database** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **SQLType** list, select **SQL**.
6. On the **Configure** field, click the **Ellipses** button.
7. On the Database Queries Window window, click **Add**.

Field Definitions

Field Name	Definition
Attribute Name	Definition: Specifies the name of custom attribute in which the selected data is stored. Allowed Values: A valid custom attribute name. Default Value: None

Field Name	Definition
	Custom Attributes: Yes
Data Type	Definition: Displays the data type of the selected node. Allowed Values: • **boolean** - Stores true or false value. • **string** - Stores sequence of characters. • **datetime** - Stores datetime value. • **decimal** - Stores decimal number. • **integer** - Stores whole number. Default Value: boolean
SQL	Definition: The SQL statement that will be performed on the database by this AgileShape at runtime. Allowed Values: A valid SQL SELECT query. Default Value: None Custom Attributes: Yes Example: SELECT ShowName FROM EventList WHERE showID = 1001
Browse Table Column	Function: Select the particular database column from the selected table.

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Retrieving Data from a Database

To retrieve data from the database using SQL statements or stored procedures, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Query Database** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **SQLType** list, select **SQL**.
6. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the **Database Queries** window, complete the following fields as required.

Field Name	Value
Connection String	Definition: Specifies the connection string that is used to connect to the database. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. Allowed Values: A valid SQL connection string. Default Value: server=myserver;database=pubs;trusted_Connection=yes Custom Attributes: Yes Example: server=DataServer;database=StoreDb;trusted_Connection=yes
Add	Opens the Following Window: Custom Attribute and Query Window Purpose of this Window: Specifies adding or editing the SQL query which are executed at runtime.

2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup

- Browse Custom Attributes Window
- Database Connection Configuration Window
- Database Stored Procedure Window
- Database Queries Window
- Query Database

Stored Procedure

An AgilePart that executes database stored procedures.



Good to Know

- This AgileShape does not support capturing return values or output parameters. See the Query Database AgileShape for additional information about retrieving data from the database.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Stored Procedure** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: Configuration for Stored Procedure or Generic SQL Window Purpose of this Window: Specifies where and how to insert the new database records into the database.
DatabaseType	Definition: Specifies the type of database to be used. Allowed Values:

Field Name	Definition
	• **SqlServer** • **Oracle** Default Value: SqlServer
Timeout	Definition: Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape. Allowed Values: Any positive integer. Default Value: 600 Custom Attributes: No

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

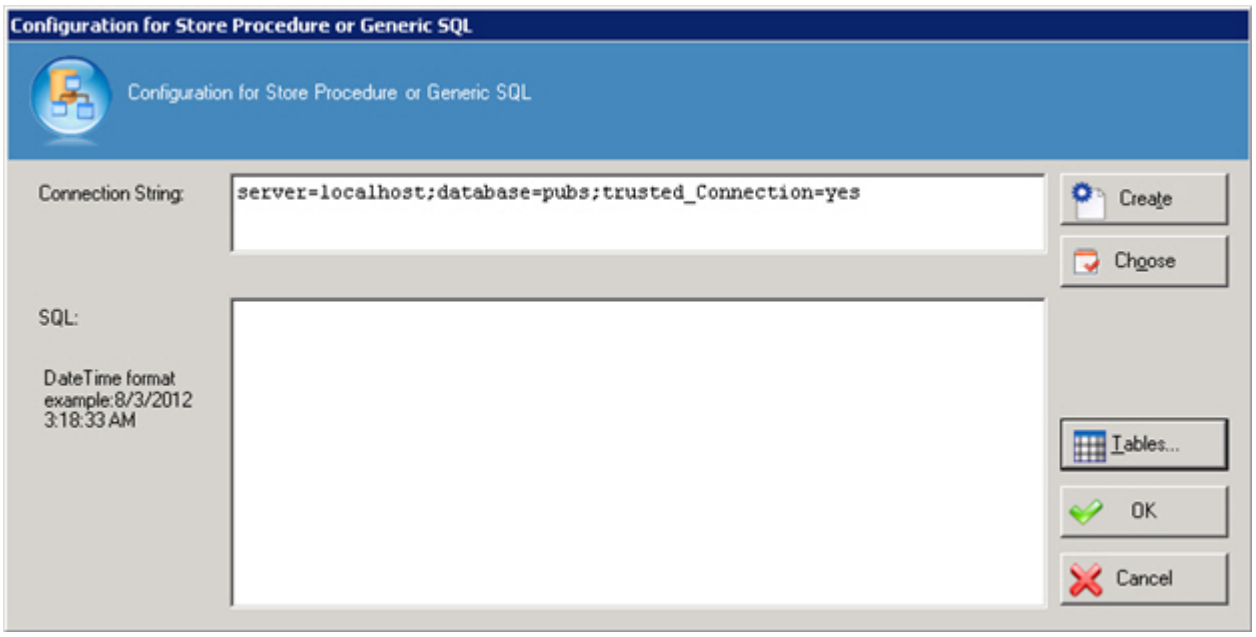
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Stored Procedure or Generic SQL Window

Specifies where and how to insert the new database records into the database.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Stored Procedure** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

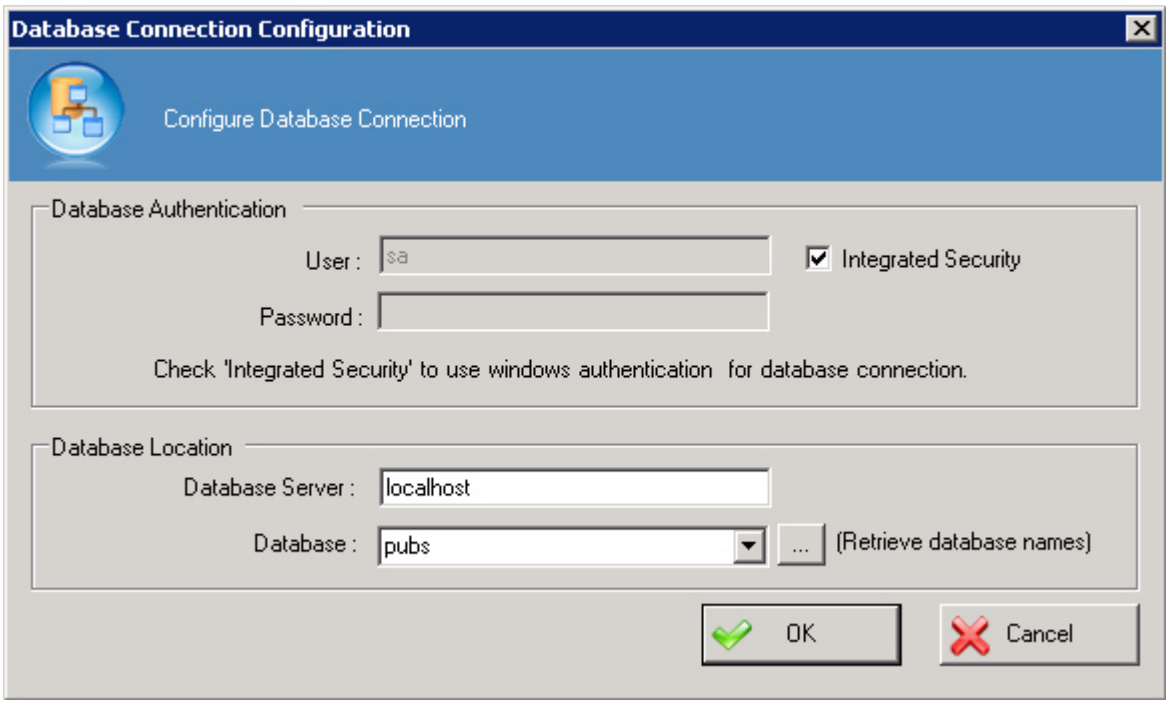
Field Definitions

Field Name	Definition
Connection String	Definition: Specifies the connection string that is used to connect to the database. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. Allowed Values: A valid SQL connection string. Default Value: server=myserver;database=pubs;trusted_Connection=yes Custom Attributes:

Field Name	Definition
	Yes Example: server=DataServer;database=StoreDb;trusted_Connection=yes
Create	Opens the Following Window: Database Connection Configuration Window Purpose of this Window: Creates a connection string with specified information.
Choose	Opens the Following Window: Browse Custom Attributes Window Purpose of this Window: Specifies a connection string from a list of shared custom attributes.
SQL	Definition: The SQL statement that will be performed on the database by this AgileShape at runtime. Allowed Values: A valid SQL SELECT query. Default Value: None Custom Attributes: Yes Example: SELECT ShowName FROM EventList WHERE showID = 1001
Tables	Function: Selects the table from the database.

Database Connection Configuration Window

Creates a connection string with specified information.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. In one of the following windows, click **Create**. The specific windows that display vary, depending upon the AgileShape you are using:
   - Configuration for Inserting Database Record Window
   - Configuration for Batch Inserting Database Record Window
   - Configuration for Updating Database Record(s) Window
   - Configuration for Deleting Database Record(s) Window
   - Configuration for Stored Procedure or Generic SQL Window
   - Database Queries Window
   - Database Stored Procedure Window

Field Definitions

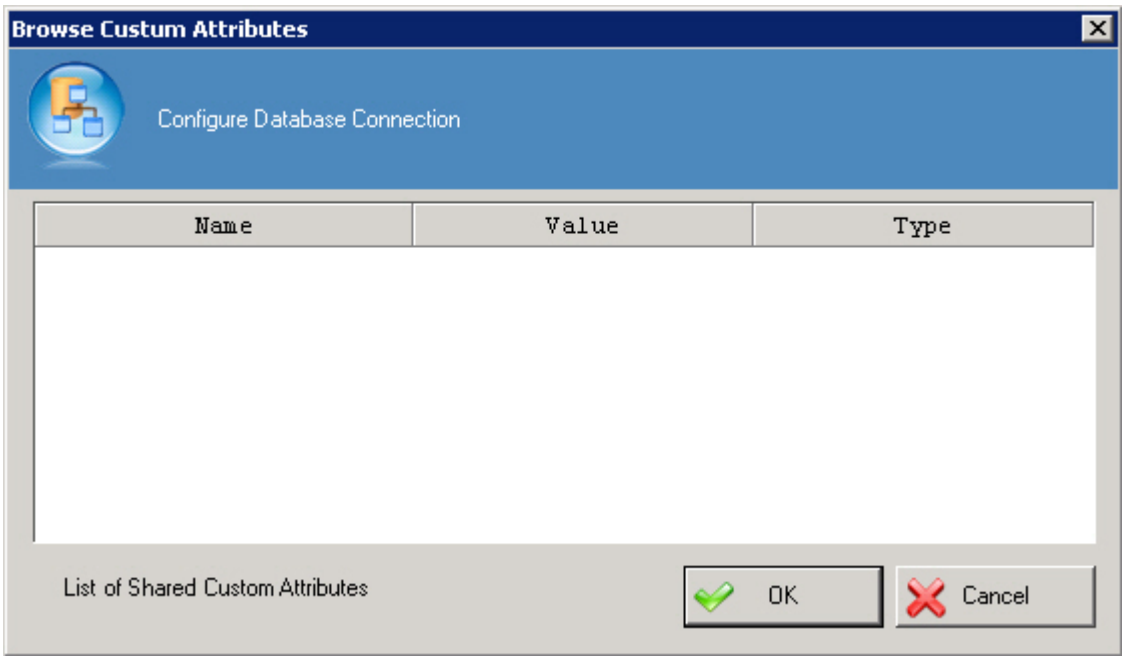
Field Name	Definition
User	Definition:

Field Name	Definition
	The user name for the database account AgilePoint Server uses to connect to the database. Allowed Values: A valid user name for the database. Default Value: sa
Password	Definition: Specifies a password for the specified user. Allowed Values: A valid password. Default Value: None Custom Attributes: No
Integrated Security	Definition: When integrated security is selected, the current windows account credentials are used for authentication. Allowed Values: • **Selected** - The windows account credentials are used for authentication automatically. • **Deselected** - The user and password fields are enabled for database authentication. Default Value: Selected
Database Server	Definition: Specifies a database server name that provides database services. Allowed Values: A valid database server name. Default Value: localhost Custom Attributes:

Field Name	Definition
	No
Database	Definition: List all the database names that are available for the authenticated user. Allowed Values: • A valid database server host name. • A valid IP address. Default Value: pubs Custom Attributes: No

Browse Custom Attributes Window

Specifies a connection string from a list of shared custom attributes.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag any AgileShape and drop it on the process template.

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. In one of the following windows, click **Choose**. The specific windows that display vary, depending upon the AgileShape you are using:
   - Configuration for Inserting Database Record Window
   - Configuration for Batch Inserting Database Record Window
   - Configuration for Updating Database Record(s) Window
   - Configuration for Deleting Database Record(s) Window
   - Configuration for Stored Procedure or Generic SQL Window
   - Database Queries Window
   - Database Stored Procedure Window
7. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

Field Name	Definition
Name	Definition: Specifies the name of custom attribute. Allowed Values: Read only.
Value	Definition: This field contains the value of the shared custom attribute. Allowed Values: Read only.
Type	Definition: Specifies the data type of the shared custom attributes. Allowed Values: Read only.

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Executing a Stored Procedure

To execute a stored procedure, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Stored Procedure** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the **Configuration for Store Procedure or Generic SQL** window, complete the following fields as required.

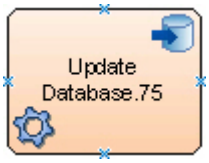
Field Name	Value
Connection String	Definition: Specifies the connection string that is used to connect to the database. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. Allowed Values: A valid SQL connection string. Default Value: server=myserver;database=pubs;trusted_Connection=yes Custom Attributes: Yes Example: server=DataServer;database=StoreDb;trusted_Connection=yes
SQL	Definition: The SQL statement that will be performed on the database by this AgileShape at runtime. Allowed Values: A valid SQL SELECT query. Default Value: None

Field Name	Value
	Custom Attributes: Yes Example: SELECT ShowName FROM EventList WHERE showID = 1001

2. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Browse Custom Attributes Window
   - Configuration for Stored Procedure or Generic SQL Window
   - Database Connection Configuration Window
   - Stored Procedure

Update Database

An AgilePart that updates multiple existing database records in a database table.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Update Database** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: Configuration for Updating Database Record(s) Window Purpose of this Window:

Field Name	Definition
	Specifies where and how to insert the new database records into the database.
DatabaseType	Definition: Specifies the type of database to be used. Allowed Values: • **SqlServer** • **Oracle** Default Value: SqlServer
Timeout	Definition: Specifies the maximum amount of time, in seconds, allowed for the completion of the web service call for the AgileShape. Allowed Values: Any positive integer. Default Value: 600 Custom Attributes: No

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

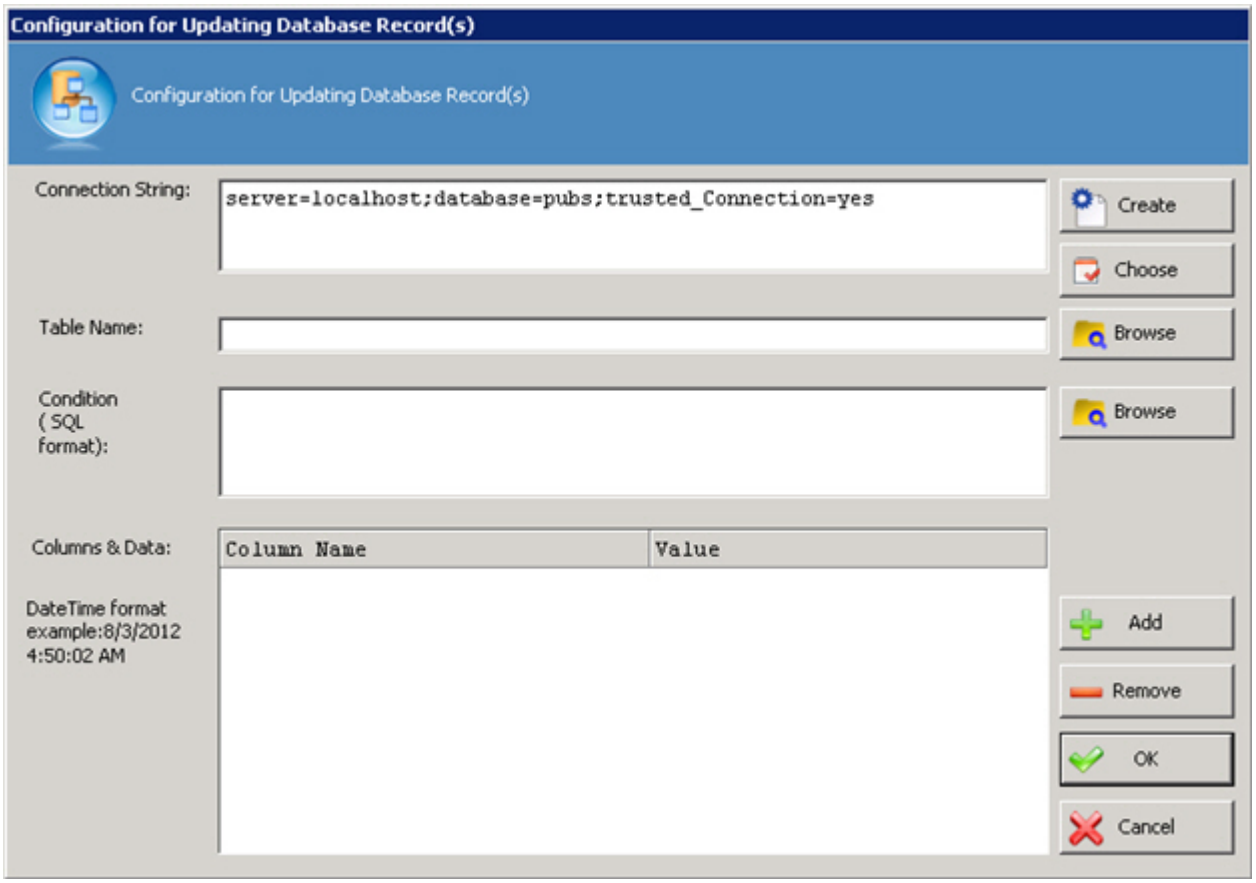
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Configuration for Updating Database Record(s) Window

Specifies where and how to insert the new database records into the database.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Update Database** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

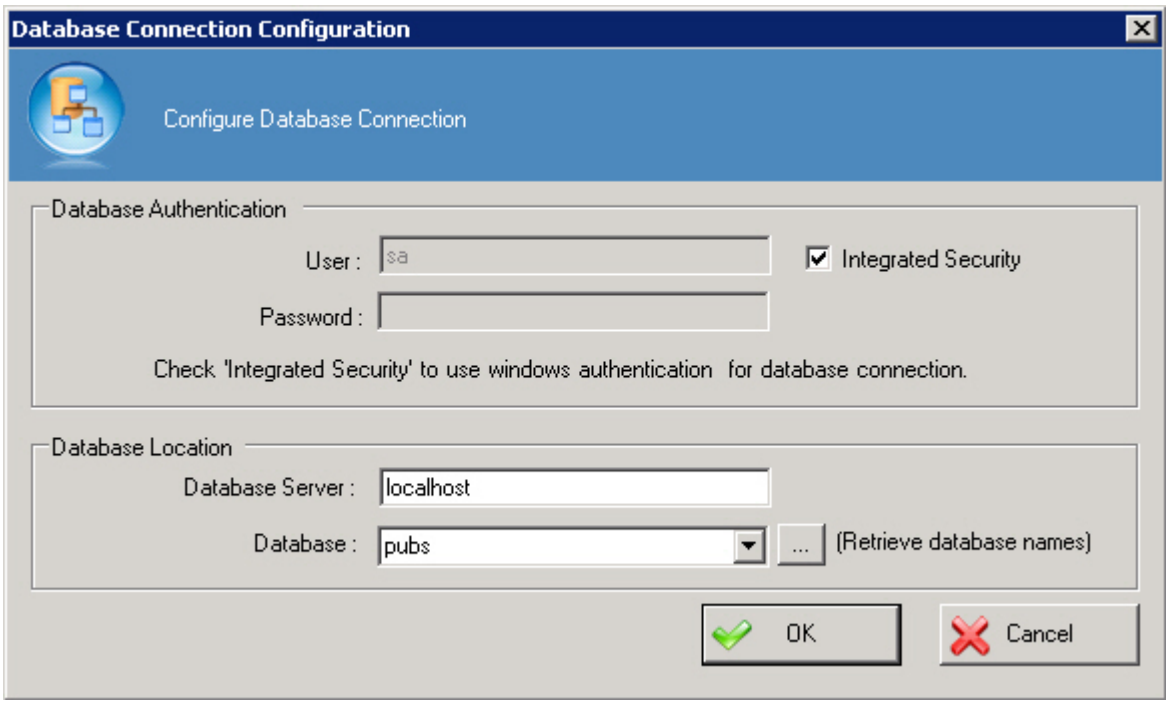
Field Name	Definition
Connection String	Definition: Specifies the connection string that is used to connect to the database. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. Allowed Values: A valid SQL connection string. Default Value: server=myserver;database=pubs;trusted_Connection=yes Custom Attributes: Yes Example: server=DataServer;database=StoreDb;trusted_Connection=yes
Create	Opens the Following Window: Database Connection Configuration Window Purpose of this Window: Creates a connection string with specified information.
Choose	Opens the Following Window: Browse Custom Attributes Window Purpose of this Window: Specifies a connection string from a list of shared custom attributes.
Table Name	Definition: Specifies the name of the database table where this AgileShape inserts the record. Allowed Values: A valid database table name. Default Value:

Field Name	Definition
	None Custom Attributes: Yes Example:
Browse	Function: Enables you to find the associated item. Purpose of this Window: Specifies a particular database table from the database.
Condition	Definition: The SQL WHERE clause that defines which database records should be updated. Allowed Values: A valid SQL WHERE clause. Default Value: None Custom Attributes: No Example: InvoiceNumber <= 3452
Column Name	Definition: Specifies the name of the column in the database. Allowed Values: A valid column name from the particular table in the database. Default Value: None Custom Attributes: No Example: CustomerName
Value	Definition:

Field Name	Definition
	Specifies an XPath to a single node inside the given repeating Xpath. Allowed Values: A valid XPath. Default Value: None Custom Attributes: Yes Example: ${/pd:AgilePoint/pd:Products/pd:ComponentName}
Add	Function: Creates new mapping to a database table column from the schema.
Remove	Function: Removes the mapping from the database table column.

Database Connection Configuration Window

Creates a connection string with specified information.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. In one of the following windows, click **Create**. The specific windows that display vary, depending upon the AgileShape you are using:
   - Configuration for Inserting Database Record Window
   - Configuration for Batch Inserting Database Record Window
   - Configuration for Updating Database Record(s) Window
   - Configuration for Deleting Database Record(s) Window
   - Configuration for Stored Procedure or Generic SQL Window
   - Database Queries Window
   - Database Stored Procedure Window

Field Definitions

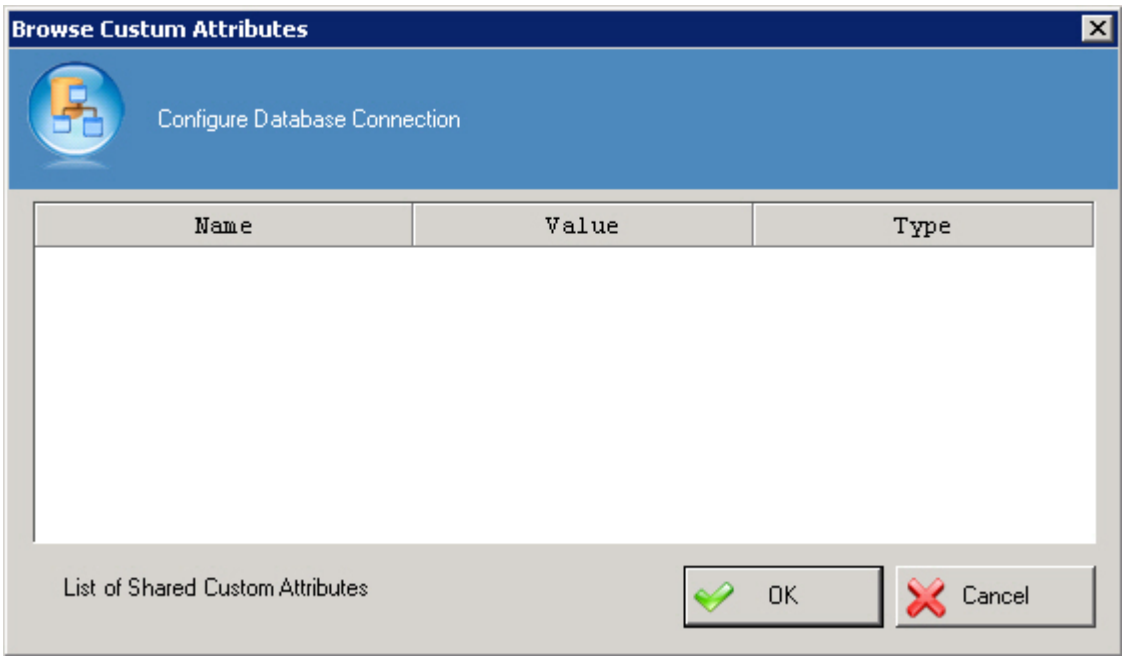
Field Name	Definition
User	Definition:

Field Name	Definition
	The user name for the database account AgilePoint Server uses to connect to the database. Allowed Values: A valid user name for the database. Default Value: sa
Password	Definition: Specifies a password for the specified user. Allowed Values: A valid password. Default Value: None Custom Attributes: No
Integrated Security	Definition: When integrated security is selected, the current windows account credentials are used for authentication. Allowed Values: • **Selected** - The windows account credentials are used for authentication automatically. • **Deselected** - The user and password fields are enabled for database authentication. Default Value: Selected
Database Server	Definition: Specifies a database server name that provides database services. Allowed Values: A valid database server name. Default Value: localhost Custom Attributes:

Field Name	Definition
	No
Database	Definition: List all the database names that are available for the authenticated user. Allowed Values: • A valid database server host name. • A valid IP address. Default Value: pubs Custom Attributes: No

Browse Custom Attributes Window

Specifies a connection string from a list of shared custom attributes.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag any AgileShape and drop it on the process template.

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. In one of the following windows, click **Choose**. The specific windows that display vary, depending upon the AgileShape you are using:
   - Configuration for Inserting Database Record Window
   - Configuration for Batch Inserting Database Record Window
   - Configuration for Updating Database Record(s) Window
   - Configuration for Deleting Database Record(s) Window
   - Configuration for Stored Procedure or Generic SQL Window
   - Database Queries Window
   - Database Stored Procedure Window
7. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

Field Name	Definition
Name	Definition: Specifies the name of custom attribute. Allowed Values: Read only.
Value	Definition: This field contains the value of the shared custom attribute. Allowed Values: Read only.
Type	Definition: Specifies the data type of the shared custom attributes. Allowed Values: Read only.

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Updating Database Records in a Database Table

To update existing records in a database table, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag the **Update Database** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the **Configuration for Updating Database Record(s)** window, complete the following fields as required.

Field Name	Value
Connection String	Definition: Specifies the connection string that is used to connect to the database. • Click **Choose** to select a connection string from the list of shared custom attributes (defined and managed in Enterprise Manager.) • Click **Create** to create a new connection string. Allowed Values: A valid SQL connection string. Default Value: server=myserver;database=pubs;trusted_Connection=yes Custom Attributes: Yes Example: server=DataServer;database=StoreDb;trusted_Connection=yes
Table Name	Definition: Specifies the name of the database table where this AgileShape inserts the record. Allowed Values: A valid database table name. Default Value: None Custom Attributes:

Field Name	Value
	Yes Example:
Condition	Definition: The SQL WHERE clause that defines which database records should be updated. Allowed Values: A valid SQL WHERE clause. Default Value: None Custom Attributes: No Example: InvoiceNumber <= 3452

2. In the **Column & Data** section, click **Add**.
3. Complete the following fields as required.

Field Name	Value
Column Name	Definition: Specifies the name of the column in the database. Allowed Values: A valid column name from the particular table in the database. Default Value: None Custom Attributes: No Example: CustomerName
Value	Definition: Specifies an XPath to a single node inside the given repeating Xpath. Allowed Values:

Field Name	Value
	A valid XPath. Default Value: None Custom Attributes: Yes Example: ${/pd:AgilePoint/pd:Products/ pd:ComponentName}

4. Complete any additional configuration for this AgileShape according to your requirements:
   - AgilePart - Common Setup
   - Browse Custom Attributes Window
   - Configuration for Updating Database Record(s) Window
   - Database Connection Configuration Window
   - Update Database

Extender

An AgileExtender is a type of AgileShape that allows users to overlay the AgilePoint process model with custom behavior. An AgileExtender is a kind of "meta shape" that runs on top of or in parallel to the process, rather than running inline within the process flow. This provides increased extensibility and allows layers of powerful functionality to be added to the process without making the core process model unnecessarily complex.

This section describes the AgileShapes in the Extender stencil, which provides access to the built-in AgileExtenders.

Service Level Agreement (SLA)

This AgileShape enables you to track the time it takes to complete a range of elements in a process instance. Within a process template, you can set more than one timer using the same SLA AgileExtender shape.



Navigation

1. In AgilePoint Envision, open a process template.

2. Navigate to the **Extender** stencil.
3. On the **Extender** stencil, drag the **Service Level Agreement** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
SLATimer	Opens the Following Window: Time Watch Between Activities Window Purpose of this Window: Sets up the SLA timer, including the range of AgileShapes you want to time.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

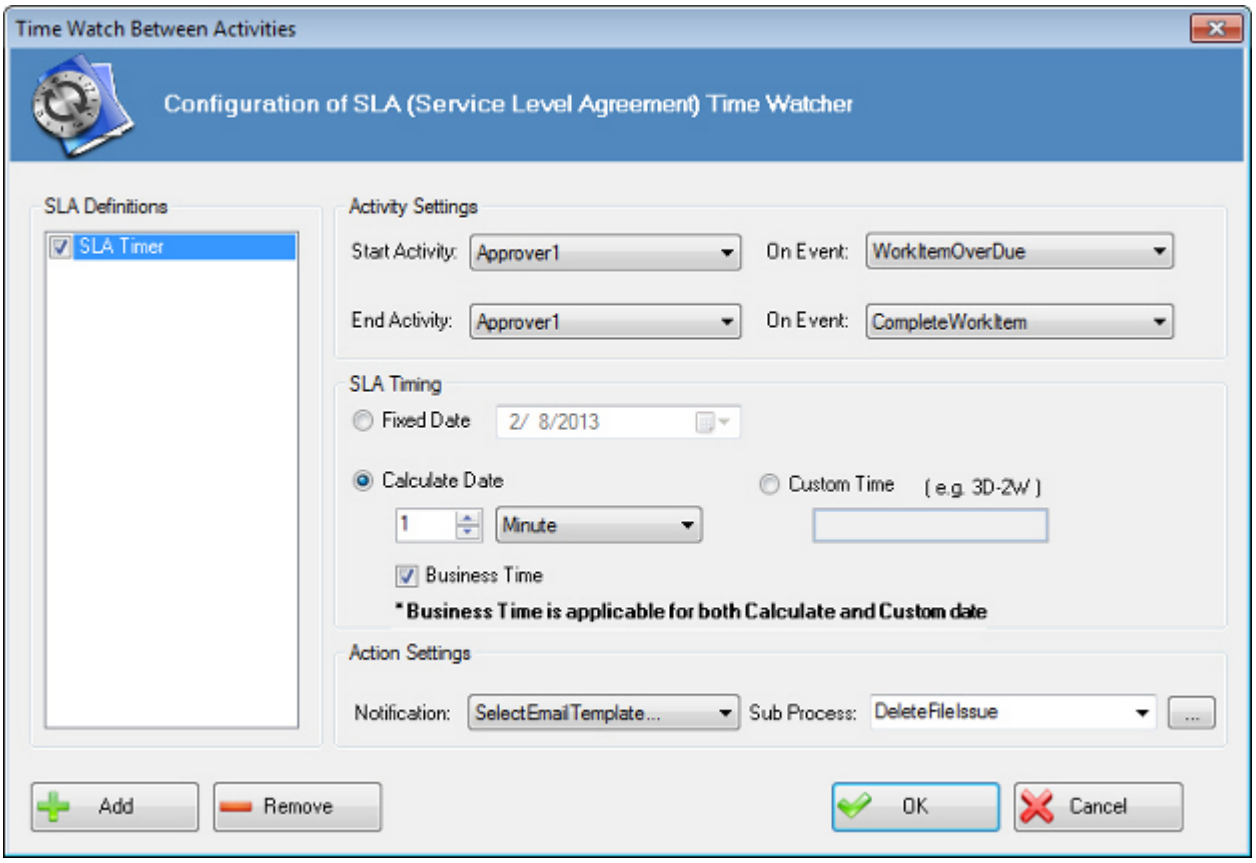
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Time Watch Between Activities Window

Sets up the SLA timer, including the range of AgileShapes you want to time.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Extender** stencil.
3. On the **Extender** stencil, drag the **Service Level Agreement** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **SLATimer** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Add	Function: Creates a new timer with a name you specify.
Remove	Function: Deletes the selected timer.
Start Activity	Definition:

Field Name	Definition
	Specifies the activity upon which you want to start the timer. Allowed Values: The name of your activity. Default Value: None.
End Activity	Definition: Specifies the activity upon which you want to end the timer. Allowed Values: The name of your activity. Default Value: None
On Event	Definition: Specifies the particular event of the activity you want to start or end the timer. Allowed Values: The name of your event. Default Value: None Example: For a Manual activity, you can choose the AssignWorkItem event.
Fixed Date	Definition: Sets a particular date to expire the timer. Allowed Values: • **Selected** - Specifies to use a particular date to expire the timer. • **Deselected** - Specifies not to use a particular date to expire the timer. Default Value: Selected.
Calculate Date	Definition:

Field Name	Definition

	Determines whether to calculate a date to expire the timer based on the information you enter.
	
	Allowed Values:
	• **Deselected** - Specifies not to calculate a date to expire the timer.
	• **Selected** - Specifies to calculate a date to expire the timer. This calculation includes the following elements:
	  • An integer.
	  This represents the length of the time unit.
	  • A time unit.
	  The Following types of time unit are used to calculate the time:
	  • Minute
	  • Hour
	  • Day
	  • Week
	
	Default Value:
	Deselected
	
	Example:
	If the length is set to 3, and the time unit is set to Day, this indicates 3 days. For example, this sets a duration of 3 days after which the timer expires.

Custom Time	Definition: Specifies a custom attribute that identifies a timespan for the timer expiration. Allowed Values: A custom attribute where the value is in the value **xD-yW**. • **xD** - Indicates x number of days. • **yW** - Indicates y number of weeks. Default Value: None Custom Attributes: Yes Example: 3D-2W

Field Name	Definition
	This value indicates 3 days plus 2 weeks.
Business Time	Definition: Determines whether the time span represents actual time, or business hours only. Allowed Values: • **True** - The time span represents a span of business hours only. For example, 5 days of business time might be equivalent to 7 days of actual time. 8 hours of business time might be equivalent to 24 hours of actual time. • **False** - The time span represents actual time. It is unaffected by any business time configuration settings. Default Value: False Example: The Business Time property is set to True, and business hours are configured as 9 a.m. to 5 p.m. A Manual AgileShape with a Time Span of 6 business hours is entered at 4 p.m. on Tuesday, then the activity must be completed by 2 p.m. on Wednesday. Property Group: Basic
Notification	Definition: Specifies the name of an email template used to send the email notification when the timer expires. Allowed Values: The name of your email template. Default Value: None.
Sub Process	Definition: Specifies the name of the process template that is started as a sub process when the timer expires. The list is populated from the subprocesses in your process model. You can use process attributes to pass date from the parent process to the subprocess.

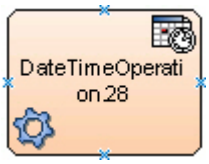
Field Name	Definition
	Allowed Values: The name of your process template. If you configure a subprocess, you can set up process attributes to pass data from the parent process to the subprocess, similar to the SubProcess AgileShape. Click the **Ellipses** button to open the Initial Attributes Configuration Window Default Value: None. Custom Attributes: Yes

Miscellaneous

This section describes the AgileShapes in the Miscellaneous stencil.

DateTimeOperation

An AgilePart that performs complex date calculations within a process model using a simple graphical user interface. The DateTime Services AgileShape can manipulate the operations between two DateTime input values or add extra DateTime values (seconds, minutes, hours, or days) to a given DateTime value.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **DateTimeOperation** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: DateTime Services Configuration Window Purpose of this Window: Sets up calculations that enable process activities to occur at a specified date and time.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

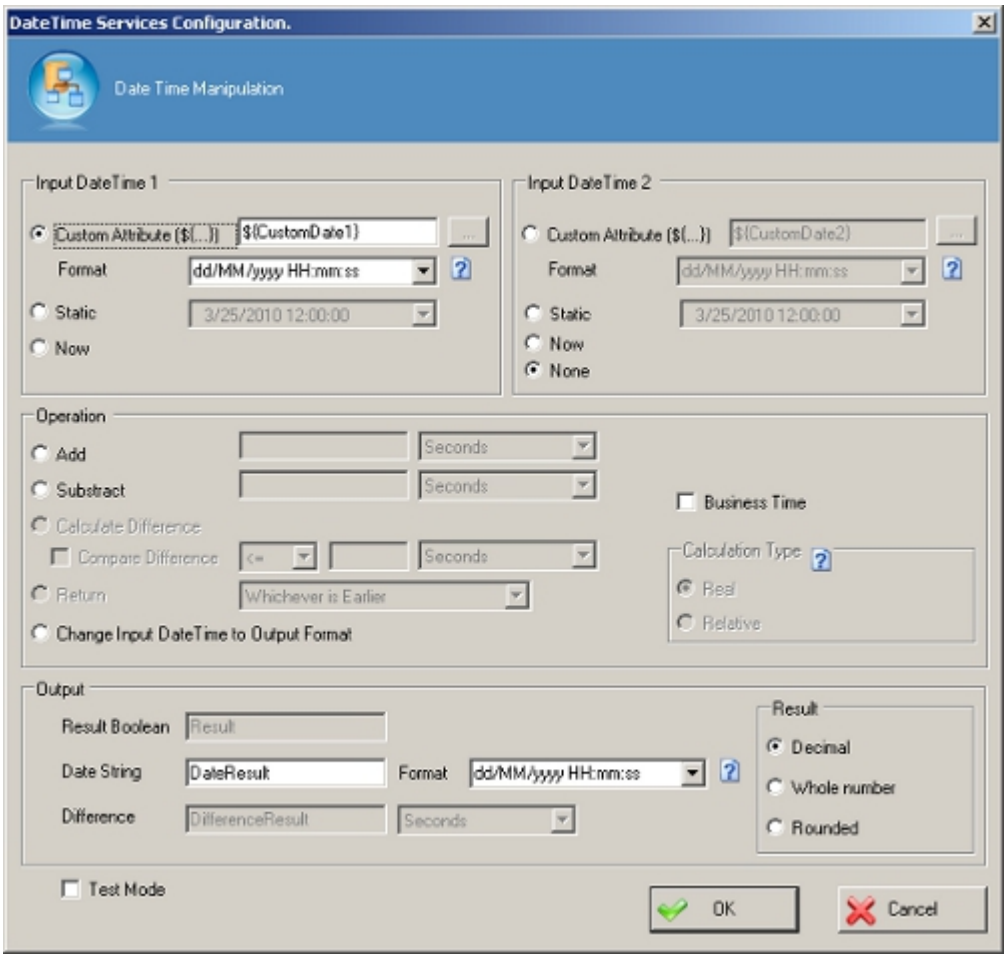
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

DateTime Services Configuration Window

Sets up calculations that enable process activities to occur at a specified date and time.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **DateTimeOperation** AgileShape, and drop it on the process template.
4. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Input DateTime	Definition: Specifies the dates that are used to perform complex date calculations. Two DateTime fields are available: Input DateTime 1 and Input DateTime 2.

Field Name	Definition
	Allowed Values: • **Custom Attribute** - Specifies a custom attribute that identifies the DateTime. Click the Ellipses button to open the Select XPath from Attributes Window. **Format** - Applies the selected format to the date if you use a custom attribute. • **Static** - Specifies a static date and time. • **Now** - Specifies the date and time the DateTime AgilePart is initiated. • **None** - Disables the Input DateTime 2 field. Default Value: Custom Attribute
Add	Definition: Specifies an amount of time to be added to the Input DateTime 1. Allowed Values: • An integer, or a custom attribute that represents an integer. Click the Ellipses button to open the Select XPath from Attributes Window. • The time unit. Options are: • **Seconds** • **Minutes** • **Hours** • **Days** • **Weeks** • **Months** • **Years** Default Value: None Custom Attributes: Yes Example:

Field Name	Definition
	If the value is set to 10, and the time unit is set to Days, 10 Days are added/subtracted.
Subtract	Definition: Specifies an amount of time to be subtracted from the Input DateTime 1. Allowed Values: • An integer, or a custom attribute that represents an integer. Click the Ellipses button to open the Select XPath from Attributes Window. • The time unit. Options are: • **Seconds** • **Minutes** • **Hours** • **Days** • **Weeks** • **Months** • **Years** Default Value: None Custom Attributes: Yes Example: If the value is set to 10, and the time unit is set to Days, 10 Days are added/subtracted.
Business Time	Definition: Specifies that the AgilePoint work calendar is taken into account for date calculations. Allowed Values: • **Deselected** - The AgilePoint work calendar is not taken into account for calculations. • **Selected** - The AgilePoint work calendar is taken into account for calculations. Default Value: Deselected

Field Name	Definition
	Example: The Business Time field is set as selected, and business hours of work calendar are configured as 9 AM to 5 PM. If the task with completion time 8 hours is entered at 1 PM on Monday, then the activity must be completed by 12 PM on Tuesday.
Compare Difference	Definition: Specifies whether to compare the difference between the two Input DateTime values. Allowed Values: 1. A comparison operator. Following are the operators that are used to compare the two Input DateTime values: • **<=** • **>** • **=** • **<>** 2. An integer, or a custom attribute that represents an integer. Click the Ellipses button to open the Select XPath from Attributes Window. 3. The time unit. Options are: • **Seconds** • **Minutes** • **Hours** • **Days** • **Weeks** • **Months** • **Years** Default Value: None Custom Attributes: Yes
Calculation Type	Definition: Specifies how the difference between the Input DateTime 1 and Input DateTime 2 is calculated.

Field Name	Definition
	Allowed Values: • **Real** - The actual difference between the two DateTime values. The result depends upon the option set in the Result field. • **Relative** - The relative difference between the two DateTime values. This setting is useful for situations when an action is allowed, for example, once per week or once per month. Default Value: Real Example: The difference between the dates Sat 29-Dec-2007 23:50:00 and Wed 02-Jan-2008 00:00:00 is calculated as follows. Note that these dates are 4 days apart, but occur in different years, different months, and different weeks. • When you select the Real option the difference is calculated based on the actual number of days (and hours and minutes) between the two dates: 4 days and 10 minutes. • When you select the Relative option, the difference is 4 days, 1 week or 1 month, or 1 year, depending upon the time unit specified.
Result	Definition: Specifies the type of value to return for the date calculations where the Calculation Type is set as Real. Allowed Values: • **Decimal** - Returns the difference as is, including any decimals. • **Whole number** - Returns the integer part of the result by removing the decimal part. • **Rounded** - Rounds up (>=0.5) or rounds down (<0.5) the result. Default Value: Decimal
Return	Definition: Specifies whether to use the earlier or later value for Input DateTime1 or Input DateTime 2. Allowed Values:

Field Name	Definition
	• **Whichever is Earlier** - Uses the earlier of Input DateTime1 and Input DateTime 2. • **Whichever is Later** - Uses the later of Input DateTime1 and Input DateTime 2. Default Value: Whichever is Earlier
Change Input DateTime to Output Format	Definition: Specifies whether the format of the date entered for the Input DateTime 1 field is converted to the format specified in the Date String - Format field. The DateTime data type for Input DateTime 1 is converted to a string data type in the format provided in the Format list, and then stored into the variable that appears in Date Sting field. Allowed Values: • **Deselected** - The value for Input DateTime 1 is not converted to the specified output format. • **Selected** - The value for Input DateTime 1 is converted to the output format. When you select this option, the DateString and the Format options are available to covert the input format to the output format. Default Value: Deselected
Result Boolean	Definition: Specifies the name of the variable that stores the Boolean result returned from the Compare Difference date calculations. If the Compare Difference option is enabled, the difference is evaluated as a Boolean result, and the Boolean value is associated with the variable that appears in this field. Allowed Values: A variable that stores a Boolean DateTime evaluation result. Default Value: Result Custom Attributes: Yes

Field Name	Definition
Date String	Definition: Specifies the name of the variable that stores the result returned from the date calculations if it is in DateTime format. The results of date calculations are converted from DateTime format to a String. The format of the string is specified in the Format list. Allowed Values: A variable that stores the result in the selected String format. Default Value: DateResult Custom Attributes: Yes
Difference	Definition: Specifies the result returned from the Compare Difference date calculations. in terms of a number of time units, such as 5 seconds, or 10 days. If Compare Difference is enabled, the difference is stored as a variable with the name that appears in this field. The value is the output value of the comparison. Allowed Values: • A variable that stores the value of the comparison result. • The time unit. Options are: • **Seconds** • **Minutes** • **Hours** • **Days** • **Weeks** • **Months** • **Years** Default Value: • DifferenceResult • Seconds

Field Name	Definition
	Custom Attributes: Yes
Test Mode	Definition: Displays the Test button to validate the specified DateTime settings. You can use the test mode to determine whether your DateTime settings will produce the desired result for your process before you run the process. Allowed Values: • **Deselected** - Test mode is disabled. • **Selected** - Enables the test mode and displays the Test button. Default Value: Deselected
Test	Function: Runs a test to validate the specified DateTime settings.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

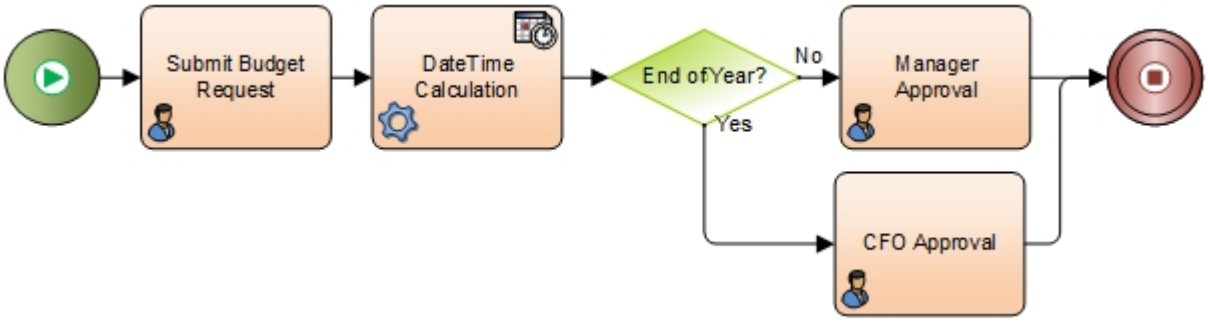
Creating a DateTimeOperation from a Process

This example shows a scenario where it performs complex date calculation using information in a process, and adds extra DateTime values (seconds, minutes, hours, or days) to a given DateTime value using the DateTimeOperation AgileShape.

Instructional Goals

- Demonstrate how to compare DateTime values using theDateTimeOperation AgileShape.

Example Process: Budget Request with Deadline



Problem Statement

Submit and approve a budget request.

Business Requirements

- The process is initiated when an employee submits a budget request form.
- If the submission date is less than 30 days before the end of the year, the request goes to the CFO for approval.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **DateTimeOperation** AgileShape, and drop it on the process template.
4. On the **Configuration** field, click the **Ellipses** button.

Instructions

1. On the **DateTime Services Configuration** Window, in the **Input DateTime 1** field, select **Now**.
2. In the **Input DateTime 2** field, select **Static**, and enter **12/31/2014 12:00**.
3. Select **Calculate Difference**.
4. Select **Compare Difference**. Select less than (**<**), and enter **30 Days**.
5. In the **Result Boolean** field, enter **AuditDate**.
6. Click **Add**, and enter **30 Days**.
7. Click **OK**.
8. On your process model, select the **Delay** shape.
9. On the **Configure** field, click the **Ellipses** button.
10. On the **Set Time for Delay Activity** window, select **Designated Date**.
11. In the **Date** field, enter **$AuditDate**.

The DateTime AgileShape tests the following statement:

(Time the process enters the DateTime activity) < (30 days before 12/31/2013).

If the result is Yes, the request is routed to the CFO for approval. If the result is No, the request is routed to the Manager for approval.

HTTP Post

This AgileShape can be used to post data from a client machine to a Web application which is predefined. The client receives response from the Web application. It also supports custom attributes and https and web proxy.

Note: This AgileShape has been deprecated. Beginning with AgilePoint BPMS v5.0 SP4 this AgileShape is available only through the Traditional AgileShape stencils, and not through the current stencils.

Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

Field Name	Definition
HttpPost	Opens the Http Post Configuration dialog box, where you can configure an HTTP post action.

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Http Post Configuration Window

This window enables you to configure an HTTP post action.

Field Definitions

Field Name	Definition
Credential	The HTTP page URL section should contain a valid URL such as http://MachineName:PortNumber/WebApplication.aspx. The Authentication section specifies the authentication for doing the Http post function. Do one of the following:

Field Name	Definition
	• Specify an account by Domain\\username and password. You can validate whether this account is valid by clicking on the Test button. • Use the AgilePoint System User at runtime, that means it will impersonate the system account of AgilePoint. • Use the default credential, this means it will use the account credentials that are used when logging into the Web application.
Request	This tab specifies a custom header by clicking on the **ellipses** button. **Note:** The Value field cannot accept special characters, such as "~!@#$%^&*. ". You can add parameters that will be used while posting to a Web application, for example: • **Schema** - You can attach a Xpath if the process is based on a template with a associated schema. • **Add** - Append a new row in a table. • **Remove** - Delete the current row in a table. • **Remove All** - Remove all rows in a table.
Response	This tab binds a response. You can bind the response in two ways. One is to bind the response with an AgilePoint Schema, the other is to store it in a custom attribute. If the Web application that is called is based on Base64 Encode, make sure to select this option.
Security	This tab specifies SSL Authentication. If SSL Authentication is checked, you can add client certificates by clicking the **ellipses** button.
ProxyServer	This tab specifies whether a proxy can be used during the execution of the Http Post.

PDF Converter

An AgilePart that converts multiple files in various formats to PDF files.



Good to Know

- Only files in the AgilePoint Server file system can be converted to PDF format.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **PDF Converter** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Destination	Definition: Specifies the file path or folder where the output file is to be stored. Allowed Values: The file or folder name with complete path. Default Value: None Custom Attributes: Yes
DestinationRepository	Definition: Specifies the repository for storing the output files. Allowed Values: • FileSystem Currently, only the FileSystem repository is supported. Default Value: FileSystem
Filter	Opens the Following Window: Filter Window Purpose of this Window: Specifies the file types you want to convert to PDF.
OverWriteFile	Definition:

Field Name	Definition
	Specifies whether the AgileShape overwrites the files if they already exist at the specified destination location. Allowed Values: • **False** - The AgileShape does not overwrite any existing file. • **True** - The AgileShape overwrites the file if it exists with the same name at the destination location. Default Value: False
Recursive	Definition: Determines whether the AgileShape's specified action - such as copying, uploading, or deleting - is recursive. In other words, it determines whether the action is repeated in subfolders of the target folder or document library. Allowed Values: • **False** - The AgileShape performs the action only on the files located at the specified source folder. Files within subfolders aren't affected. • **True** - The AgileShape performs the action on the files located at the specified source folder, as well as the files that are located within the subfolders. Default Value: False
Source	Definition: Specifies the name of the source file or folder containing files to be converted to the PDF files. Allowed Values: The source file or folder name with complete path. Default Value: None Custom Attributes: No
SourceRepository	Definition: Specifies the repository for storing the source files.

Field Name	Definition
	Allowed Values: • FileSystem Currently, only the FileSystem repository is supported. Default Value: FileSystem

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

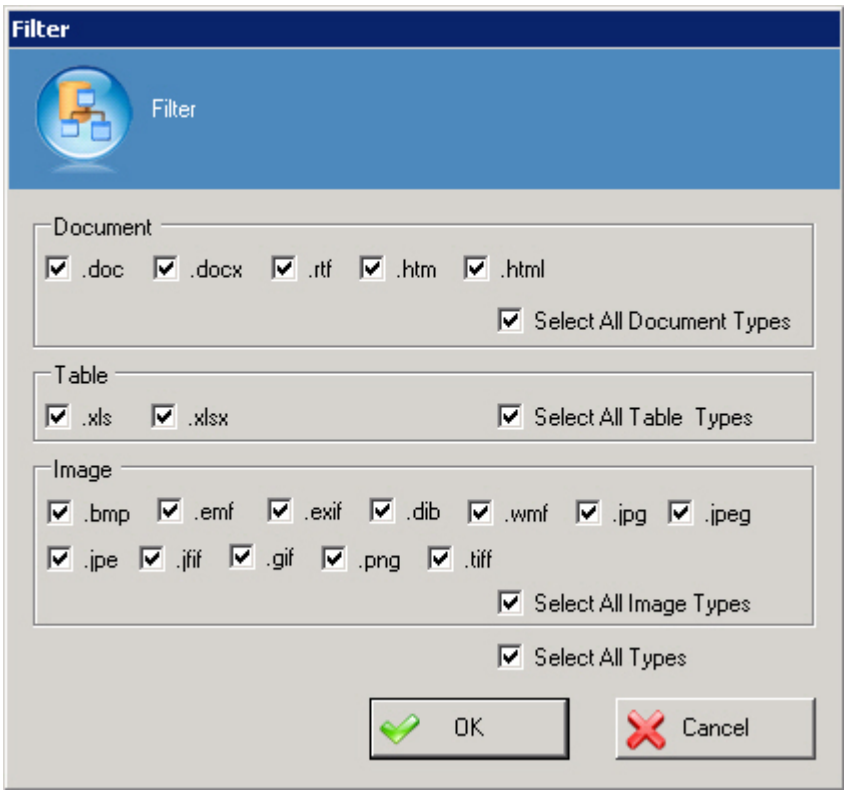
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Filter Window

Specifies the file types you want to convert to PDF.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **PDF Converter** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Filter** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
File Types	Definition: Specifies the types of files to be converted to PDF format. This is not a specific field, but rather this item describes all the options on the Filter window collectively. Allowed Values: • **Specific file types** - You can select one or more specific file types to convert. Other file types at your specified location are ignored.

Field Name	Definition
	• **Groups of file types** - You can select groups of file types, such as all document types (Select All Document Types) all image types (Select All Image Types), or all file types (Select All Types). Default Value: All selected.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Converting a File to PDF Format

To convert a file to PDF format, do the following.

Prerequisites

- The file you want to convert must be present in the Source folder.

Good to Know

- Only files in the AgilePoint Server file system can be converted to PDF format.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **PDF Converter** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. Complete the following fields as required:

Field Name	Definition
Destination	Definition: Specifies the file path or folder where the output file is to be stored. Allowed Values:

Field Name	Definition
	The file or folder name with complete path. Default Value: None Custom Attributes: Yes
Source	Definition: Specifies the name of the source file or folder containing files to be converted to the PDF files. Allowed Values: The source file or folder name with complete path. Default Value: None Custom Attributes: No

2. Complete any additional configuration for this AgileShape according to your requirements:
   - PDF Converter
   - AgilePart - Common Setup

Read File

An AgilePart that uploads the contents of any file to a selected schema node of an ASP.NET application.

The process using this AgilePart must have an associated schema.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **Read File** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: Read File Configuration Window Purpose of this Window: This window sets up a read file action.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

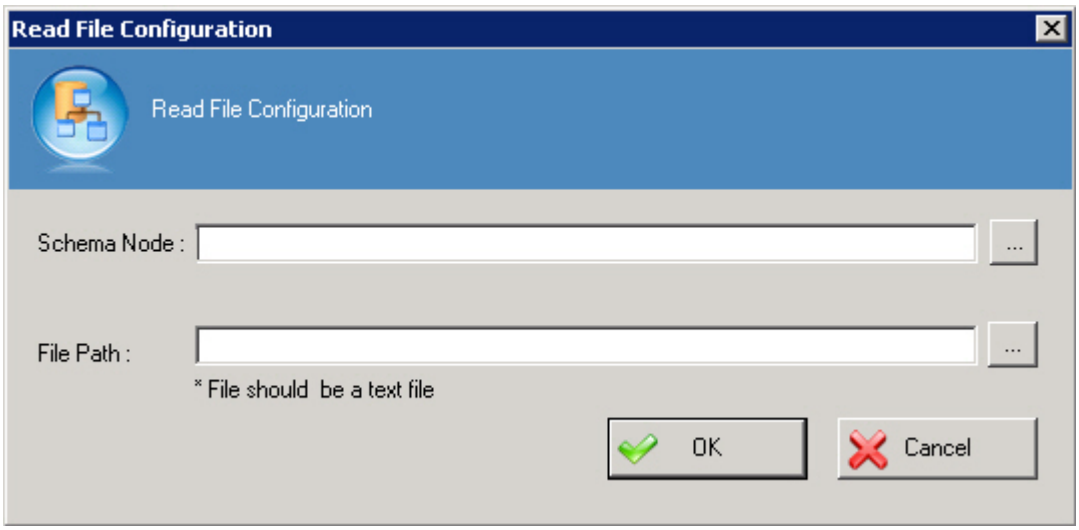
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Read File Configuration Window

This window sets up a read file action.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **Read File** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Schema Node	Definition: Specifies the schema node you want to upload the file data. Allowed Values: An XPath to a schema node. You can use the **Ellipses** button to select the required schema from the Select XPath from Attributes Window. Default Value: None Custom Attributes: Yes
File Path	Definition:

Field Name	Definition
	Specifies the path of the file on the local file system that includes the content you want to upload to the schema node. Allowed Values: The file name with the full path. Note the following: • The file must be a text file. • You can use the Ellipses button to select the file. Default Value: None Custom Attributes: No

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

Reading a Text File from a Process

To read a text file from a process, do the following.

Prerequisites

- A target schema node to upload the contents of the file.

Good to Know

- The process using this AgileShape must have an associated schema.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **Read File** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the Read File Configuration Window, complete the following fields as required:

Field Name	Definition
Schema Node	Definition: Specifies the schema node you want to upload the file data. Allowed Values: An XPath to a schema node. You can use the **Ellipses** button to select the required schema from the Select XPath from Attributes Window. Default Value: None Custom Attributes: Yes
File Path	Definition: Specifies the path of the file on the local file system that includes the content you want to upload to the schema node. Allowed Values: The file name with the full path. Note the following: • The file must be a text file. • You can use the Ellipses button to select the file. Default Value: None Custom Attributes: No

2. Complete any additional configuration for this AgileShape according to your requirements:
   - Read File
   - Read File Configuration Window
   - AgilePart - Common Setup

Text File Writer

An AgilePart that extracts some or all of the content of a process to save in a file in a UNC or FTP folder.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **Text File Writer** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: Opens one of the following windows, depending upon the settings configured in the LocationType field: • Text File Writer Configuration Window - UNC Tab - Sets up text file storage options for in a UNC destination. • Text File Writer Configuration Window - FTP Tab - Sets up text file storage options for in an FTP destination.
LocationType	Definition: Determines the type of the location for storing the text file. Allowed Values: • **FTP** - Uses the FTP path to store the text file. • **UNC** - Uses the UNC path to store the text file. Default Value: UNC Example:

Field Name	Definition
	• **UNC** - \\myserver\myshare\path\myfile.txt • **FTP** - //myserver/myshare/path/myfile.txt

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

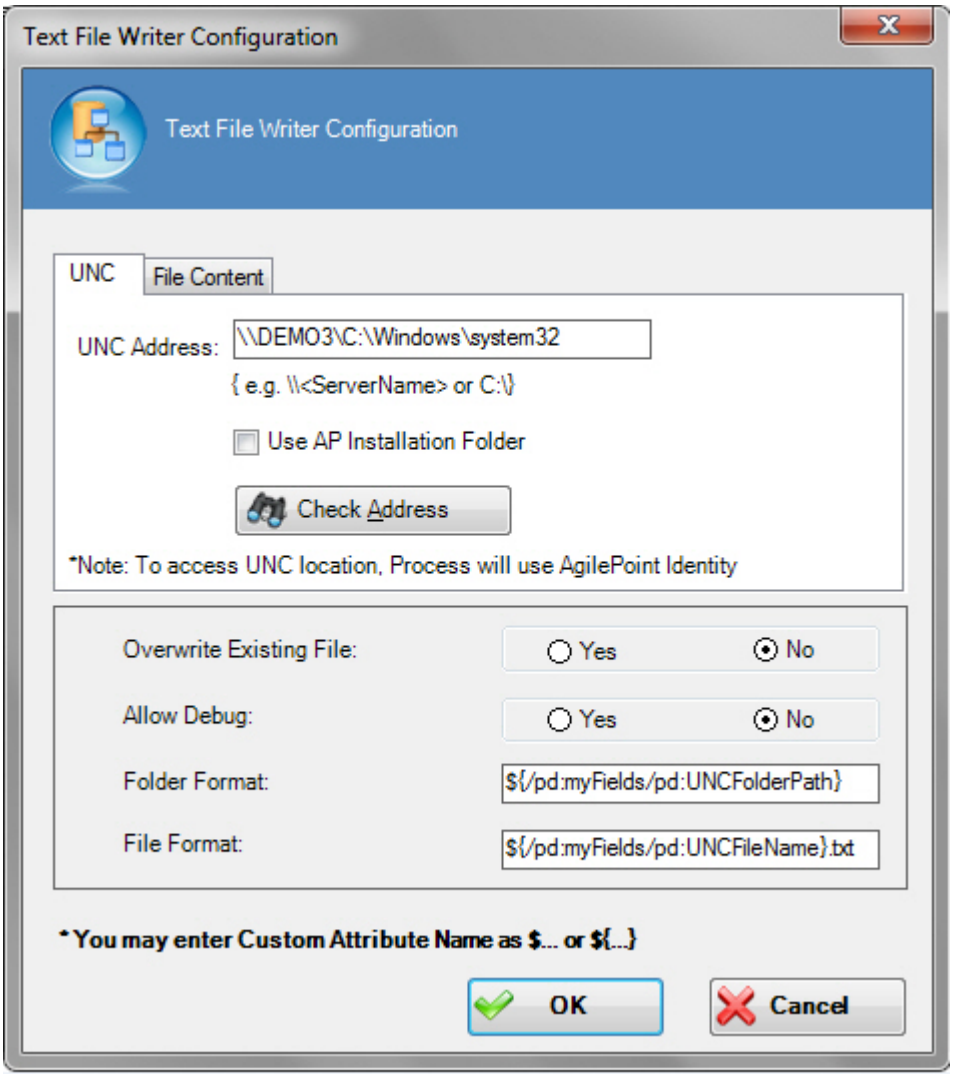
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Text File Writer Configuration Window - UNC Tab

Sets up text file storage options for in a UNC destination.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **Text File Writer** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In the **LocationType** field, click **UNC**.
6. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
UNC Address	Definition:

Field Name	Definition
	Specifies the UNC path that serves as the destination address for the text file. Allowed Values: A valid UNC path. Default Value: A variable path based on your environment and authentication. Custom Attributes: Yes Example: \\DEMO3\C:\Windows\system32
Use AP Installation Folder	Definition: Determines whether you want to use AgilePoint installation folder for the UNC location. Allowed Values: • **Deselected** - The AgilePoint installation folder is not used. • **Selected** - The AgilePoint installation folder is used. Default Value: Deselected
Check Address	Function: Verifies whether the specified UNC location exists.
Overwrite Existing File	Definition: Specifies whether the AgileShape overwrites the files if they already exist at the specified destination location. Allowed Values: • **No** - The AgileShape does not overwrite any existing file. • **Yes** - The AgileShape overwrites the file if it exists with the same name at the destination location. Default Value: No

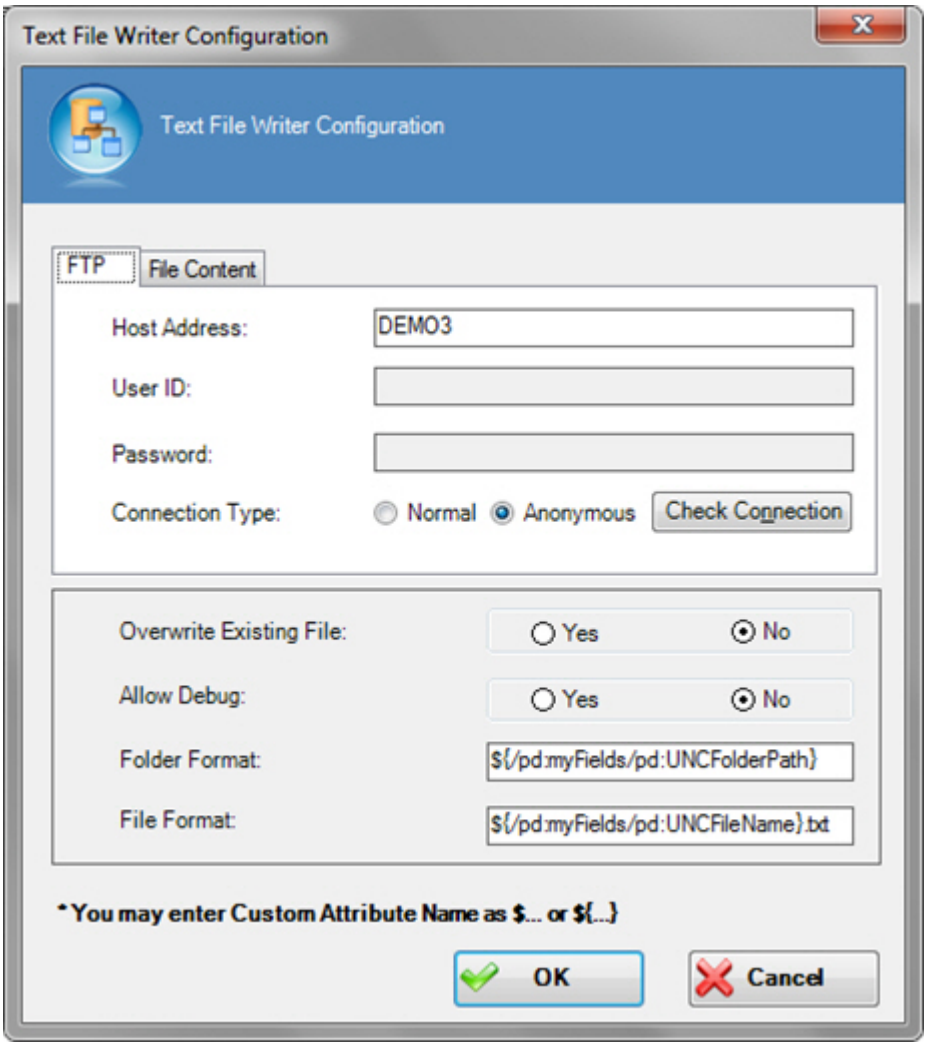
Field Name	Definition
Folder Format	Definition: Specifies the folder structure to store the file. Allowed Values: A valid folder path. Default Value: [Department]\[ExpenseCode] Custom Attributes: Yes Example: ${/pd:myFields/pd:UNCFolderPath}
File Format	Definition: Specifies the format for the name of the file to be stored at the destination location. Allowed Values: A valid file name. Default Value: [MM-dd-yyyy]_[Submitter].txt Custom Attributes: Yes Example: ${/pd:myFields/pd:UNCFileName}.txt

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Text File Writer Configuration Window - FTP Tab

Sets up text file storage options for in an FTP destination.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **Text File Writer** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In the **LocationType** field, click **FTP**.
6. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Host Address	Definition:

Field Name	Definition
	Specifies the FTP server location where you want to store the file. Allowed Values: A valid FTP location. Default Value: A variable path based on your environment and authentication. Custom Attributes: Yes Example: DEMO3
User ID	Definition: The user name for your FTP account. Allowed Values: A valid user name for the authentication account. Default Value: None Custom Attributes: Yes
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes
Connection Type	Definition: Determines whether a user accesses the FTP server as an authenticated or anonymous user. Allowed Values: • **Normal** - A user accesses the FTP server as an authenticated user. The user authentication

Field Name	Definition
	details are required, such as user name and password. • **Anonymous** - A user accesses the FTP server as a guest. User authentication is not required. Default Value: Anonymous
Check Connection	Function: Verifies whether the connection settings are correct, such as host address, user ID, and password.
Overwrite Existing File	Definition: Specifies whether the AgileShape overwrites the files if they already exist at the specified destination location. Allowed Values: • **No** - The AgileShape does not overwrite any existing file. • **Yes** - The AgileShape overwrites the file if it exists with the same name at the destination location. Default Value: No
Folder Format	Definition: Specifies the folder structure to store the file. Allowed Values: A valid folder path. Default Value: [Department]\[ExpenseCode] Custom Attributes: Yes Example: ${/pd:myFields/pd:UNCFolderPath}
File Format	Definition: Specifies the format for the name of the file to be stored at the destination location. Allowed Values:

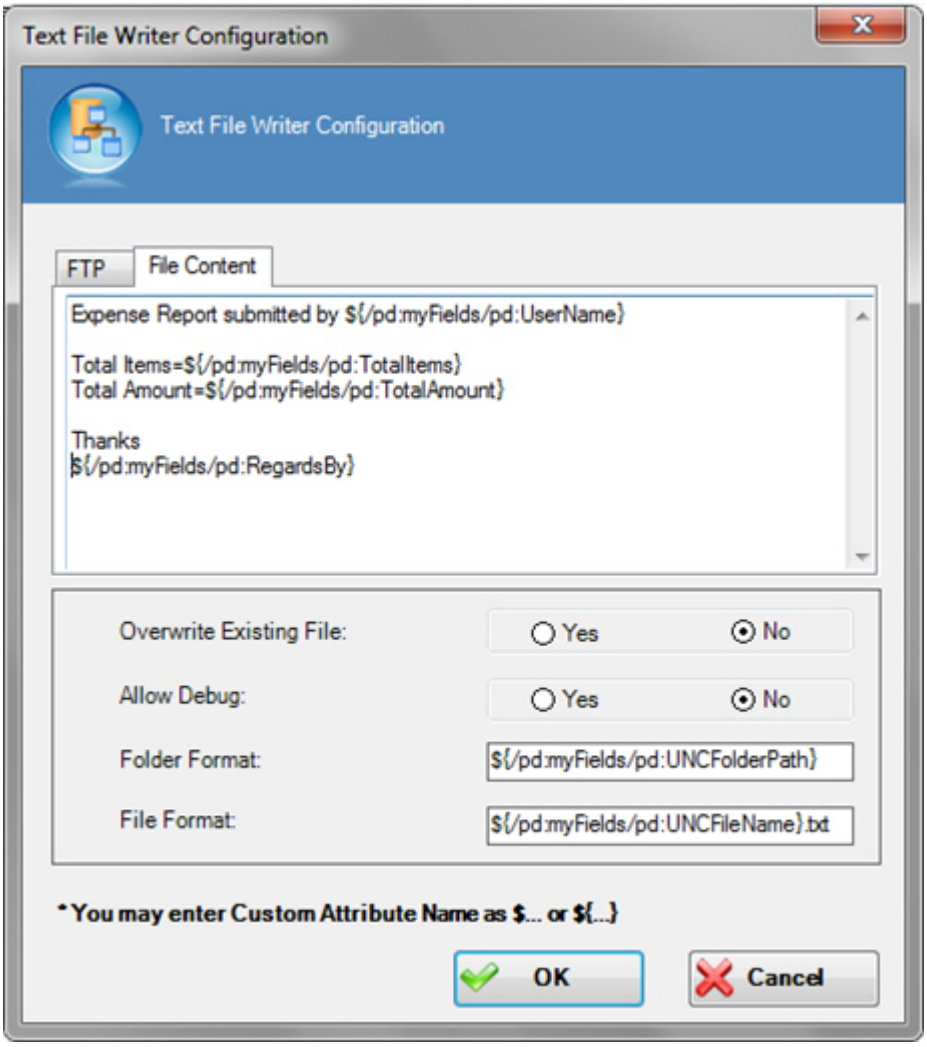
Field Name	Definition
	A valid file name. Default Value: [MM-dd-yyyy]_[Submitter].txt Custom Attributes: Yes Example: ${/pd:myFields/pd:UNCFileName}.txt

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Text File Writer Configuration Window - File Content Tab

The content of the file created by the Text File Writer AgileShape.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **Text File Writer** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In the **LocationType** field, select either **UNC** or **FTP**.
6. On the **Configure** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
File Content	Definition: Displays the content of the text file.

Field Name	Definition

	Allowed Values:
	The content of the file.
	Default Value:
	The content of the file.
	Custom Attributes:
	Yes
	Example:
	`Expense Report submitted by ${/pd:myFields/pd:UserName}`
	`Total Items=${/pd:myFields/pd:TotalItems}`
	`Total Amount=${/pd:myFields/pd:TotalAmount}`
	`Thanks`
	`${/pd:myFields/pd:RegardsBy}`

Overwrite Existing File	Definition: Specifies whether the AgileShape overwrites the files if they already exist at the specified destination location. Allowed Values: • **No** - The AgileShape does not overwrite any existing file. • **Yes** - The AgileShape overwrites the file if it exists with the same name at the destination location. Default Value: No
Folder Format	Definition: Specifies the folder structure to store the file. Allowed Values: A valid folder path. Default Value: [Department]\[ExpenseCode] Custom Attributes: Yes

Field Name	Definition
	Example: ${/pd:myFields/pd:UNCFolderPath}
File Format	Definition: Specifies the format for the name of the file to be stored at the destination location. Allowed Values: A valid file name. Default Value: [MM-dd-yyyy]_[Submitter].txt Custom Attributes: Yes Example: ${/pd:myFields/pd:UNCFileName}.txt

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

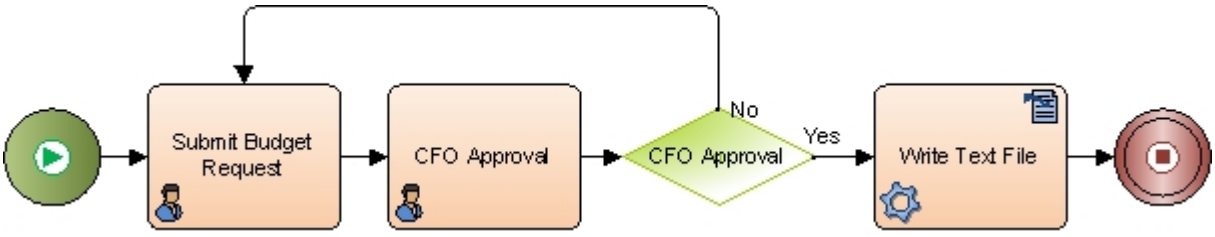
Creating a Text File from a Process

This example shows a scenario where a text file is created using information in a process, and saved to a file system using the Text File Writer AgileShape.

Instructional Goals

- Demonstrate how to create and store a text file using theText File Writer AgileShape.

Example Process: Simple Budget Request



Problem Statement

Submit and approve a budget request.

Business Requirements

- The process is initiated when an employee submits a budget request form.
- The request goes to the CFO for approval.
- If the CFO approves the request, the following data from the Submit Budget Request form is recorded in a text file, and saved on a local file system:
  - Submitter Name
  - Department
  - Submission Date
  - Budget Amount

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **Text File Writer** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In the **LocationType** field, click **UNC**.
6. On the **Configure** field, click the **Ellipses** button.

Instructions

1. On the **UNC** tab, complete the following fields:

Field Name	Value
UNC Address	\\DEMO3\C:\Windows\system32

2. To verify the UNC address, click **Check Address**.
3. Click the **File Content** tab.
4. On the **File Content** tab, complete the following fields:

Field Name	Value
File Content	Expense Report submitted by: ${/pd:myFields/pd:SubmitterName} Department: ${/pd:myFields/pd:Department} Submission Date: ${/pd:myFields/pd:BudgetSubmitDate} Budget Amount: ${/pd:myFields/pd:BudgetAmount}

Field Name	Value
Folder Format	${/pd:myFields/pd:UNCFolderPath}
File Format	${/pd:myFields/pd:UNCFileName}.txt

Word

An AgilePart that creates Word documents (.doc or .docx files) or PDF files from Word templates (.dot or .dotx files), populating Mail Merge or bookmark fields in the template with values you specify in the generated document.

Note: For information about creating a Word template, see the online help for Microsoft Word regarding Word templates, Mail Merge fields, and bookmark fields.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **Word** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: Word Configuration Window Purpose of this Window: Sets up a Word template conversion.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

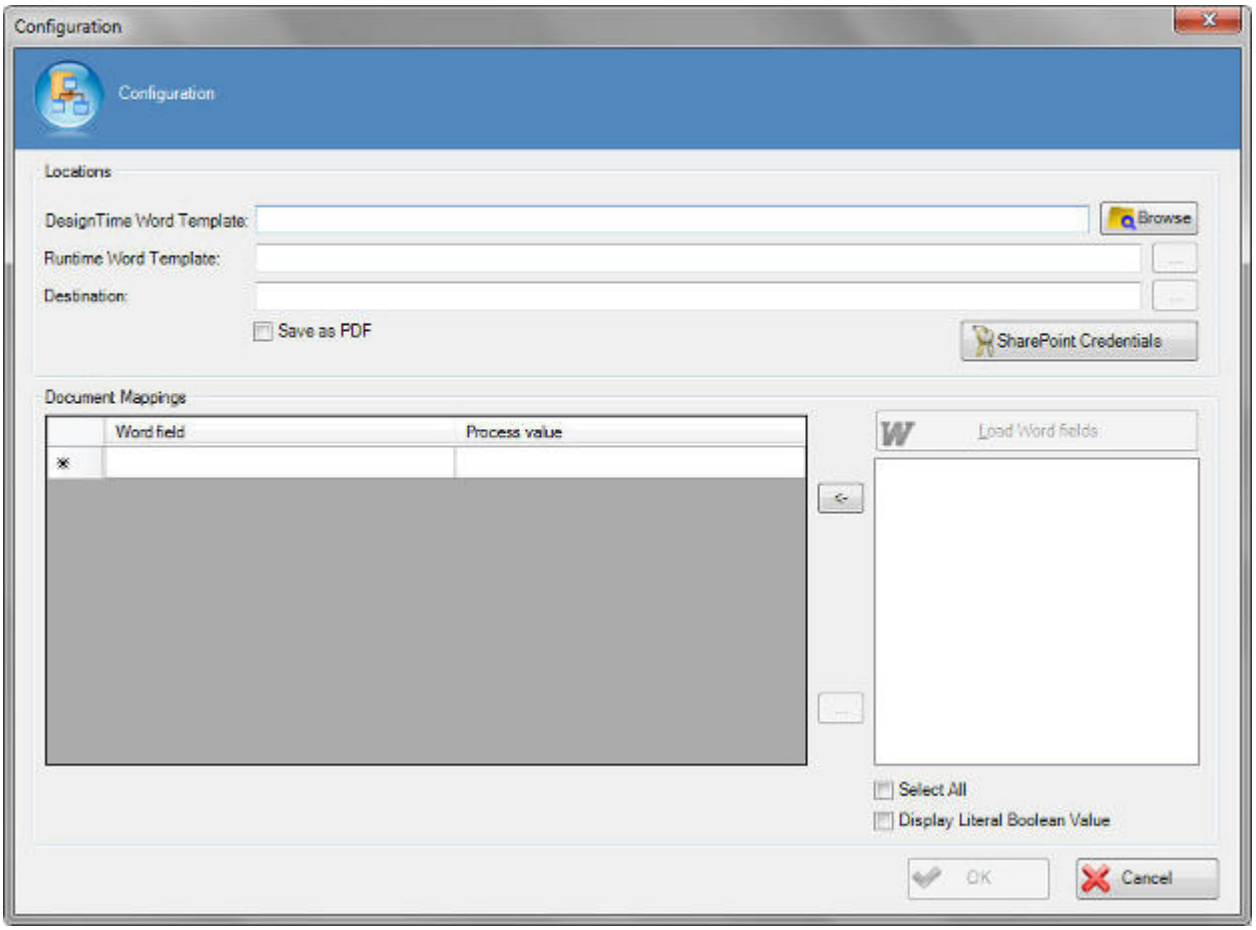
The following topics provide details about the configuration windows for this AgileShape.

Word Configuration Window

Sets up a Word template conversion.



Note: For information about creating a Word template, see the online help for Microsoft Word regarding Word templates, Mail Merge fields, and bookmark fields.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **Word** AgileShape, and drop it on the process template.
4. On the **Word Creator** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
DesignTime Word Template	Definition: Specifies the name of the Word template file that is used at design time. The design-time template document is used for mapping purpose, as it allows an access to all the dynamic fields of a word document. This document is not used at runtime.

Field Name	Definition
	Allowed Values: A valid Word template file name with the full path. You can use the Browse button to select the file. Default Value: None Custom Attributes: No
Runtime Word Template	Definition: Specifies the name of the Word template file to be used by AgilePoint Server at runtime. Allowed Values: • A valid Word template file name with the full path. • A custom attribute. Use the **Ellipses** button to select a custom attribute from the Select XPath from Attributes Window. Default Value: None Custom Attributes: Yes
Destination	Definition: Specifies the file path or folder where the output file is to be stored. Allowed Values: • A valid file path. • A custom attribute. Use the **Ellipses** button to select a custom attribute from the Select XPath from Attributes Window. Default Value: None Custom Attributes: Yes

Field Name	Definition
Save as PDF	Definition: Determines whether the generated file is saved as a PDF file, instead of a Word document. Allowed Values: • **Deselected** - The generated file is saved as a Word document. • **Selected** - The generated file is saved as a PDF document. Default Value: Deselected
SharePoint Credentials	Opens the Following Window: Logging on to SharePoint from a Process Template or AgileShape. Purpose of this Window: For process templates and AgileShapes that uses data from SharePoint, the first time you access SharePoint during your AgilePoint Envision user session
Word field	Definition: Specifies the word field that is to be mapped to the process value. The mapping is performed to update the fields in the Word document or PDF document, generated as output. Allowed Values: Read only - A word field. Use the Left Arrow button to move the word field from the Word Fields box to the Word field column.
Process Value	Definition: Specifies the process value to be mapped to the word field to update each field in the Word document. Allowed Values: • A number or a text string that can contain spaces. This must be in accordance with the data type of the word field. • A custom attribute.

Field Name	Definition
	Note the following: • Once a word field is in the Word field column, to map a word field to a process value, first select the row, and then click the **Ellipses** button to select from the Select XPath from Attributes Window. • You can type a custom attribute directly in the Process Value column. Default Value: None Custom Attributes: Yes
Load Word fields	Function: Loads the dynamic fields specified using the DesignTime Word Template to the Word Fields box.
Word Fields Box	Definition: Specifies the dynamic fields populated from the Word document. The dynamic fields are used for the mapping purpose. Allowed Values: Read only. The dynamic fields from the Word document are populated when you click the Load Word fields button.
Left Arrow	Function: Moves the selected Word fields from the Word Fields box to the Word field column.
SelectAll	Definition: Determines whether to select all the word fields in the Word Fields box at the same time. Allowed Values: • **Deselected** - Selects only one Word field at a time. • **Selected** - Selects all the Word fields at the same time. Default Value: Deselected

Field Name	Definition
Display Literal Boolean Value	Definition: Determines whether the generated Word document displays the literal value of a Boolean field - for example, display the words Yes or No for a boolean field. By default, the Word AgileShape displays the Boolean values as a selection box - X for True, and empty for False. Allowed Values: • **Deselected** - Displays the Boolean values as a selection box. • **Selected** - Displays the literal value of a Boolean field. Default Value: Deselected

Common Configuration Tasks

- Data Binding
- Using Process Attributes

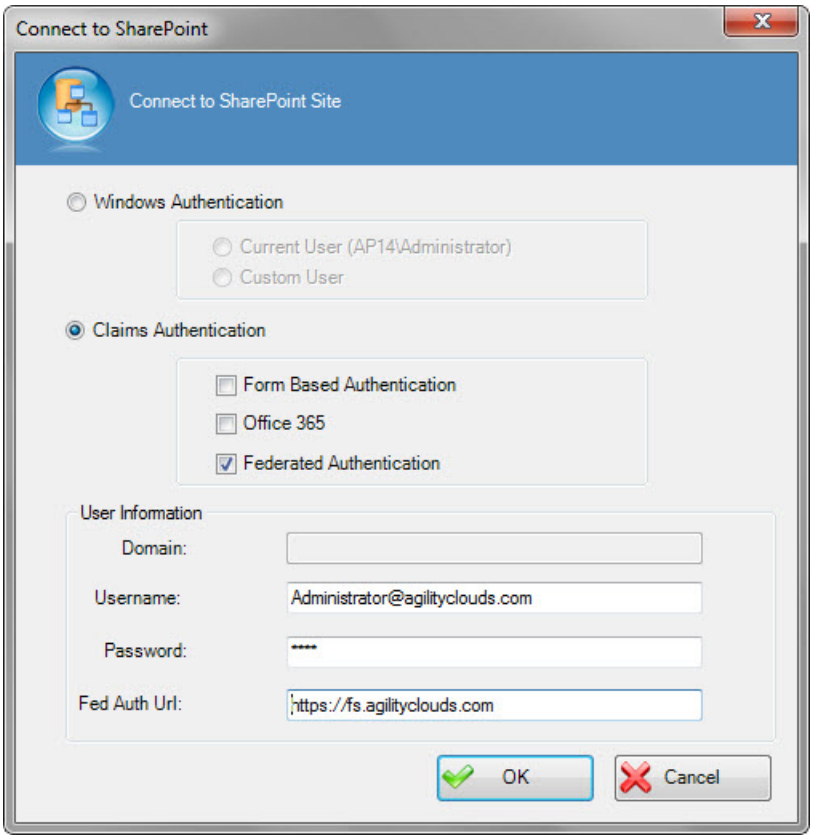
Logging on to SharePoint from a Process Template or AgileShape

For process templates and AgileShapes that uses data from SharePoint, the first time you access SharePoint during your AgilePoint Envision user session, you must link it to a SharePoint list.

Instructions

1. On the **Connect to SharePoint** dialog box, complete the fields to specify the user account you want to use to connect to SharePoint, and then click **OK**.

   These credentials will be saved and used each time you open the process model.



Field Definitions

Field Name	Definition
Windows Authentication	Definition: Specifies whether, and what type, of Windows Authentication is used to connect to SharePoint.
Claims Authentication	Definition: Specifies whether to use Claims authentication, and what type of Claims authentication, to use to connect to SharePoint. Allowed Values: If this option is selected, the following types of Claims Authentication are available: • **Form Based Authentication** - Activates Forms based authentication using a custom membership provider to connect to an on-premises SharePoint environment. • **Office 365** - Activates Claims authentication to connect to SharePoint in an Office 365

Field Name	Definition
	environment. This option can be used side-by-side with on-premises SharePoint. • **Federated Authentication** - Activates Federated authentication to connect to SharePoint -- for example, ADFS.  **Note:** Out of the box, AgilePoint supports ADFS authentication. If you want to use your own authentication provider, see Federated Authentication Example in the Documentation Library. Default Value: Deselected
Domain	Definition: The authentication domain. This does not apply to Forms-Based Authentication.
Username	Definition: The user ID of the SharePoint authentication account. Allowed Values: A valid user name. Default Value: None Custom Attributes: No
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes
Fed Auth Url	Definition:

Field Name	Definition
	The URI of the federated authentication provider. This provider issues security tokens for federated authentication. Allowed Values: A valid federated authentication provider URI. Default Value: None Custom Attributes: No Example: https://fs.agilityclouds.com

Instructions

The following topics provide instructions for using and configuring this AgileShape.

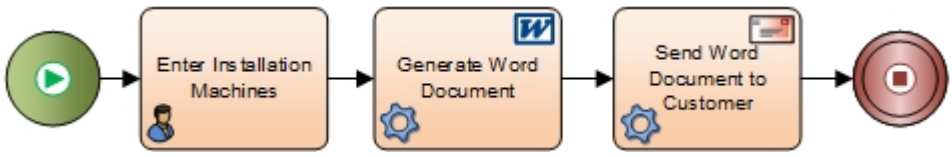
Creating a Word Document from a Process

This example shows a scenario where a Word document is created from a Word templates using information in a process. The Word AgileShape populates Mail Merge fields in your template with the values you specify.

Instructional Goals

- Demonstrate how to create a Word documents using the Word AgileShape.

Example Process: Budget Request



Problem Statement

Determine the installation machine for a client/server application.

Business Requirements

- A customer completes an online form to determine the machines where they need to install a client/server application.

  This process is based on a simplified version of the AgilePoint BPMS Genesis Edition pre-installation intake form.

Prerequisites

- Download the attached Word template file **ClientServerMachines.dotx** with the following Mail Merge fields:
  - **ServerMachineName** - The name of the machine in the customer's environment where the server component of the client/server component must be installed.
  - **ClientMachineName** - The name of the machine in the customer's environment where the client component of the client/server component must be installed.
- Place **ClientServerMachines.dotx** on the file system for AgilePoint Server.
- A process model with a form that includes input fields for the following custom attributes:
  - **ServerMachineName** - The name of the machine in the customer's environment where the server component of the client/server component must be installed.
  - **ClientMachineName** - The name of the machine in the customer's environment where the client component of the client/server component must be installed.
  - **CustomerEmailAddress** - The email address where the completed Word document will be sent.
- Set up an email AgileShape to send the resulting file **ClientServerMachines.docx** to the email address entered in the **CustomerEmailAddress** field.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **Word** AgileShape, and drop it on the process template.
4. On the **Word Creator** field, click the **Ellipses** button.

Instructions

1. On the **Configuration** window, in the **DesignTime Word Template** field, select the Word template select the file **ClientServerMachines.dotx**.
2. In the **Runtime Word Template** filed, select the Word template select the file **ClientServerMachines.dotx**.
3. In the **Destination** field, enter the path of the output file for your form.
4. Click **Load Word fields**.
5. To select the Mail Merge fields in ClientServerMachines.dotx, click **Select All**.
6. To move the Mail Merge fields to the Word fields list, click the **Left Arrow** button.
7. In the **Process Value** column, enter the following process attribute names:
   - **ServerMachineName**
   - **ClientMachineName**

When a customer enters his server machine name and client machine name on the input form, these values are populated in the Word template, and the resulting Word document. This Word document is then emailed to the customer.

Downloads

ClientServerMachines.zip.

Creating Repeating Tables using the Word AgileShape

To create the repeating tables using the Word AgileShape, do the following.

Prerequisites

- Microsoft Word installed in your environment.
- An understanding of Microsoft Word templates.

  For information about creating a Word template, see the online help for Microsoft Word regarding Word templates, Mail Merge fields, and bookmark fields.

Navigation

1. In Microsoft Word, create or open a template file.
2. In your Word template, insert a table, or navigate to an existing table where you want to add a repeating node.

Instructions

1. In your Word template table, in the row where you want to start a repeating node, place your cursor in the far left table column.
2. On the **Insert** tab, click **Quick Parts > Field**.
3. In the **Categories** list, select **All**.
4. In the **Field names** list, select **MergeField**.
5. In the **Field name** field, enter **TableStart:[node name]**.

   Replace **[node name]** with the name of your repeating node. The start and end tags must indicate the same node name. For example, **TableStart:Employee** and **TableEnd:Employee**.

   Example:

Name	Department	Title
<<TableStart:Employee>>		

6. Place the cursor in the table column where you want to end the repeating node.
7. On the **Insert** tab, click **Quick Parts > Field**.
8. In the **Categories** list, select **All**.
9. In the **Field names** list, select **MergeField**.
10. In the **Field name** field, enter **TableEnd:[node name]**.

    Replace **[node name]** with the name of your repeating node. The start and end tags must indicate the same node name. For example, **TableStart:Employee** and **TableEnd:Employee**.

    Example:

Name	Department	Title
<<TableStart:Employee>>		<<TableEnd:Employee>>

11. Within each column of your repeating row, between the TableStart and the TableEnd tags, insert a merge field with the name of the custom attribute you want to insert from your process. Repeat this procedure for each table cell in your row.
    a. On the **Insert** tab, click **Quick Parts > Field**.
    b. In the **Categories** list, select **All**.
    c. In the **Field names** list, select **MergeField**.
    d. In the **Field name** field, enter your custom attribute name.

    Example:

Name	Department	Title
<<TableStart:Employee>> <<FullName>>	<<EmployeeDepartment>>	<<EmployeeTitle>> <<TableEnd:Employee>>

XML Manipulation

An AgilePart that calculates the values in XML by formula or custom expression.

Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **XML Manipulation** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configure	Opens the Following Window: Multiple Formulae Dialog Window Purpose of this Window:

Field Name	Definition
	Defines the formula to be calculated for the XML Manipulation AgileShape at runtime.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

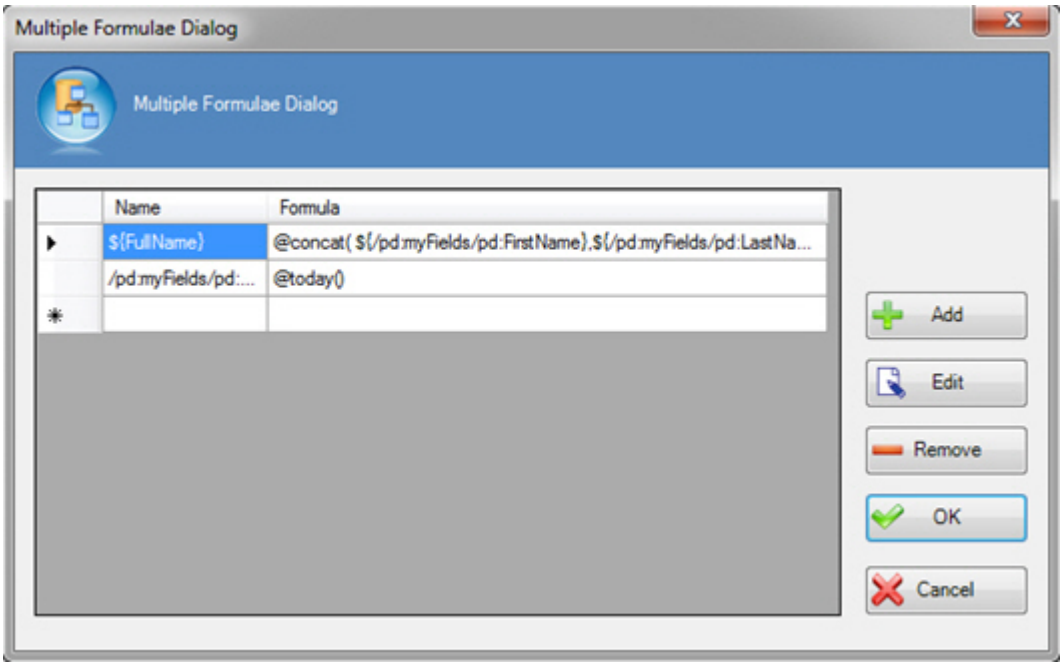
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Configuration Windows

The following topics provide details about the configuration windows for this AgileShape.

Multiple Formulae Dialog Window

Defines the formula to be calculated for the XML Manipulation AgileShape at runtime.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **XML Manipulation** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.

Field Definitions

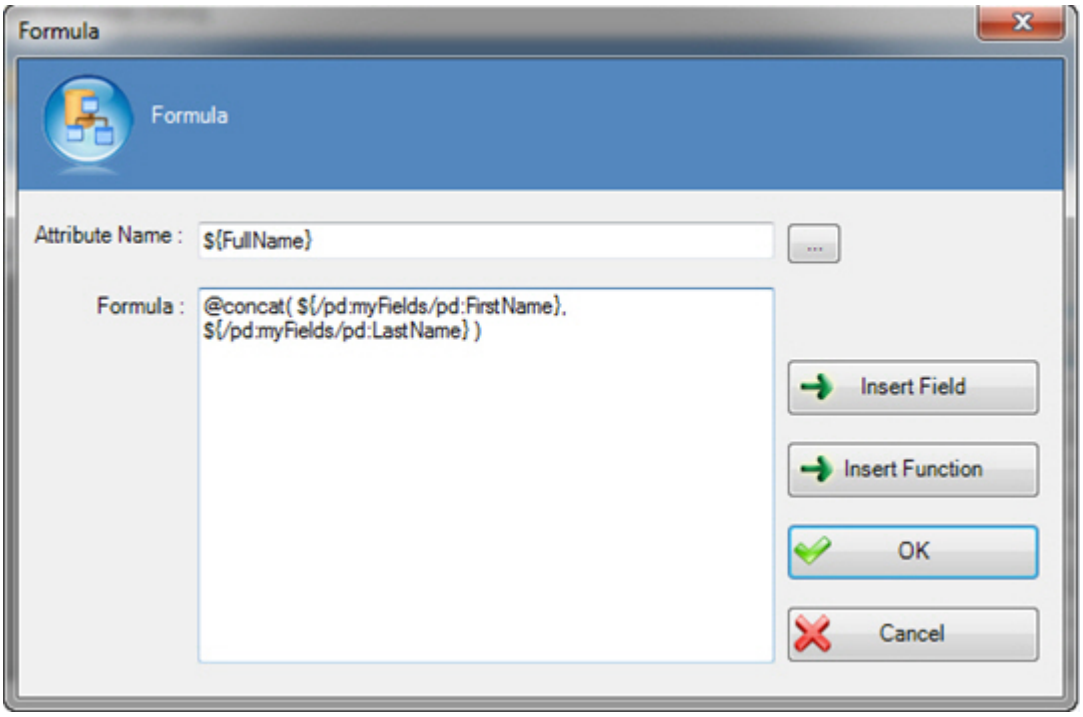
Field Name	Definition
Add	Opens the Following Window: Formula Window Purpose of this Window: Defines a formula for the XML Manipulation AgileShape.
Edit	Opens the Following Window: Formula Window Purpose of this Window: Defines a formula for the XML Manipulation AgileShape.
Name	Definition: Specifies the name of the custom attribute. Allowed Values: Read only - Populated when you set the options on the Formula Window.
Formula	Definition: Specifies the formula to be calculated. Allowed Values: Read only - Populated when you set the options on the Formula Window.
Remove	Function: Deletes the selected formula from the list.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Formula Window

Defines a formula for the XML Manipulation AgileShape.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **XML Manipulation** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. To add formulas for XML calculation, on the **Multiple Formulae Dialog** window, click **Add**.

Field Definitions

Field Name	Definition
Attribute Name	Definition:

Field Name	Definition
	Specifies the name of the custom attribute. Allowed Values: • A custom attribute. • XML metadata. You can use the Ellipses button to select the process attribute. This button is activated only when the process has an associated attributes or schema. Default Value: None Custom Attributes: Yes
Insert Field	Function: Opens the schema to select the required XML data element. Then, adds the selected XML data to the formula to be calculated. Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process.
Insert Function	Opens the Following Window: Insert Function Window Purpose of this Window: Defines a function for use in an XML Manipulation formula.
Formula	Definition: Specifies the formula to be calculated. Allowed Values: • A valid formula or expression. • Populated if you specify a function using the Insert Function and Insert Field (optional). Using the Insert Field, you can add an XML field to the formula. Default Value:

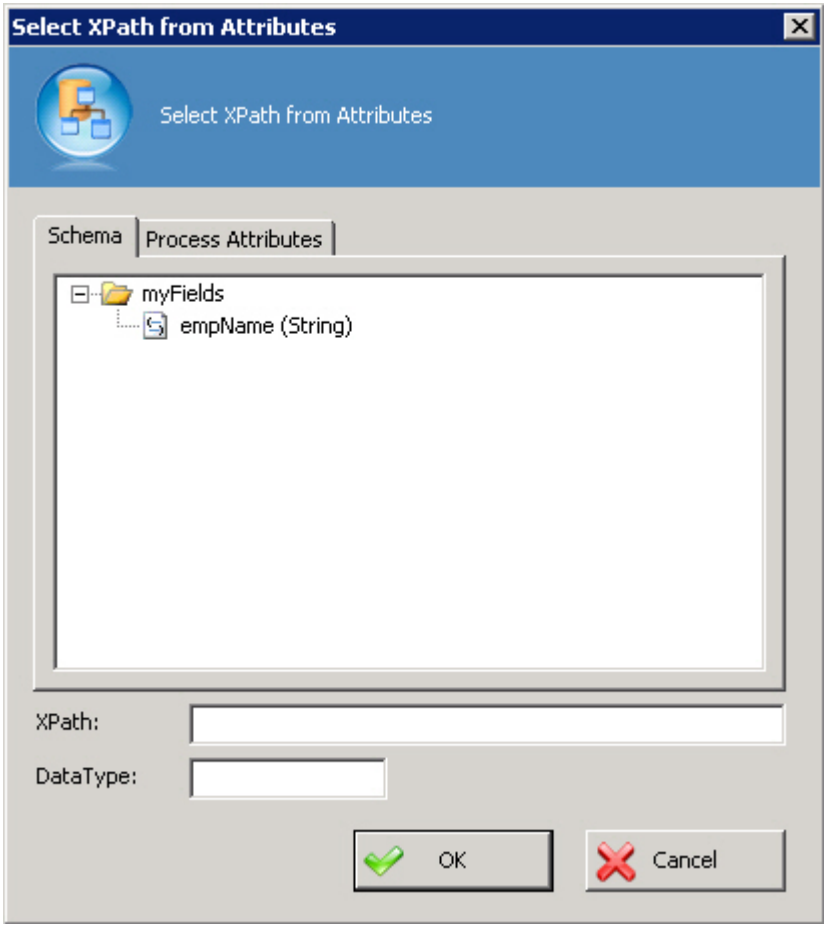
Field Name	Definition
	None Custom Attributes: No Example: @concat(${/pd:myFields/pd:FirstName}.${/pd:myFields/pd:LastName})

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.



Prerequisites

- The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the appropriate stencil.
3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the respective field/configuration window, do one of the following, as appropriate:
   - Type the characters **${** in the property box.
   - Click the **Ellipses** button.
   - Click the **Schema** button.

Field Definitions

Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition:

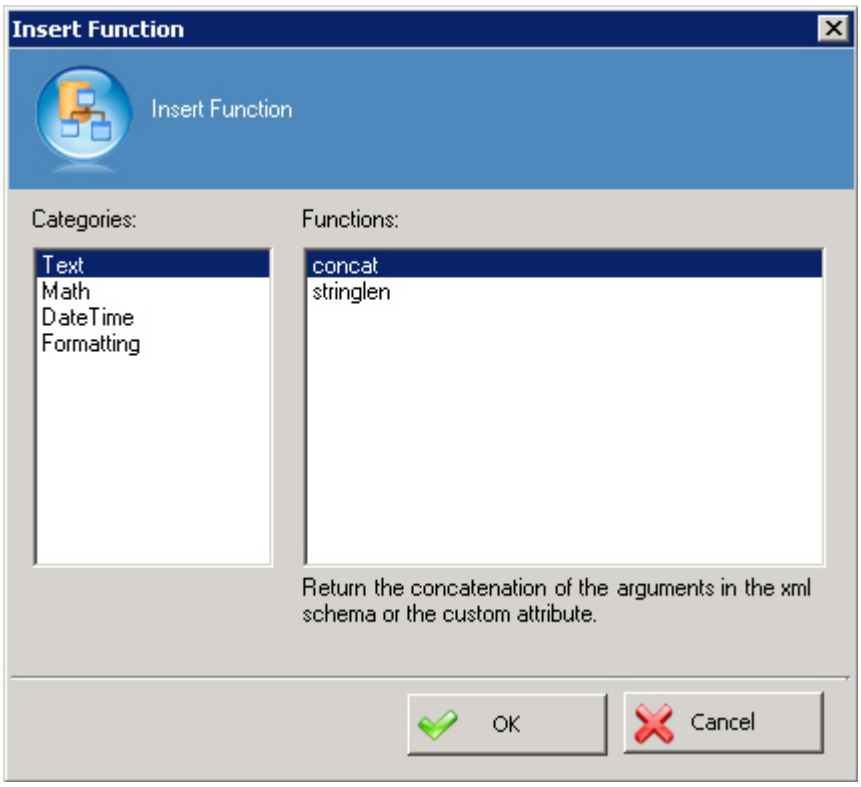
Field Name	Definition
	Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Insert Function Window

Defines a function for use in an XML Manipulation formula.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.
3. On the **Miscellaneous** stencil, drag the **XML Manipulation** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. To add formulas for XML calculation, on the **Multiple Formulae Dialog** window, click **Add**.
7. To define functions for formulas for XML calculation, on the **Formula** window, click **Insert Function**.

Field Definitions

Field Name	Definition
Categories	Definition: Displays the function categories. Select the category you want. Allowed Values:

Field Name	Definition
	• **Text** - Displays the functions related to string data type in the Functions list. For example, concat, stringlen. • **Math** - Displays the mathematical functions in the Functions list. For example, sum, avg, max. • **DateTime** - Displays the DateTime related functions in the Functions list. For example, mindate, maxdate, adddays. • **Formatting** - Displays the functions related to formatting in the Functions list. For example, fmtnum, fmtdate. Default Value: Text
Functions	Definition: Displays a list of functions for the specified function category. Allowed Values: The name of your function. Default Value: • **concat** • **stringlen**
OK	Function: Completes the task and inserts the selected function in the place where this window was invoked - in the Formula to be calculated. Note the following: • First, you must select the function you want, and then click OK. • You can select only one function at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Instructions

The following topics provide instructions for using and configuring this AgileShape.

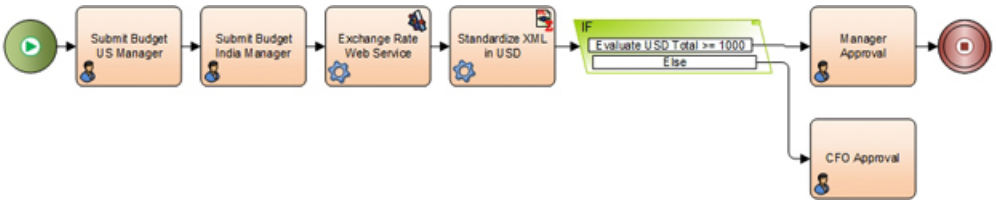
Modifying Process Behavior Using XML Manipulation

This example shows a scenario where an XML file is created using information in a process, and calculates the values in an XML by formula or custom expression using an XML Manipulation AgileShape.

Instructional Goals

- Demonstrate how to calculate the values in an XML by formula or custom expression using an XML Manipulation AgileShape.

Example Process: Budget Request



Problem Statement

Submit budget requests from multiple international department heads.

Business Requirements

- Both the US Manager and India Manager of a department submit budget request forms.
- The local currency is standardized to US dollars.
- The request is routed for review by the manager or CFO, depending upon the standardized budget amount.

Prerequisites

- A process model with the following process attributes:
  - **BudgetAmountUS** - The budget amount for the US office in US dollars (USD).
  - **BudgetAmountIndiaInr** - The budget amount for the India office in Indian rupees (INR).
  - **BudgetAmountIndiaUsd** - The budget amount for the India office in (USD).
  - **TotalBudgetAmountUsd** - The total budget amount of both offices in USD.
  - **ExchangeRateInrToUsd** - The number of INR in on USD.
- A web form where the US manager can enter the requested budget amount in USD and the India manager can enter the requested budget amount in INR.
- A web service that queries the current exchange rate from INR to USD, and then populates ExchangeRateInrToUsd with this ratio.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Miscellaneous** stencil.

3. On the **Miscellaneous** stencil, drag the **XML Manipulation** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. To add formulas for XML calculation, on the **Multiple Formulae Dialog** window, click **Add**.

Instructions

1. On the Formula Window, in the **Attribute Name** field, enter **BudgetAmountIndiaUsd**.
2. Place your cursor in the **Formula** field, and click **Insert Function**.
3. On the Insert Function Window, in the Categories list, select **Math**.
4. In the **Functions** list, select **Product**.
5. Click **OK**.
6. On the **Formula** window, in the **Formula** field, place your cursor after **@product**, and click **Insert Field**.
7. On the Select XPath from Attributes Window, select **BudgetAmountIndiaInr**.
8. Click **OK**.
9. On the **Formula** window, in the **Formula** field, place your cursor after **@product**, and click **Insert Field**.
10. On the **Select XPath from Attributes** window, select **ExchangeRateInrToUsd**.
11. Click **OK**.
12. On the **Multiple Formulae Dialog** window, click **Add**.
13. On the **Formula** window, in the Attribute Name field, enter **TotalBudgetAmountUsd**.
14. Place your cursor in the **Formula** field, and click **Insert Function**.
15. On the **Insert Function** window, in the **Categories** list, select **Math**.
16. In the **Functions** list, select **Sum**.
17. Click **OK**.
18. On the **Formula** window, in the **Formula** field, place your cursor after **@sum**, and click **Insert Field**.
19. On the **Select XPath from Attributes** window, select **BudgetAmountIndiaUsd**.
20. Click **OK**.
21. On the **Formula** window, in the **Formula** field, place your cursor after **BudgetAmountIndiaUsd**, and click **Insert Field**.
22. On the **Select XPath from Attributes** window, select **TotalBudgetAmountUsd**.

The result of these formulas is a total budget amount that converts the budget amount from the India office from INR to USD, and then adds this amount to the budget from the US office. This provides a total budget amount in USD. This value can then be evaluated by the multiple condition AgileShape to determine whether the request needs to be routed to the Director or CFO.

Active Directory

This section describes the AgileShapes in the Active Directory stencil.

Create User

Creates a new user in Active Directory.

Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

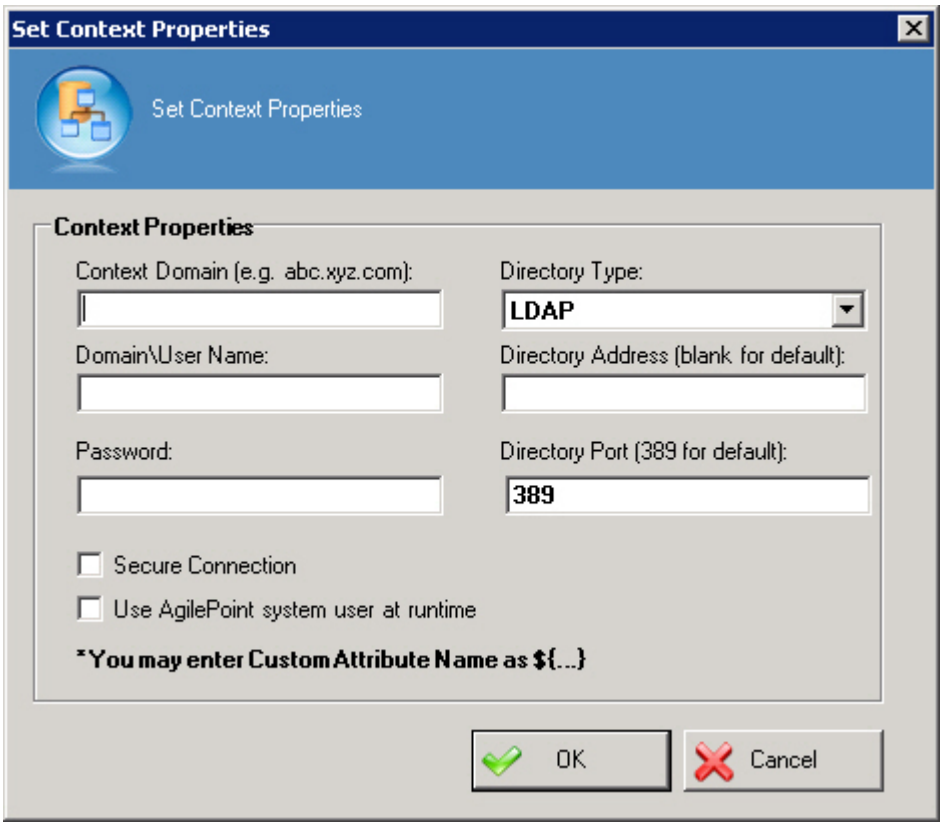
Field Name	Definition
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.
NewUserConfiguration	Specifies the user information to create in Active Directory.

AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Username	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory. You can enter one of the following: • **IP address** - The IP address of the Active Directory. For example, 211.325.5.3. • **IP address/[relative distinguished name (RDN)]** - The IP address of the Active Directory with the container name (CN), organizational unit (OU),

Field Name	Definition
	or both for the user. For example, 211.325.5.3/OU=MyGroup
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Update User

This AgileShape can be used to update user information in Active Directory.

Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

Field Name	Definition
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.
UserInfo	Allows for the update of user information and organization details. **Note:** The Context property must be completed before configuring this property. **Note:** If the process template has an associated schema, the Schema button appears. **Note:** If the domain configured in context property cannot be accessed at design time, the Search button will not be available. There are several ways to update user information in Active Directory: • Enter the user name manually. • Click the **Search** button and select the user name from the list that is populated.

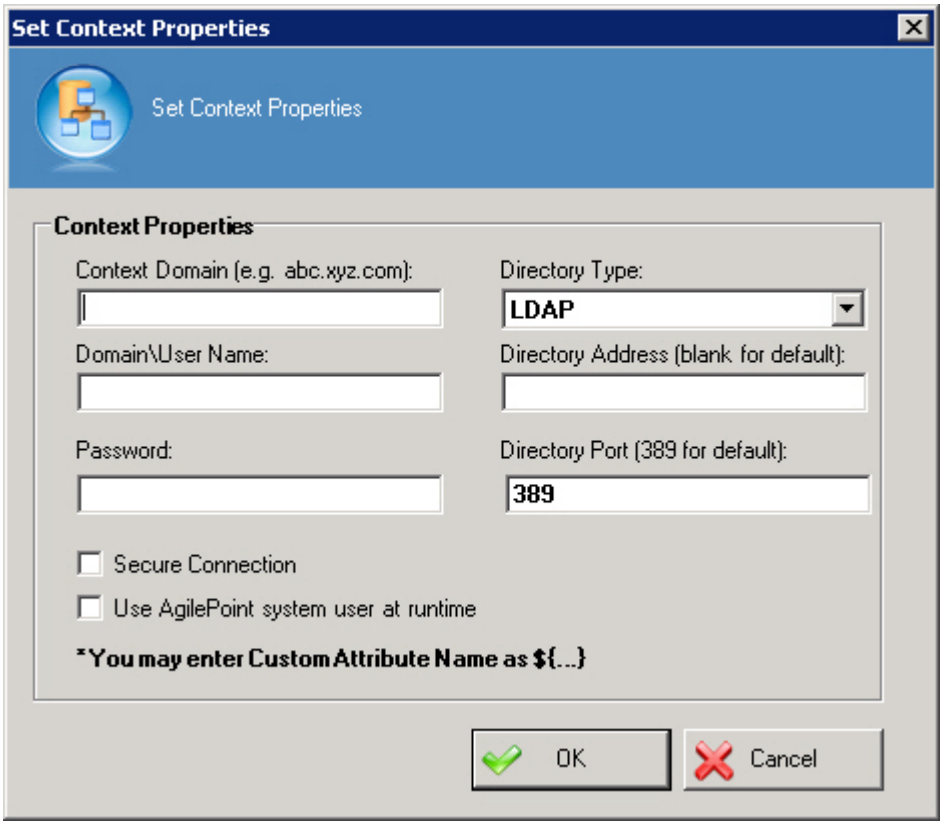
Field Name	Definition
	• Search for a user name that is a custom attribute. The format of the custom attribute should be as follows:$\{CustomAttributeName\} • Update user information via an Xpath. This is done by clicking the Schema button, and selecting a node. The user name will be obtained via the Xpath at run time.

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Username	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory. You can enter one of the following: • **IP address** - The IP address of the Active Directory. For example, 211.325.5.3. • **IP address/[relative distinguished name (RDN)]** - The IP address of the Active Directory with the container name (CN), organizational unit (OU), or both for the user. For example, 211.325.5.3/OU=MyGroup
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Remove User

This AgileShape can be used to remove a user(s) from AD. The user name(s) can be a real name, custom attribute, or schema.

Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

Field Name	Definition
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.

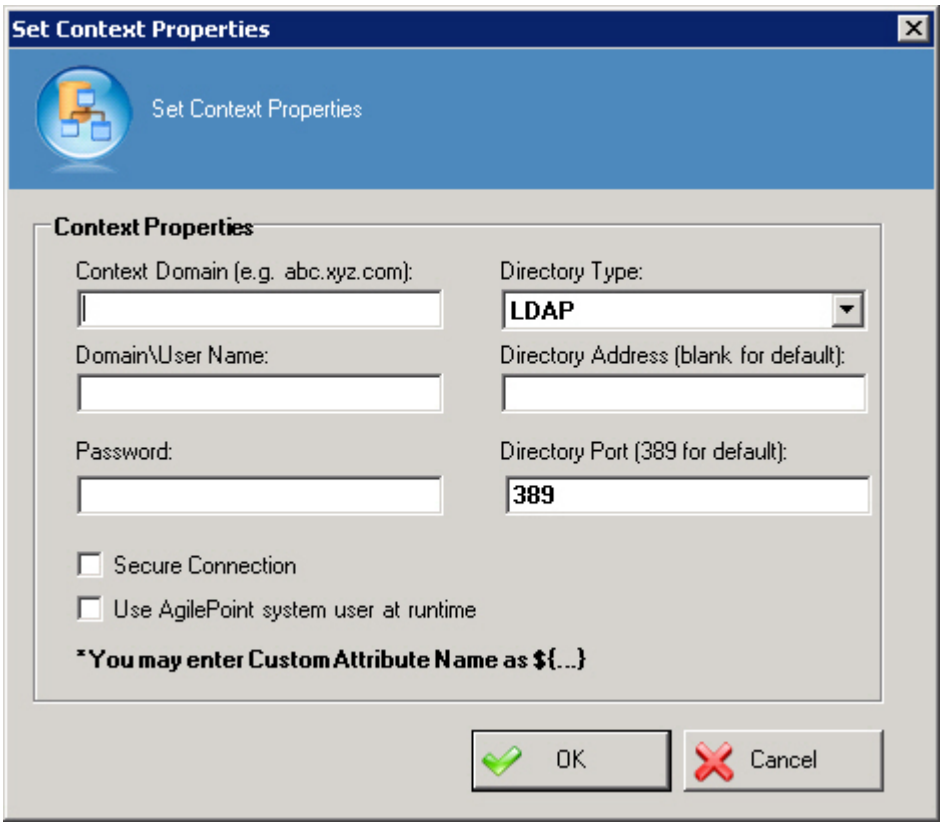
Field Name	Definition
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.
UserNames	Specifies the user information to be affected (e.g., used or disabled) from Active Directory. When you need to affect multiple users, the user names should be separated by a semicolon. **Note:** The Context property must be completed before configuring this property. **Note:** If the process template has an associated schema, the Schema button appears. **Note:** If the domain configured in context property cannot be accessed at design time, the Search button will not be available. There are several ways to specify user names to be affected in Active Directory: • Enter the user name manually. • Click the **Search** button and select the user name from the list that is populated. • Remove a user name that is a custom attribute. The format of the custom attribute should be as follows:$\{CustomAttributeName\} • Remove a user name via an Xpath. This is done by clicking the **Schema** button, and selecting a node. The user name will be obtained via the Xpath at run time.

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Username	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory. You can enter one of the following: • **IP address** - The IP address of the Active Directory. For example, 211.325.5.3. • **IP address/[relative distinguished name (RDN)]** - The IP address of the Active Directory with the container name (CN), organizational unit (OU),

Field Name	Definition
	or both for the user. For example, 211.325.5.3/OU=MyGroup
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Disable User

This AgileShape can be used to disable users from AD. The user name can be a real name, custom attribute, or schema.

Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

Field Name	Definition
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.
UserNames	Specifies the user information to be affected (e.g., used or disabled) from Active Directory. When you need to affect multiple users, the user names should be separated by a semicolon. **Note:** The Context property must be completed before configuring this property. **Note:** If the process template has an associated schema, the Schema button appears. **Note:** If the domain configured in context property cannot be accessed at design time, the Search button will not be available. There are several ways to specify user names to be affected in Active Directory: • Enter the user name manually.

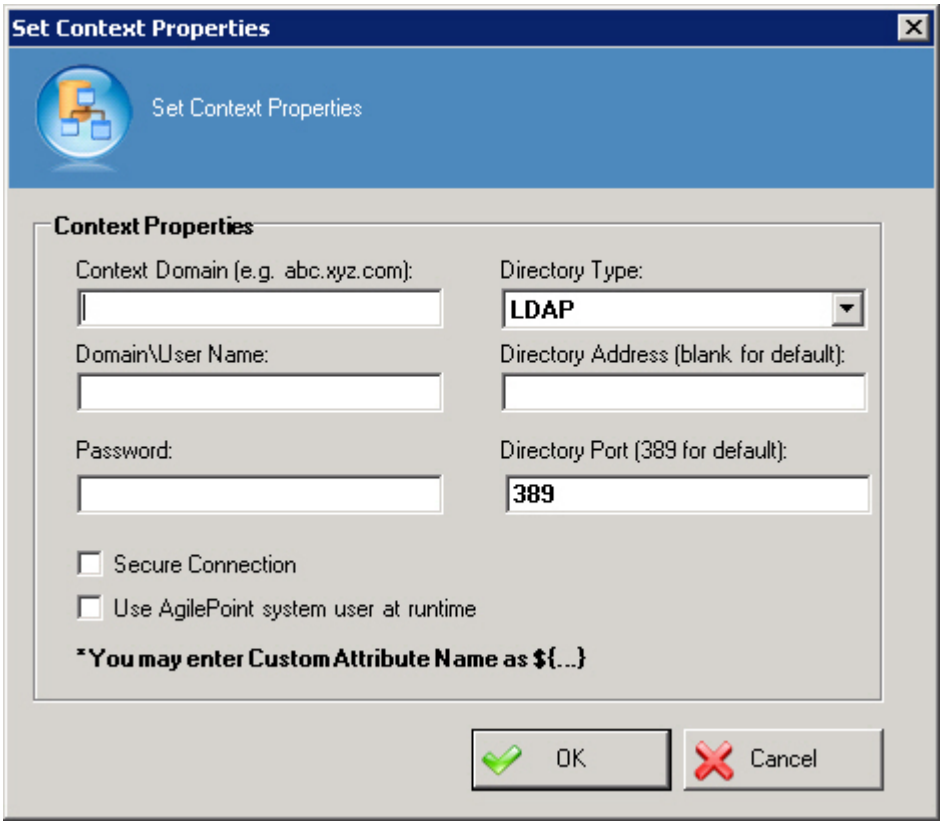
Field Name	Definition
	• Click the **Search** button and select the user name from the list that is populated. • Remove a user name that is a custom attribute. The format of the custom attribute should be as follows:$\{CustomAttributeName\} • Remove a user name via an Xpath. This is done by clicking the **Schema** button, and selecting a node. The user name will be obtained via the Xpath at run time.

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Username	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory. You can enter one of the following: • **IP address** - The IP address of the Active Directory. For example, 211.325.5.3. • **IP address/[relative distinguished name (RDN)]** - The IP address of the Active Directory with the container name (CN), organizational unit (OU), or both for the user. For example, 211.325.5.3/OU=MyGroup
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Create Group

This AgileShape can be used to create a group in Active Directory. The group can be a real name, custom attribute, or schema.

Note: This value cannot contain certain special characters, such as ! () ~ ` # @ % / \ [ ] : ; - | = + ? < > ,etc. (& and * are supported.) This AgilePart will detect whether invalid characters are used, if so, each special character will be replaced with an underscore ("_") automatically.

Note: If errors occur during the execution, a message will be written into the SharePoint Integration log file.

Properties for This AgilePart

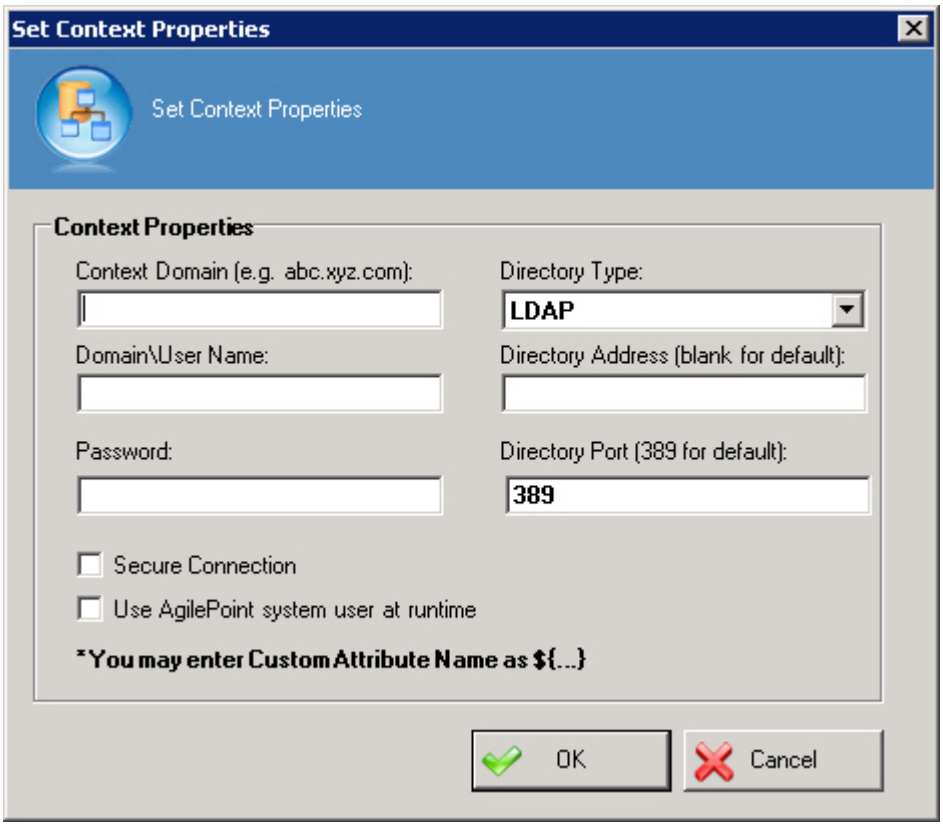
Field Name	Definition
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
Create Group	Opens the Create Group window, where you can specify the group information to create in Active Directory. If the process template is associated with a schema, the Schema buttons will appear allowing you to select an Xpath. Custom attributes are also supported.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.

AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Username	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory. You can enter one of the following: • **IP address** - The IP address of the Active Directory. For example, 211.325.5.3. • **IP address/[relative distinguished name (RDN)]** - The IP address of the Active Directory with the container name (CN), organizational unit (OU),

Field Name	Definition
	or both for the user. For example, 211.325.5.3/OU=MyGroup
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Create Group Window

Specifies the group information to create in Active Directory. If the process template is associated with a schema, the Schema buttons will appear allowing you to select an Xpath. Custom attributes are also supported.

Field Definitions

Field Name	Definition
Group Name	Specifies the affected group name (the group name to be created, removed, etc.). The Group Name cannot be duplicated in the domain. Also, once the Group is created, it cannot be changed.
Group Name (Pre-Windows 2000)	Specifies the log name of the account, the difference between the Group Name above and this field is it can be modified after it has been created.
Email Address	Specifies the email address of the group.
Verify Group	This button verifies the availability of the group name. The button is available just for the context domain if the context is reachable at design time. For example, if the context domain binds with a custom attribute, and the value depends on it at run time, in this case, the button is unavailable.
Group Scope	Refers to the profile of Group Scope in Active Directory.
GroupType	Refers to the profile of Group Type in Active Directory.

Remove Group

This AgileShape can be used to remove groups in AD. The group can be a real name, custom attribute, or schema.

Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

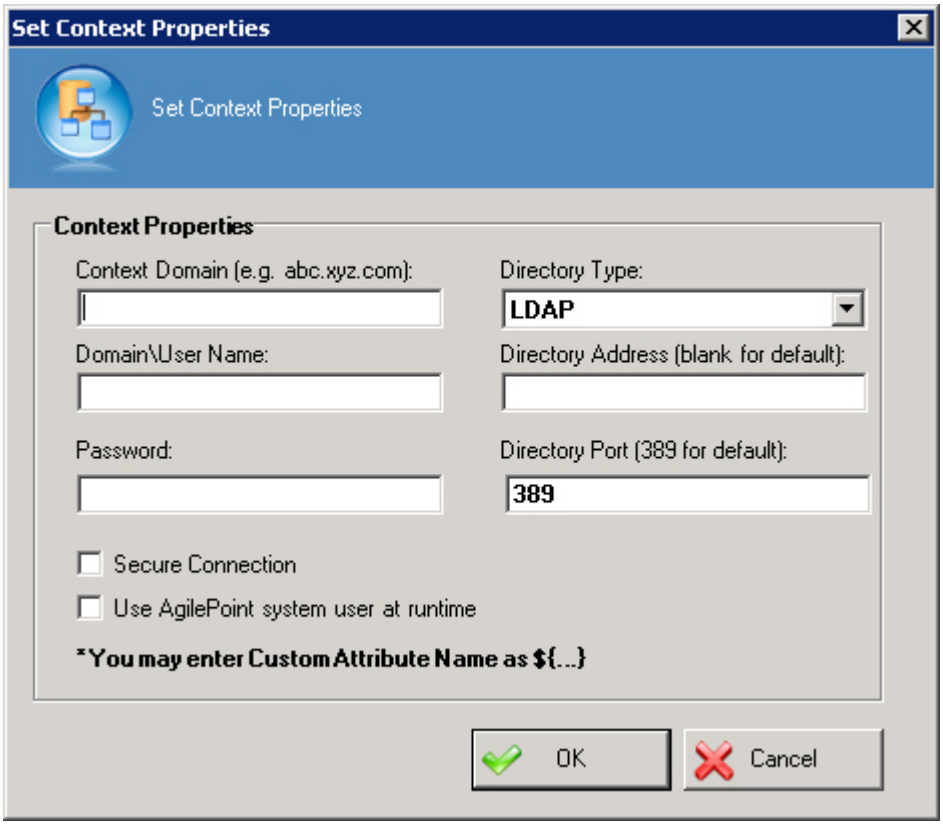
Field Name	Definition
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.
Remove Group	Specifies the group names to be removed from Active Directory. When you need to remove multiple groups, the group names should be separated by a semicolon. **Note:** The Context property must be completed before configuring this property. **Note:** If the process template has an associated schema, the Schema button appears. **Note:** If the domain configured in context property cannot be accessed at design time, the Search button will not be available. There are several ways to specify group names to be removed from Active Directory: • Enter the group name manually. • Click the Search button and select the group name from the list that is populated. • Remove a group name that is a custom attribute. The format of the custom attribute should be as follows:$\{CustomAttributeName\} • Remove a group name via an Xpath. This is done by clicking the **Schema** button, and selecting a node. The group name will be obtained via the Xpath at run time.

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Username	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory. You can enter one of the following:

Field Name	Definition
	• **IP address** - The IP address of the Active Directory. For example, 211.325.5.3. • **IP address/[relative distinguished name (RDN)]** - The IP address of the Active Directory with the container name (CN), organizational unit (OU), or both for the user. For example, 211.325.5.3/OU=MyGroup
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Remove User from Group

This AgileShape can be used to remove user(s) from a group in AD. The group or user name(s) can be a real name, custom attribute, or schema.

Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

Field Name	Definition
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.
RemoveUserFromGroup	Specifies the information for user name and group to be removed from Active Directory. When you need to remove multiple users, the user names should be separated by a semicolon. **Note:** The Context property must be completed before configuring this property. **Note:** If the process template has an associated schema, the Schema button appears.

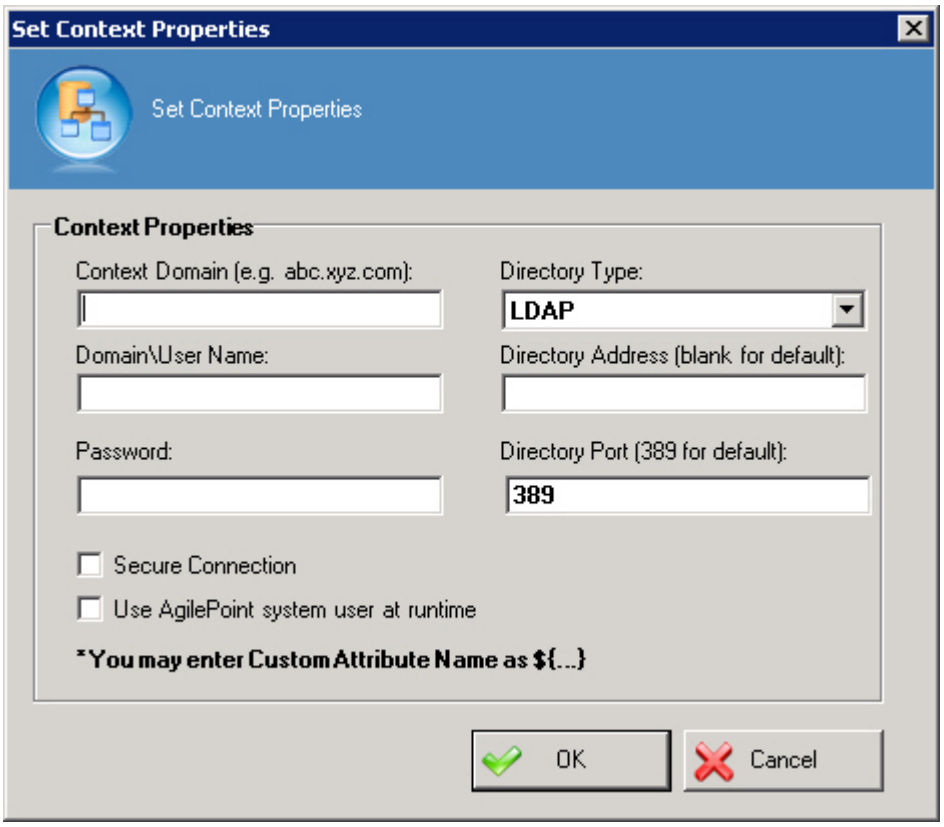
Field Name	Definition
	Note: If the domain configured in context property cannot be accessed at design time, the Search button will not be available. There are several ways to specify group names to be removed from Active Directory: • Enter the group name and user name(s) manually. • Click the **Search** button and select the Group Name and User Name(s) from the list that is populated. • Enter a custom attribute name for a Group Name and User Names(s). The format of the custom attribute should be as follows:$ \{CustomAttributeName\} • Remove a group name via an Xpath. This is done by clicking the **Schema** button, and selecting a node. The group name will be obtained via the Xpath at run time.

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Username	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory. You can enter one of the following: • **IP address** - The IP address of the Active Directory. For example, 211.325.5.3. • **IP address/[relative distinguished name (RDN)]** - The IP address of the Active Directory with the container name (CN), organizational unit (OU),

Field Name	Definition
	or both for the user. For example, 211.325.5.3/OU=MyGroup
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Retrieve User Information

This AgileShape can be used to retrieve user information from AD. The user name can be a real name, custom attribute, or schema.

Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

Field Name	Definition
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.
UserInfo	Allows for the update of user information and organization details. **Note:** The Context property must be completed before configuring this property. **Note:** If the process template has an associated schema, the Schema button appears. **Note:** If the domain configured in context property cannot be accessed at design time, the Search button will not be available. There are several ways to update user information in Active Directory: • Enter the user name manually.

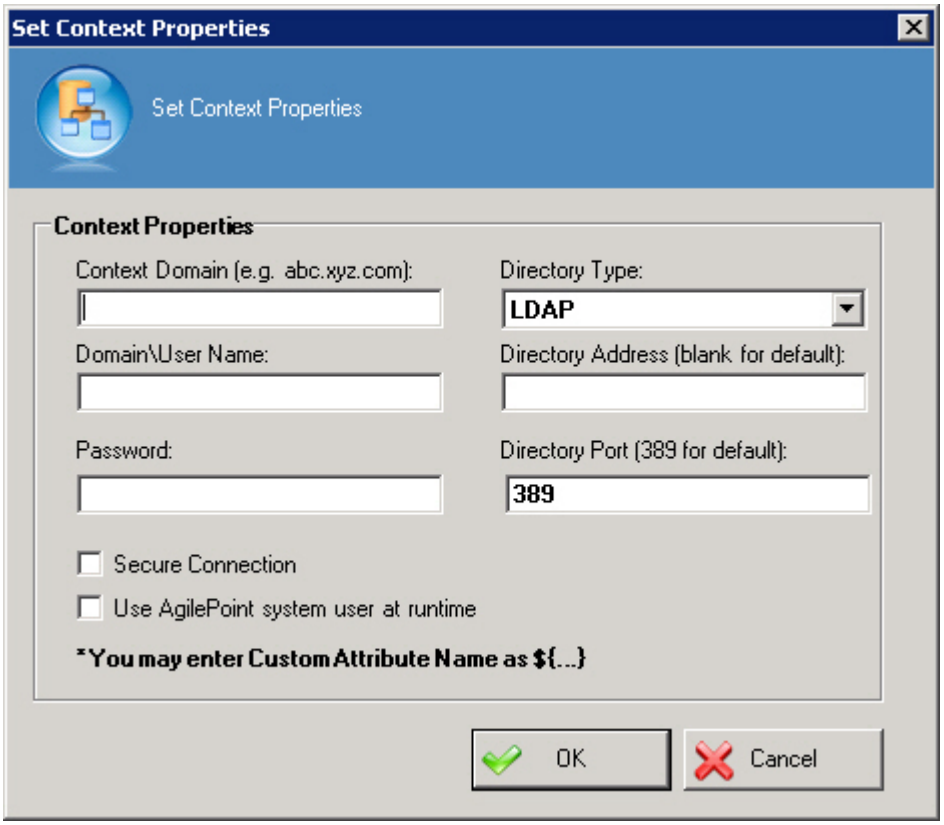
Field Name	Definition
	• Click the **Search** button and select the user name from the list that is populated. • Search for a user name that is a custom attribute. The format of the custom attribute should be as follows:$\{CustomAttributeName\} • Update user information via an Xpath. This is done by clicking the Schema button, and selecting a node. The user name will be obtained via the Xpath at run time.

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Username	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory. You can enter one of the following: • **IP address** - The IP address of the Active Directory. For example, 211.325.5.3. • **IP address/[relative distinguished name (RDN)]** - The IP address of the Active Directory with the container name (CN), organizational unit (OU), or both for the user. For example, 211.325.5.3/OU=MyGroup
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

Add User to Group

This AgileShape can be used to add a user to a group in AD.

Note: If errors occur during the execution, the process will terminate and a message will be written into the AgilePoint Server log file.

Properties for This AgilePart

Field Name	Definition
AddUserToGroup	Specifies for the configuration of user information to be added to a group in Active Directory.

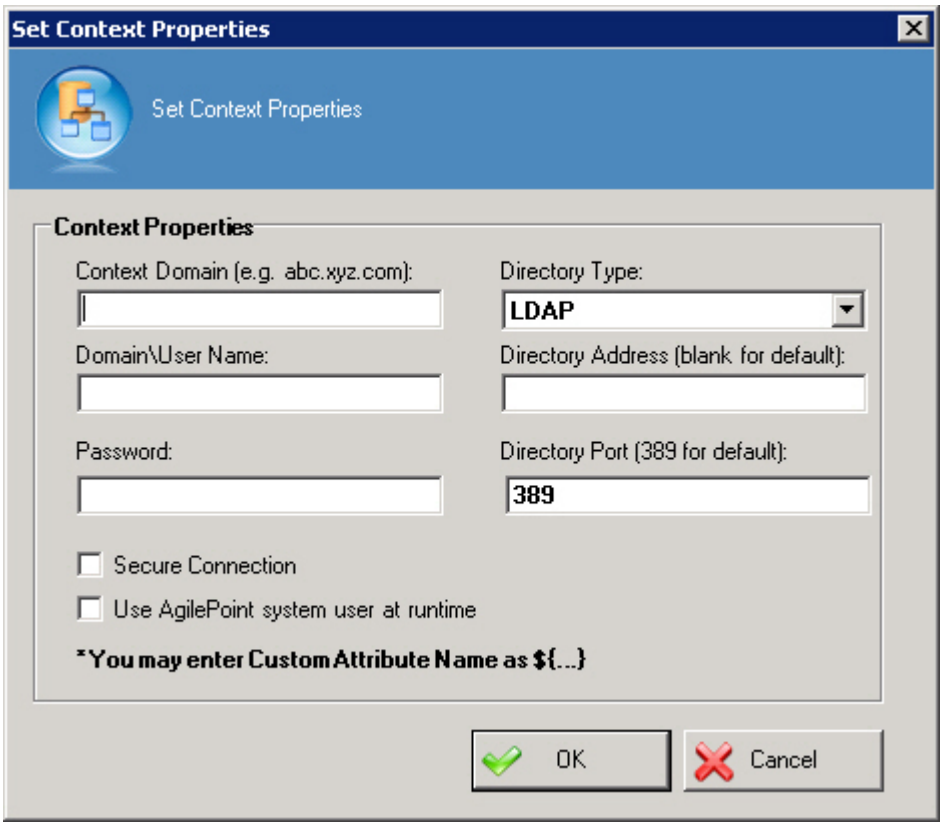
Field Name	Definition
	Note: The Context property must be completed before configuring this property. **Note:** If the process template has an associated schema, the Schema button appears. **Note:** If the domain configured in context property cannot be accessed at design time, the Search button will not be available. There are several ways to specify user names to be added to a group in Active Directory: • Enter the user name manually. • Click the Search button and select the user name from the list that is populated. • Add a user name that is a custom attribute. The format of the custom attribute should be as follows:$\{CustomAttributeName\} • Add a user name via an Xpath. This is done by clicking the Schema button, and selecting a node. The user name will be obtained via the Xpath at run time.
Context	Opens the Set Context Properties window, where you can specify the Active Directory properties.
LocationType	Specifies the Active Directory Services Interface provider type. At this time, only LDAP is supported.

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Set Context Properties Window

Specifies the Active Directory properties.



Field Definitions

Field Name	Definition
Context Domain	The domain name.
Username	The username of the account to be used to create a group in Active Directory at run time.
Password	The password of the account to be used to create a group in the domain at run time.
Directory Type	The Active Directory type (LDAP/WinNT). At this time, only LDAP is supported.
Directory Address	Specifies a host address of the Active Directory. You can enter one of the following: • **IP address** - The IP address of the Active Directory. For example, 211.325.5.3. • **IP address/[relative distinguished name (RDN)]** - The IP address of the Active Directory with the container name (CN), organizational unit (OU),

Field Name	Definition
	or both for the user. For example, 211.325.5.3/OU=MyGroup
Directory Port	Specifies a port number of the Active Directory. By default, it is 389. In the case of a remote domain, the port should match the port of the remote domain server.
Secure Connection	In this version, the SSL is not supported; it will be an enhancement in the future.

XRM Manual Activities 2011

This AgileXRM stencil has AgileShapes for creating different Activity Types in Dynamics CRM 2011, including any Custom Activity. These are used by Power Users.

There is also an AgileShape for surfacing a task in the Intranet Portal (See See "Create Intranet Task") for involving Standard Users in the processes.

Create Appointment

This shape creates an Appointment Activity in CRM.

This shape can optionally have an AgileLightForm (ALF form) associated with it. This permits creating activity-based forms, which have all the fields necessary for carrying out this task by the user.

When the activity is Marked as Completed, the process flow continues.



Other fields including any custom fields in the Appointment entity can be updated using the Activity Properties property.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** stencil.
3. On the **XRM Manual Activities 2011** stencil, drag the **Create Appointment** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
ConfigureParticipants	Opens the Following Window: Participants Window - Assign Mode Purpose of this Window: Default value: ${ProcessInitiator} Click the ellipsis button to open the configuration dialog:
ActivityProperties	Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:
AllDayEvent	Definition: Sets the All Day Event flag of the appointment.
End On	Definition: Sets the End Time of the appointment. It must be a dynamic value.
Form	Opens the Following Window: Form Configuration Window Purpose of this Window: This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:
Location	Definition: Sets the Location of the appointment. It could be a static or dynamic value.
OptionalAttendees	Definition: Sets the list of Optional Attendees of the appointment. This can be a semicolon separated list of IDs of any valid entity (Account, Contact, Lead, Facility/ Equipment or User)

Field Name	Definition
OwnerID	Definition: When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record
RequiredAttendees	Definition: Sets the list of Required Attendees of the appointment. This can be a semicolon separated list of IDs of any valid entity (Account, Contact, Lead, Facility/ Equipment or User)
ShowTimeAs	Definition: Sets the Show Time As field of the appointment. Possible values are: • Default • Free • Tentative • Busy • OutOfOffice
Start On	Definition: Sets the Start Time of the appointment. It must be a dynamic value.
Subject	Definition: This sets the subject field of the activity in CRM, this value can be either static or dynamic. Clicking the ellipsis button opens a window for setting the subject content: This window accepts dynamic values by typing these special characters ${ which opens the Schema Selector Dialog
TaskDescription	Definition: This sets the value of the description field in the CRM activity. Clicking the ellipsis button opens a window for setting the description content. This window accepts dynamic values by typing these special characters ${ which opens the Schema Selector Dialog

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

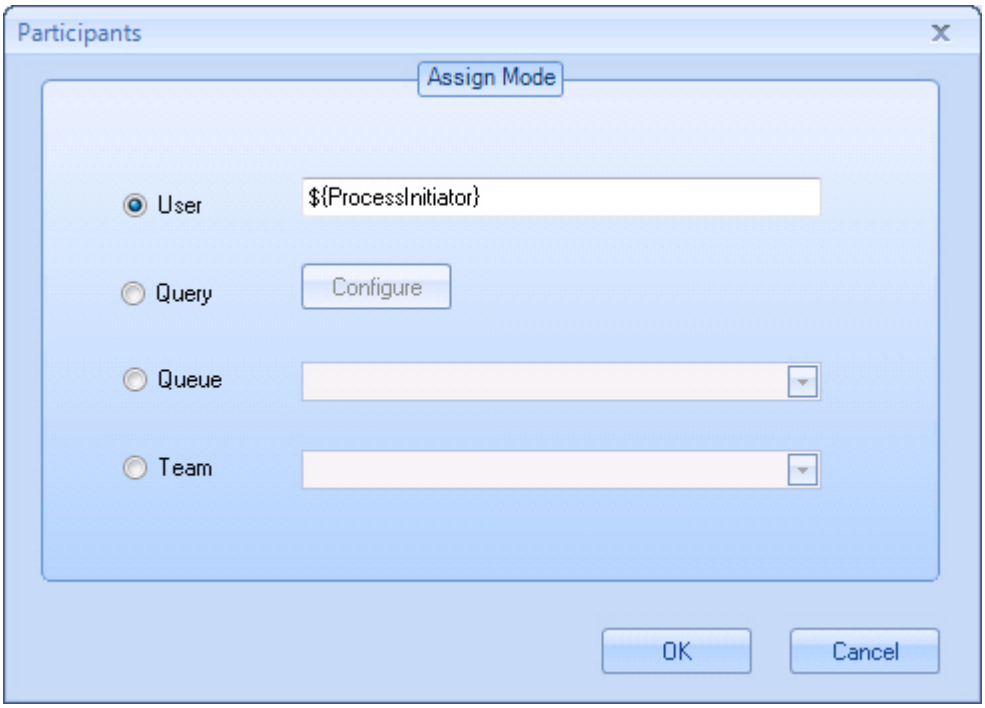
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Participants Window - Assign Mode

Default value: ${ProcessInitiator} Click the ellipsis button to open the configuration dialog:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ConfigurePartcipants** field, click the **Ellipses** button.

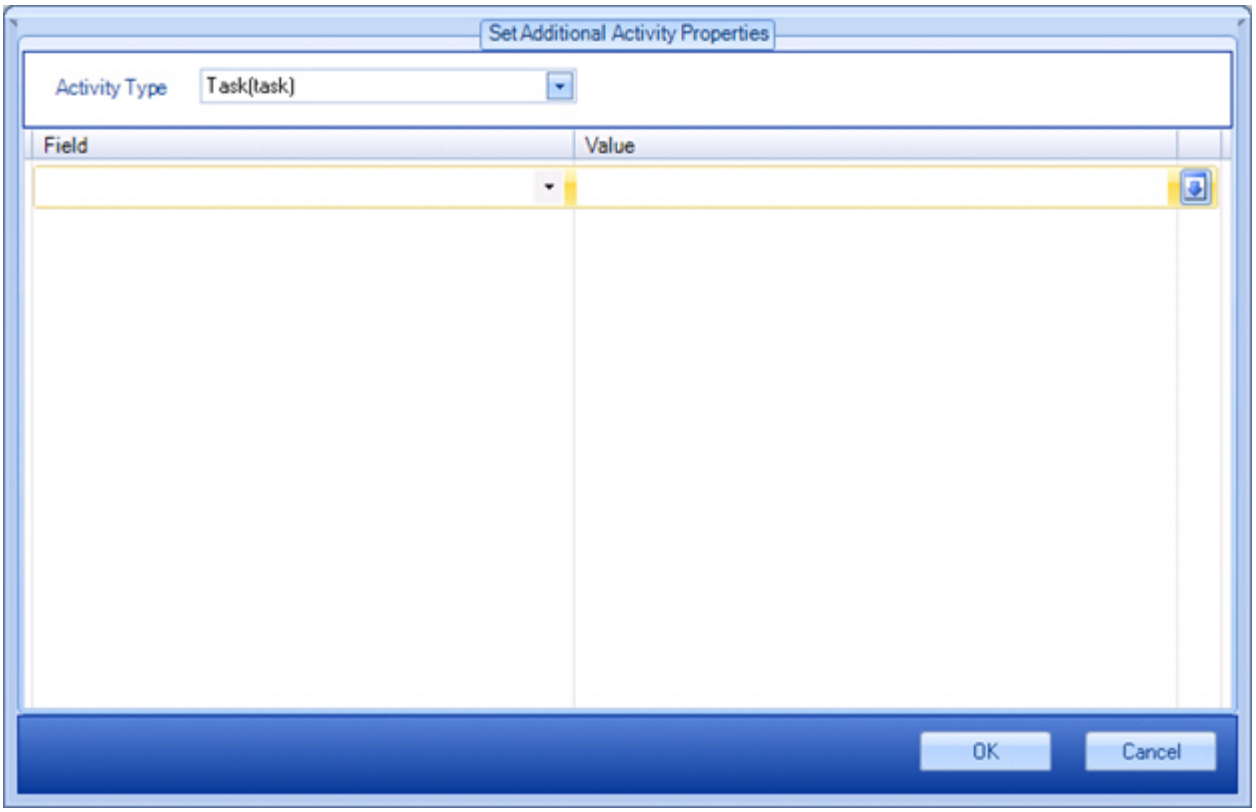
Field Definitions

Field Name	Definition
User	Definition: Can contain a static or dynamic value which can be one or more user IDs or user names. Multiple values should be separated by a semicolon ";" When multiple values are used, each participant gets a task and the shape is not Completed until all

Field Name	Definition
	the participants have Completed (or Cancelled) their corresponding tasks. Type ${ to open the Schema Selector Dialog.
Query	Function: Click to open the Query Expression Builder. The query should return 1 or more values of one of these types: • systemuserid (e.g. ownerid of an account) • username (e.g. DOMAIN\loginid) SeeQuery Expression Builder
Queue	Definition: Select the corresponding Queue from the list. The task will appear in the selected Queue. When this is selected, the OwnerID property can also be set.
Team	Definition: Select the corresponding Team from the list. The task will be assigned to the chosen Team. If any member of the Team completes (or Cancels) the task, the shape is Completed and the process progresses to the next step(s).

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ActivityProperties** field, click the **Ellipses** button.

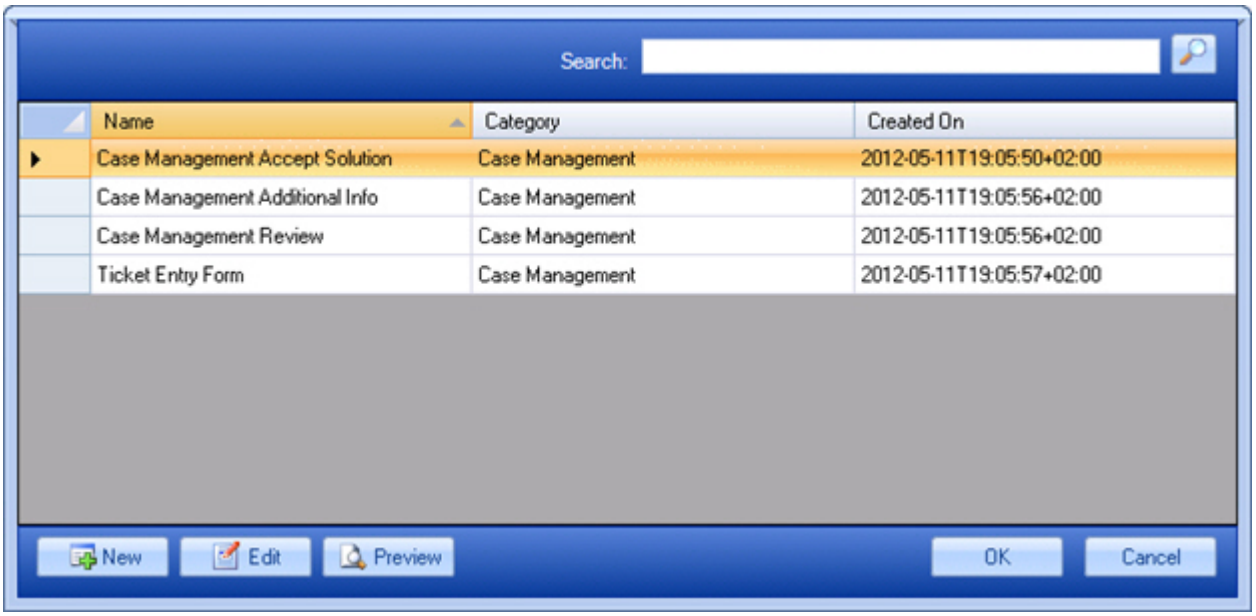
Field Definitions

Field Name	Definition
ActivityType	Definition: Shows all the activity types including custom activity types
Field	Definition:

Field Name	Definition
	Select the field for the selected Activity Type
Value	Definition: Sets the value of the Field. Type ${ to open the Schema Selector Dialog to enter a dynamic value
Down Arrow	Function: Add new Field-Value pair or Remove existing Field-Value pair

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:



When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

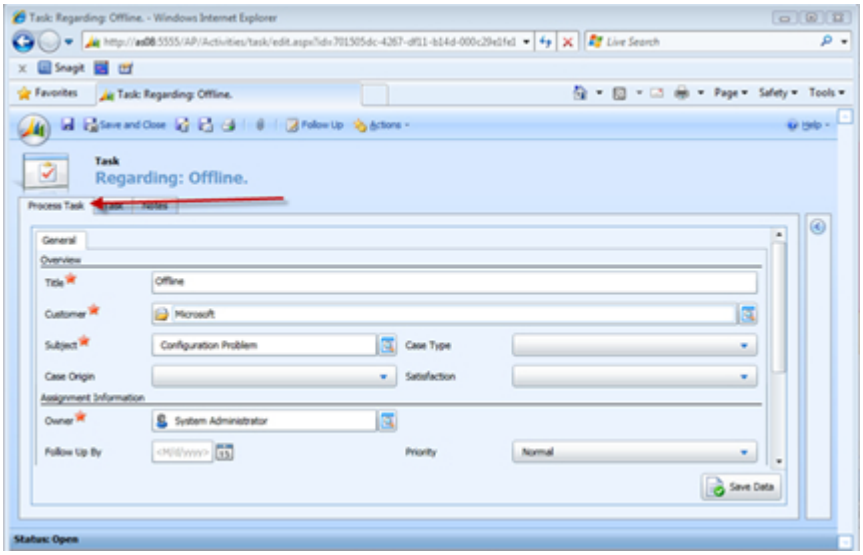
Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Manual Activities 2011**
   - **XRM Manual Activities 4**
   - **XRM External Connector**

3. Do one of the following:
   - On the **XRM Manual Activities 2011** or **XRM Manual Activities 4** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Form** field, click the **Ellipses** button.

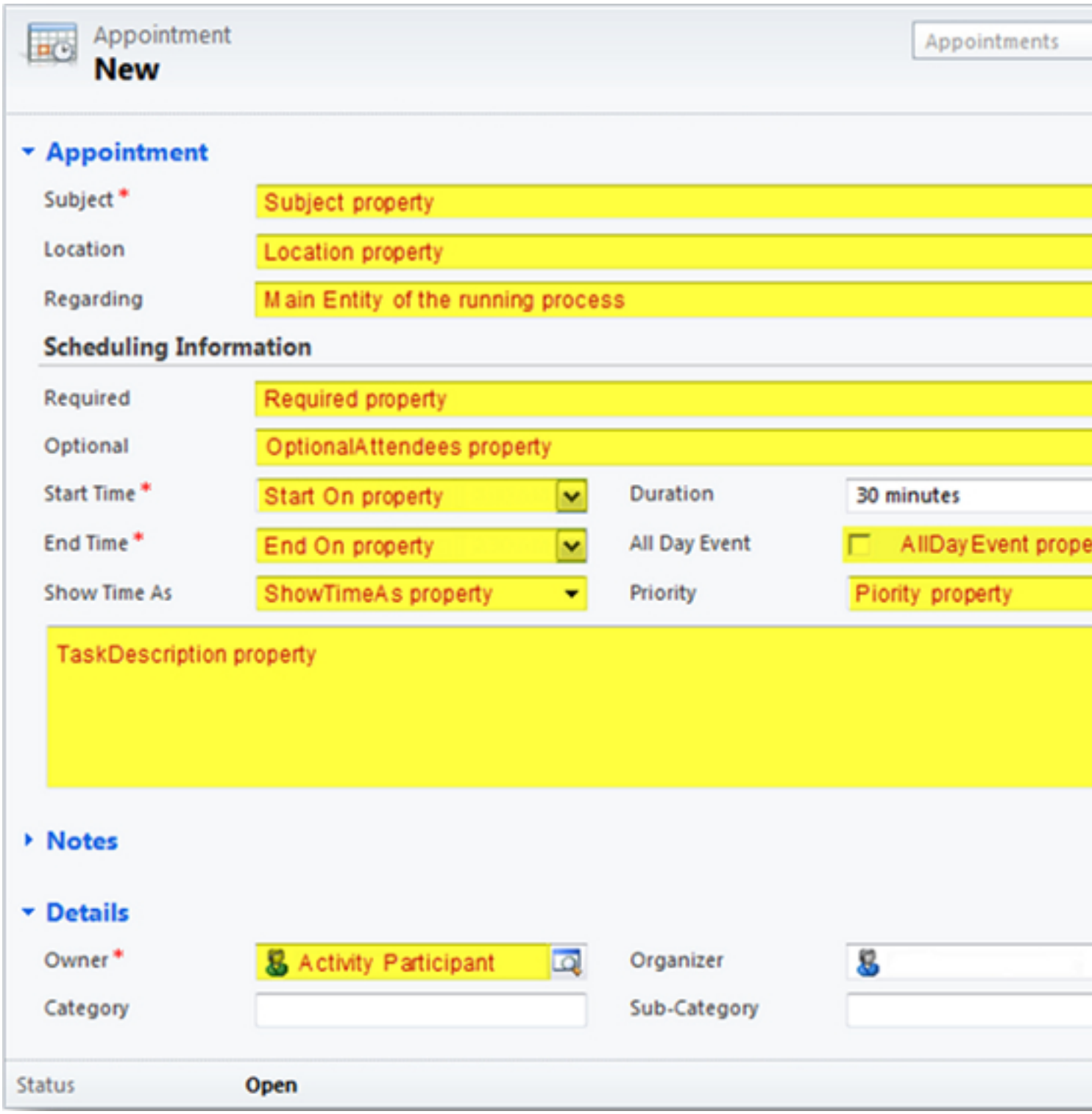
Form Example

The following is an example of a form created using the AgileXRM Form Designer.



Create Appointment Example

The following is an example of a form created using the Create Appointment AgileShape.



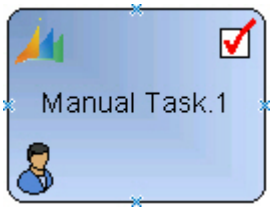
Create Manual Task

This shape is used for creating a CRM Task activity. The Task Owner will be the user/team that the task is assigned to (i.e. Participant), and the Regarding field will be the Main Entity of the process.

This shape can optionally have an AgileLightForm (ALF form) associated with it. This permits creating activity-based forms, which have all the fields necessary for carrying out this task by the user.

When the task is Marked as Completed in CRM, the process continues.

Other fields including any custom fields in the Task entity can be updated using the Activity Properties property.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** stencil.
3. On the **XRM Manual Activities 2011** stencil, drag the **Create Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
ActivityProperties	Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:
Form	Opens the Following Window: Form Configuration Window Purpose of this Window: This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:
OwnerID	Definition: When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record

Field Name	Definition
Subject	Definition: This sets the subject field of the activity in CRM, this value can be either static or dynamic. Clicking the ellipsis button opens a window for setting the subject content: This window accepts dynamic values by typing these special characters ${ which opens the Schema Selector Dialog
TaskDescription	Definition: This sets the value of the description field in the CRM activity. Clicking the ellipsis button opens a window for setting the description content. This window accepts dynamic values by typing these special characters ${ which opens the Schema Selector Dialog

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

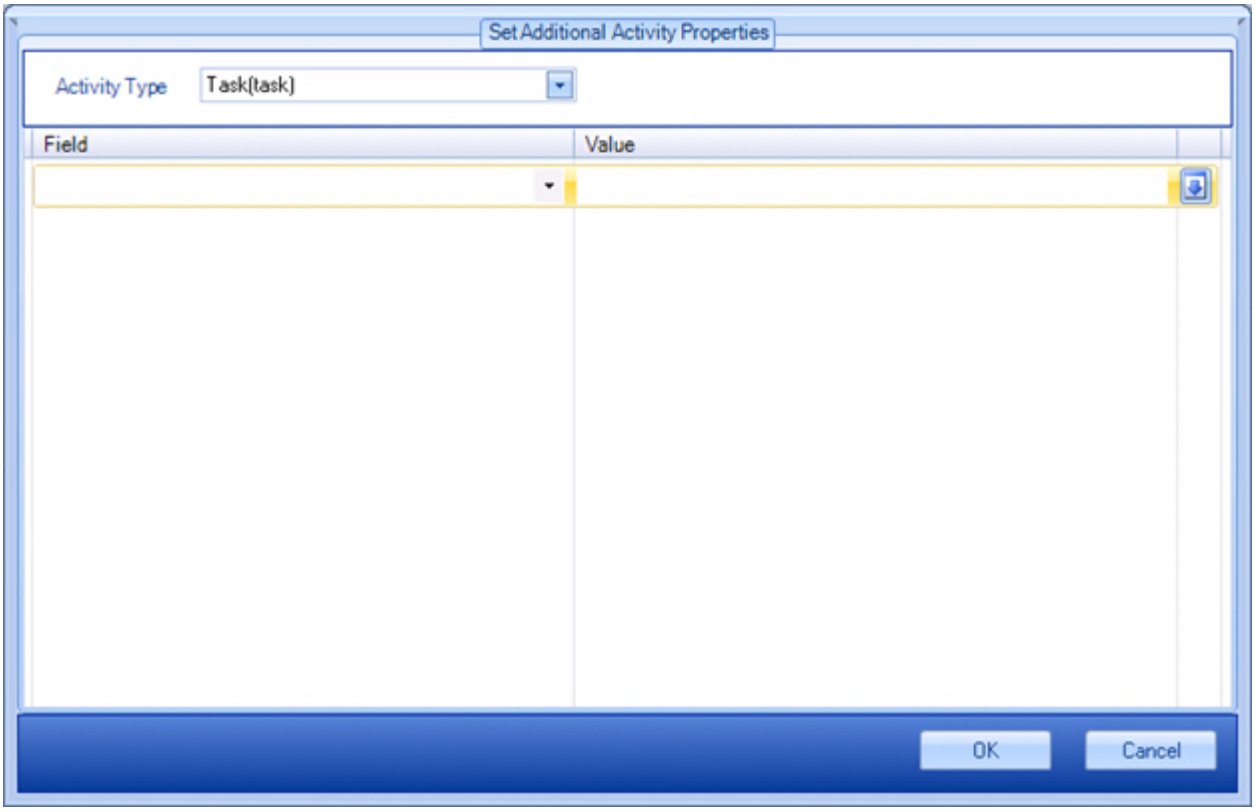
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:



Navigation

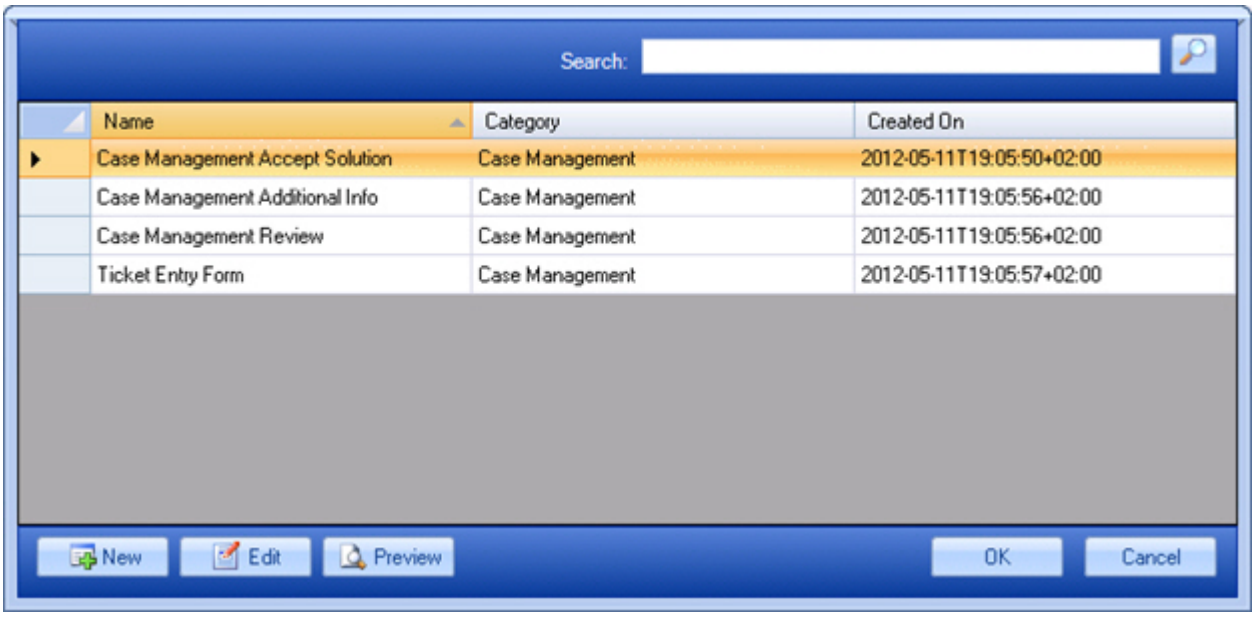
1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ActivityProperties** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
ActivityType	Definition: Shows all the activity types including custom activity types
Field	Definition: Select the field for the selected Activity Type
Value	Definition: Sets the value of the Field. Type ${ to open the Schema Selector Dialog to enter a dynamic value
Down Arrow	Function: Add new Field-Value pair or Remove existing Field-Value pair

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:



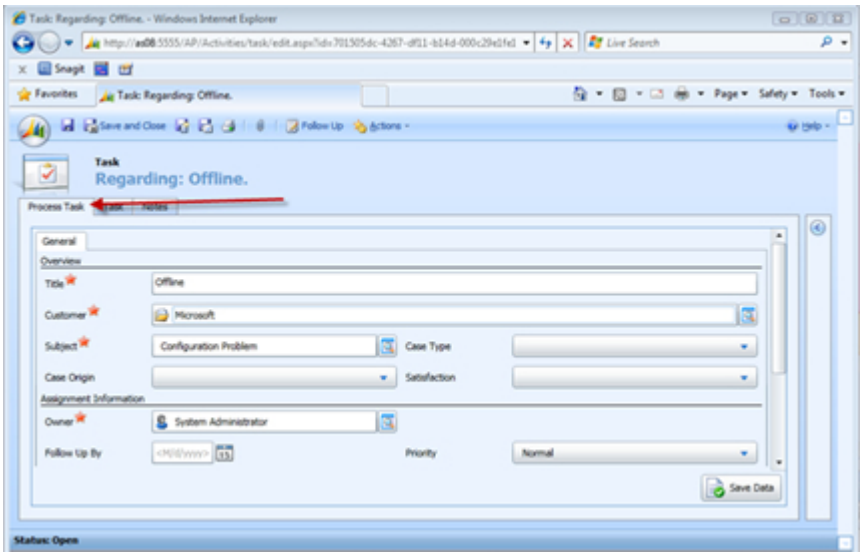
When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Manual Activities 2011**
   - **XRM Manual Activities 4**
   - **XRM External Connector**
3. Do one of the following:
   - On the **XRM Manual Activities 2011** or **XRM Manual Activities 4** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Form** field, click the **Ellipses** button.

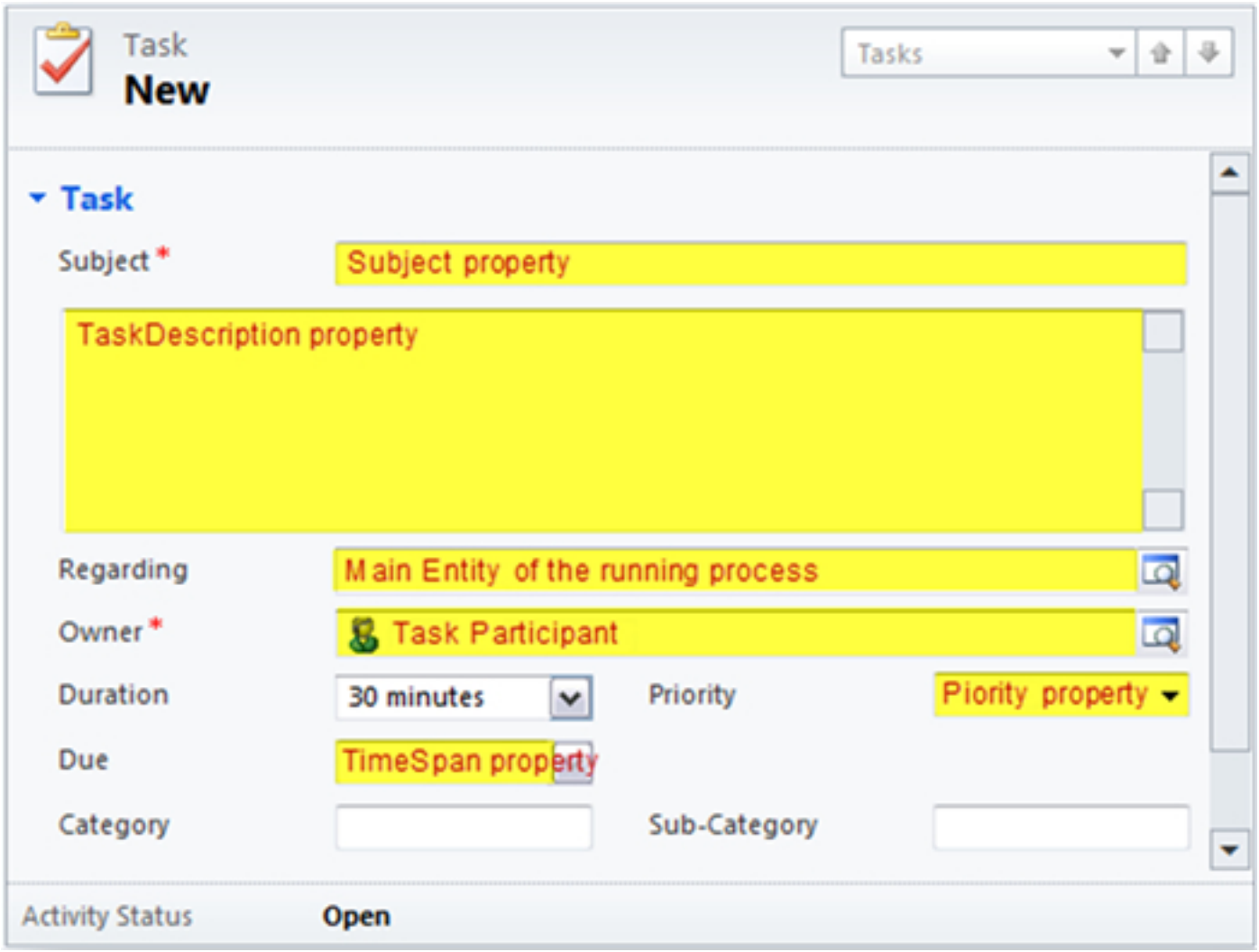
Form Example

The following is an example of a form created using the AgileXRM Form Designer.



Create Manual Task Example

The following is an example of a form created using the Create Manual Task AgileShape.



Create Intranet Task

This creates a task for a Standard User. That is a user who is in AgileXRM but is not necessarily a CRM Licensed user.

The task will be presented to the user via the Task List WebPart in SharePoint, where the user can interact with it.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** stencil.
3. On the **XRM Manual Activities 2011** stencil, drag the **Create Intranet Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
QueryExpression	Opens the Following Window: Advanced Find - QueryExpression Configuration Window
Form	Opens the Following Window: Form Configuration Window Purpose of this Window: This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

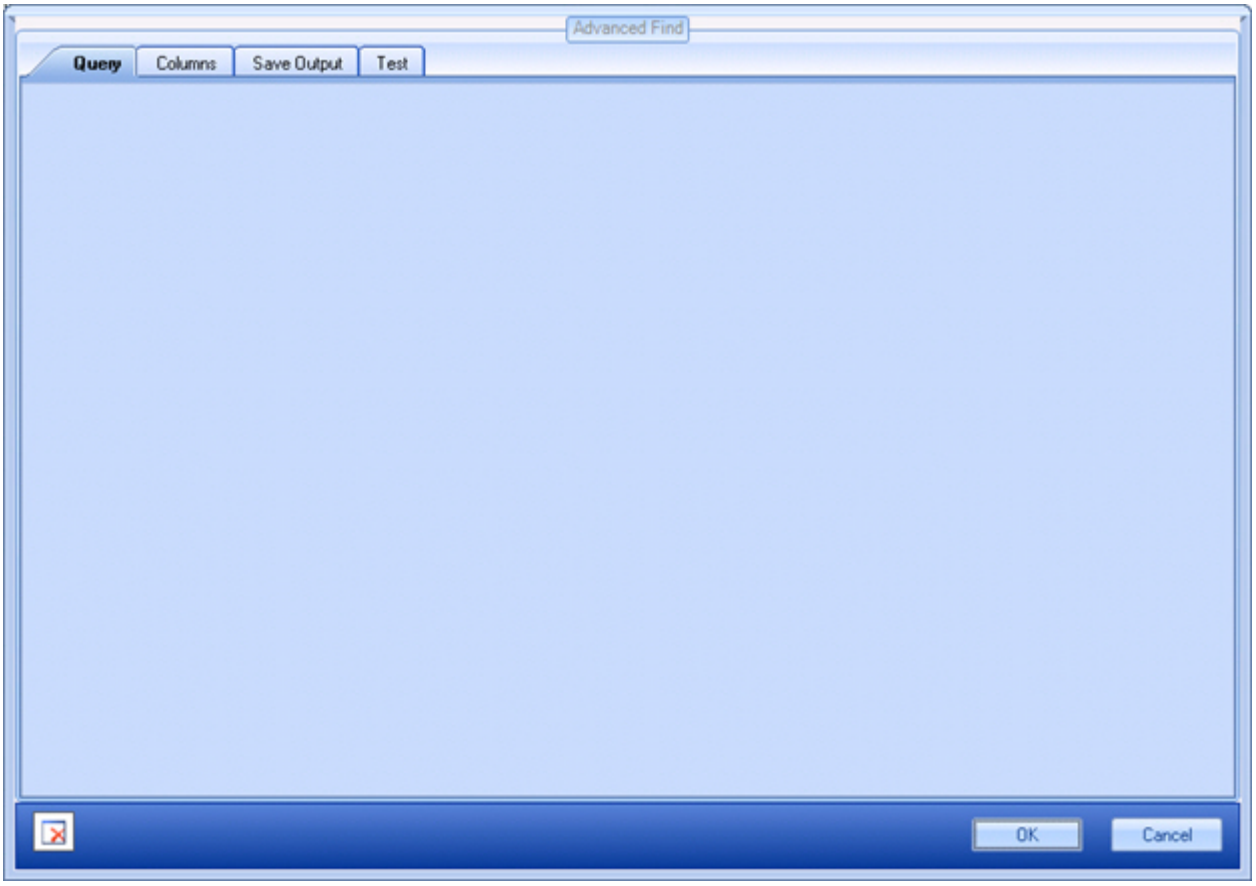
- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Advanced Find - QueryExpression Configuration Window



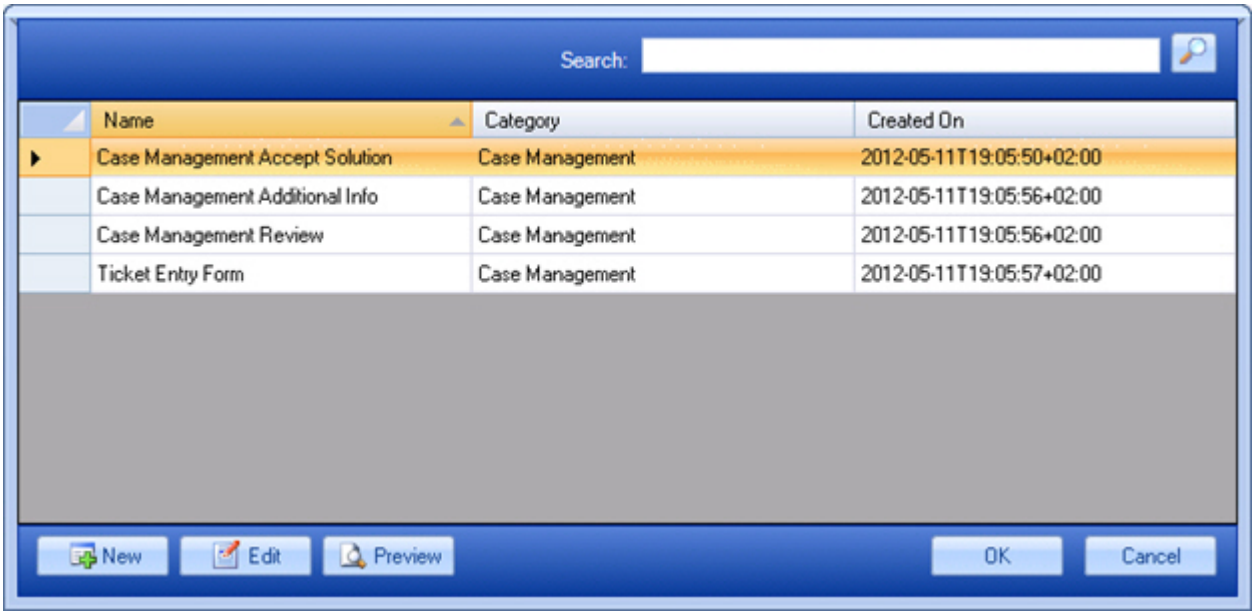
Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM Manual Activities 2011**
3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

5. On the **QueryExpression** field, click the **Ellipses** button.

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:



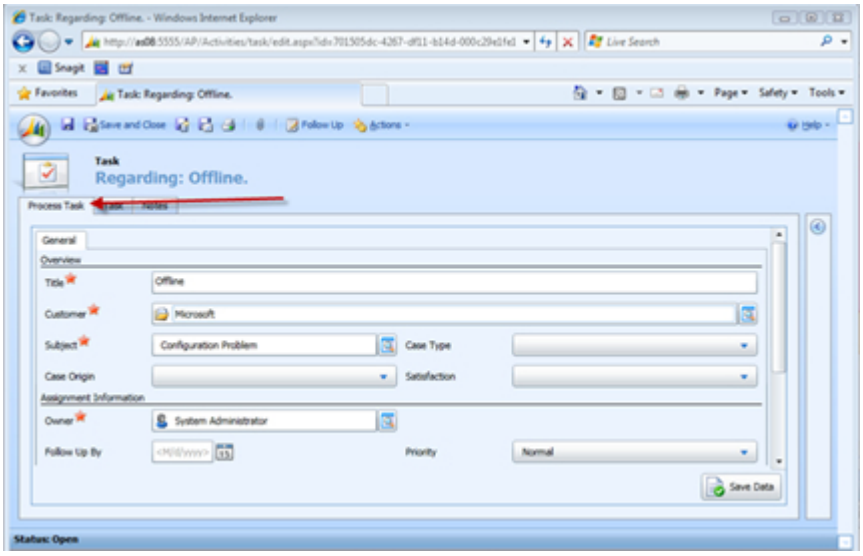
When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Manual Activities 2011**
   - **XRM Manual Activities 4**
   - **XRM External Connector**
3. Do one of the following:
   - On the **XRM Manual Activities 2011** or **XRM Manual Activities 4** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Form** field, click the **Ellipses** button.

Form Example

The following is an example of a form created using the AgileXRM Form Designer.



Email Activity

This shape creates an Email activity in CRM.

The Email can be sent automatically (if AutoComplete is set to True) or manually by the user through clicking the Send button in the ribbon. In either case, once sent, the process continues.

This shape can optionally have an AgileLightForm (ALF form) associated with it. This permits creating activity-based forms, which have all the fields necessary for carrying out this task by the user.



Other fields including any custom fields in the Email entity can be updated using the Activity Properties property.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** stencil.
3. On the **XRM Manual Activities 2011** stencil, drag the **Email Activity** AgileShape, and drop it on the process template.

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
QueryExpression	Opens the Following Window: Advanced Find - QueryExpression Configuration Window
ConfigureParticipants	Opens the Following Window: Participants Window - Assign Mode Purpose of this Window: Default value: ${ProcessInitiator} Click the ellipsis button to open the configuration dialog:
ActivityProperties	Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:
AgilePointTemplate	Definition: By clicking on Add Mail Template the standard Envision email configuration window is opened (See Defining an Email Template) Valid values for thenFrom field are: • A single CRM Domain Logon Name (domainname) • A single ID of a valid entity: Account, Lead, Contact, Queue or User Valid values for the To, CC and BCC fields are: • A single CRM Domain Logon Name (domainname) • A single ID of a valid entity: Account, Lead, Contact, Queue or User • A semicolon-separated list of IDs of any valid entity (Account, Lead, Contact, Queue or User)
Form	Opens the Following Window: Form Configuration Window Purpose of this Window:

Field Name	Definition
	This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:
OwnerID	Definition: When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

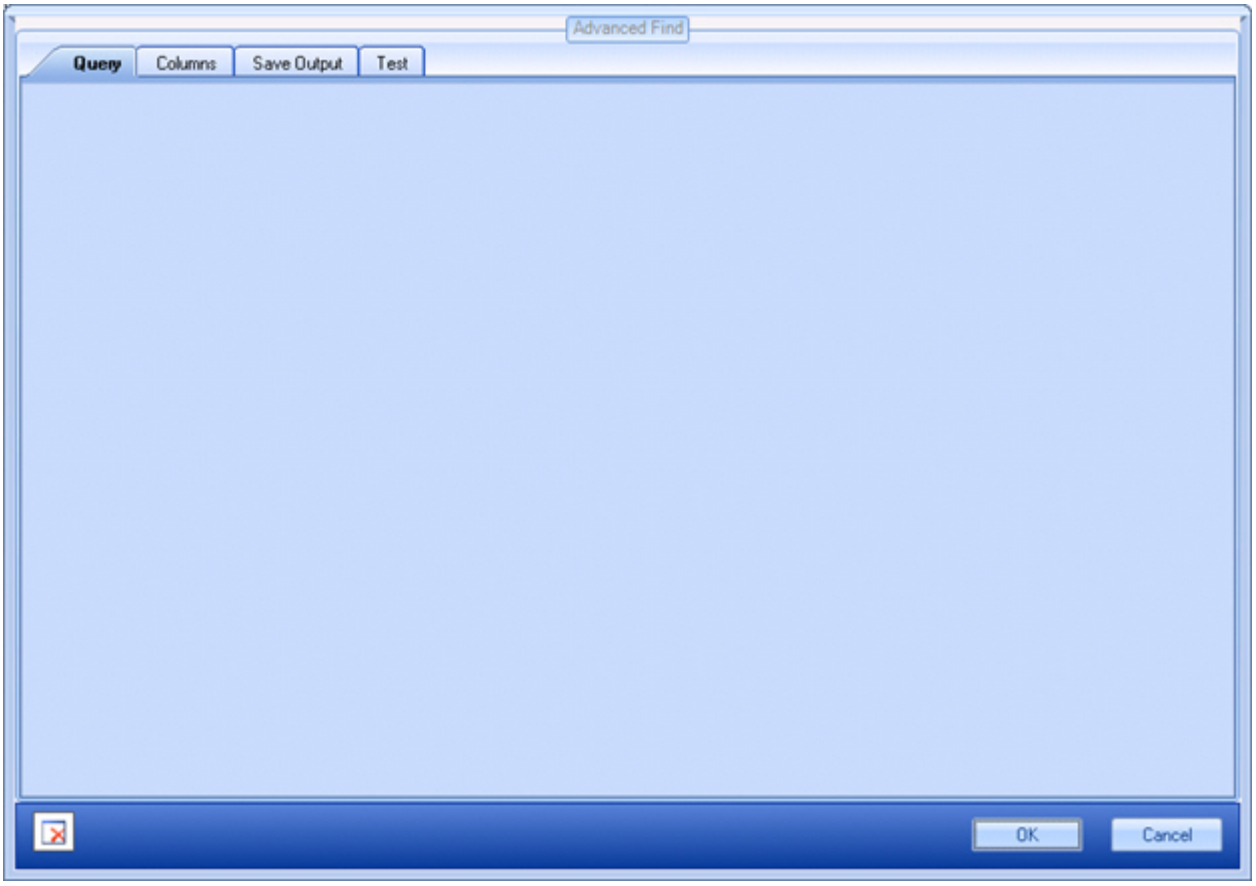
- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Advanced Find - QueryExpression Configuration Window

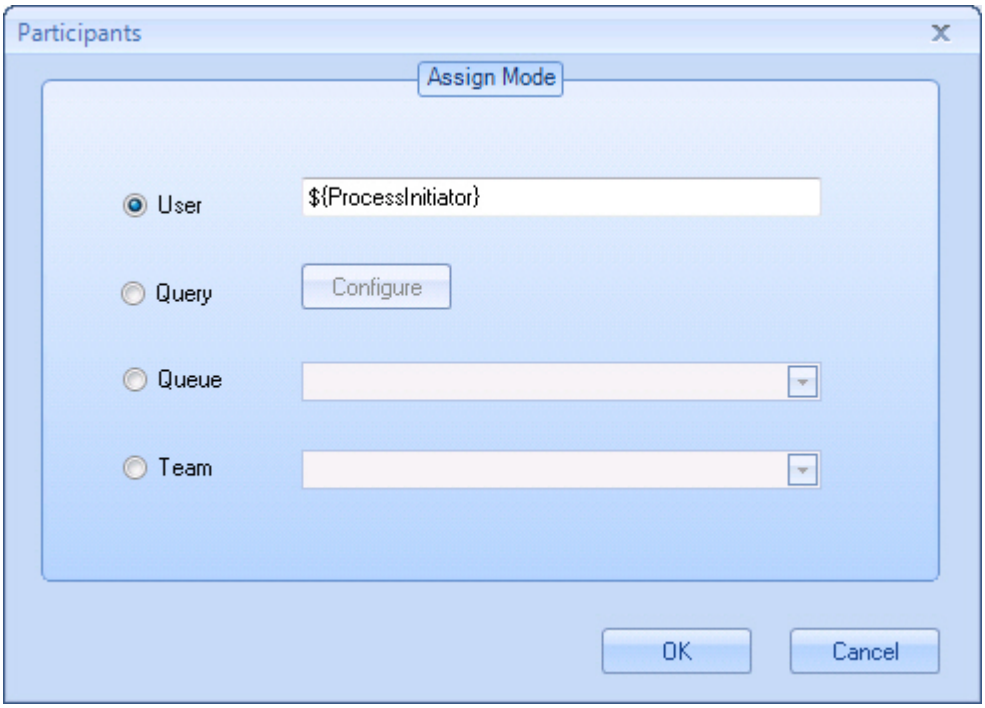


Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM Manual Activities 2011**
3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **QueryExpression** field, click the **Ellipses** button.

Participants Window - Assign Mode

Default value: ${ProcessInitiator} Click the ellipsis button to open the configuration dialog:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ConfigurePartcipants** field, click the **Ellipses** button.

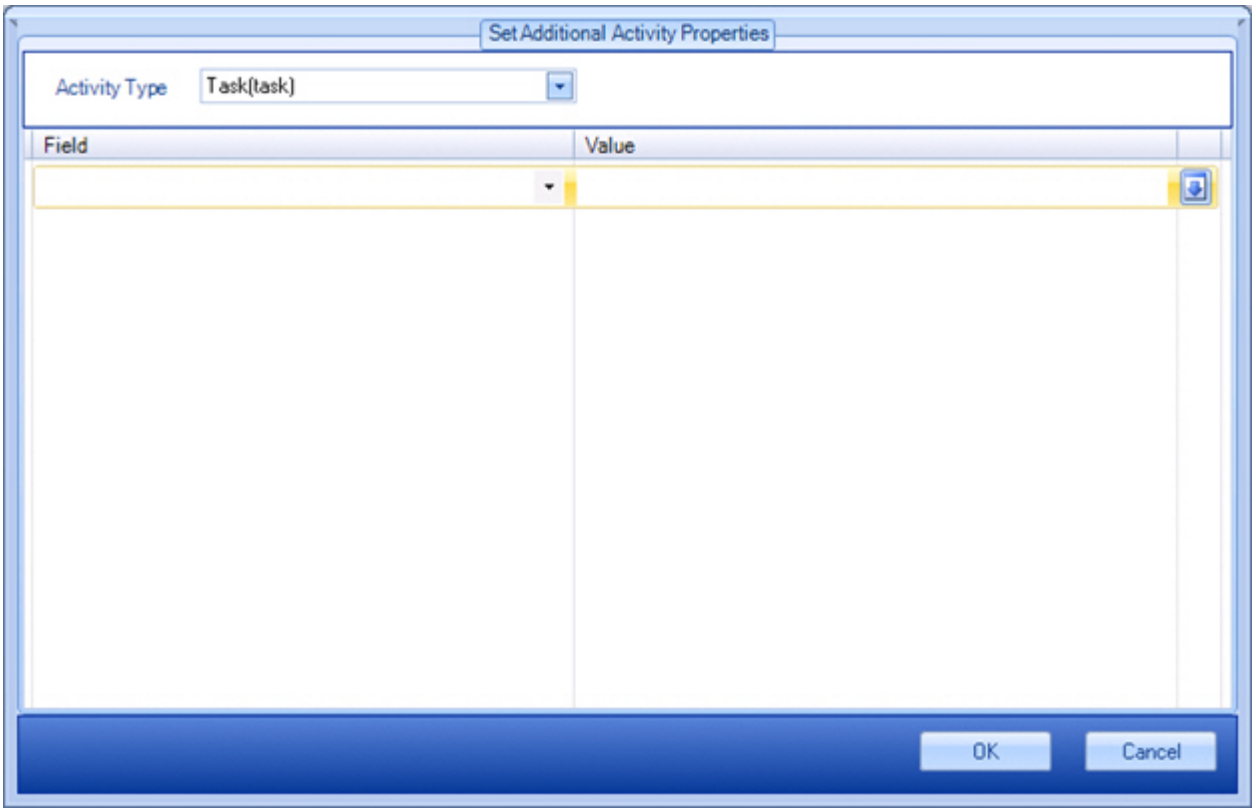
Field Definitions

Field Name	Definition
User	Definition: Can contain a static or dynamic value which can be one or more user IDs or user names. Multiple values should be separated by a semicolon ";" When multiple values are used, each participant gets a task and the shape is not Completed until all

Field Name	Definition
	the participants have Completed (or Cancelled) their corresponding tasks. Type ${ to open the Schema Selector Dialog.
Query	Function: Click to open the Query Expression Builder. The query should return 1 or more values of one of these types: • systemuserid (e.g. ownerid of an account) • username (e.g. DOMAIN\loginid) SeeQuery Expression Builder
Queue	Definition: Select the corresponding Queue from the list. The task will appear in the selected Queue. When this is selected, the OwnerID property can also be set.
Team	Definition: Select the corresponding Team from the list. The task will be assigned to the chosen Team. If any member of the Team completes (or Cancels) the task, the shape is Completed and the process progresses to the next step(s).

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ActivityProperties** field, click the **Ellipses** button.

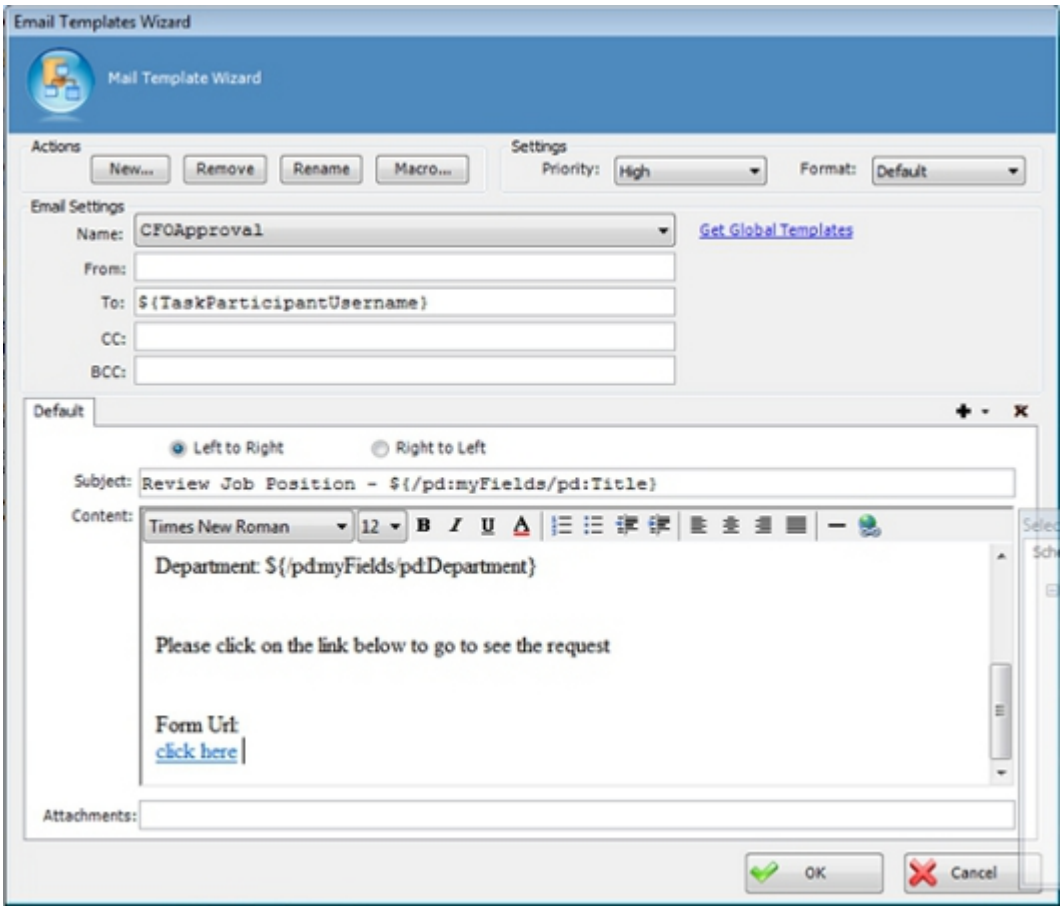
Field Definitions

Field Name	Definition
ActivityType	Definition: Shows all the activity types including custom activity types
Field	Definition:

Field Name	Definition
	Select the field for the selected Activity Type
Value	Definition: Sets the value of the Field. Type ${ to open the Schema Selector Dialog to enter a dynamic value
Down Arrow	Function: Add new Field-Value pair or Remove existing Field-Value pair

Email Template Wizard

Specifies the content of an email template. An email template determines recipients, subject, body, and other aspects of an automated email template sent from AgilePoint.



Navigation

1. In AgilePoint Envision, open a process template.

2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Activity Entry Message (Email)**
   - **Reminder Message (Email)**
   - **Task Completed Message (Email)**
   - **Task Reassigned Message (Email)**
5. On the **Email Template Wizard**, do one of the following:
   - To modify an existing message template, in the **Name** list, select the name of the template you want to modify.
   - To create a new message template:
     1. Click **New**.
     2. On the **New Name** window, enter the name you want to identify your message template.
     3. Click **OK**.

Field Definitions

Field Name	Definition
New	Function: Opens the New Name window, where you can enter the name of the message template. Allowed Values: Free text in text format. Default Value: None Custom Attributes: No
Rename	Function: Opens the New Name window, where you can change the name of the message template. Allowed Values: A single line of text. Default Value: None Custom Attributes:

Field Name	Definition
	No
Remove	Function: Deletes the message template from the Name list.
Name	Definition: Specifies the Email Template you want to modify. Allowed Values: A single line of text. Default Value: An email template, if one exists.
From	Definition: Specifies the recipients in the From field of an Email Notification. Allowed Values: A semicolon-delineated list of valid email addresses. If process attributes are used, domain\username is converted automatically to a valid email format. Default Value: None Custom Attributes: Yes Example: me@mydomain.com; ${ProcessInitiator}; ${ProcessParticipantUserNames}
To	Definition: Specifies the recipients in the To field of an Email Notification. Allowed Values: A semicolon-delineated list of valid email addresses. If process attributes are used, domain\username is converted automatically to a valid email format. Default Value: None

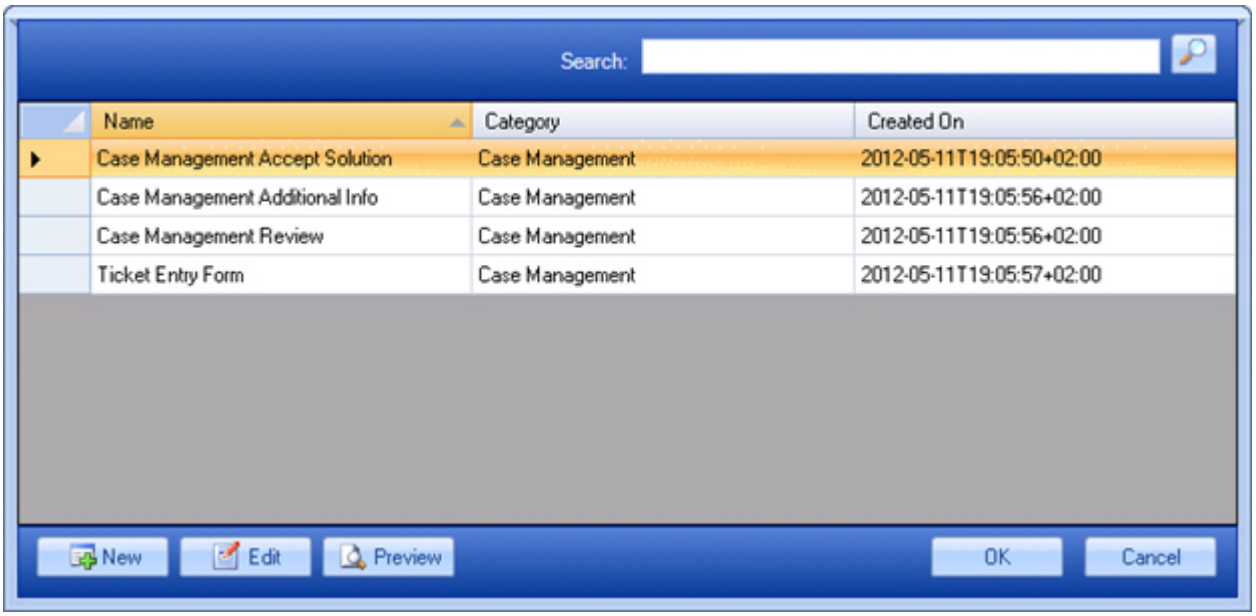
Field Name	Definition
	Custom Attributes: Yes Example: me@mydomain.com; ${ProcessInitiator}; ${ProcessParticipantUserNames}
CC	Definition: Specifies the recipients in the CC field of an Email Notification. Allowed Values: A semicolon-delineated list of valid email addresses. If process attributes are used, domain\username is converted automatically to a valid email format. Default Value: None Custom Attributes: Yes Example: me@mydomain.com; ${ProcessInitiator}; ${ProcessParticipantUserNames}
Subject	Definition: Specifies the subject line of an email notification. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes Example: ${ActivityName} in ${ProcessName} is complete
Multi-language List (+)	Definition: Specifies an additional language for which you can define the content of an email. Allowed Values:

Field Name	Definition
	A list of languages. Example: af-ZA sq-AL am-ET
Priority	Definition: Specifies the priority setting for an email notification. Allowed Values: • High • Normal • Low Default Value: Normal
Format	Definition: Specifies the display format for an email. Allowed Values: • **HTML** - Displays the email in HTML format. • **Text** - Displays the email in text-only format. • **Default** - Displays the email in your organization's default format. This is set by your AgilePoint system administrator. Typically this is HTML. Default Value: Default
Left to Right/Right to Left	Definition: Specifies the alignment of text in the content section of an email. Allowed Values: • Left to Right • Right to Left Default Value: Left to Right
Content	Definition:

Field Name	Definition
	Specifies the content of the body of an email. Allowed Values: Rich text in HTML format, or free text in text format. Default Value: None Custom Attributes: Yes
Attachments	Definition: Specifies one or more files you want to include in an email. Allowed Values: The full path and file name for the attachments you want to include. Lists are separated by semicolons. **Note:** The file that you would like to attach must reside on the local machine. Default Value: None Custom Attributes: Yes Example: C:\My Documents\sample1.doc; ${HomeDirectory}\sample2.doc; ${AttachDoc}

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:



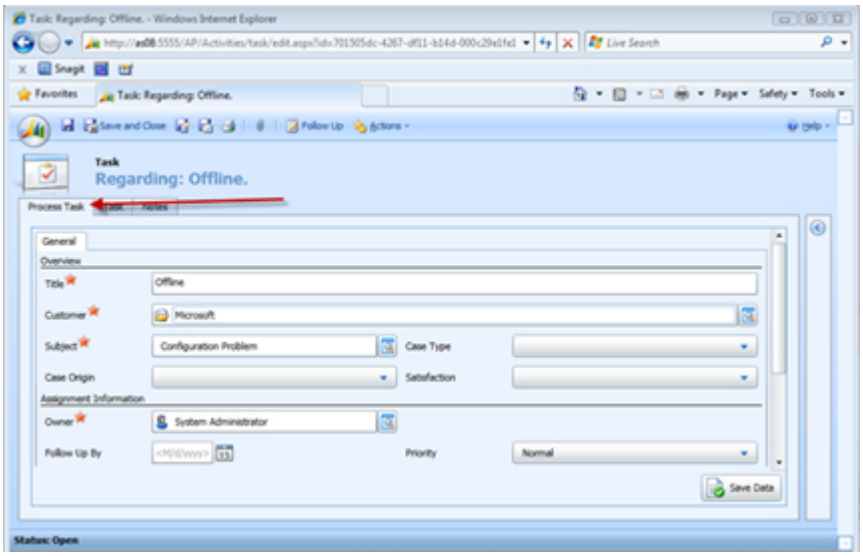
When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Manual Activities 2011**
   - **XRM Manual Activities 4**
   - **XRM External Connector**
3. Do one of the following:
   - On the **XRM Manual Activities 2011** or **XRM Manual Activities 4** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Form** field, click the **Ellipses** button.

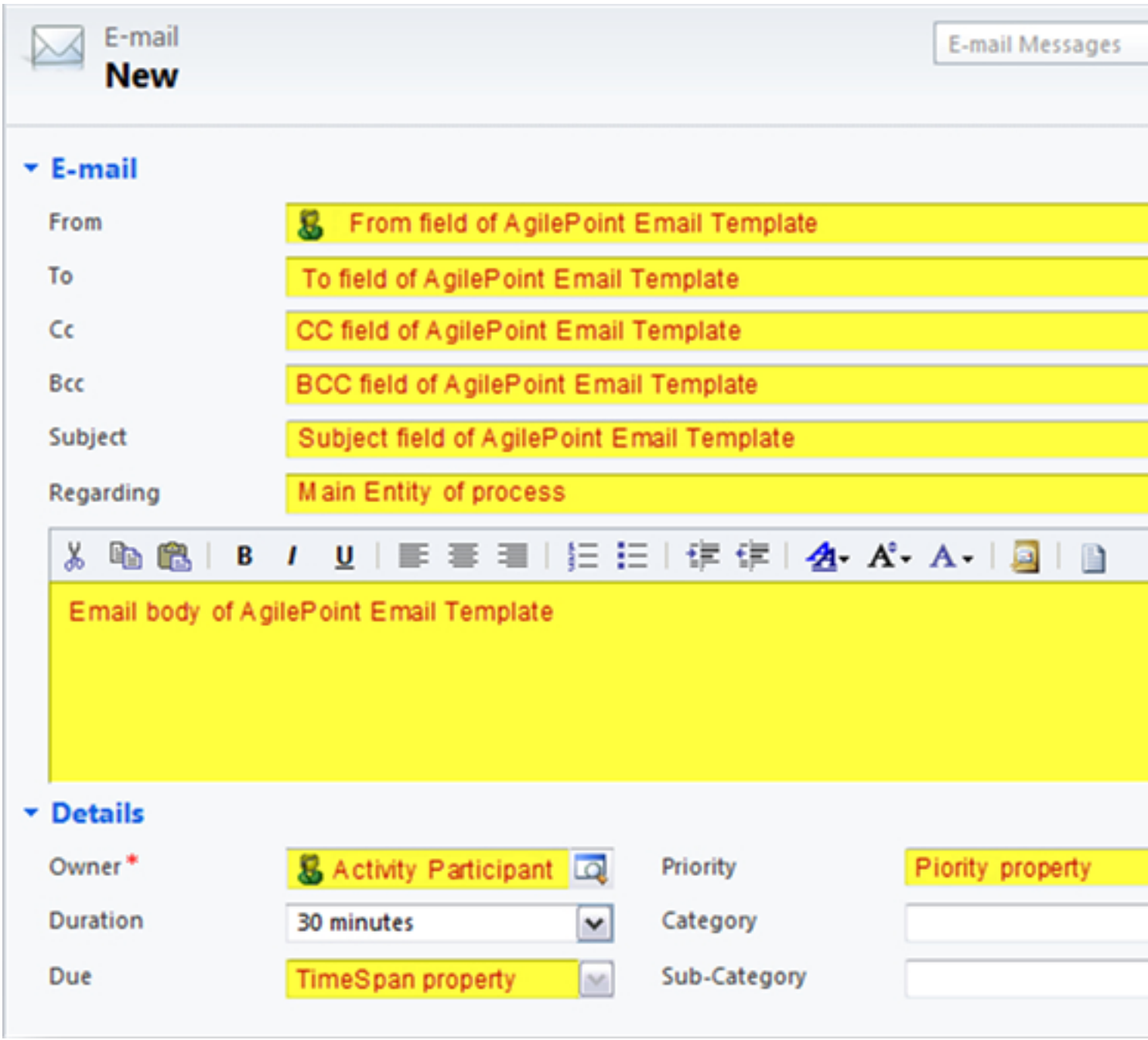
Form Example

The following is an example of a form created using the AgileXRM Form Designer.



Email Activity Example

The following is an example of a form created using the Email Activity AgileShape.



Fax Activity

This shape creates a Fax Activity in CRM.

This shape can optionally have an AgileLightForm (ALF form) associated with it. This permits creating activity-based forms, which have all the fields necessary for carrying out this task by the user.

When the activity is Marked as Completed, the process flow continues.



Other fields including any custom fields in the Fax entity can be updated using the Activity Properties property.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** stencil.
3. On the **XRM Manual Activities 2011** stencil, drag the **Fax Activity** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
ConfigureParticipants	Opens the Following Window: Participants Window - Assign Mode Purpose of this Window: Default value: ${ProcessInitiator} Click the ellipsis button to open the configuration dialog:
ActivityProperties	Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:
CommunucationDirection	Definition: This is for setting the direction of the communication with the Recipient as Incoming or Outgoing
Destination	Definition: This is the Phone Number of the call with the Recipient. It could be a static or dynamic value.
Form	Opens the Following Window: Form Configuration Window

Field Name	Definition
	Purpose of this Window: This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:
OwnerID	Definition: When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record
Recipient	Definition: This sets the Recipient(s) for this communication. This can be: • One Recipient: Use the ID of a valid entity (Account, Contact, Lead or User) or CRM Domain Logon Name (domainname) • Multiple Recipients: Use a semicolon separated list of IDs of any valid entity (Account, Contact, Lead or User)
Sender	Definition: This sets the Sender for this communication. This must be a single ID of a valid entity (Account, Contact, Lead or User) or CRM Domain Logon Name (domainname)
Subject	Definition: This sets the subject field of the activity in CRM, this value can be either static or dynamic. Clicking the ellipsis button opens a window for setting the subject content: This window accepts dynamic values by typing these special characters ${ which opens the Schema Selector Dialog
TaskDescription	Definition: This sets the value of the description field in the CRM activity. Clicking the ellipsis button opens a window for setting the description content. This window accepts dynamic values by typing these special characters ${ which opens the Schema Selector Dialog

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

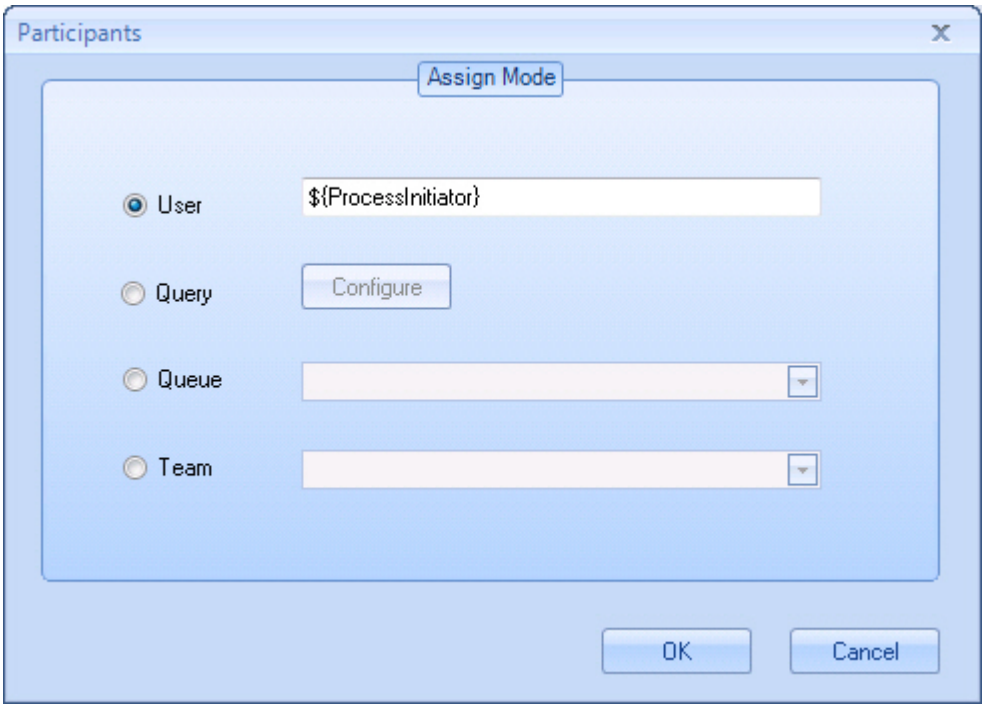
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Participants Window - Assign Mode

Default value: ${ProcessInitiator} Click the ellipsis button to open the configuration dialog:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ConfigurePartcipants** field, click the **Ellipses** button.

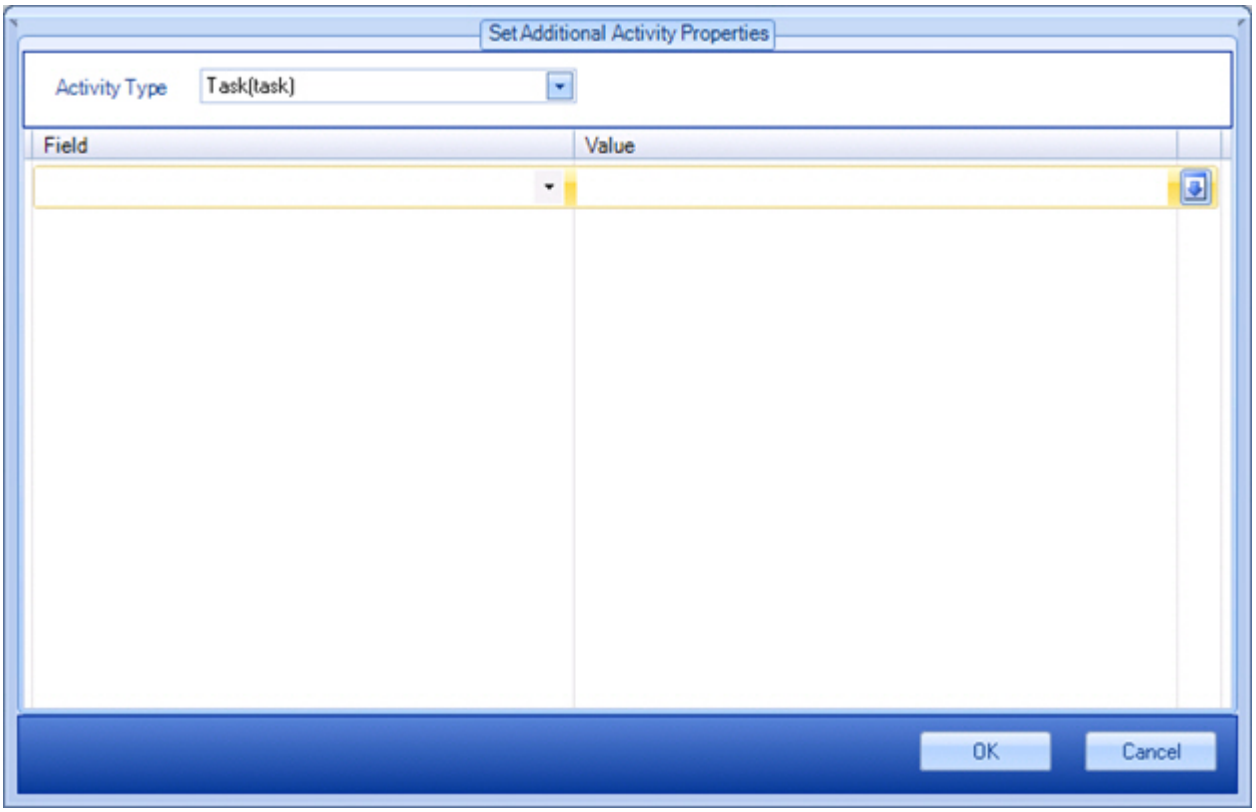
Field Definitions

Field Name	Definition
User	Definition: Can contain a static or dynamic value which can be one or more user IDs or user names. Multiple values should be separated by a semicolon ";" When multiple values are used, each participant gets a task and the shape is not Completed until all

Field Name	Definition
	the participants have Completed (or Cancelled) their corresponding tasks. Type ${ to open the Schema Selector Dialog.
Query	Function: Click to open the Query Expression Builder. The query should return 1 or more values of one of these types: • systemuserid (e.g. ownerid of an account) • username (e.g. DOMAIN\loginid) SeeQuery Expression Builder
Queue	Definition: Select the corresponding Queue from the list. The task will appear in the selected Queue. When this is selected, the OwnerID property can also be set.
Team	Definition: Select the corresponding Team from the list. The task will be assigned to the chosen Team. If any member of the Team completes (or Cancels) the task, the shape is Completed and the process progresses to the next step(s).

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ActivityProperties** field, click the **Ellipses** button.

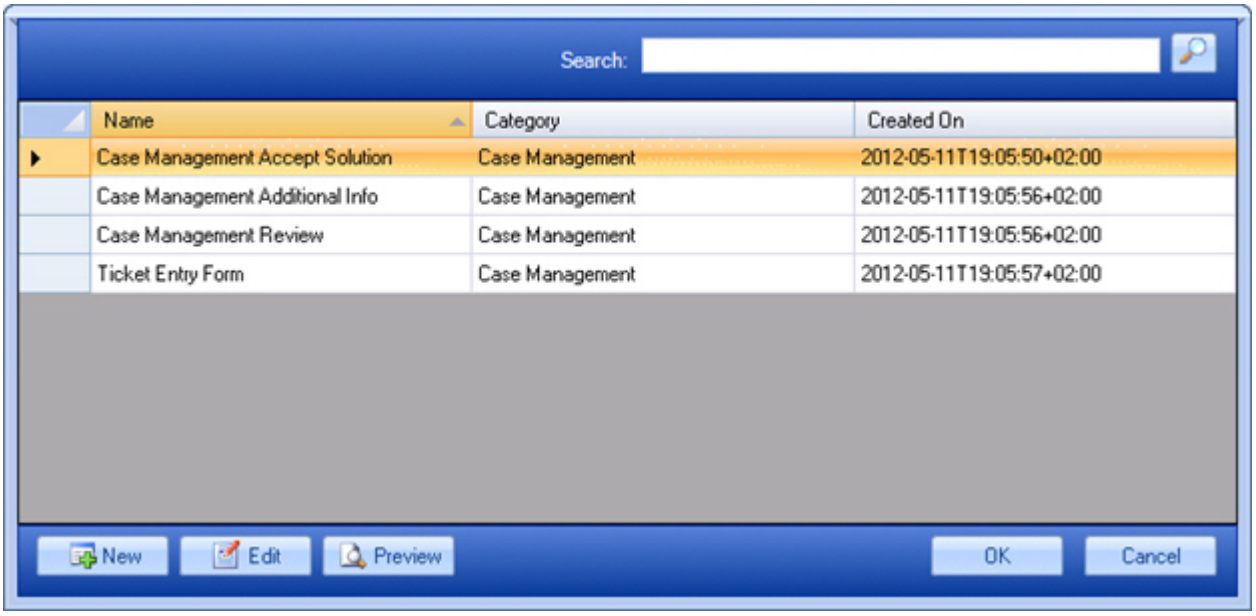
Field Definitions

Field Name	Definition
ActivityType	Definition: Shows all the activity types including custom activity types
Field	Definition:

Field Name	Definition
	Select the field for the selected Activity Type
Value	Definition: Sets the value of the Field. Type ${ to open the Schema Selector Dialog to enter a dynamic value
Down Arrow	Function: Add new Field-Value pair or Remove existing Field-Value pair

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:



When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

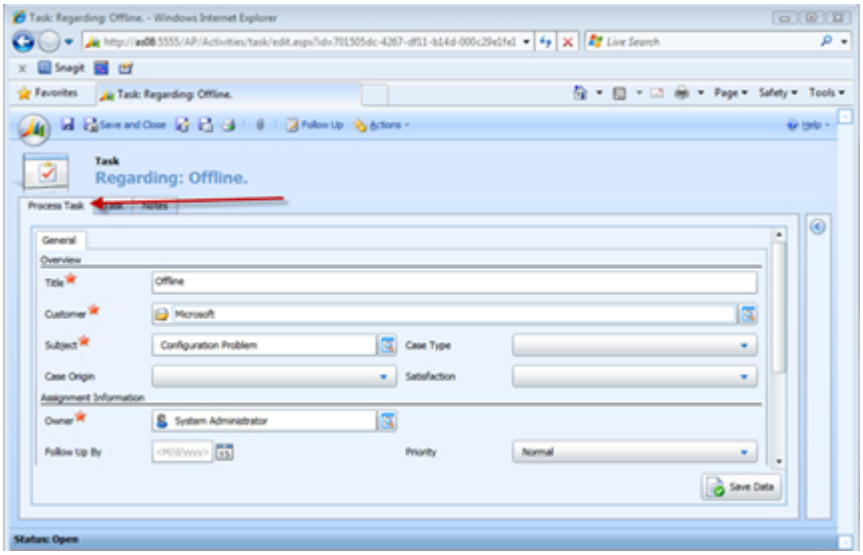
Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Manual Activities 2011**
   - **XRM Manual Activities 4**
   - **XRM External Connector**

3. Do one of the following:
   - On the **XRM Manual Activities 2011** or **XRM Manual Activities 4** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Form** field, click the **Ellipses** button.

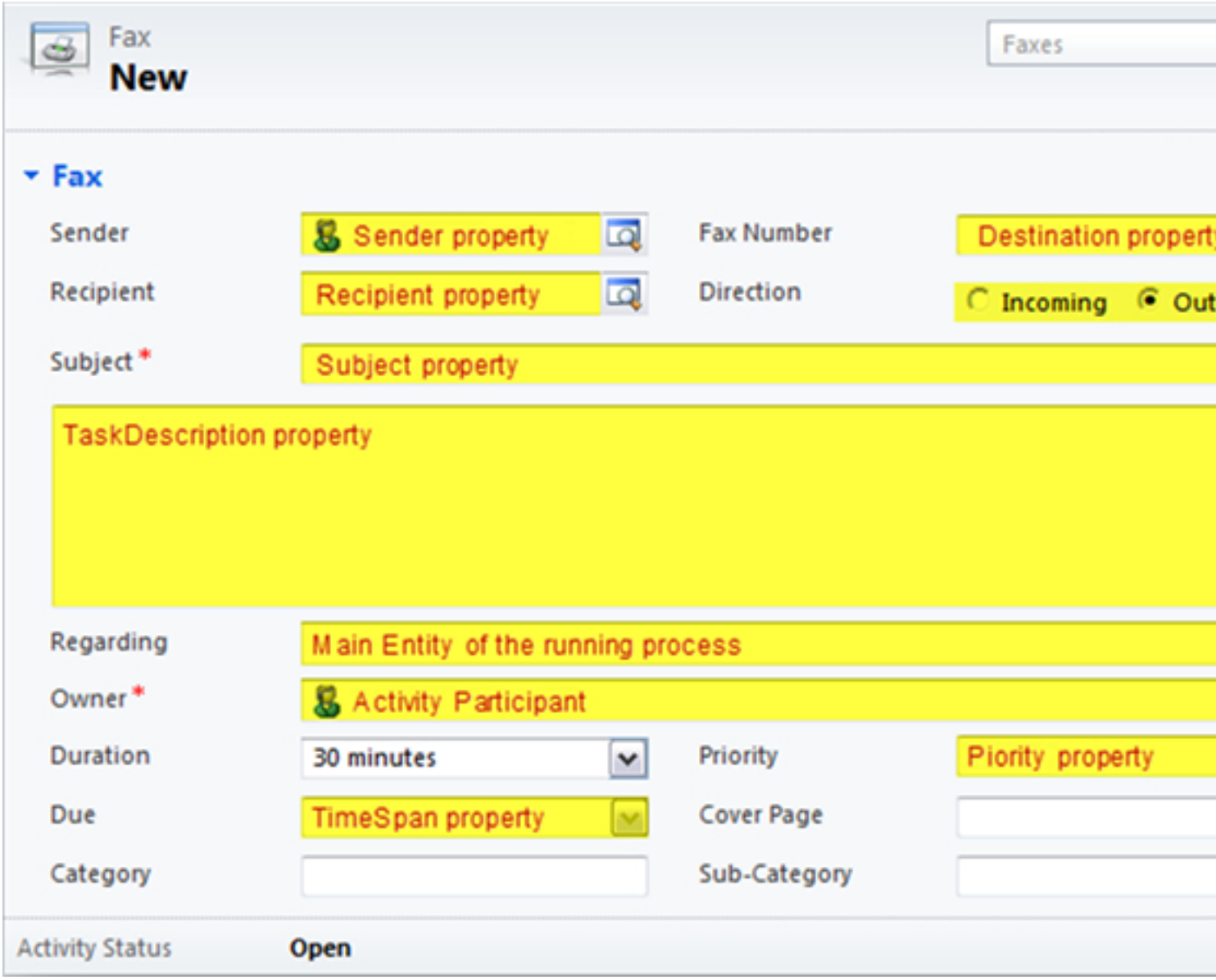
Form Example

The following is an example of a form created using the AgileXRM Form Designer.



Fax Activity Example

The following is an example of a form created using the Fax Activity AgileShape.



Generic Activity

This shape can create any type of activity in CRM, and is particularly suited for use with custom activity types.

When the activity is Marked as Completed, the process flow continues.

Apart from the Subject (subject) and TaskDescription (description) fields,the other fields in the activity, including any custom fields, can be updated using the Activity Properties property.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** stencil.
3. On the **XRM Manual Activities 2011** stencil, drag the **Generic Activity** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
ConfigureParticipants	Opens the Following Window: Participants Window - Assign Mode Purpose of this Window: Default value: ${ProcessInitiator} Click the ellipsis button to open the configuration dialog:
ActivityProperties	Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:
Form	Opens the Following Window: Form Configuration Window Purpose of this Window: This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:
OwnerID	Definition:

Field Name	Definition
	When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record
Subject	Definition: This sets the subject field of the activity in CRM, this value can be either static or dynamic. Clicking the ellipsis button opens a window for setting the subject content: This window accepts dynamic values by typing these special characters ${ which opens the Schema Selector Dialog
TaskDescription	Definition: This sets the value of the description field in the CRM activity. Clicking the ellipsis button opens a window for setting the description content. This window accepts dynamic values by typing these special characters ${ which opens the Schema Selector Dialog

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

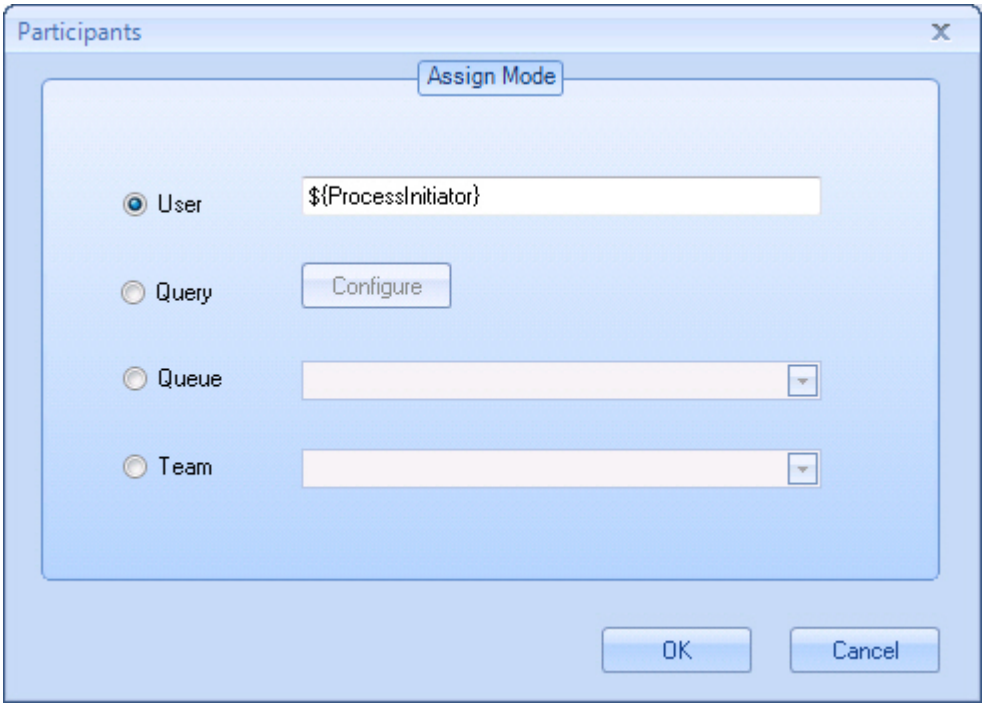
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Participants Window - Assign Mode

Default value: ${ProcessInitiator} Click the ellipsis button to open the configuration dialog:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ConfigurePartcipants** field, click the **Ellipses** button.

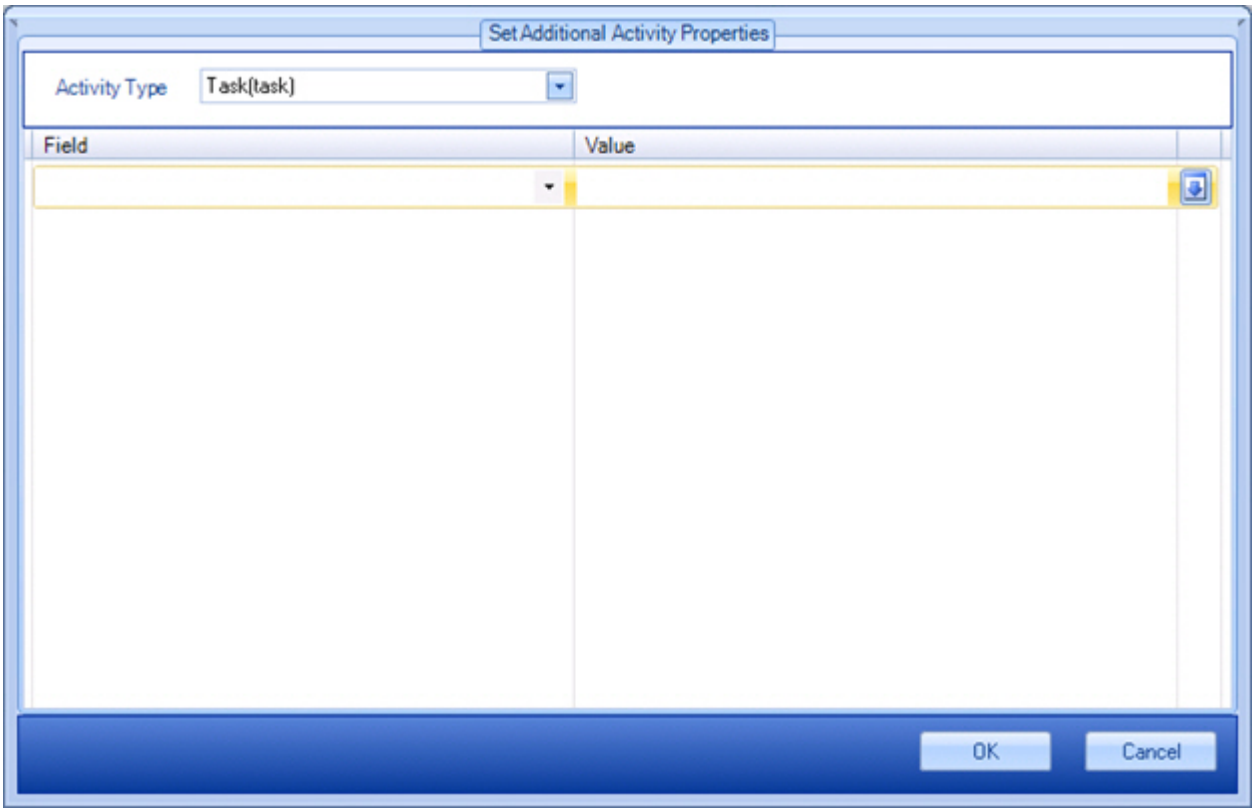
Field Definitions

Field Name	Definition
User	Definition:

Field Name	Definition
	Can contain a static or dynamic value which can be one or more user IDs or user names. Multiple values should be separated by a semicolon ";" When multiple values are used, each participant gets a task and the shape is not Completed until all the participants have Completed (or Cancelled) their corresponding tasks. Type ${ to open the Schema Selector Dialog.
Query	Function: Click to open the Query Expression Builder. The query should return 1 or more values of one of these types: • systemuserid (e.g. ownerid of an account) • username (e.g. DOMAIN\loginid) SeeQuery Expression Builder
Queue	Definition: Select the corresponding Queue from the list. The task will appear in the selected Queue. When this is selected, the OwnerID property can also be set.
Team	Definition: Select the corresponding Team from the list. The task will be assigned to the chosen Team. If any member of the Team completes (or Cancels) the task, the shape is Completed and the process progresses to the next step(s).

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ActivityProperties** field, click the **Ellipses** button.

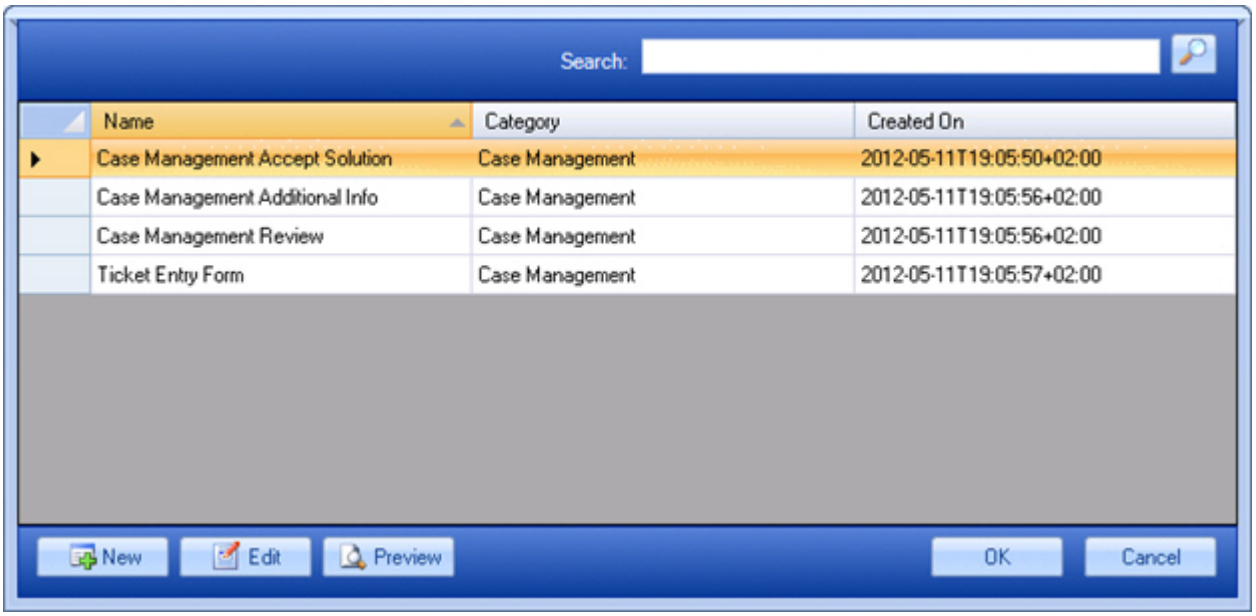
Field Definitions

Field Name	Definition
ActivityType	Definition: Shows all the activity types including custom activity types
Field	Definition:

Field Name	Definition
	Select the field for the selected Activity Type
Value	Definition: Sets the value of the Field. Type ${ to open the Schema Selector Dialog to enter a dynamic value
Down Arrow	Function: Add new Field-Value pair or Remove existing Field-Value pair

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:



When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

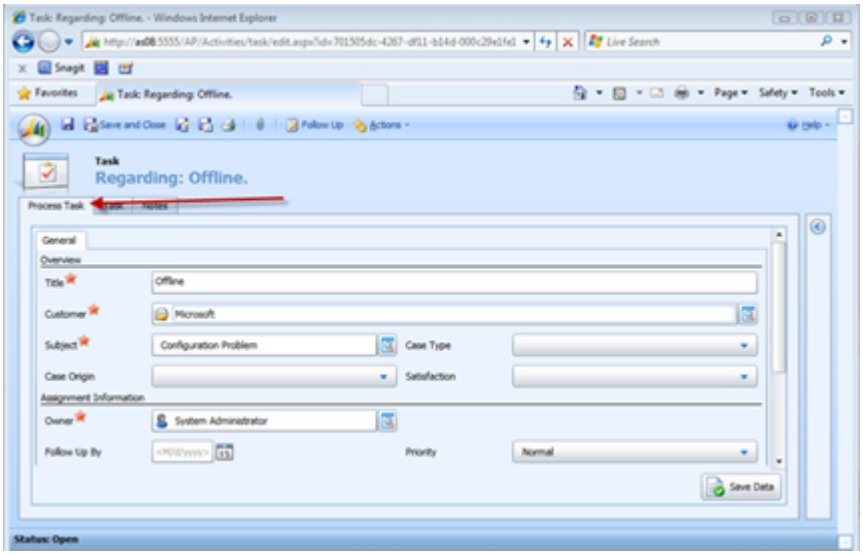
Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Manual Activities 2011**
   - **XRM Manual Activities 4**
   - **XRM External Connector**

3. Do one of the following:
   - On the **XRM Manual Activities 2011** or **XRM Manual Activities 4** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Form** field, click the **Ellipses** button.

Form Example

The following is an example of a form created using the AgileXRM Form Designer.



Letter Activity

This shape creates a Letter Activity in CRM.

This shape can optionally have an AgileLightForm (ALF form) associated with it. This permits creating activity-based forms, which have all the fields necessary for carrying out this task by the user.

When the activity is Marked as Completed, the process flow continues.



Other fields including any custom fields in the Letter entity can be updated using the Activity Properties property.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** stencil.
3. On the **XRM Manual Activities 2011** stencil, drag the **Letter Activity** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
ConfigureParticipants	Opens the Following Window: Participants Window - Assign Mode Purpose of this Window: Default value: ${ProcessInitiator} Click the ellipsis button to open the configuration dialog:
ActivityProperties	Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:
CommunucationDirection	Definition: This is for setting the direction of the communication with the Recipient as Incoming or Outgoing
Destination	Definition: This is the Phone Number of the call with the Recipient. It could be a static or dynamic value.
Form	Opens the Following Window: Form Configuration Window Purpose of this Window: This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:
OwnerID	Definition:

Field Name	Definition
	When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record
Recipient	Definition: This sets the Recipient(s) for this communication. This can be: • One Recipient: Use the ID of a valid entity (Account, Contact, Lead or User) or CRM Domain Logon Name (domainname) • Multiple Recipients: Use a semicolon separated list of IDs of any valid entity (Account, Contact, Lead or User)
Sender	Definition: This sets the Sender for this communication. This must be a single ID of a valid entity (Account, Contact, Lead or User) or CRM Domain Logon Name (domainname)
Subject	Definition: This sets the subject field of the activity in CRM, this value can be either static or dynamic. Clicking the ellipsis button opens a window for setting the subject content: This window accepts dynamic values by typing these special characters ${ which opens the Schema Selector Dialog
TaskDescription	Definition: This sets the value of the description field in the CRM activity. Clicking the ellipsis button opens a window for setting the description content. This window accepts dynamic values by typing these special characters ${ which opens the Schema Selector Dialog

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

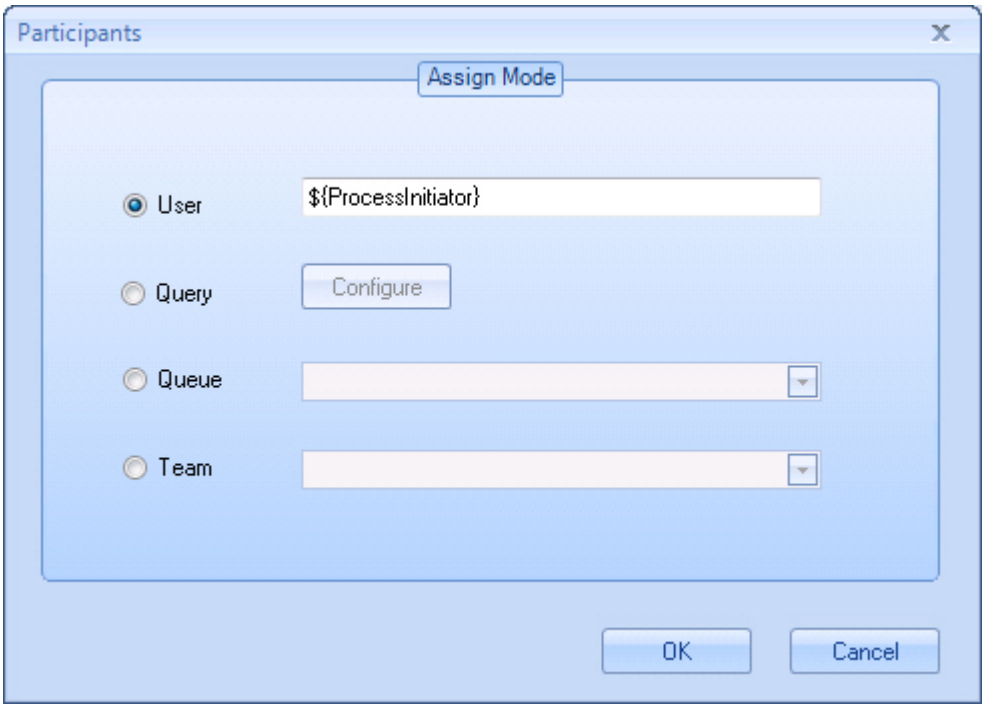
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Participants Window - Assign Mode

Default value: ${ProcessInitiator} Click the ellipsis button to open the configuration dialog:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ConfigurePartcipants** field, click the **Ellipses** button.

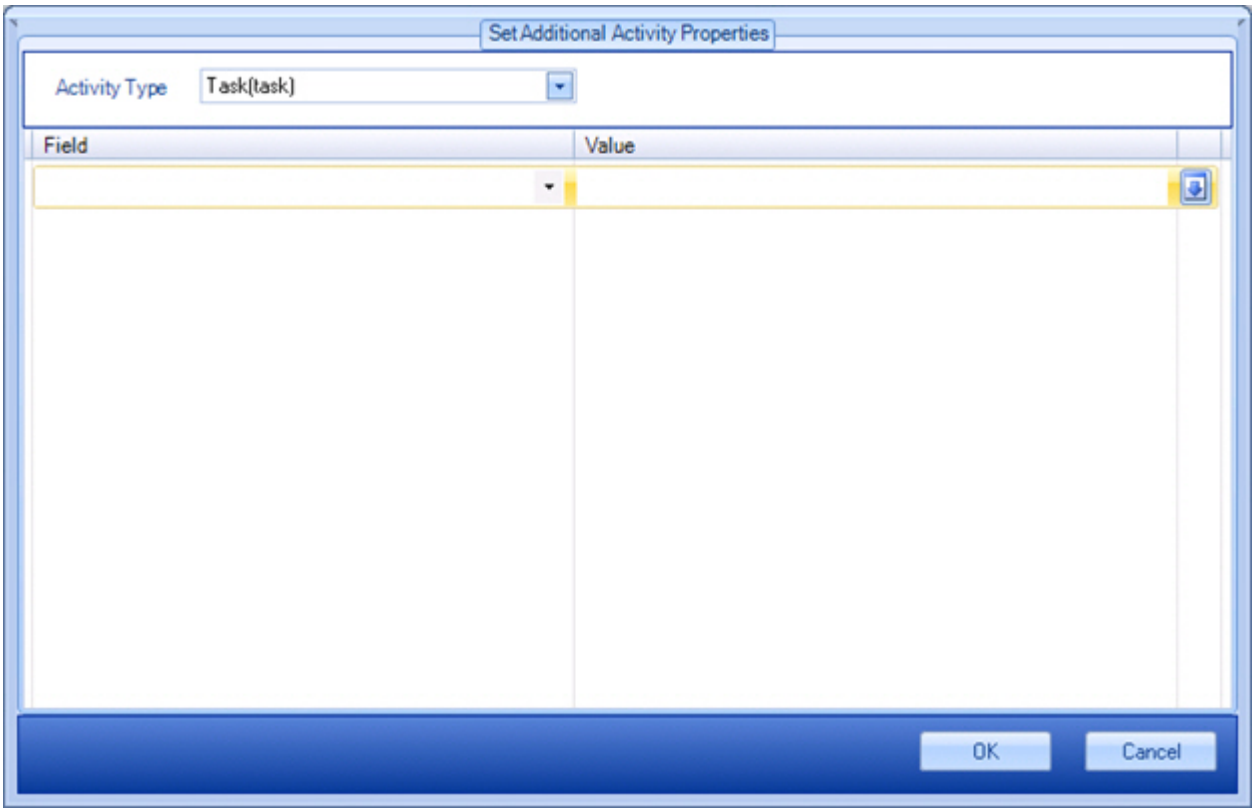
Field Definitions

Field Name	Definition
User	Definition: Can contain a static or dynamic value which can be one or more user IDs or user names. Multiple values should be separated by a semicolon ";" When multiple values are used, each participant gets a task and the shape is not Completed until all the participants have Completed (or Cancelled) their corresponding tasks. Type ${ to open the Schema Selector Dialog.
Query	Function: Click to open the Query Expression Builder. The query should return 1 or more values of one of these types: • systemuserid (e.g. ownerid of an account) • username (e.g. DOMAIN\loginid) SeeQuery Expression Builder
Queue	Definition: Select the corresponding Queue from the list. The task will appear in the selected Queue. When this is selected, the OwnerID property can also be set.
Team	Definition:

Field Name	Definition
	Select the corresponding Team from the list. The task will be assigned to the chosen Team. If any member of the Team completes (or Cancels) the task, the shape is Completed and the process progresses to the next step(s).

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.

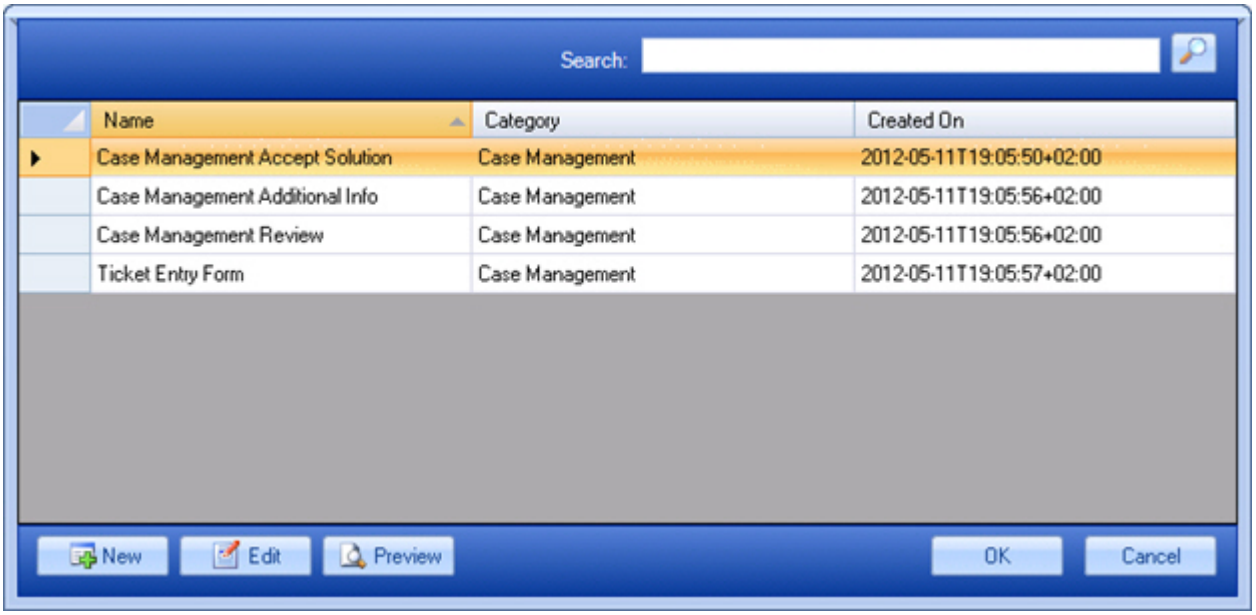
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ActivityProperties** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
ActivityType	Definition: Shows all the activity types including custom activity types
Field	Definition: Select the field for the selected Activity Type
Value	Definition: Sets the value of the Field. Type ${ to open the Schema Selector Dialog to enter a dynamic value
Down Arrow	Function: Add new Field-Value pair or Remove existing Field-Value pair

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:



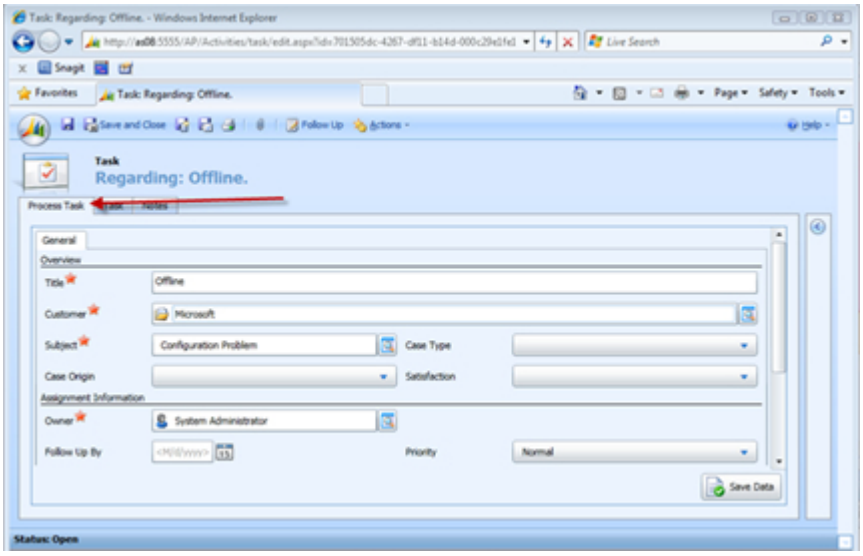
When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Manual Activities 2011**
   - **XRM Manual Activities 4**
   - **XRM External Connector**
3. Do one of the following:
   - On the **XRM Manual Activities 2011** or **XRM Manual Activities 4** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Form** field, click the **Ellipses** button.

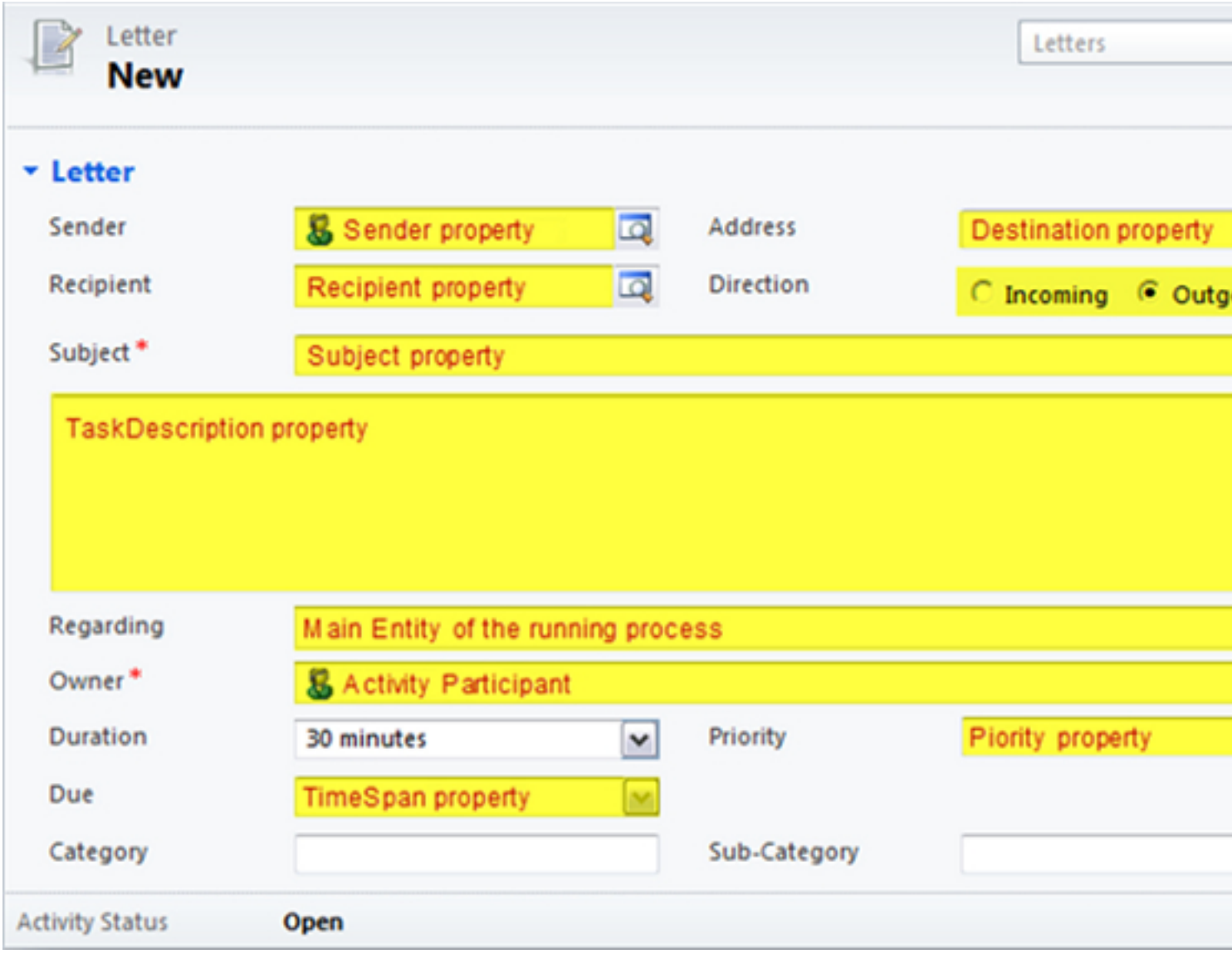
Form Example

The following is an example of a form created using the AgileXRM Form Designer.



Letter Activity Example

The following is an example of a form created using the Letter Activity AgileShape.



Phone Call Activity

This shape creates a Phone Call Activity in CRM.

This shape can optionally have an AgileLightForm (ALF form) associated with it. This permits creating activity-based forms, which have all the fields necessary for carrying out this task by the user.

When the activity is Marked as Completed, the process flow continues.



Other fields including any custom fields in the Phone Call entity can be updated using the Activity Properties property.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** stencil.
3. On the **XRM Manual Activities 2011** stencil, drag the **Phone Call Activity** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
ConfigureParticipants	Opens the Following Window: Participants Window - Assign Mode Purpose of this Window: Default value: ${ProcessInitiator} Click the ellipsis button to open the configuration dialog:
ActivityProperties	Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:
CommunucationDirection	Definition: This is for setting the direction of the communication with the Recipient as Incoming or Outgoing
Destination	Definition: This is the Phone Number of the call with the Recipient. It could be a static or dynamic value.
Form	Opens the Following Window: Form Configuration Window Purpose of this Window: This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:

Field Name	Definition
OwnerID	Definition: When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record
Recipient	Definition: This sets the Recipient(s) for this communication. This can be: • One Recipient: Use the ID of a valid entity (Account, Contact, Lead or User) or CRM Domain Logon Name (domainname) • Multiple Recipients: Use a semicolon separated list of IDs of any valid entity (Account, Contact, Lead or User)
Sender	Definition: This sets the Sender for this communication. This must be a single ID of a valid entity (Account, Contact, Lead or User) or CRM Domain Logon Name (domainname)
Subject	Definition: This sets the subject field of the activity in CRM, this value can be either static or dynamic. Clicking the ellipsis button opens a window for setting the subject content: This window accepts dynamic values by typing these special characters ${ which opens the Schema Selector Dialog
TaskDescription	Definition: This sets the value of the description field in the CRM activity. Clicking the ellipsis button opens a window for setting the description content. This window accepts dynamic values by typing these special characters ${ which opens the Schema Selector Dialog

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

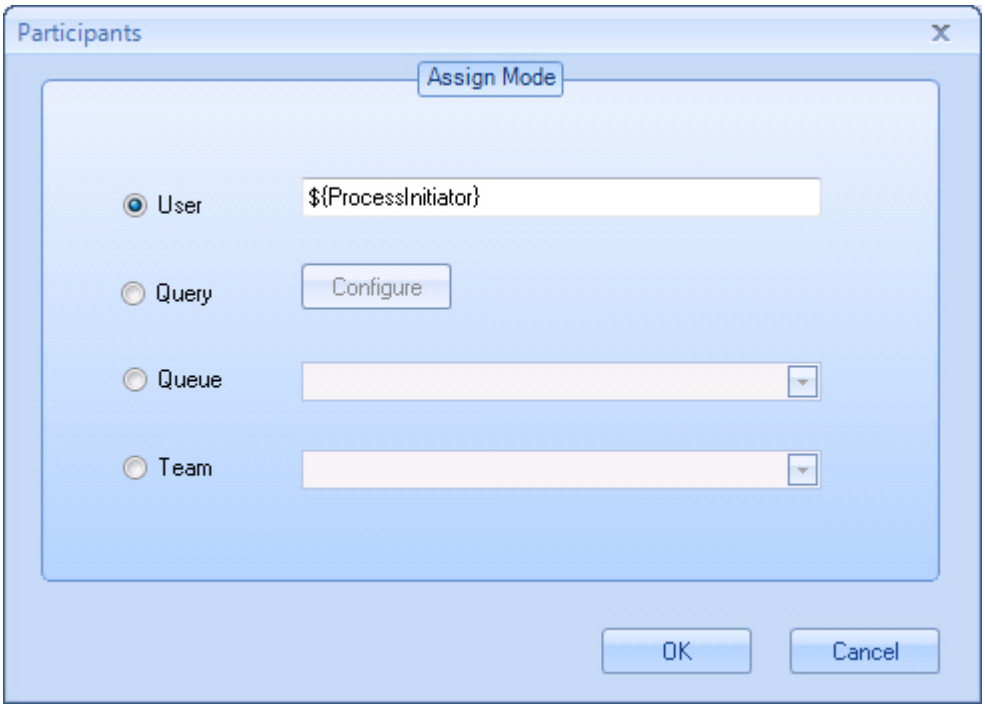
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Participants Window - Assign Mode

Default value: ${ProcessInitiator} Click the ellipsis button to open the configuration dialog:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ConfigurePartcipants** field, click the **Ellipses** button.

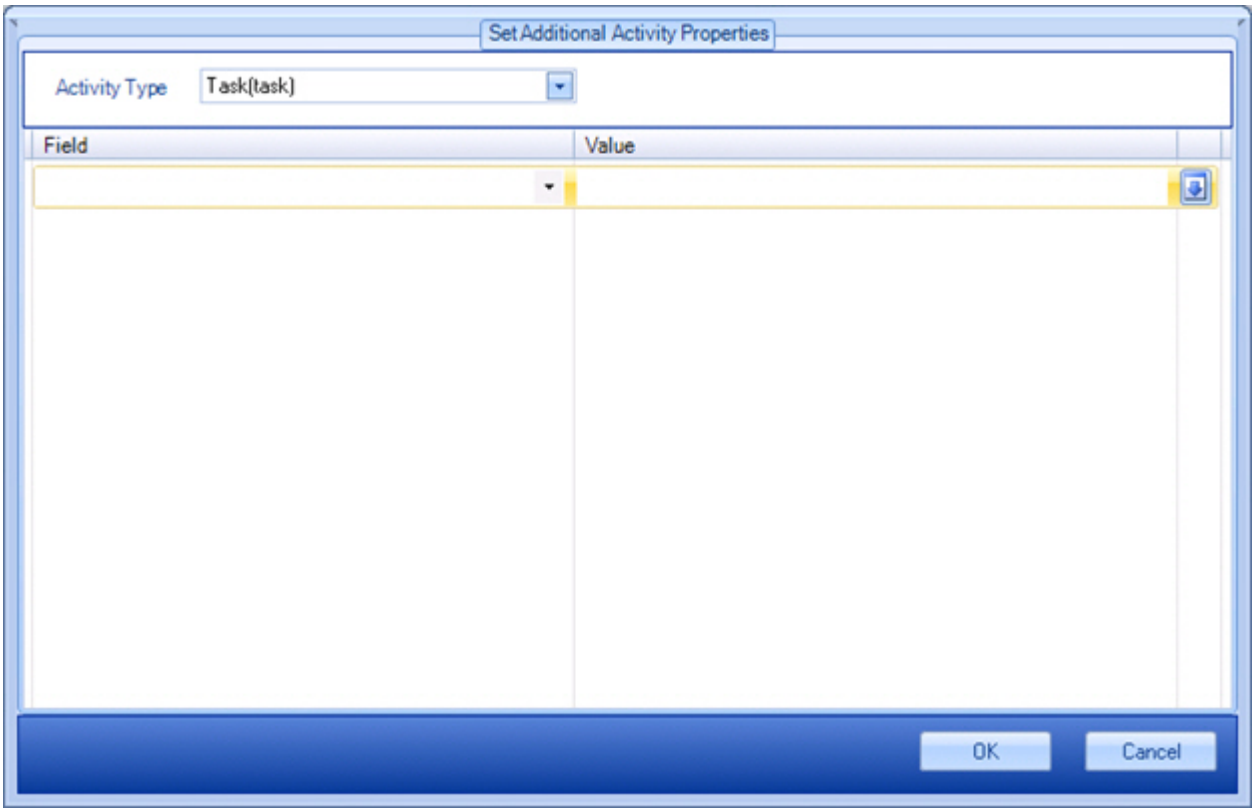
Field Definitions

Field Name	Definition
User	Definition: Can contain a static or dynamic value which can be one or more user IDs or user names. Multiple values should be separated by a semicolon ";" When multiple values are used, each participant gets a task and the shape is not Completed until all the participants have Completed (or Cancelled) their corresponding tasks. Type ${ to open the Schema Selector Dialog.
Query	Function: Click to open the Query Expression Builder. The query should return 1 or more values of one of these types: • systemuserid (e.g. ownerid of an account) • username (e.g. DOMAIN\loginid) SeeQuery Expression Builder
Queue	Definition: Select the corresponding Queue from the list. The task will appear in the selected Queue. When this is selected, the OwnerID property can also be set.
Team	Definition:

Field Name	Definition
	Select the corresponding Team from the list. The task will be assigned to the chosen Team. If any member of the Team completes (or Cancels) the task, the shape is Completed and the process progresses to the next step(s).

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.

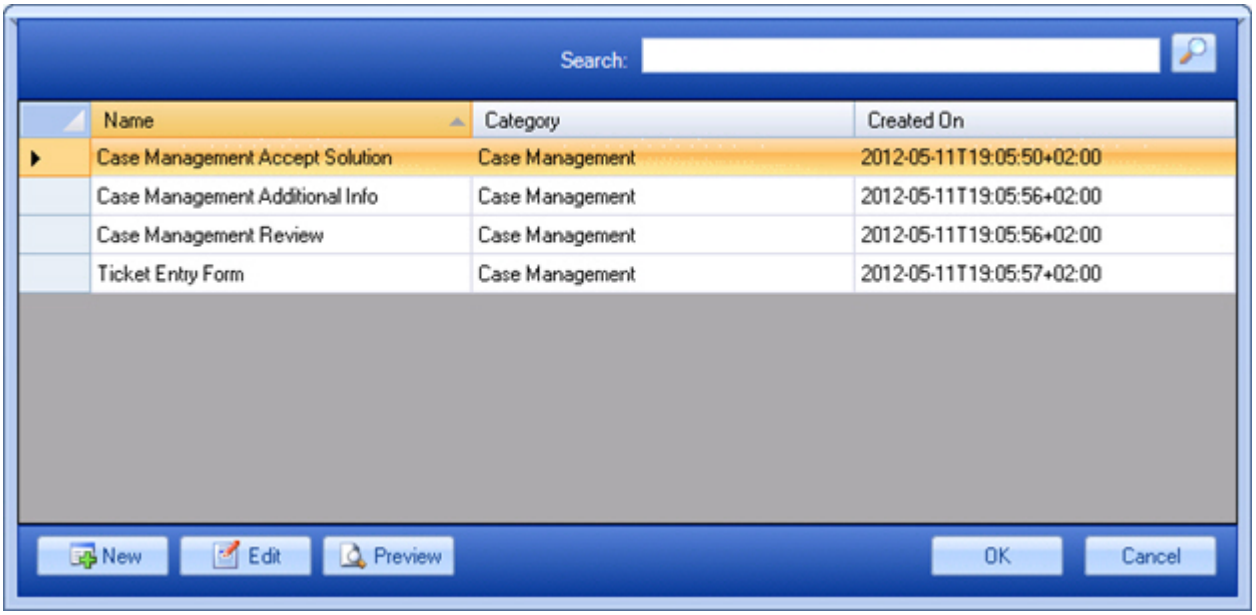
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ActivityProperties** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
ActivityType	Definition: Shows all the activity types including custom activity types
Field	Definition: Select the field for the selected Activity Type
Value	Definition: Sets the value of the Field. Type ${ to open the Schema Selector Dialog to enter a dynamic value
Down Arrow	Function: Add new Field-Value pair or Remove existing Field-Value pair

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:



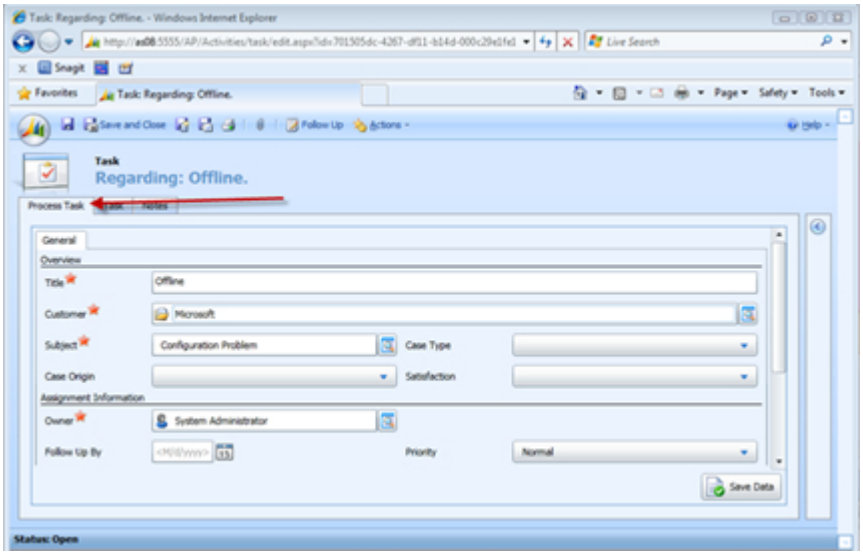
When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Manual Activities 2011**
   - **XRM Manual Activities 4**
   - **XRM External Connector**
3. Do one of the following:
   - On the **XRM Manual Activities 2011** or **XRM Manual Activities 4** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Form** field, click the **Ellipses** button.

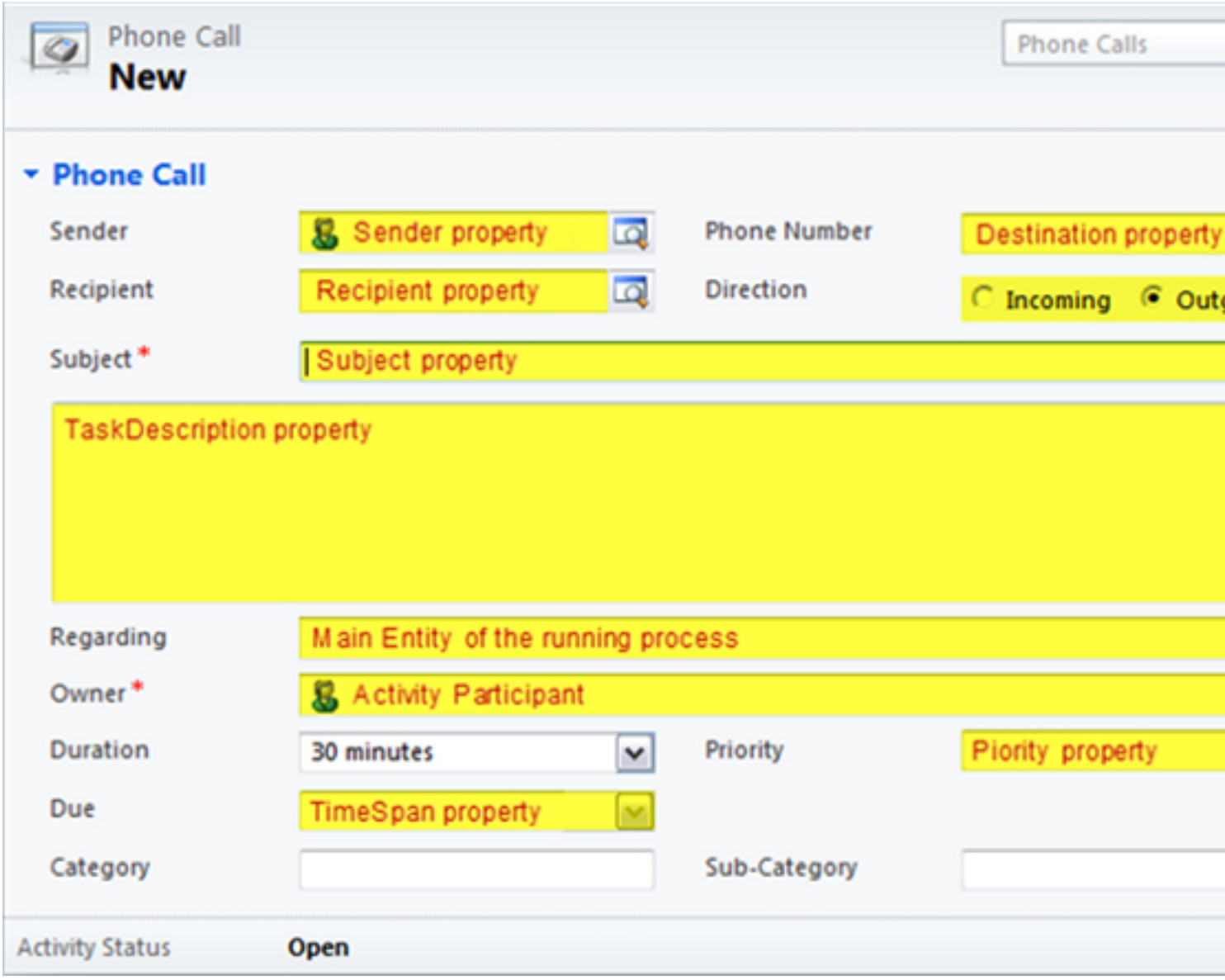
Form Example

The following is an example of a form created using the AgileXRM Form Designer.



Phone Call Activity Example

The following is an example of a form created using the Phone Call Activity AgileShape.



Service Activity

Note: This shape will be greatly enhanced in a future version.

This shape creates a Service Activity in CRM.

This shape can optionally have an AgileLightForm (ALF form) associated with it. This permits creating activity-based forms, which have all the fields necessary for carrying out this task by the user.

When the activity is Marked as Completed, the process flow continues.



Other fields including any custom fields in the Service entity can be updated using the Activity Properties property.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** stencil.
3. On the **XRM Manual Activities 2011** stencil, drag the **Service Activity** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
ConfigureParticipants	Opens the Following Window: Participants Window - Assign Mode Purpose of this Window: Default value: ${ProcessInitiator} Click the ellipsis button to open the configuration dialog:
ActivityProperties	Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:
Form	Opens the Following Window: Form Configuration Window Purpose of this Window: This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:
OwnerID	Definition:

Field Name	Definition
	When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record
Service	Definition: This sets the Service associated with this activity. It should be the ID of a Service entity.
Subject	Definition: This sets the subject field of the activity in CRM, this value can be either static or dynamic. Clicking the ellipsis button opens a window for setting the subject content: This window accepts dynamic values by typing these special characters ${ which opens the Schema Selector Dialog
TaskDescription	Definition: This sets the value of the description field in the CRM activity. Clicking the ellipsis button opens a window for setting the description content. This window accepts dynamic values by typing these special characters ${ which opens the Schema Selector Dialog

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

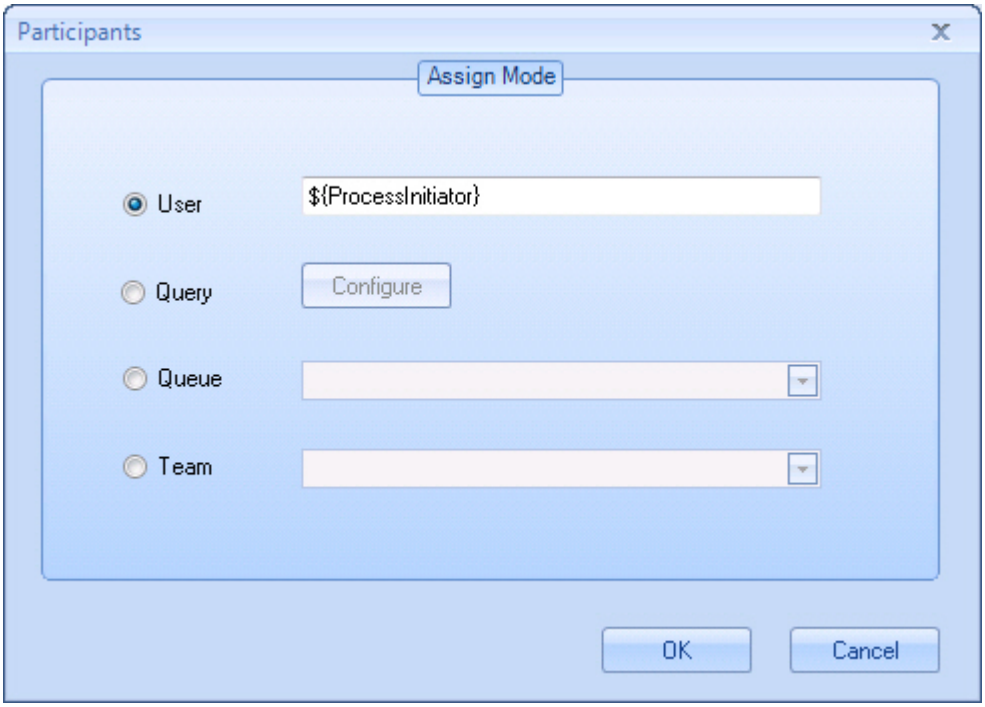
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Participants Window - Assign Mode

Default value: ${ProcessInitiator} Click the ellipsis button to open the configuration dialog:



Navigation

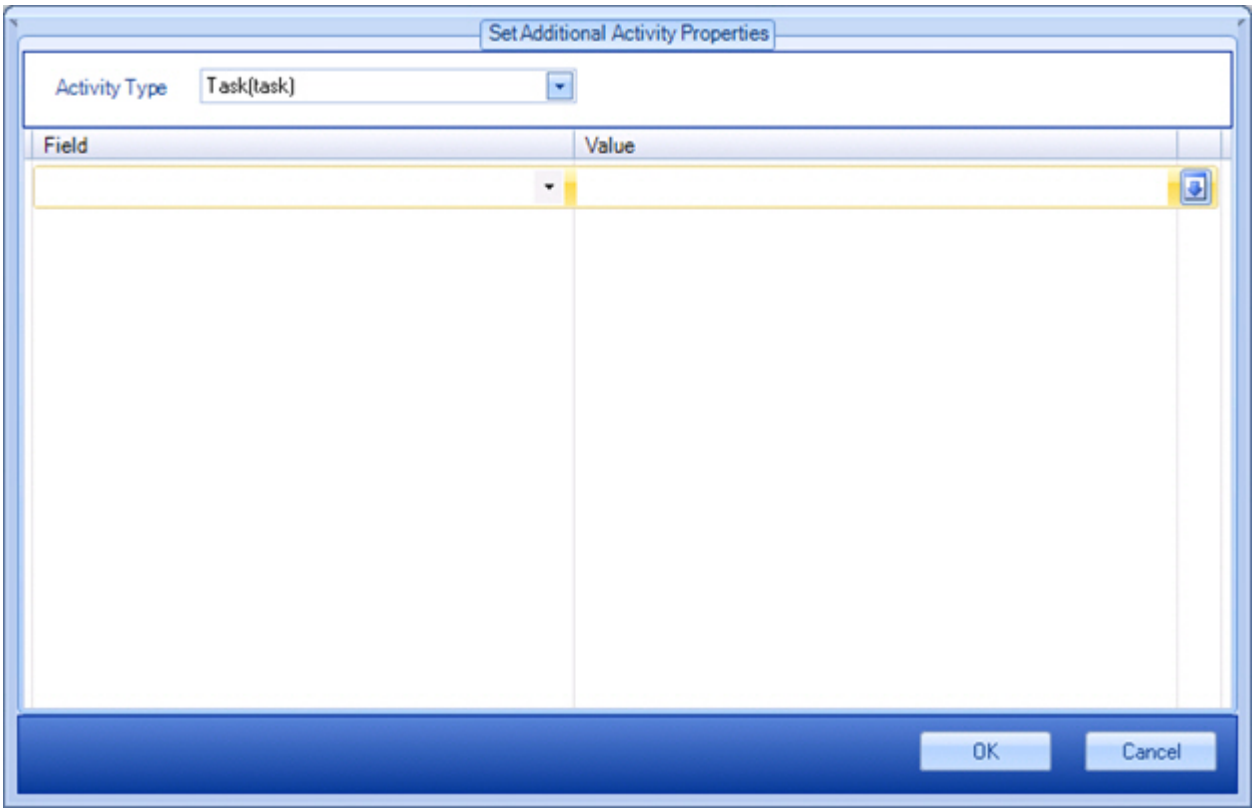
1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ConfigurePartcipants** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
User	Definition: Can contain a static or dynamic value which can be one or more user IDs or user names. Multiple values should be separated by a semicolon ";" When multiple values are used, each participant gets a task and the shape is not Completed until all the participants have Completed (or Cancelled) their corresponding tasks. Type ${ to open the Schema Selector Dialog.
Query	Function: Click to open the Query Expression Builder. The query should return 1 or more values of one of these types: • systemuserid (e.g. ownerid of an account) • username (e.g. DOMAIN\loginid) SeeQuery Expression Builder
Queue	Definition: Select the corresponding Queue from the list. The task will appear in the selected Queue. When this is selected, the OwnerID property can also be set.
Team	Definition: Select the corresponding Team from the list. The task will be assigned to the chosen Team. If any member of the Team completes (or Cancels) the task, the shape is Completed and the process progresses to the next step(s).

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ActivityProperties** field, click the **Ellipses** button.

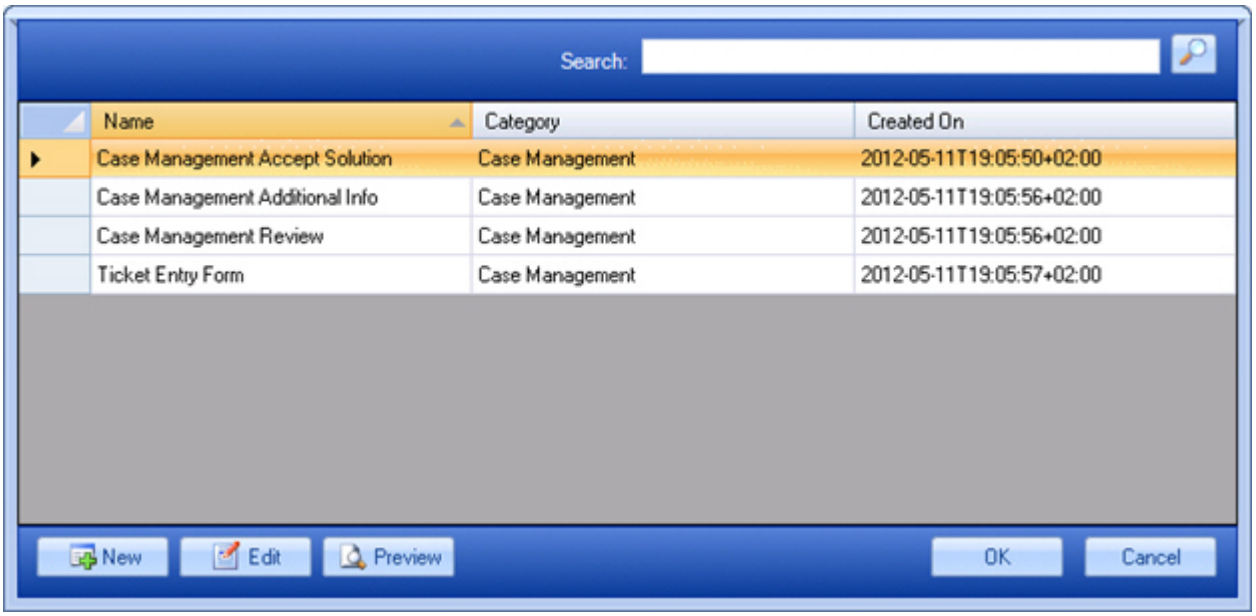
Field Definitions

Field Name	Definition
ActivityType	Definition: Shows all the activity types including custom activity types
Field	Definition:

Field Name	Definition
	Select the field for the selected Activity Type
Value	Definition: Sets the value of the Field. Type ${ to open the Schema Selector Dialog to enter a dynamic value
Down Arrow	Function: Add new Field-Value pair or Remove existing Field-Value pair

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:



When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

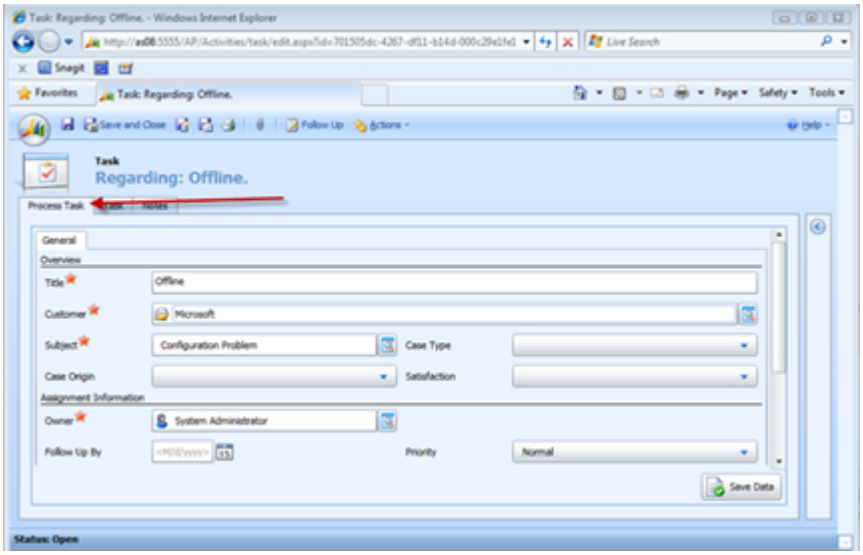
Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Manual Activities 2011**
   - **XRM Manual Activities 4**
   - **XRM External Connector**

3. Do one of the following:
   - On the **XRM Manual Activities 2011** or **XRM Manual Activities 4** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Form** field, click the **Ellipses** button.

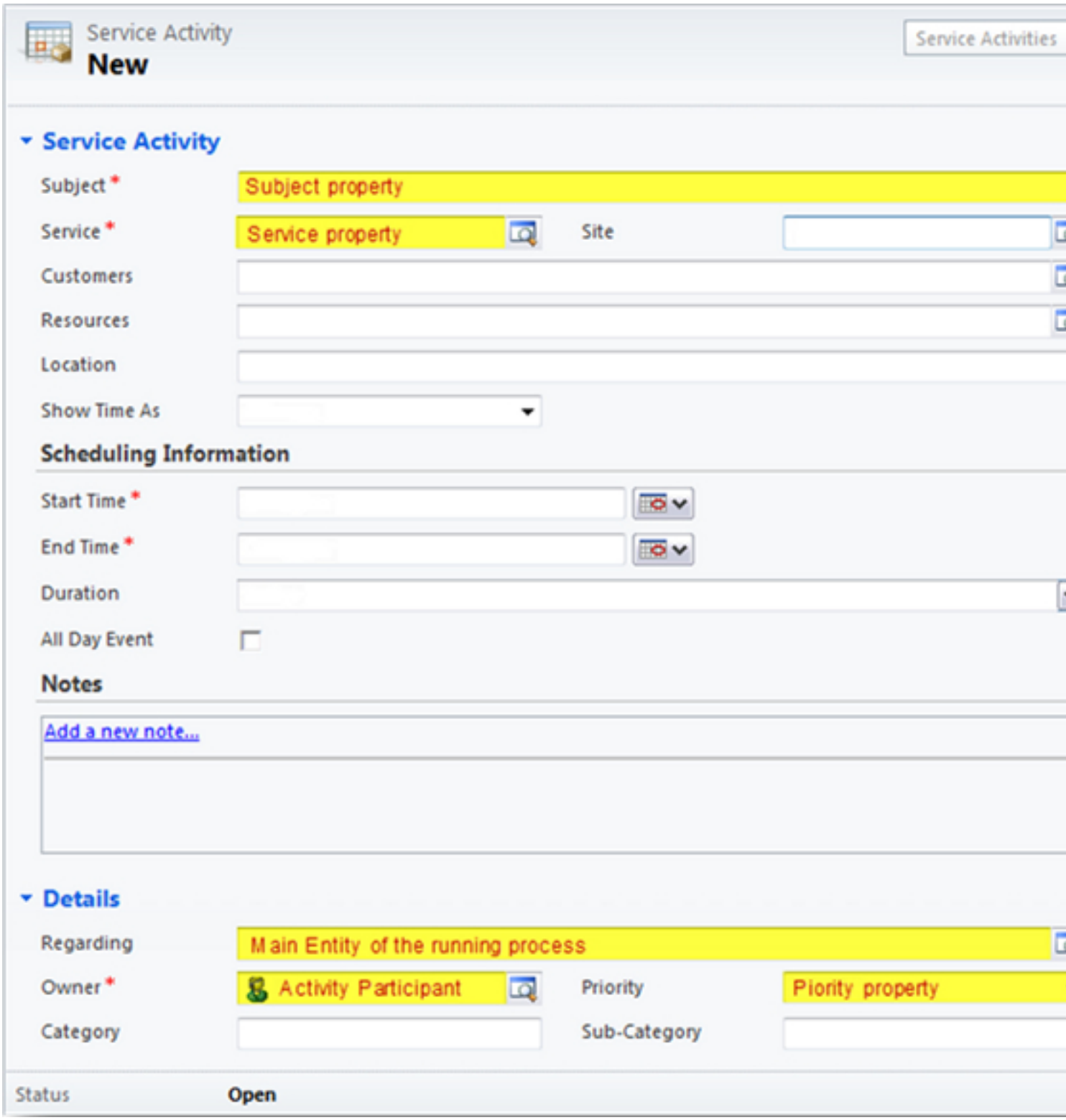
Form Example

The following is an example of a form created using the AgileXRM Form Designer.



Service Activity Example

The following is an example of a form created using the Service Activity AgileShape.


Service Activity
New
Service Activities
Service Activity
Subject *
Subject property
Service *
Service property
Site
Customers
Resources
Location
Show Time As
Scheduling Information
Start Time *
End Time *
Duration
All Day Event
Notes
Add a new note...
Details
Regarding
Main Entity of the running process
Owner *
Activity Participant
Priority
Piority property
Category
Sub-Category
Status
Open

XRM Automatic Activities 2011

This AgileXRM stencil contains AgileShapes that act upon CRM automatically. Most of these have equivalent or improved functionality to their CRM Workflow counterparts.

Additionally it contain a Search shape (similar to CRM Query in CRM WF), a Word/PDF creation shape (using Mail Merge), as well as two Sub-process shapes.

Add Note

Use this shape to add a Note to an entity.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Add Note** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
EntityId	Definition: This should be the ID of the desired entity record. This value is usually a dynamic value.
EntityType	Definition: Select the entity type. This can only be a static value selected from the drop-down list
Subject	Definition: Sets the title of the Note. It can be a static or a dynamic value.

Field Name	Definition
Text	Definition: Set the text of the body of the Note. It can be a static or a dynamic value.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

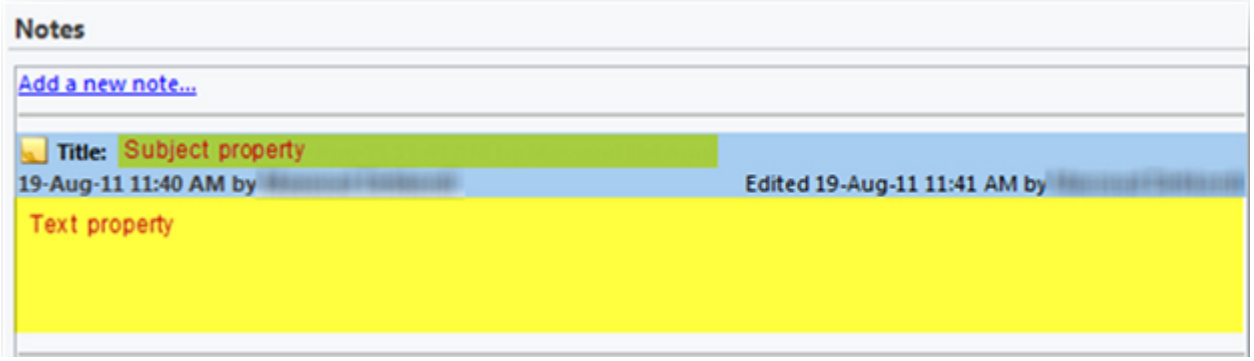
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Add Note Example

The following is an example of a form created using the Add Note AgileShape.



Assign to Manager

This shape will assign the Main Entity to the current owner's manager as defined in CRM.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Assign to Manager** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

This AgileShape has no unique properties.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime

- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Attach Document

This activity creates an attachment or attachments (annotation s) in a CRM entity.

The file or files to be attached must be accessible from the Process Engine server. The file must be located either in a local disk or UNC path and the user of the application pool user of AgilePoint Server must have access to this path.

Note: It is best practice not to attach files to entities as CRM is not the best place for document management. Rather, files should be stored in SharePoint in associated libraries.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Attach Document** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
EntityId	Definition: Default value: ${CrmBeId} This should be the ID of the desired entity record. This value is usually a dynamic value.
EntityName	Definition: Default value: Current Main Entity Select the entity type. This can be a static or dynamic value
FilePath	Definition: The full path to the local file or files (using wildcards) on the Process Server or a UNC path. This can be a dynamic value or contain dynamic values: e.g. C:\${DirectoryName}\${FileName} or \\server \sharedir\${filename2} or C:\myDir*.docx The Process Server (AgilePoint Server) Application Pool Identity must have Read permission on the file(s)
RemoveFileFromDisk	Definition: If set to True, the file or files are deleted from disk after being attached to the Entity. For this to work the Process Server (AgilePoint Server) Application Pool Identity should have Delete permission on the file(s)

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications

- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Change Ownership

This shape is used to change the Owner of an entity record to another User or Team.



Good to Know

- Owner field is a special field and cannot be changed using the Update Entity shape.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Change Ownership** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
EntityId	Definition:

Field Name	Definition
	This should be the ID of the desired entity record. This value is usually a dynamic value.
EntityName	Definition: Select the entity type. This can be a static or dynamic value
NewOwner	Definition: This can be any of these: If OwnerType property is set to User then it can be either CRM Domain Logon Name (domainname) or User (systemuserid). If OwnerType property is set to Team then it must be the Team ID.(teamid)
OwnerType	Definition: This can be either User or Team

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Change Ownership (Multi)

This shape is used to change the Owner of multiple entity records to another User or Team.

The set of records that are affected are selected by either:

- The ones returned by the query configured in the QueryExpression property
- From a semicolon-separated list of IDs passed via the EntityIds property



Good to Know

- Owner field is a special field and cannot be changed using the Update Entity (Multi) shape.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Change Ownership (Multi)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
EntityIds	Definition: This could be a list of entity record IDs separated with a semicolon (;). It can take dynamic variable(s)
EntityName	Definition: Select the entity type. This can be a static or dynamic value
NewOwner	Definition: This can be any of these:

Field Name	Definition
	If OwnerType property is set to User then it can be either CRM Domain Logon Name (domainname) or User (systemuserid). If OwnerType property is set to Team then it must be the Team ID.(teamid)
OwnerType	Definition: This can be either User or Team
QueryExpression	Opens the Following Window: Advanced Find - QueryExpression Configuration Window

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

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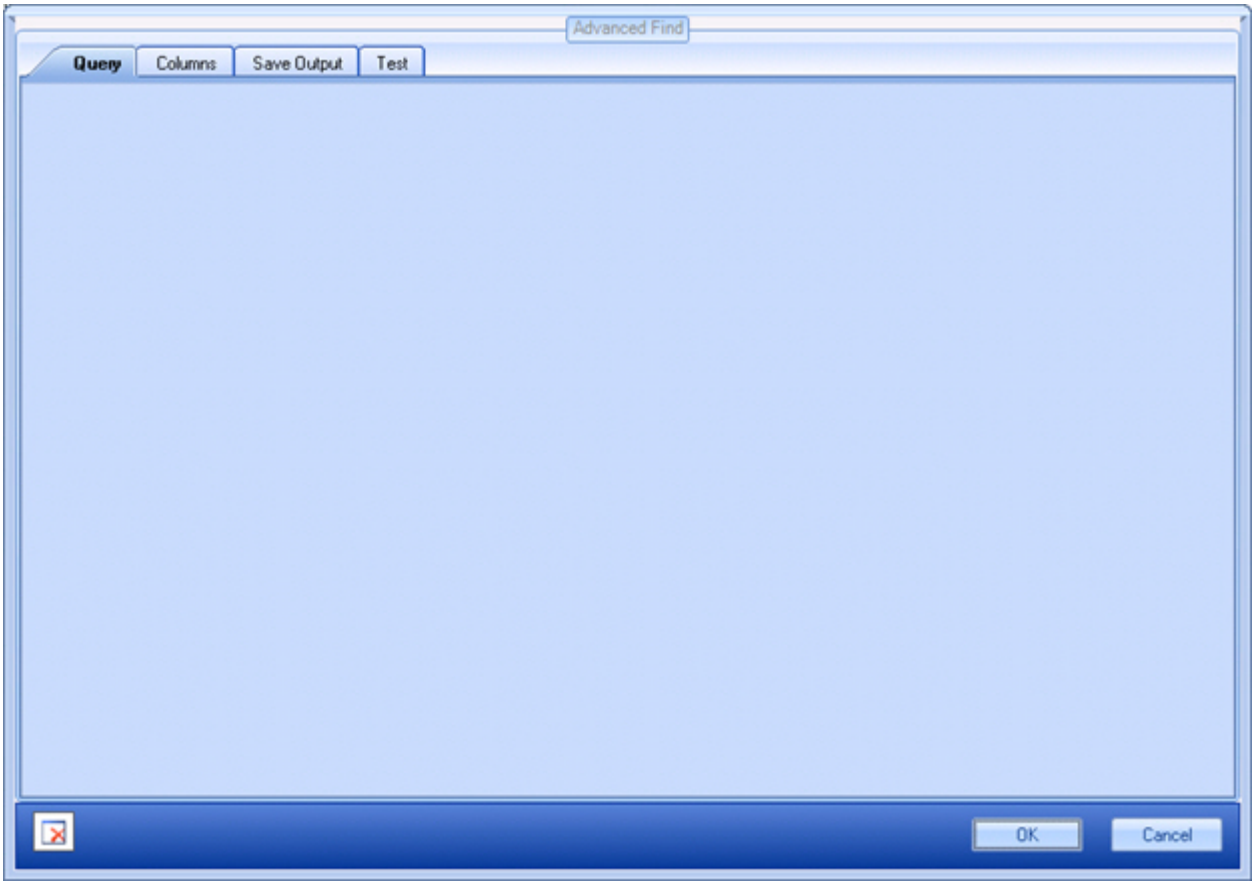
Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

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Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Advanced Find - QueryExpression Configuration Window



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM Manual Activities 2011**
3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **QueryExpression** field, click the **Ellipses** button.

Converter

This shape is used to perform these conversions on the Main Entity:

- Kit to Product
- Product to Kit
- Quote to Order
- Order to Invoice



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Converter** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
SaveStatusTo	Definition: Default value: Success Specifies the name of a process variable that should be updated when the AgileShape is exited. Depending if the shape executed correctly or if an error occurred, then the values true or false will be stored (as a String) in the process variable specified by this property. It is common to use a Single Condition shape directly afterwards, bound to the process variable
ConversionType	Definition: This can be one of the following: • KitToProduct • ProductToKit • QuoteToSales (i.e. Quote To Order) • OrderToInvoice
EntityId	Definition:

Field Name	Definition
	This should be the ID of the desired entity record. This value is usually a dynamic value.
SaveEntityIdTo	Definition: Set the name of the process variable that will hold the ID of the entity that is going to be created. The process variable can then be used elsewhere in the process

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

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Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Convert Lead

This shape converts a Lead to an Account and/or Contact and/or Opportunity.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Convert Lead** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Currency	Definition: When creating an opportunity, currency must be specified. This can be a static or dynamic value.
LeadId	Definition: ID of the Lead to be converted.
PotentialCustomer	Definition: Need to be specified when creating an opportunity only. If Lead is also converted to Contact or Account, potential customer is set to this Account or Contact automatically and this value does not need to be provided.
SaveEntityIdTo	Definition: Set the name of the process variable that will hold the ID of the entity that is going to be created. The process variable can then be used elsewhere in the process
ToAccount	Definition: If set to True an Account is created
ToContact	Definition: If set to True a Contact is created

Field Name	Definition
ToOpportunity	Definition: If set to True an Opportunity is created

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

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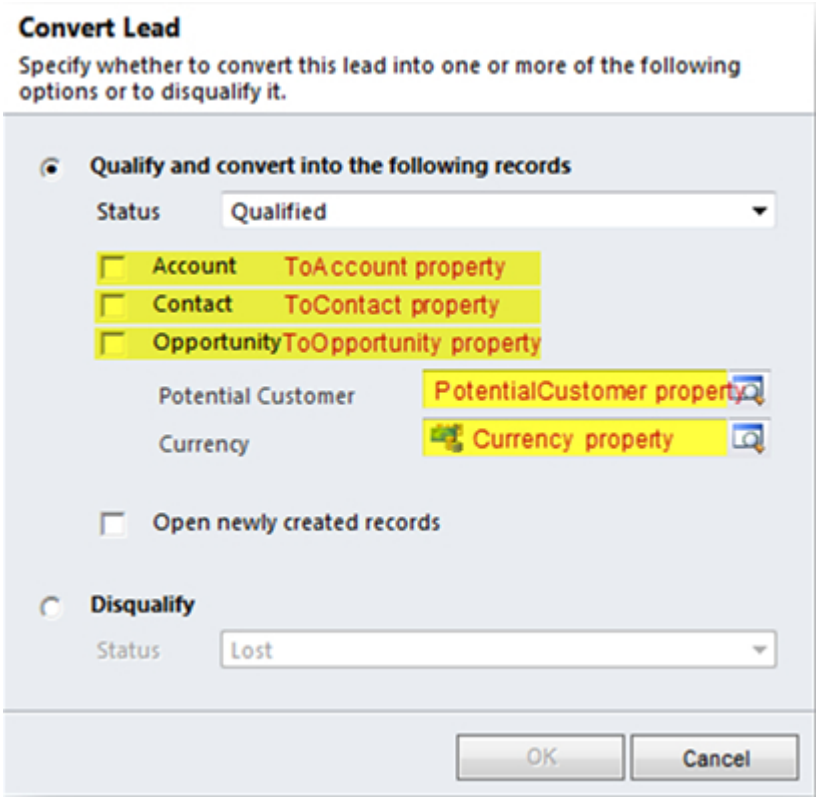
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Convert Lead Example

The following is an example of a form created using the Convert Lead AgileShape.



Create Association

This shape is used to create a record in a M:M relationship, for example to add a Role to a User.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Create Association** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: Create Association Window

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

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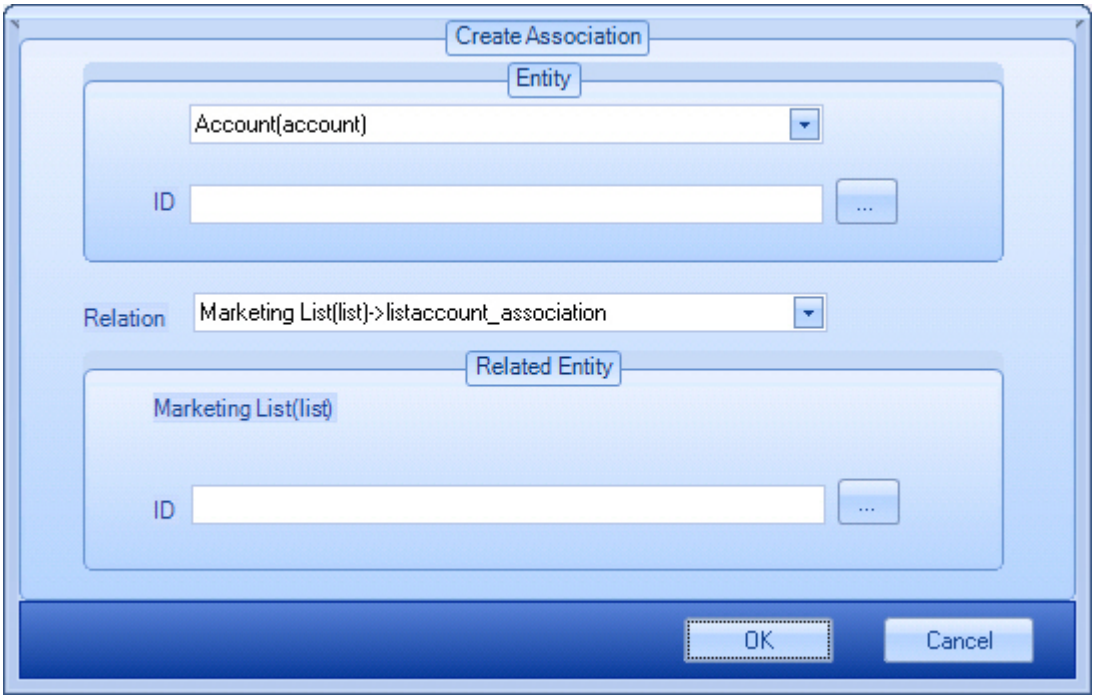
Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

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Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Create Association Window



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Create Association** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Entity	Definition: Select the entity type from one side of the M:M relationship
Entity ID	Definition: Enter the Entity ID for the above entity type. This can be a dynamic value.

Field Name	Definition
	Click the ellipsis button to open the Schema Selector dialog
Relation	Definition: Select the entity type for the other side of the M:M relationship
Related Entity ID	Definition: Enter the Entity ID for the related entity type. This can be a dynamic value. Click the ellipsis button to open the Schema Selector dialog

Create Connection (AgileXRM 2011)

This shapes is used to create Connections between two records



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** stencil.
3. On the **XRM Automatic Activities 2011** stencil, drag the **Create Connection** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Configuration	Opens the Following Window: Connections Editor Window

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

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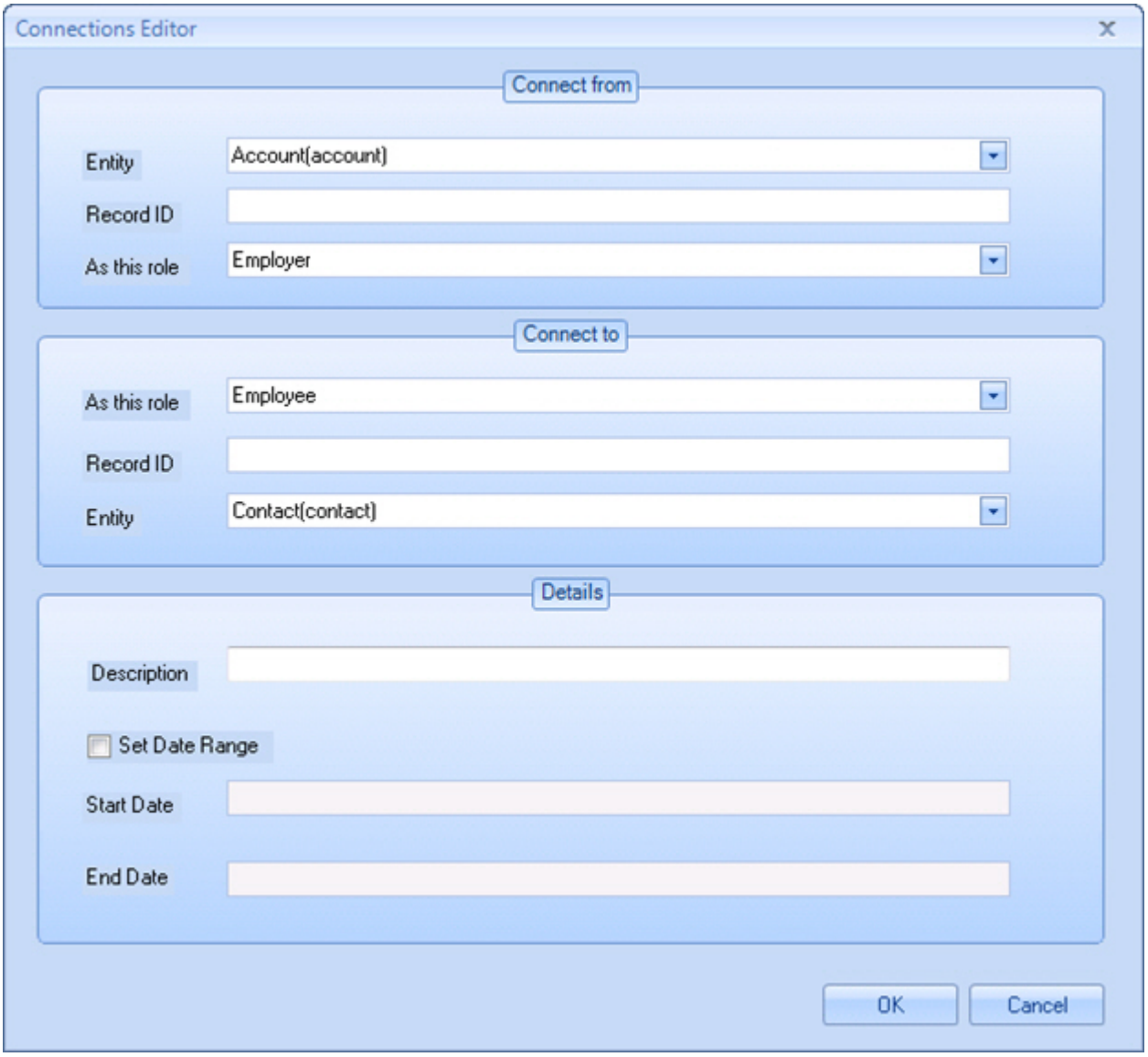
Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Connections Editor Window



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** stencil.
3. On the **XRM Automatic Activities 2011** stencil, drag the **Create Connection** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Connect from - Entity	Definition: Entity name of the From side of the connection
Connect from - Record ID	Definition: Record ID of the From side of the connection
Connect from - As this role	Definition: Role of the From side of the connection
Connect to - As this role	Definition: Role of the To side of the connection
Connect to - Record ID	Definition: Record ID of the To side of the connection
Connect to - Entity	Definition: Entity name of the To side of the connection
Description	Definition: Text field to add explanation to the connection.
Set Date Range	Definition: If set, enables the Start and End Date fields
Set Date Range - Start Date	Definition: Connection valid from this date
Set Date Range - End Date	Definition: Connection valid to this date

Create Connection Example

The following is an example of a form created using the Create Connection AgileShape.



Create Entity

This activity is used to create an entity record, including custom entities and even entities not related to the Main Entity.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Create Entity** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
EntitySpecification	Opens the Following Window: Set Properties - EntitySpecification Configuration Window Purpose of this Window: This is for updating the values of different attributes in the entity.
EntityType	Definition: Select the entity type. This can only be a static value selected from the drop-down list
MainProcessEntity	Definition: Indicates if the newly created entity becomes the Main Entity or not (i.e. the CrmBeId process variable will hold the ID of the created record, and CrmBeType variable will hold the entity type) Note: This functionality is for a process that does not have a Main Entity since the record is created as part of the process itself, rather than initiated against an existing record. What it is not designed for, is for changing the Main Entity mid-process. The only supported way of acting upon a different Main Entity is to use Sub-processes that have the desired Main Entity.
SaveEntityIdTo	Definition: Set the name of the process variable that will hold the ID of the entity that is going to be created. The process variable can then be used elsewhere in the process

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

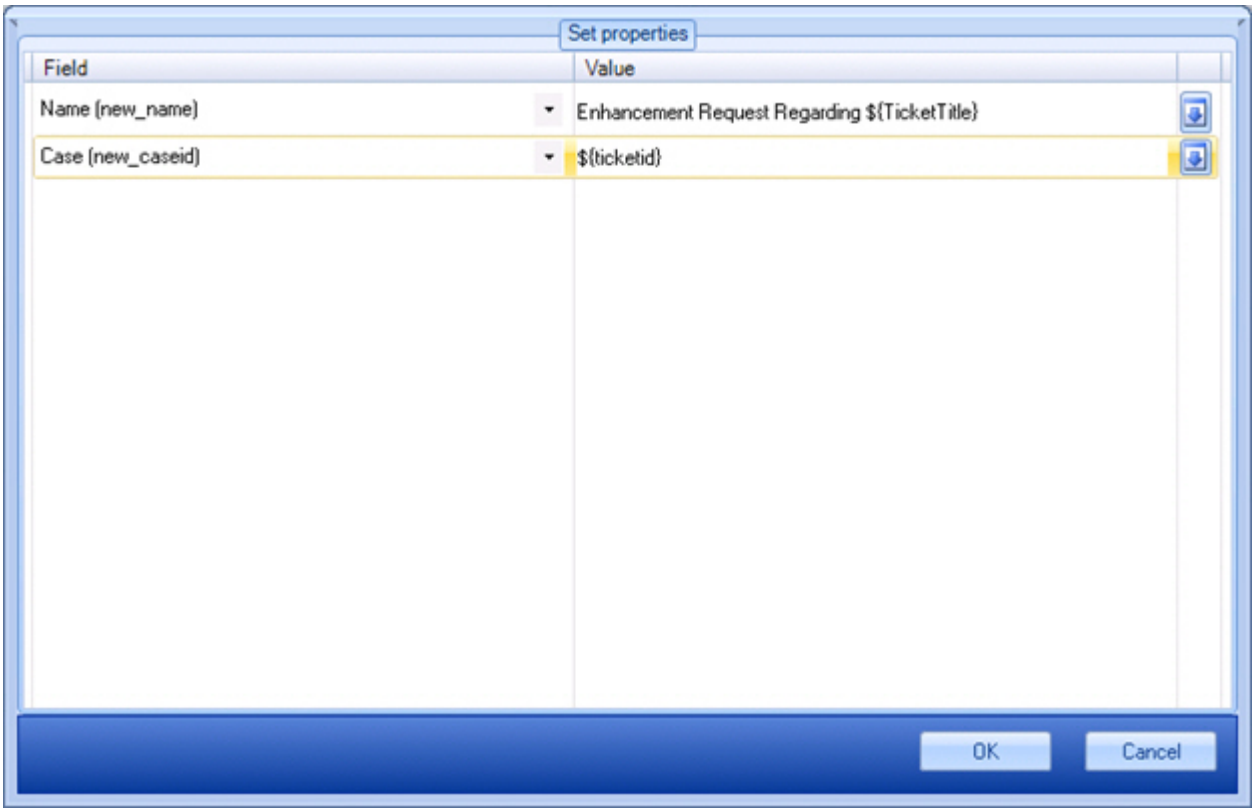
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Set Properties - EntitySpecification Configuration Window

This is for updating the values of different attributes in the entity.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag any of the following AgileShape, and drop it on the process template:
   - **Create Entity**
   - **Update Entity**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **EntitySpecification** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Field	Definition: Select the desired attribute to update from the list of all the attributes for the entity
Value	Definition:

Field Name	Definition
	The Value to set for the attribute. It can be static or dynamic. For dynamic value type ${ to open the Schema Selector Dialog
Down Arrow	Function: Add a new row or Remove an existing row from the grid

Delete Entity

This shape deletes an entity record from CRM.



Good to Know

- Standard CRM rules and restrictions apply (e.g. Role, Referential integrity etc).

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Delete Entity** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
EntityId	Definition: This should be the ID of the desired entity record. This value is usually a dynamic value.
EntityName	Definition: Select the entity type. This can be a static or dynamic value

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Delete Entity (Multi)

This shape deletes multiple entity records from CRM.

The set of records that are affected are selected by either:

- The ones returned by the query configured in the QueryExpression property
- From a semicolon-separated list of IDs passed via the EntityIds property



Good to Know

- Standard CRM rules and restrictions apply (e.g. Role, Referential integrity etc).

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Delete Entity (Multi)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
EntityIds	Definition: This could be a list of entity record IDs separated with a semicolon (;). It can take dynamic variable(s)
EntityName	Definition: Select the entity type. This can be a static or dynamic value
QueryExpression	Opens the Following Window: Advanced Find - QueryExpression Configuration Window

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

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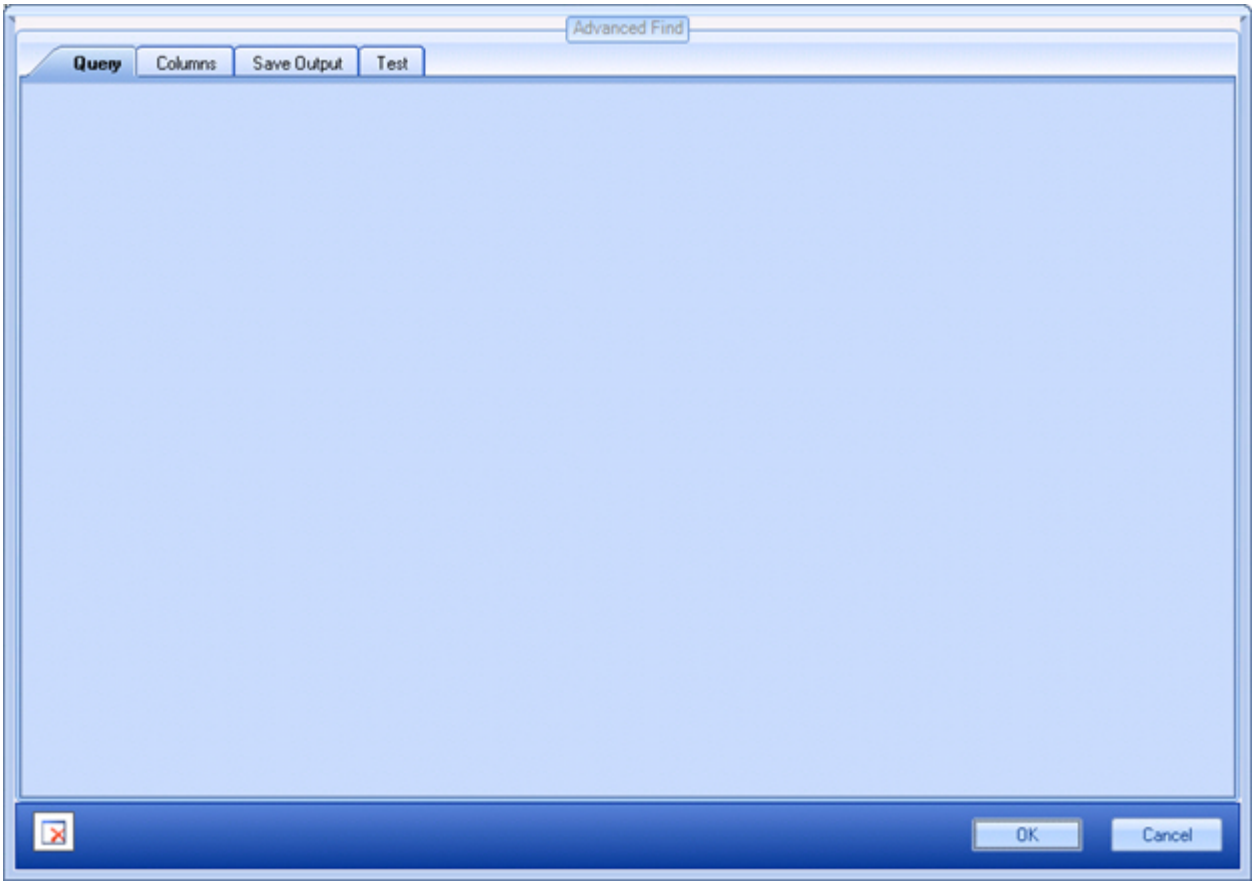
Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

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Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Advanced Find - QueryExpression Configuration Window



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:

- **XRM Automatic Activities 2011**
- **XRM Automatic Activities 4**
- **XRM Manual Activities 2011**

3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **QueryExpression** field, click the **Ellipses** button.

Detach Document

This shape is used to copy/move all attachments (annotations) from an entity to a SharePoint Library or Folder (which must already exist).

An entity Field (of Type Text and of Format URL) can be configured to hold the URL of the filename in SharePoint, so that the file in SharePoint is associated with the entity.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Detach Document** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
EntityId	Definition: This should be the ID of the desired entity record. This value is usually a dynamic value.
EntityName	Definition: Select the entity type. This can be a static or dynamic value
RemoveNotes	Definition:

Field Name	Definition
	If set to True, the attachment is deleted from the entity after being stored in SharePoint
SharePointUrl	Definition: This is the URL of an existing SharePoint Library or Folder where the file in the attachment is going to be stored. It can contain dynamic values with ${
UrlFieldName	Definition: This is the name of the field of the entity to store the URL of the filename that is now stored in SharePoint. Make sure the field is of Type Text and of Format URL.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

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Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Search XRM

This shape can:

- Check if a certain Search criteria in CRM is met or not
- Optionally, return the records that meet a certain search criteria in CRM



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Search XRM** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Exists	Definition: The holds the name of the variable that is set depending if the query expression returns zero (False) or one-or-more records (True). By default the name of the variable is Exists, but this can set to any valid variable name. It is common to use this variable to take decisions later in the process.
QueryExpression	Opens the Following Window: Advanced Find - QueryExpression Configuration Window
ResultCount	Definition: The holds the name of the variable that is set to the number of records that the query expression has returned. By default the name of the variable is ResultCount, but this can set to any valid variable name.

Field Name	Definition
ReturnAllRecords	Definition: Default value: False • False – The variables defined in the Save Output tab of the QueryExpression dialog are set to the first record that meets the search criteria • True - The variables defined in the Save Output tab of the QueryExpression dialog are set to a semicolon-separated list of all records returned by the search criteria

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

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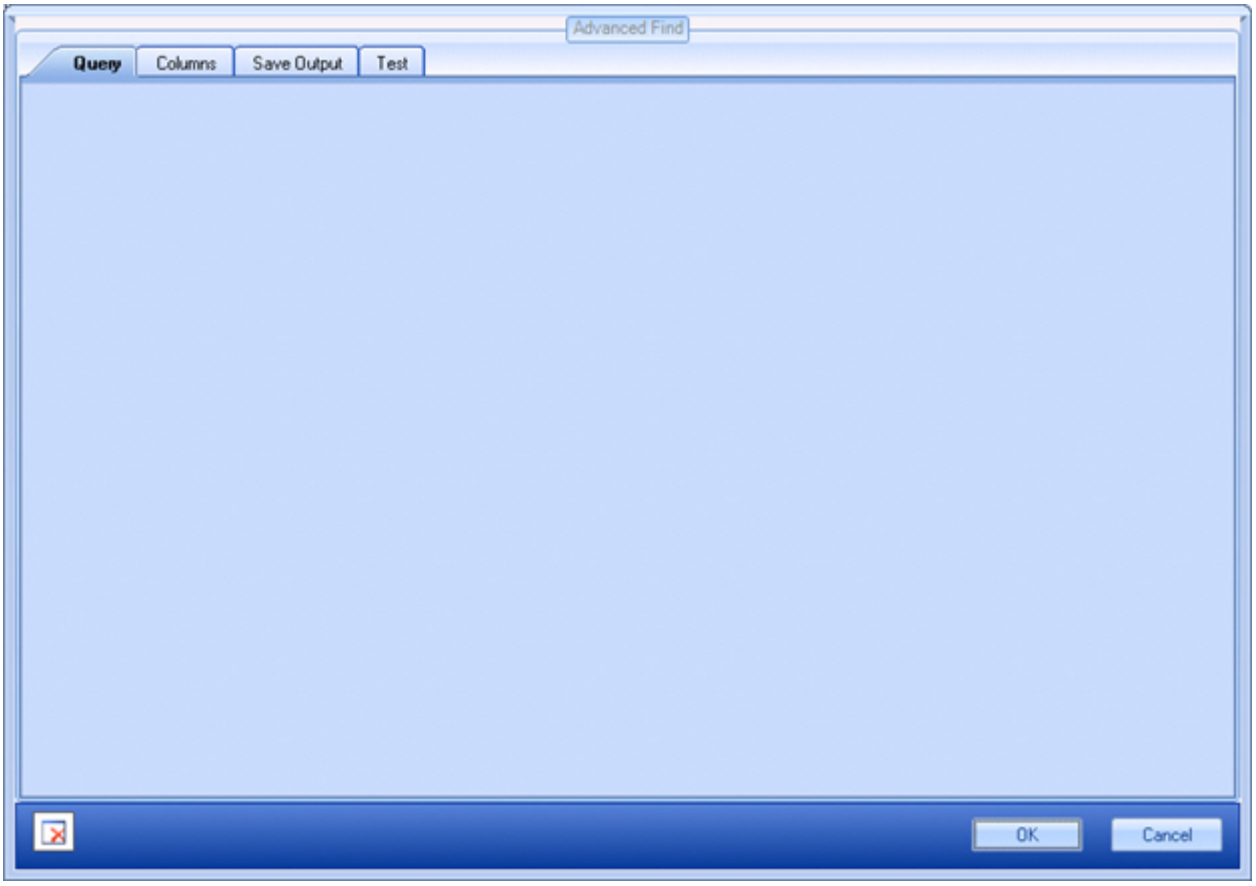
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Add/Remove Timer

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Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Advanced Find - QueryExpression Configuration Window



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM Manual Activities 2011**
3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **QueryExpression** field, click the **Ellipses** button.

Send XRM Email

This shape is used to send an email using a CRM Email Template.

The Regarding object of this email will be the Main Entity of the process, that means that the created email activity will be in activity history of the record.

Use this shape if you want to reutilize existing CRM Email Templates.

AgileXRM Email Templates, which are used in the other Email Shapes, are much more powerful and flexible. For a comparison see the Email Shape Comparison Table.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Send XRM Email** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
RegardingType	Definition: This is the entity type for the Email Template. Use the ellipsis button to open the configuration dialog Opens the Following Window: Send mail using XRM template Window
SenderId	Definition: This is the ID of the User or Queue. In case of User it can be a dynamic value. Use the ellipsis button to open the configuration dialog Opens the Following Window: Send mail using XRM template Window
SenderTypeName	Definition: This is either User (systemuser) or Queue (queue). Use the ellipsis button to open the configuration dialog Opens the Following Window:

Field Name	Definition
	Send mail using XRM template Window
TemplateName	Definition: This is the name of the Email Template in CRM. Use the ellipsis button to open the configuration dialog Opens the Following Window: Send mail using XRM template Window

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

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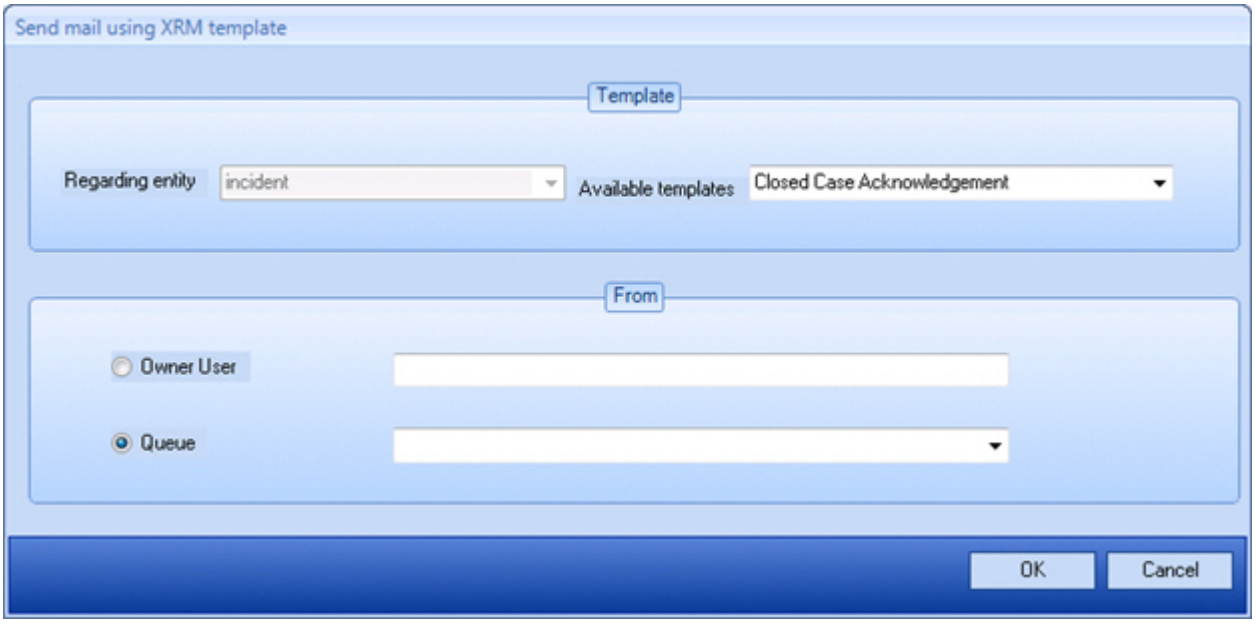
Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

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Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Send mail using XRM template Window



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Send XRM Email** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On one of the following fields, click the **Ellipses** button:
   - **RegardingType**
   - **SenderId**
   - **SenderTypeName**
   - **TemplateName**

Field Definitions

Field Name	Definition
Regarding entity	Definition: This is the entity type for the Email Template.
Available templates	Definition:

Field Name	Definition
	This is the name of the Email Template in CRM
Owner User	Definition: This is the ID of the User (systemuser) that will be the Owner of this email activity. It can be a dynamic value by entering ${
Queue	Definition: This list the available Queue Names. Select which is to become the Owner of the email activity

Set Status

This shape is used to change the Status &Status Reason of a record in CRM.



Good to Know

- Status fields are special fields and cannot be changed using the Update Entity shape.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Set Status** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
ClosePendingTasks	Definition: When set to True, it closes all open tasks associated to this record, before the status is changed

Field Name	Definition
Closing Task Subject	Definition: Certain types of entities (e.g. Opportunity) create a Close Task when their status is changed to Closed. This property sets the Subject field of that Close Task.
EntityId	Definition: This should be the ID of the desired entity record. This value is usually a dynamic value.
EntityName	Definition: Select the entity type. This can be a static or dynamic value
Status	Definition: Note: Set the EntityName property first in order to fill the drop-down list of this property. This combo field is for selecting the Status and Status Reason combination for the entity However, it can take a dynamic value by typing ${variable}which should resolve to a Status value (not the display name –e.g. 2 instead of “Inactive”)
StatusStateValue	Definition: This is the value of the Status Reason to be used. If the Status property is set from the drop-down, then this property is filled automatically. If however, the Status property is set to a variable, then you can also use a ${variable} for this property, and it should resolve to a value (not the display name –e.g. 2 instead of “Inactive”)

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime

- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

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Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

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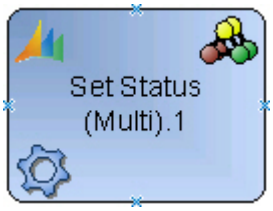
Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Set Status (Multi)

This shape is used to change the Status & Status Reason of multiple entity records in CRM.

The set of records that are affected are selected by either:

- The ones returned by the query configured in the QueryExpression property
- From a semicolon-separated list of IDs passed via the EntityIds property



Good to Know

- Status fields are special fields and cannot be changed using the Update Entity (Multi) shape.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Set Status (Multi)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
ClosePendingTasks	Definition: When set to True, it closes all open tasks associated to this record, before the status is changed
Closing Task Subject	Definition: Certain types of entities (e.g. Opportunity) create a Close Task when their status is changed to Closed. This property sets the Subject field of that Close Task.
EntityIds	Definition: This could be a list of entity record IDs separated with a semicolon (;). It can take dynamic variable(s)
EntityName	Definition: Select the entity type. This can be a static or dynamic value
QueryExpression	Opens the Following Window: Advanced Find - QueryExpression Configuration Window
Status	Definition: Note: Set the EntityName property first in order to fill the drop-down list of this property. This combo field is for selecting the Status and Status Reason combination for the entity However, it can take a dynamic value by typing ${variable}which should resolve to a Status value (not the display name –e.g. 2 instead of “Inactive”)
StatusStateValue	Definition: This is the value of the Status Reason to be used. If the Status property is set from the drop-down, then this property is filled automatically. If however, the Status property is set to a variable, then you can also use a ${variable} for this property, and it should resolve to a value (not the display name –e.g. 2 instead of “Inactive”)

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

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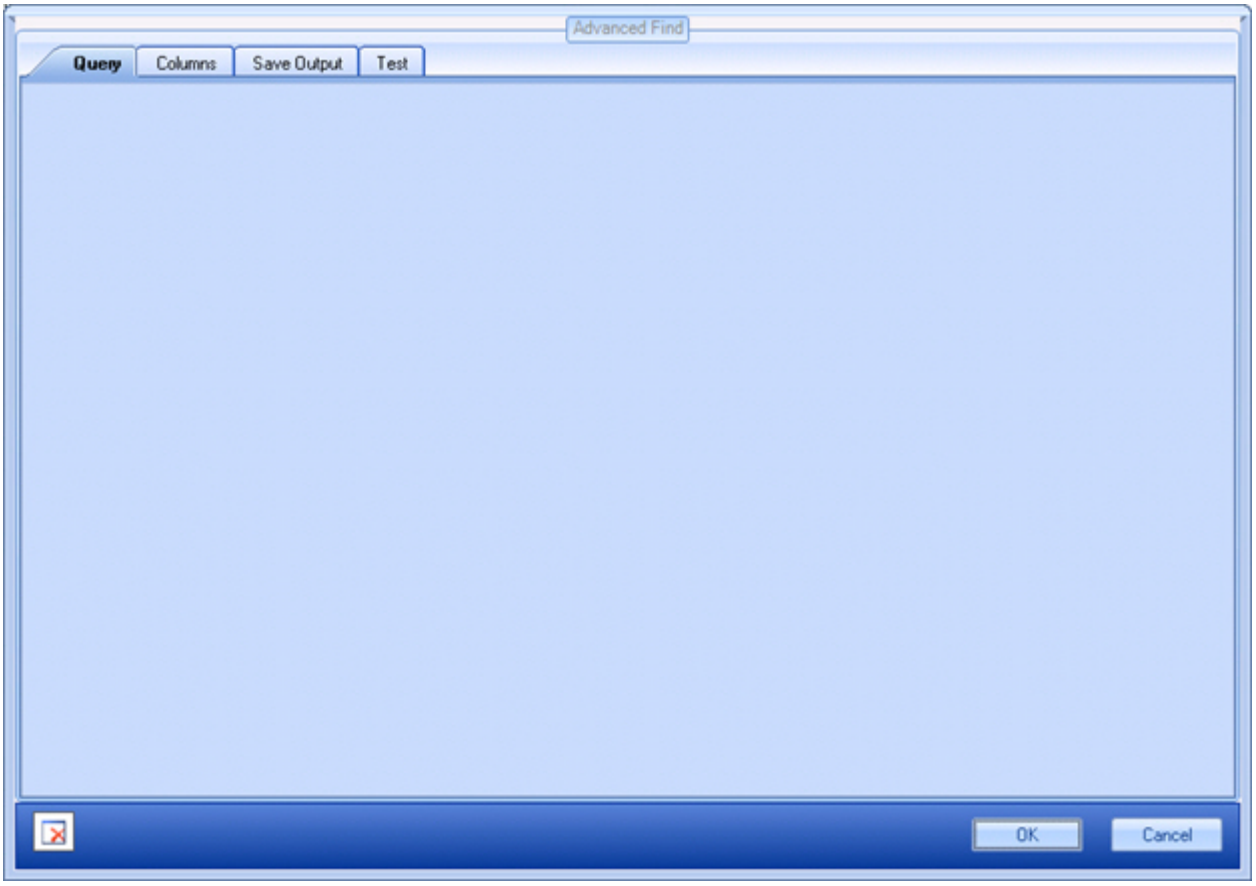
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Advanced Find - QueryExpression Configuration Window



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM Manual Activities 2011**
3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **QueryExpression** field, click the **Ellipses** button.

Subprocess

When entered, this AgileShape will initiate another AgileXRM process instance as a sub-process.

This functionality is useful for breaking complex processes to more manageable chunks and also allows creating more modular processes, and enhances reusability.

It allows selecting any AgileXRM Process. For initiating other types of processes, use the Subprocess shape in the Generic stencil.

This shape does NOT share the context of the caller with the child, assuming that the Main Entity of the child is different. To pass variables to the child process use the SubProcessParams property.

child

When selecting a sub-process, it is possible to initiate the latest version or a particular version. Please see below for details of choosing which version of the sub-process template to initiate.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Subprocess** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
NamePrefix	Definition: SubProcesses and SubDialogs Instance Names can be overridden by using this property. It can have static and dynamic values, e.g. “Order Detail ${OrderItemID}”. This is added as such to the name of the process instance: processInstanceID + “_!_” + NamePrefix + “_!_” NOTE: The value of this property overrides the one set at SubProcess/ SubDialog level in the Process Name tab of the XRM Connection window in Envision.
Sub Process	Opens the Following Window: Process Selector Window Purpose of this Window:

Field Name	Definition
	This opens the Process Selector dialog for choosing which process and version to initiate.
SubProcessParams	Opens the Following Window: Subprocess Parameters Window Purpose of this Window: This opens the Subprocess Parameters dialog for passing variables to the sub-process:
Wait	Definition: Default value: True • True - The process will wait for the sub-process to finish before considering this step completed (i.e. synchronous) False – The process will launch the sub-process but will not wait for it to complete(i.e. asynchronous)

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

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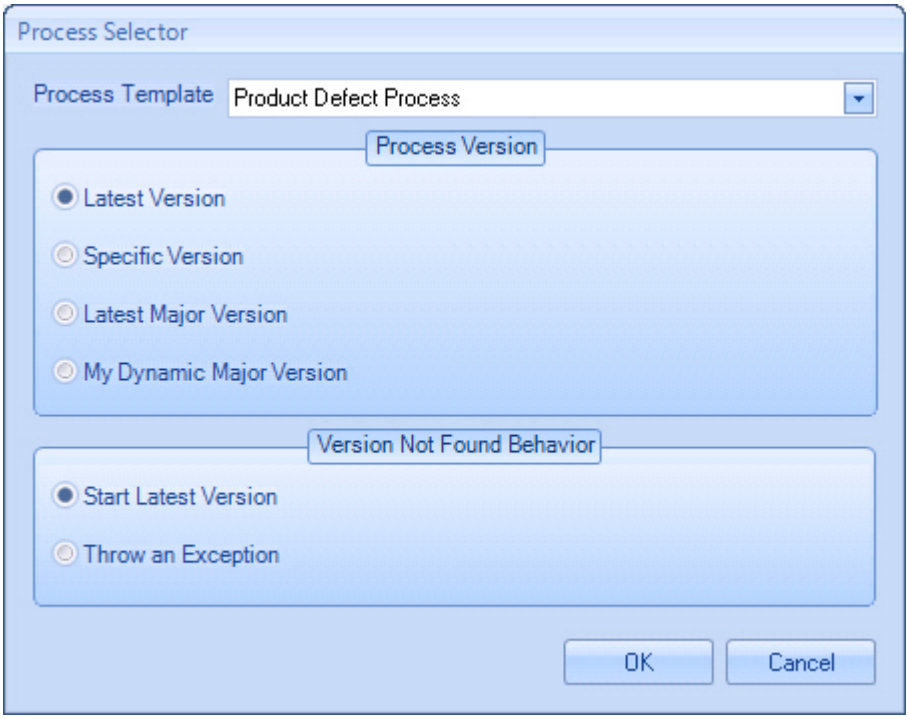
Add/Remove Timer

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Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Process Selector Window

This opens the Process Selector dialog for choosing which process and version to initiate.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM AgileDialogs 2011**
3. Do one of the following:
   - On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Subprocess** or **Subprocess (Multi)** AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
     - **SubDialog** AgilePart
     - **Dialog Task** AgileWork
     - **Intranet Dialog Task** AgileWork

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Sub Process**
   - **Sub Dialog**
   - **Dialog**
6. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

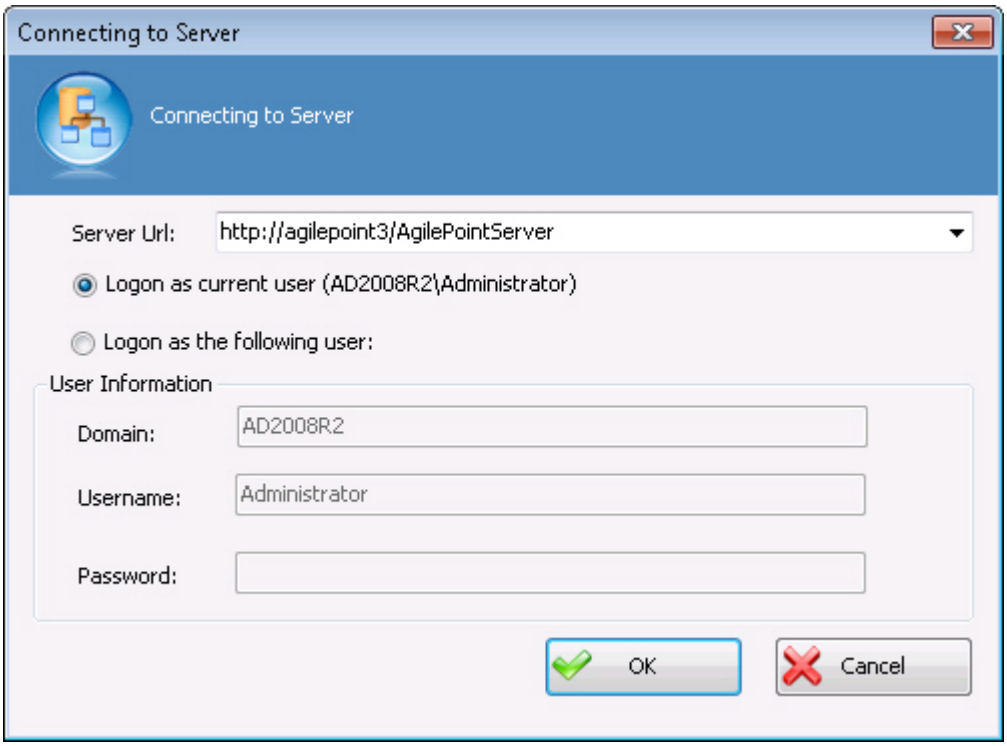
Field Name	Definition
Process Template	Definition: This drop-down list will show all the processes that are already published in the Process Engine (AgilePoint Server). Select the name of the process that you want to initiate as a sub-process.
Process Version - Latest Version	Function: The process model version that has the status of Released is initiated, (usually, but not necessarily, the latest version of the model)
Process Version - Specific Version	Function: When this is chosen, all the available versions (including ones with the status of Retired) are listed in the drop-down list. Select the specific version of the model that you want to initiate as a sub-process.
Process Version - Latest Major Version	Function: Version numbers are in the form Major.Minor (e.g. 4.06 or 3.50). When this option is selected, all the available Major versions of the selected Process Template are listed in the drop-down (including ones with the status of Retired). When the process arrives to this shape, it starts the highest Minor version of the chosen Major version.
Process Version - My Dynamic Major Version	Function: The calling parent process has a Major version. The version of the sub-process that is initiated is the highest Minor version of this Major version. This functionality is useful under 2 circumstances:

Field Name	Definition
	1. You only have one environment (production) and it is not possible to test your new processes in another environment before publishing them to the production environment. 2. Although you do have a test environment, you need to keep running these interdependent processes in the same version. It is best to set the Major version for all these related processes to the same value. When you want to deploy many new Templates, increment the Major version for all of them, so that existing running processes do not initiate the new Templates but the corresponding Template in their own Major version. For example, you have 3 related processes: • Process A at version 1.04 • Sub-Process B at version 1.34 – initiated from A • Sub-Process C at version 1.20 – initiated from B Let's say you continue enhancing these processes and you then publish B 2.0 first and C 2.0 on another day. If the sub-processes shapes were configured with this option, new A process instances will continue initiating B 1.34, and B in turn would continue to initiate C 1.20. This is even though there are new versions of B and C available in the Process Engine. Once you publish A 2.0, then the new instances of A would initiate the new versions of B and C (i.e. 2.0).
Version Not Found Behavior - Start Latest Version	Function: This is default behavior. If the Process Option above was Specific Version, Latest Major Version or My Dynamic Major Version; and at runtime such a version is not available, then the Engine is instructed to run the latest version of the process irrespective of the Process Option (i.e. treat it as if the Process Option was Latest Version)
Version Not Found Behavior - Throw an Exception	Function: Rather than initiating the Latest Version, this option would cause the Engine to throw an exception at runtime when the desired version is not found. This way the System Administrator gets a chance to correct the error.

Log on to AgilePoint Server

The first time you configure the shape, this dialog will be shown to get the credentials for connecting to the Process Engine (AgilePoint Server), in order to list the published sub-processes.

Note: The credentials are saved and reused in subsequent accesses to the Process Engine.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM AgileDialogs 2011**
3. Do one of the following:
   - On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Subprocess** or **Subprocess (Multi)** AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
     - **SubDialog** AgilePart
     - **Dialog Task** AgileWork

- **Intranet Dialog Task** AgileWork

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Sub Process**
   - **Sub Dialog**
   - **Dialog**

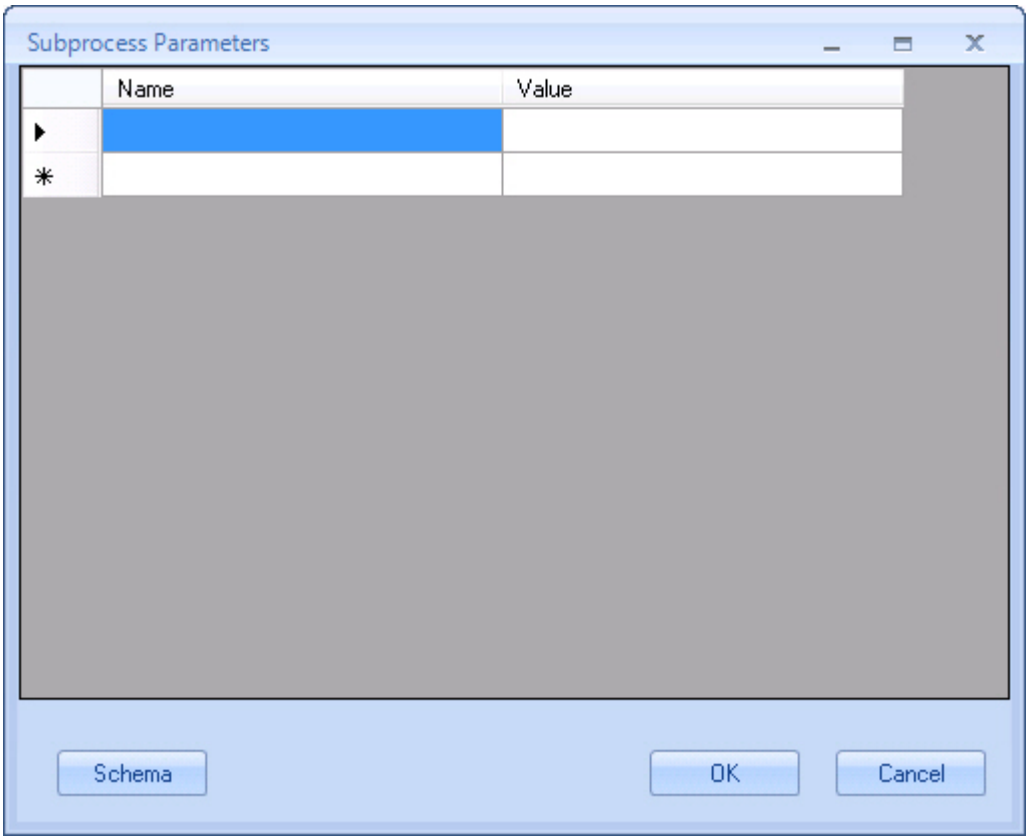
Field Definitions

Field Name	Definition
Server Url	Definition: This is the URL of the Process Engine (AgilePoint Server). Whenever a new URL is used it is added to the drop-down list-box, so next time it is needed, it is easier to select than reenter it.
Logon as current user	Definition: Authenticates using the local machine's Windows user account. This option can be used with Windows authentication only.
Logon as the following user	Definition: Authenticates using the credentials you specify. Allowed Values: • **Selected** - The domain, username and password fields are enabled to fetch the input from an user. • **Deselected** - Specifies that the logon as current user (AD2008R2\Administrator) option is enabled. Default Value: Deselected
Domain	Definition: The authentication domain. This does not apply to Forms-Based Authentication.
User Name	Definition:

Field Name	Definition
	The user name you want to associate with the action. Allowed Values: A user name, not including the domain. Default Value: None Custom Attributes: No
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes

Subprocess Parameters Window

This opens the Subprocess Parameters dialog for passing variables to the sub-process:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Subprocess** or **Subprocess (Multi)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **SubProcessParams** field, click the **Ellipses** button.

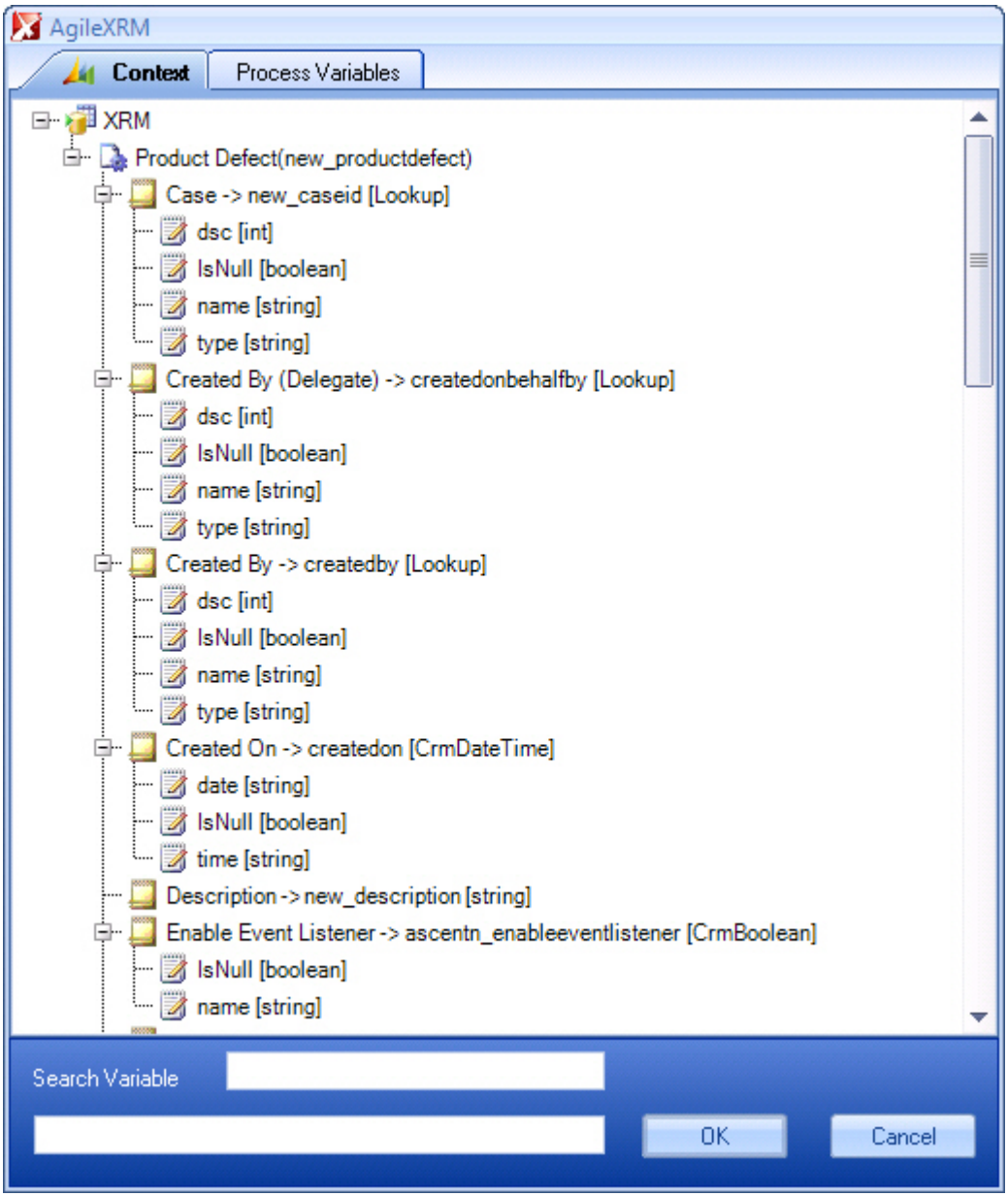
Field Definitions

Field Name	Definition
Name	Definition: This is the name of the Process Variable (aka Custom Attribute) to be created in the sub-process
Value	Definition:

Field Name	Definition
	This is the value that the variable is going to have. It can be a static value, a Process Variable or a value from the Schema
Schema	Function: This opens the Schema Selector Dialog to select one for the Value column.

Schema Selector Dialog

When configuring some shapes, it is possible to pass dynamic context data or process variables as the value of the parameters. The procedure is always the same, either there is an ellipsis button (…), a button called Schema or the user can invoke the dialog by typing the characters ${ in which case the following dialog would appear:



The user can then select the correct attribute from the tree and press OK to insert it in the corresponding place where the dialog was invoked.

When writing in Search Variable field, fields are auto-filtered to make selection easier.

Subprocess (Multi)

This shape is used to start one sub-process for each record returned by a query.

If the Wait parameter is set to True, the process continues once all the subprocesses that were initiated by this shape are completed.

Typically this is used to manage the lifecycle of child entities, for example Order Line Items of an Order.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Subprocess (Multi)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
EntityIds	Definition: This could be a list of entity record IDs separated with a semicolon (;). It can take dynamic variable(s)
EntityName	Definition: Select the entity type. This can be a static or dynamic value
NamePrefix	Definition: SubProcesses and SubDialogs Instance Names can be overridden by using this property. It can have static and dynamic values, e.g. “Order Detail ${OrderItemID}”. This is added as such to the name of the process instance: processInstanceID + “_!_” + NamePrefix + “_!_” NOTE: The value of this property overrides the one set at SubProcess/ SubDialog level in the Process Name tab of the XRM Connection window in Envision.
QueryExpression	Opens the Following Window: Advanced Find - QueryExpression Configuration Window
Sub Process	Opens the Following Window: Process Selector Window Purpose of this Window:

Field Name	Definition
	This opens the Process Selector dialog for choosing which process and version to initiate.
SubProcessParams	Opens the Following Window: Subprocess Parameters Window Purpose of this Window: This opens the Subprocess Parameters dialog for passing variables to the sub-process:
Wait	Definition: Default value: True • True - The process will wait for the sub-process to finish before considering this step completed (i.e. synchronous) False – The process will launch the sub-process but will not wait for it to complete(i.e. asynchronous)

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

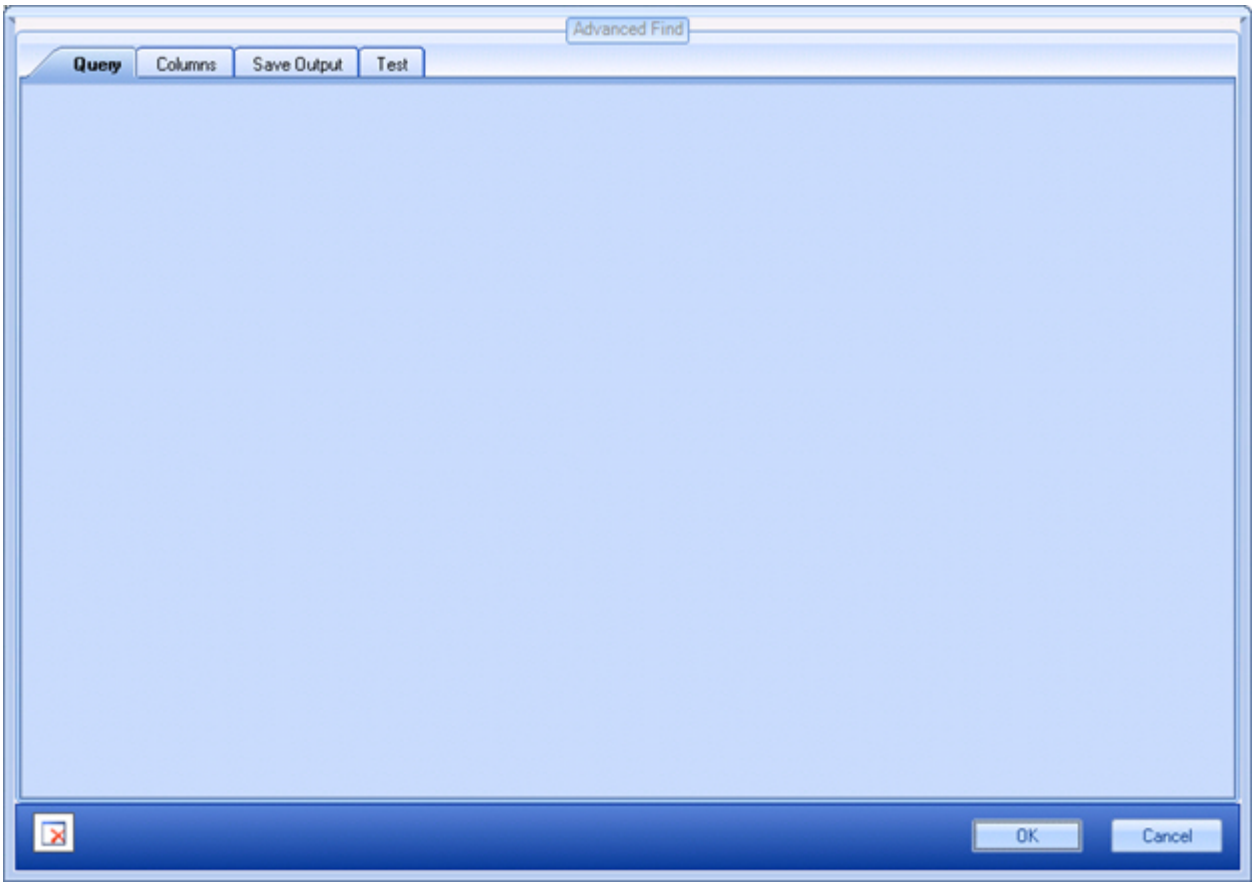
Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Advanced Find - QueryExpression Configuration Window

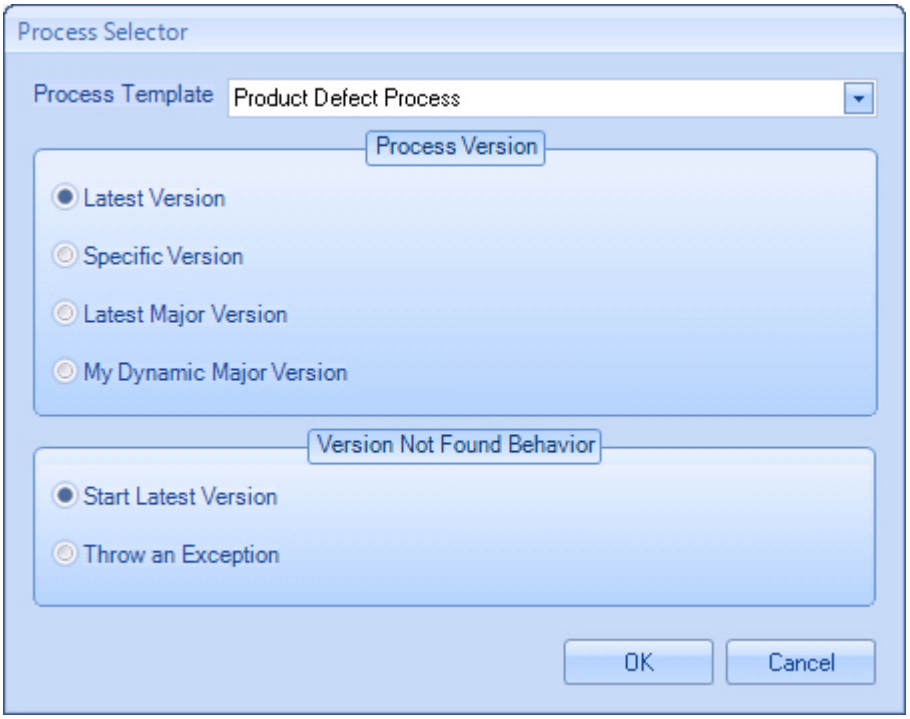


Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM Manual Activities 2011**
3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **QueryExpression** field, click the **Ellipses** button.

Process Selector Window

This opens the Process Selector dialog for choosing which process and version to initiate.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM AgileDialogs 2011**
3. Do one of the following:
   - On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Subprocess** or **Subprocess (Multi)** AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
     - **SubDialog** AgilePart
     - **Dialog Task** AgileWork
     - **Intranet Dialog Task** AgileWork
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Sub Process**
   - **Sub Dialog**
   - **Dialog**
6. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

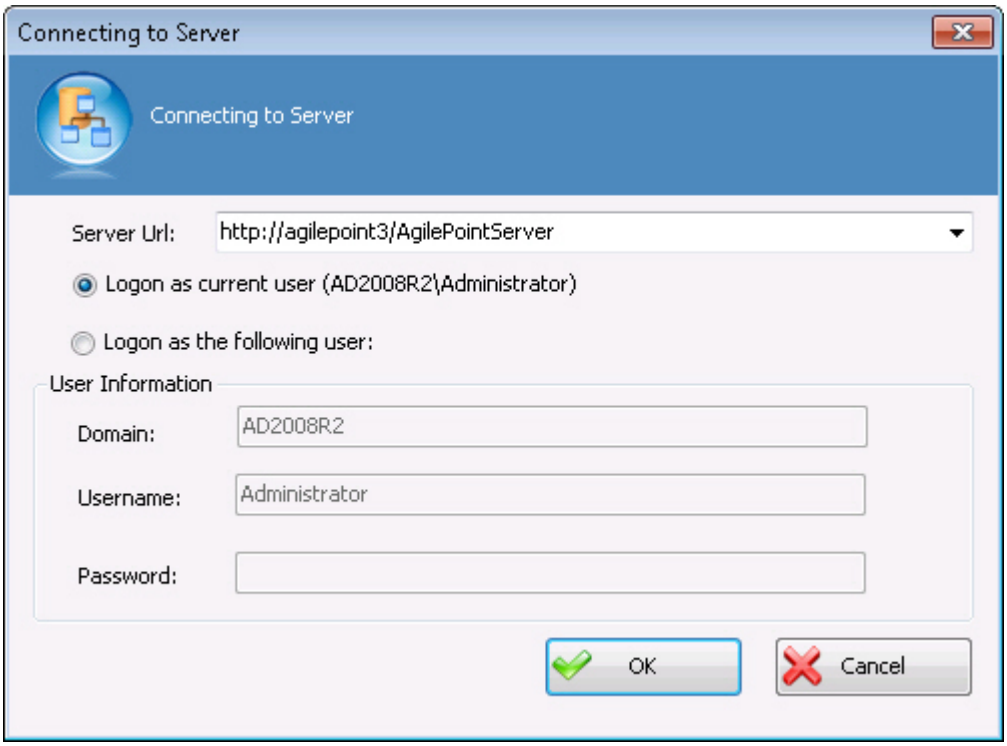
Field Name	Definition
Process Template	Definition: This drop-down list will show all the processes that are already published in the Process Engine (AgilePoint Server). Select the name of the process that you want to initiate as a sub-process.
Process Version - Latest Version	Function: The process model version that has the status of Released is initiated, (usually, but not necessarily, the latest version of the model)
Process Version - Specific Version	Function: When this is chosen, all the available versions (including ones with the status of Retired) are listed in the drop-down list. Select the specific version of the model that you want to initiate as a sub-process.
Process Version - Latest Major Version	Function: Version numbers are in the form Major.Minor (e.g. 4.06 or 3.50). When this option is selected, all the available Major versions of the selected Process Template are listed in the drop-down (including ones with the status of Retired). When the process arrives to this shape, it starts the highest Minor version of the chosen Major version.
Process Version - My Dynamic Major Version	Function: The calling parent process has a Major version. The version of the sub-process that is initiated is the highest Minor version of this Major version. This functionality is useful under 2 circumstances: 1. You only have one environment (production) and it is not possible to test your new processes

Field Name	Definition
	in another environment before publishing them to the production environment. 2. Although you do have a test environment, you need to keep running these interdependent processes in the same version. It is best to set the Major version for all these related processes to the same value. When you want to deploy many new Templates, increment the Major version for all of them, so that existing running processes do not initiate the new Templates but the corresponding Template in their own Major version. For example, you have 3 related processes: • Process A at version 1.04 • Sub-Process B at version 1.34 – initiated from A • Sub-Process C at version 1.20 – initiated from B Let's say you continue enhancing these processes and you then publish B 2.0 first and C 2.0 on another day. If the sub-processes shapes were configured with this option, new A process instances will continue initiating B 1.34, and B in turn would continue to initiate C 1.20. This is even though there are new versions of B and C available in the Process Engine. Once you publish A 2.0, then the new instances of A would initiate the new versions of B and C (i.e. 2.0).
Version Not Found Behavior - Start Latest Version	Function: This is default behavior. If the Process Option above was Specific Version, Latest Major Version or My Dynamic Major Version; and at runtime such a version is not available, then the Engine is instructed to run the latest version of the process irrespective of the Process Option (i.e. treat it as if the Process Option was Latest Version)
Version Not Found Behavior - Throw an Exception	Function: Rather than initiating the Latest Version, this option would cause the Engine to throw an exception at runtime when the desired version is not found. This way the System Administrator gets a chance to correct the error.

Log on to AgilePoint Server

The first time you configure the shape, this dialog will be shown to get the credentials for connecting to the Process Engine (AgilePoint Server), in order to list the published sub-processes.

Note: The credentials are saved and reused in subsequent accesses to the Process Engine.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM AgileDialogs 2011**
3. Do one of the following:
   - On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Subprocess** or **Subprocess (Multi)** AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
     - **SubDialog** AgilePart
     - **Dialog Task** AgileWork

- **Intranet Dialog Task** AgileWork

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Sub Process**
   - **Sub Dialog**
   - **Dialog**

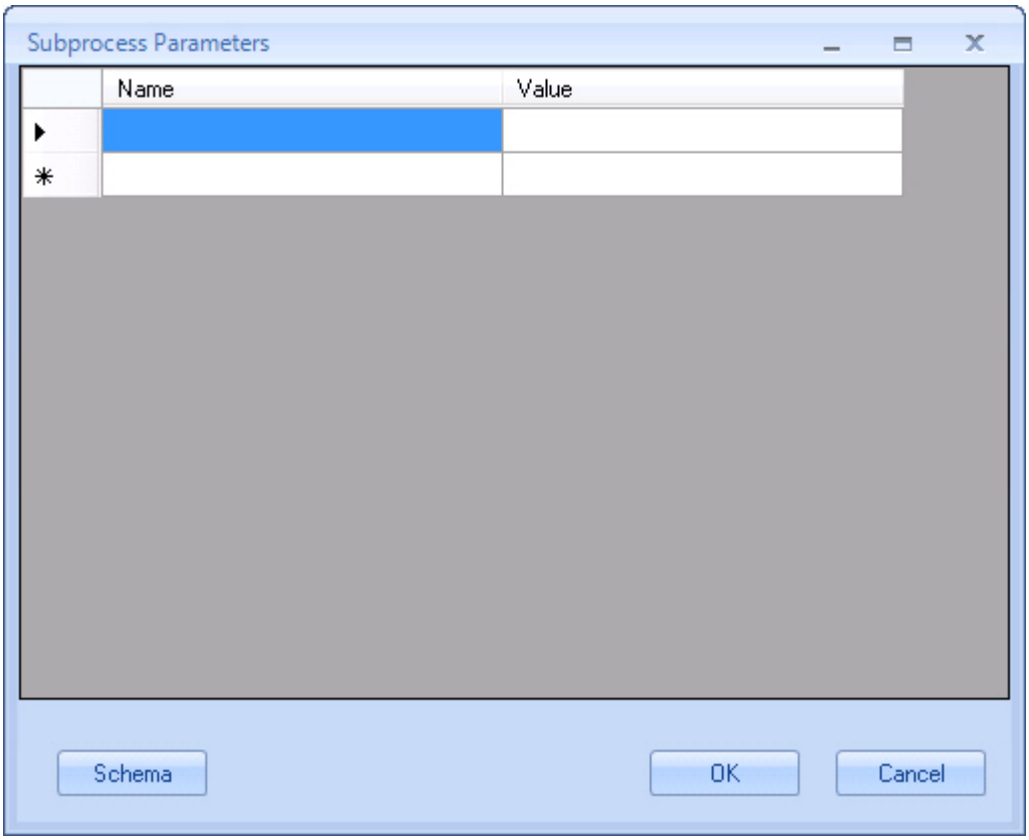
Field Definitions

Field Name	Definition
Server Url	Definition: This is the URL of the Process Engine (AgilePoint Server). Whenever a new URL is used it is added to the drop-down list-box, so next time it is needed, it is easier to select than reenter it.
Logon as current user	Definition: Authenticates using the local machine's Windows user account. This option can be used with Windows authentication only.
Logon as the following user	Definition: Authenticates using the credentials you specify. Allowed Values: • **Selected** - The domain, username and password fields are enabled to fetch the input from an user. • **Deselected** - Specifies that the logon as current user (AD2008R2\Administrator) option is enabled. Default Value: Deselected
Domain	Definition: The authentication domain. This does not apply to Forms-Based Authentication.
User Name	Definition:

Field Name	Definition
	The user name you want to associate with the action. Allowed Values: A user name, not including the domain. Default Value: None Custom Attributes: No
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes

Subprocess Parameters Window

This opens the Subprocess Parameters dialog for passing variables to the sub-process:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Subprocess** or **Subprocess (Multi)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **SubProcessParams** field, click the **Ellipses** button.

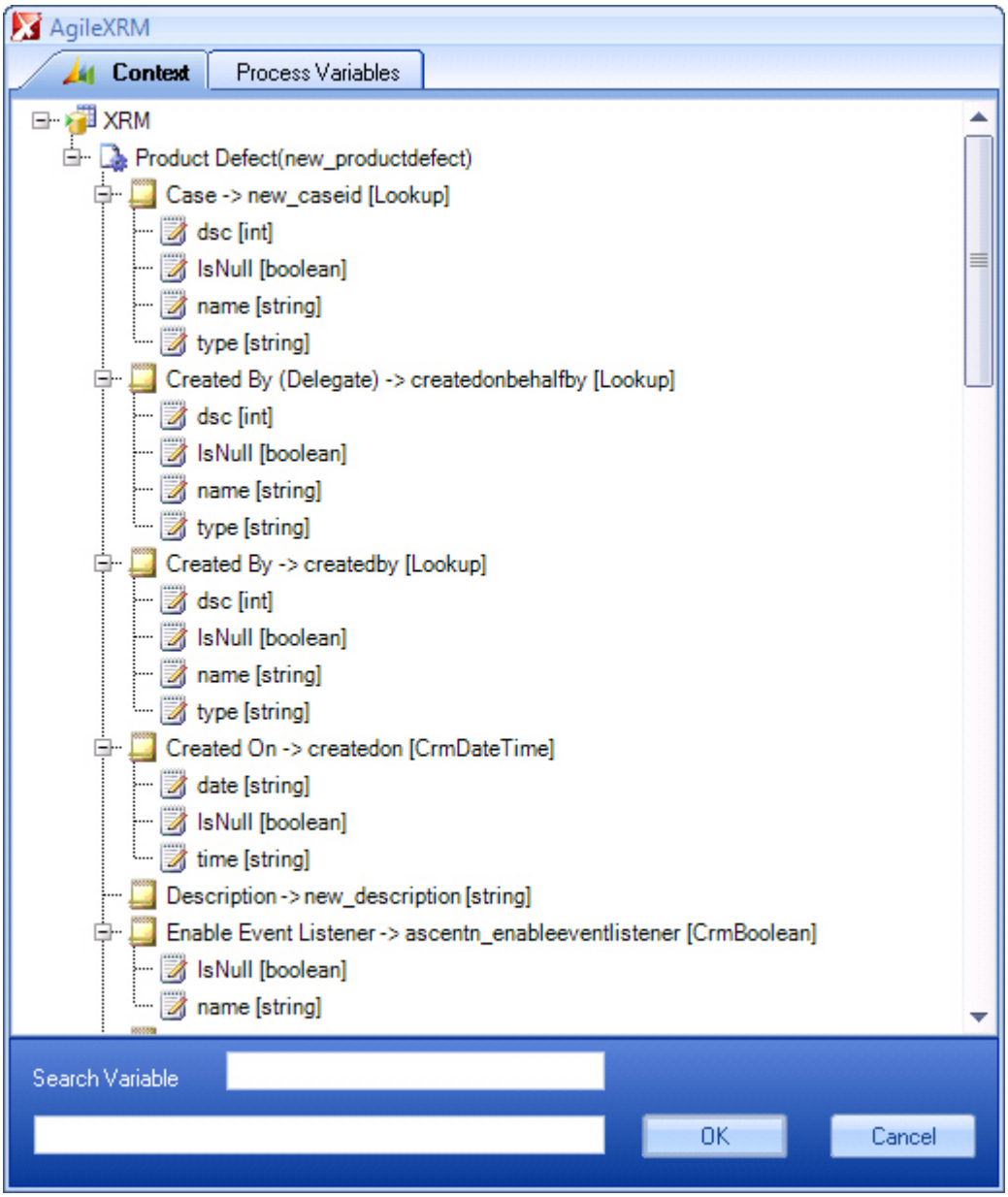
Field Definitions

Field Name	Definition
Name	Definition: This is the name of the Process Variable (aka Custom Attribute) to be created in the sub-process
Value	Definition:

Field Name	Definition
	This is the value that the variable is going to have. It can be a static value, a Process Variable or a value from the Schema
Schema	Function: This opens the Schema Selector Dialog to select one for the Value column.

Schema Selector Dialog

When configuring some shapes, it is possible to pass dynamic context data or process variables as the value of the parameters. The procedure is always the same, either there is an ellipsis button (…), a button called Schema or the user can invoke the dialog by typing the characters ${ in which case the following dialog would appear:



The user can then select the correct attribute from the tree and press OK to insert it in the corresponding place where the dialog was invoked.

When writing in Search Variable field, fields are auto-filtered to make selection easier.

Update Entity

This activity is used to update an entity record, including custom entities and even entities not related to the Main Entity.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Update Entity** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
EntityId	Definition: This should be the ID of the desired entity record. This value is usually a dynamic value.
EntitySpecification	Opens the Following Window: Set Properties - EntitySpecification Configuration Window Purpose of this Window: This is for updating the values of different attributes in the entity.
EntityType	Definition: Select the entity type. This can only be a static value selected from the drop-down list

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

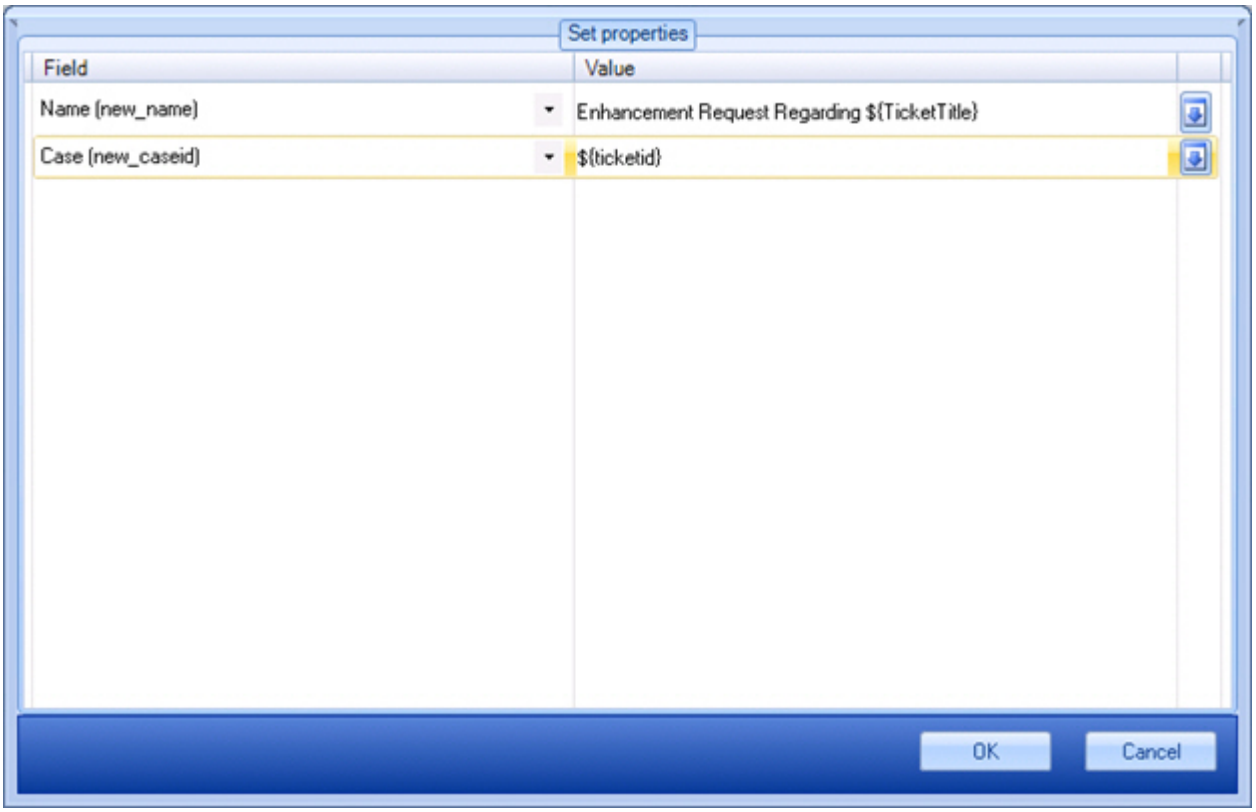
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Set Properties - EntitySpecification Configuration Window

This is for updating the values of different attributes in the entity.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag any of the following AgileShape, and drop it on the process template:
   - **Create Entity**
   - **Update Entity**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **EntitySpecification** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Field	Definition: Select the desired attribute to update from the list of all the attributes for the entity
Value	Definition:

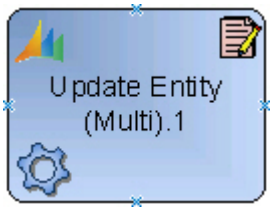
Field Name	Definition
	The Value to set for the attribute. It can be static or dynamic. For dynamic value type ${ to open the Schema Selector Dialog
Down Arrow	Function: Add a new row or Remove an existing row from the grid

Update Entity (Multi)

This activity is used to update multiple entity records at the same time, including custom entities and even entities not related to the Main Entity.

The set of records that are affected are selected by either:

- The ones returned by the query configured in the QueryExpression property
- From a semicolon-separated list of IDs passed via the EntityIds property



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Update Entity (Multi)** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
EntityIds	Definition: This could be a list of entity record IDs separated with a semicolon (;). It can take dynamic variable(s)
EntityName	Definition:

Field Name	Definition
	Select the entity type. This can be a static or dynamic value
EntitySpecification	Opens the Following Window: Set Properties - EntitySpecification Configuration Window Purpose of this Window: This is for updating the values of different attributes in the entity.
QueryExpression	Opens the Following Window: Advanced Find - QueryExpression Configuration Window

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

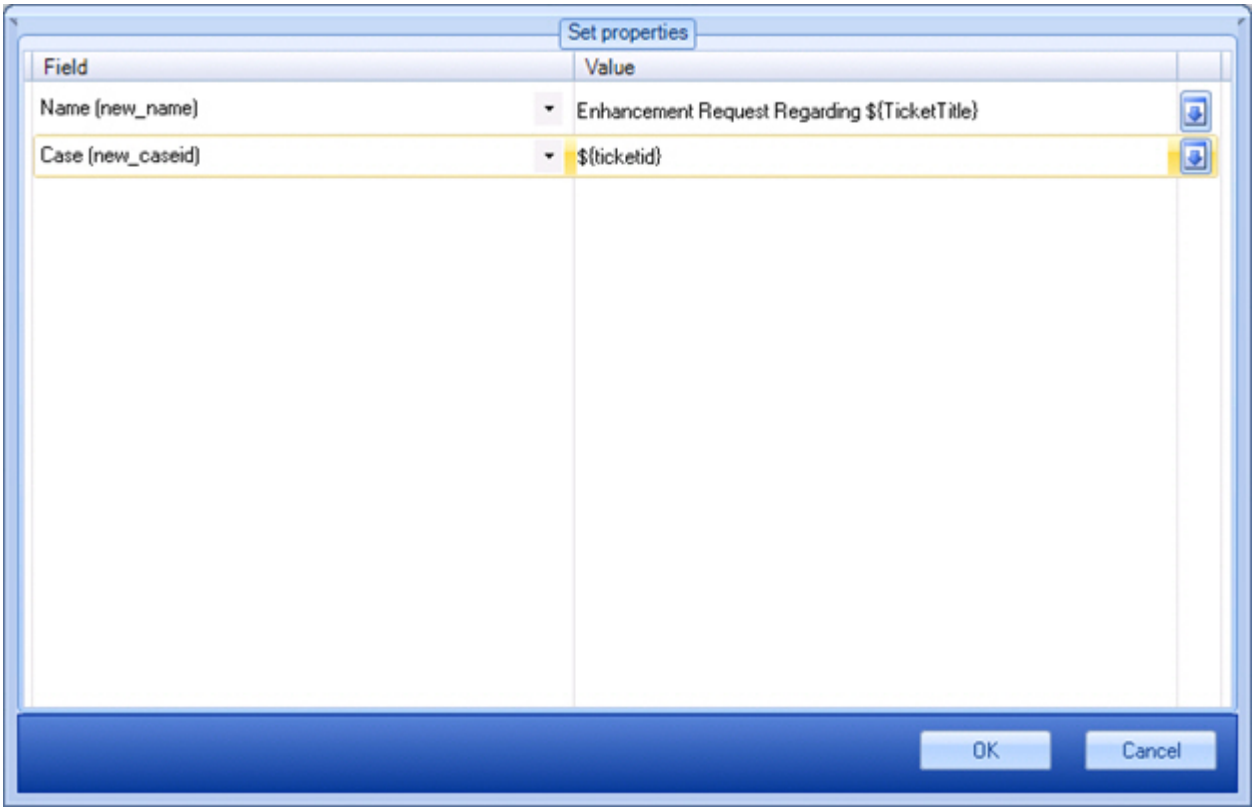
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Set Properties - EntitySpecification Configuration Window

This is for updating the values of different attributes in the entity.



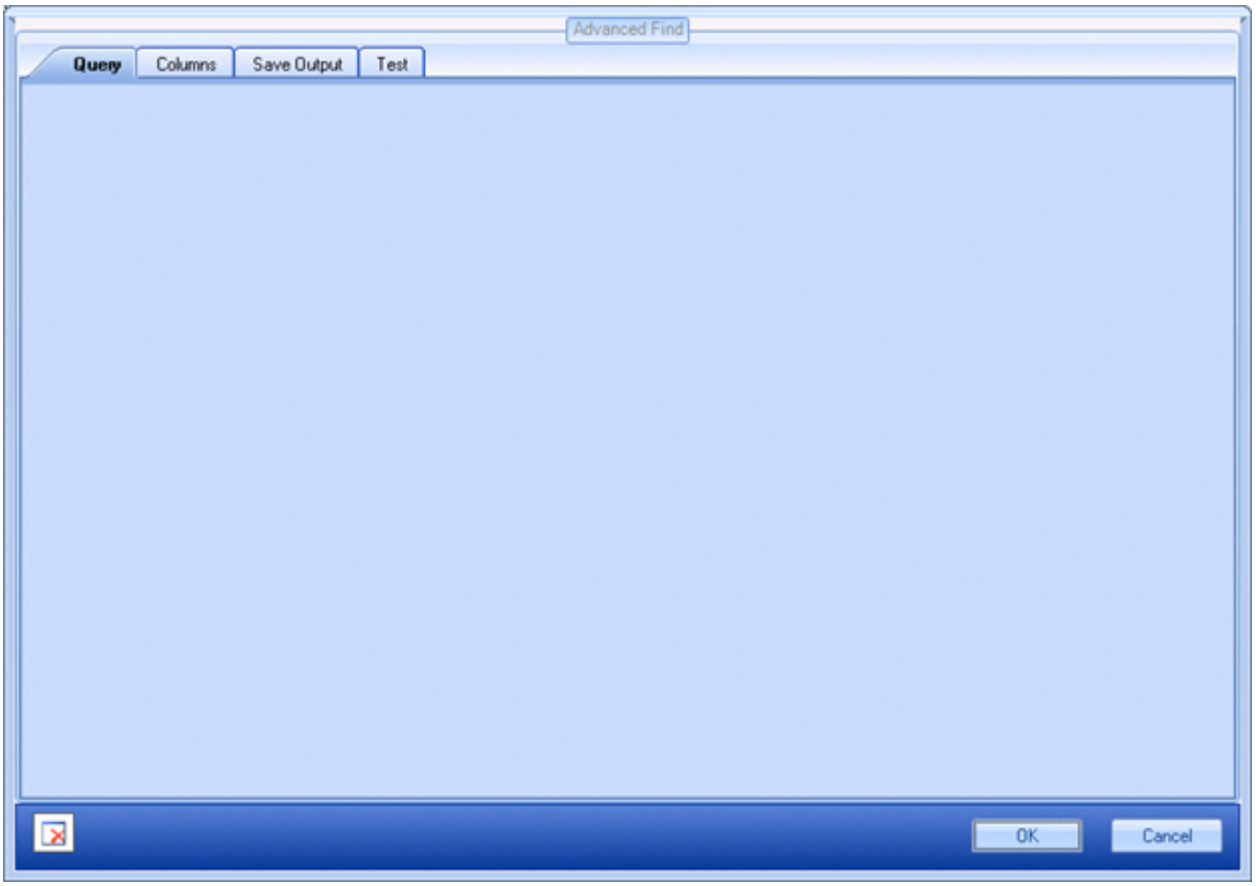
Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag any of the following AgileShape, and drop it on the process template:
   - **Create Entity**
   - **Update Entity**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **EntitySpecification** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Field	Definition: Select the desired attribute to update from the list of all the attributes for the entity
Value	Definition: The Value to set for the attribute. It can be static or dynamic. For dynamic value type ${ to open the Schema Selector Dialog
Down Arrow	Function: Add a new row or Remove an existing row from the grid

Advanced Find - QueryExpression Configuration Window



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM Manual Activities 2011**
3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **QueryExpression** field, click the **Ellipses** button.

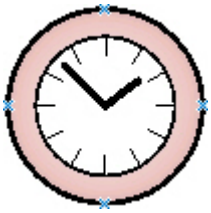
Wait for Update (AgileXRM 2011)

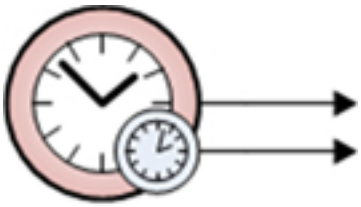
This activity is used to wait until a condition is met in XRM repository. This can be used in many scenarios. For example:

- Make all order items processes to wait until customer account credit rating is High.
- Make a process wait until product stock is sufficient to fulfill an order

The process will wait until the condition configured in the query is met.

It is common to Add a Timer to this shape in order not to wait indefinitely. This way when the due date is reached, the process will continue using the alternative route:





Wait for Update

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** stencil.

3. On the **XRM Automatic Activities 2011** stencil, drag the **Wait for Update** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
EntityId	Definition: This should be the ID of the desired entity record. This value is usually a dynamic value.
EntityName	Definition: Select the entity type. This can be a static or dynamic value
QueryExpression	Opens the Following Window: Advanced Find - QueryExpression Configuration Window

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

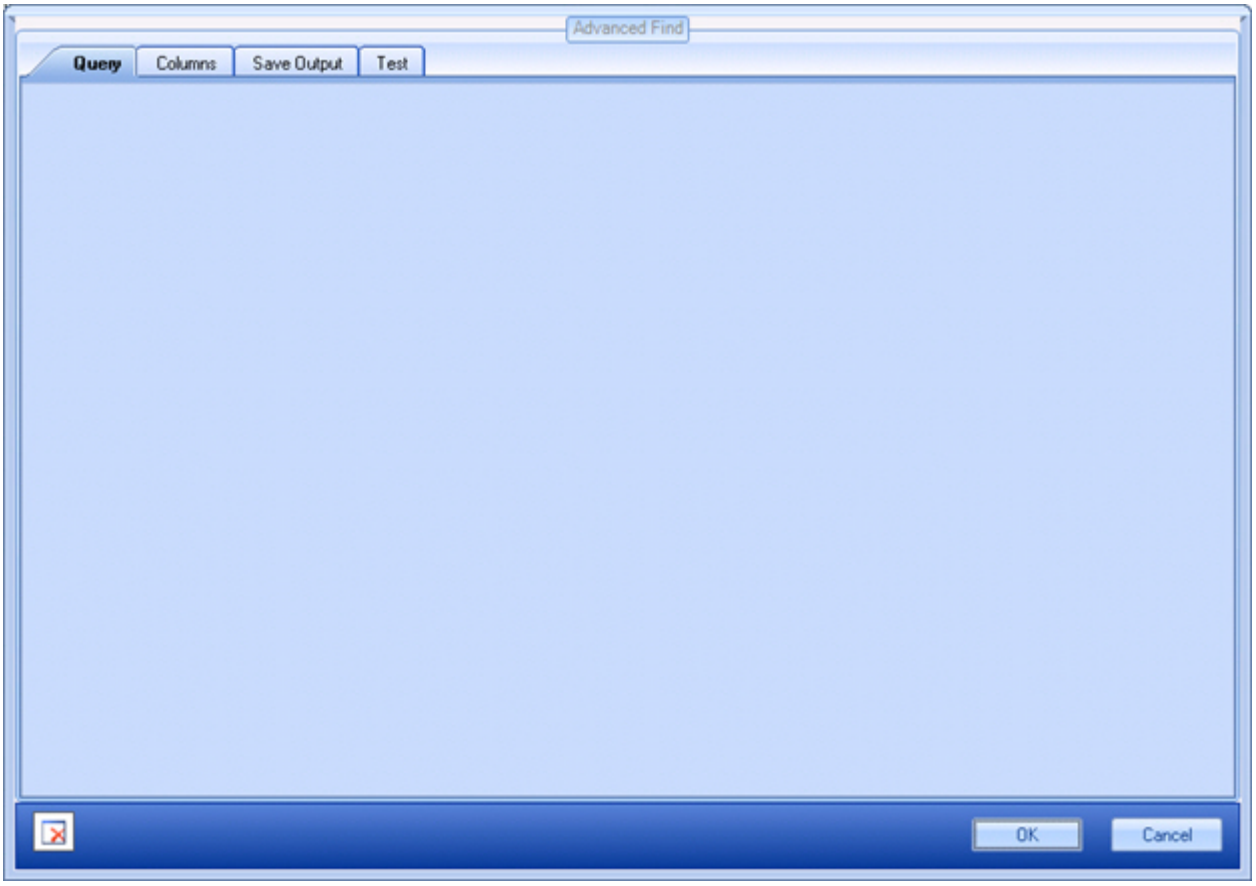
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Advanced Find - QueryExpression Configuration Window



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM Manual Activities 2011**
3. On the specific stencil, drag the appropriate AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **QueryExpression** field, click the **Ellipses** button.

XRM Workflow

This automatic activity kicks off a CRM Workflow. This permits reutilizing any existing CRM Workflows. Please note that by definition, CRM Workflows are asynchronous, so this shape will not wait for the execution of the Workflow to complete before becoming completed itself.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil.
3. On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Run XRM Workflow** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
EntityId	Definition: This should be the ID of the desired entity record. This value is usually a dynamic value.
EntityName	Definition: Select the entity type. This can be a static or dynamic value
Workflow	Definition: This is the name of the CRM Workflow for the selected EntityName property. This can be a dynamic value using ${

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

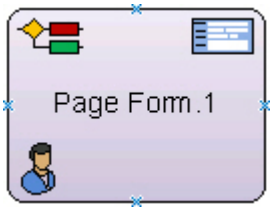
XRM AgileDialogs 2011 Stencil

This AgileXRM stencils contains the AgileShapes for AgileDialogs models.

Page Form

This shape is used in AgileDialogs models only and is for designing a Page (a group of controls similar to Prompts & Responses in CRM dialogs) in an AgileDialog.

For a detailed explanation of how to use this shape and other AgileDialog shapes, please see the AgileDialogs Design Guide document.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM AgileDialogs 2011** stencil.
3. On the **XRM AgileDialogs 2011** stencil, drag the **Page Form** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
FormConfiguration	Opens the Following Window: AgileDialogs Form Window Purpose of this Window: Click the ellipsis to open the Form Configuration dialog.

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

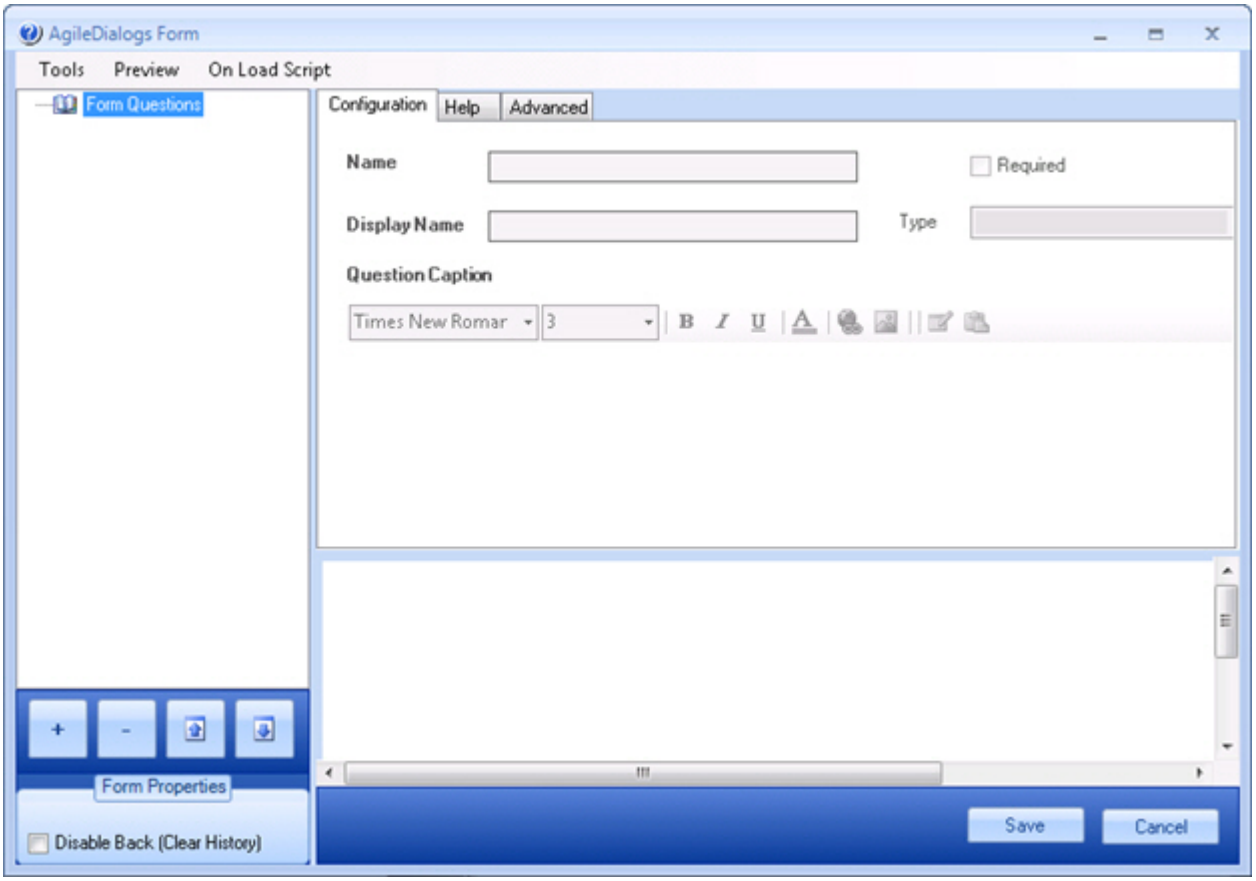
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

AgileDialogs Form Window

Click the ellipsis to open the Form Configuration dialog.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM AgileDialogs 2011** stencil.
3. On the **XRM AgileDialogs 2011** stencil, drag the **Page Form** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **FormConfiguration** field, click the **Ellipses** button.

SubDialog

This shape is used in AgileDialogs models only and is for initiating a SubDialog from another.

For a detailed explanation of how to use this shape and other AgileDialog shapes, please see the AgileDialogs Design Guide document.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM AgileDialogs 2011** stencil.
3. On the **XRM AgileDialogs 2011** stencil, drag the **SubDialog** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
NamePrefix	Definition: SubProcesses and SubDialogs Instance Names can be overridden by using this property. It can have static and dynamic values, e.g. “Order Detail ${OrderItemID}”. This is added as such to the name of the process instance: processInstanceID + “_!_” + NamePrefix + “_!_” NOTE: The value of this property overrides the one set at SubProcess/ SubDialog level in the Process Name tab of the XRM Connection window in Envision.
Sub Dialog	Opens the Following Window: Process Selector Window Purpose of this Window: This opens the Process Selector dialog for choosing which process and version to initiate.

Common AgilePart Properties

This AgilePart inherits the following common properties. For more information, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgilePart Tasks

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Collapse/Expand Shape

Right-clicking the shape brings up the Collapse menu action. Clicking it collapses the shape to a small circle. Right-clicking a collapsed shape shows the Expand menu item, restoring the shape to its original form.

Use Collapse shape to minimize the visual effect of steps in the process which are not of any interest to the Business User.

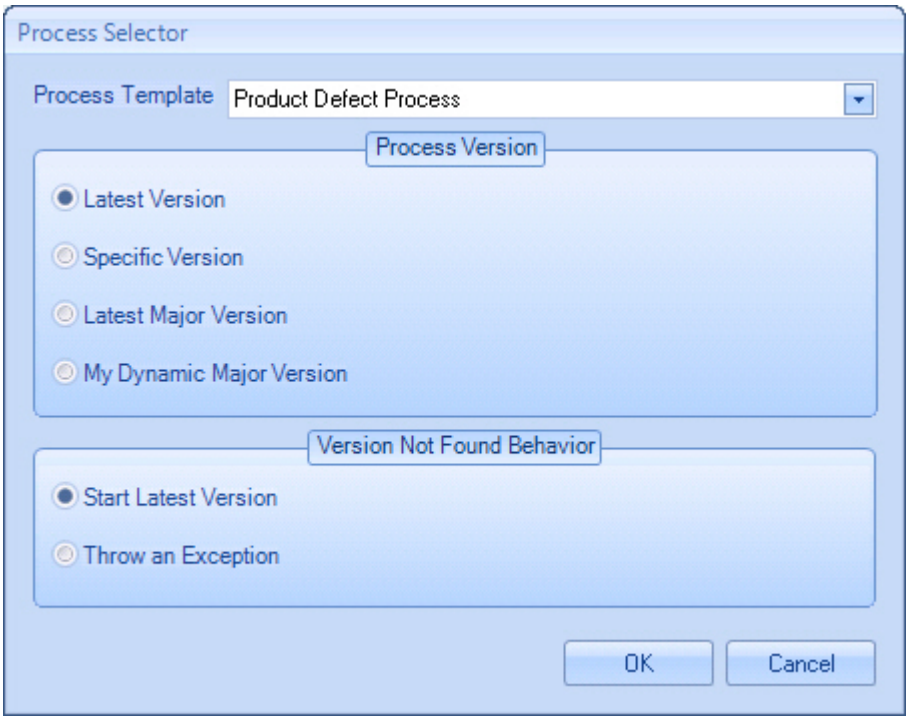
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Process Selector Window

This opens the Process Selector dialog for choosing which process and version to initiate.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM AgileDialogs 2011**
3. Do one of the following:
   - On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Subprocess** or **Subprocess (Multi)** AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
     - **SubDialog** AgilePart
     - **Dialog Task** AgileWork
     - **Intranet Dialog Task** AgileWork
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Sub Process**
   - **Sub Dialog**
   - **Dialog**
6. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

Field Name	Definition
Process Template	Definition: This drop-down list will show all the processes that are already published in the Process Engine (AgilePoint Server). Select the name of the process that you want to initiate as a sub-process.
Process Version - Latest Version	Function: The process model version that has the status of Released is initiated, (usually, but not necessarily, the latest version of the model)
Process Version - Specific Version	Function:

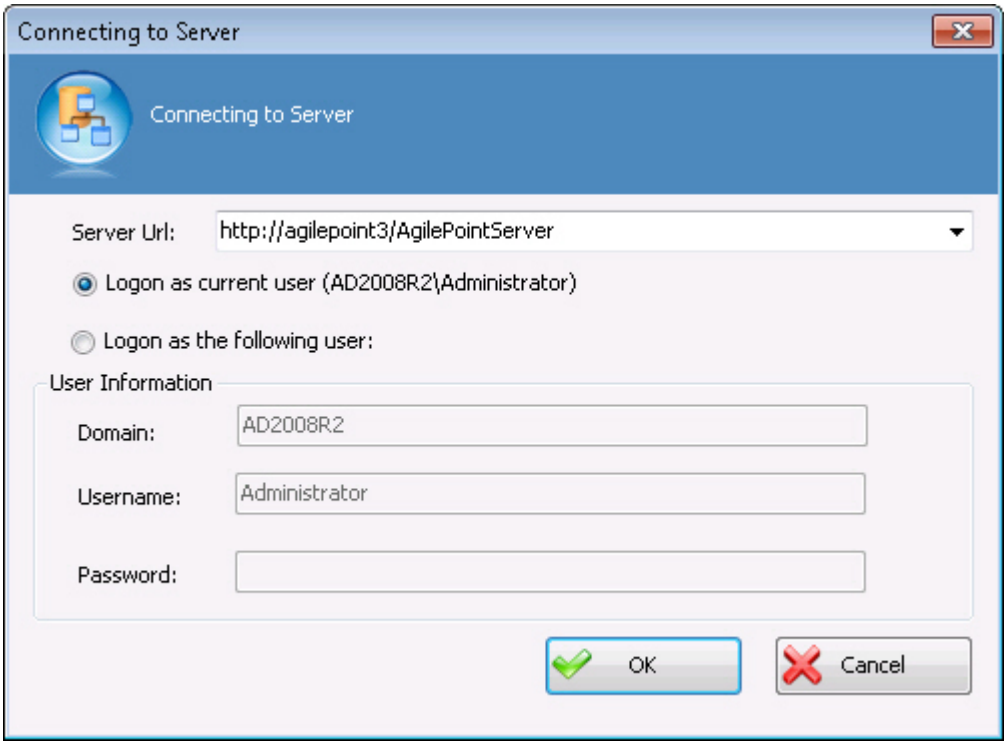
Field Name	Definition
	When this is chosen, all the available versions (including ones with the status of Retired) are listed in the drop-down list. Select the specific version of the model that you want to initiate as a sub-process.
Process Version - Latest Major Version	Function: Version numbers are in the form Major.Minor (e.g. 4.06 or 3.50). When this option is selected, all the available Major versions of the selected Process Template are listed in the drop-down (including ones with the status of Retired). When the process arrives to this shape, it starts the highest Minor version of the chosen Major version.
Process Version - My Dynamic Major Version	Function: The calling parent process has a Major version. The version of the sub-process that is initiated is the highest Minor version of this Major version. This functionality is useful under 2 circumstances: 1. You only have one environment (production) and it is not possible to test your new processes in another environment before publishing them to the production environment. 2. Although you do have a test environment, you need to keep running these interdependent processes in the same version. It is best to set the Major version for all these related processes to the same value. When you want to deploy many new Templates, increment the Major version for all of them, so that existing running processes do not initiate the new Templates but the corresponding Template in their own Major version. For example, you have 3 related processes: • Process A at version 1.04 • Sub-Process B at version 1.34 – initiated from A • Sub-Process C at version 1.20 – initiated from B Let's say you continue enhancing these processes and you then publish B 2.0 first and C 2.0 on another day. If the sub-processes shapes were configured with this option, new A process instances will continue initiating B 1.34, and B in turn would continue to initiate C 1.20. This is even though there are new versions of B and C available in the Process Engine. Once you publish A 2.0, then the new instances of A would initiate the new versions of B and C (i.e. 2.0).

Field Name	Definition
Version Not Found Behavior - Start Latest Version	Function: This is default behavior. If the Process Option above was Specific Version, Latest Major Version or My Dynamic Major Version; and at runtime such a version is not available, then the Engine is instructed to run the latest version of the process irrespective of the Process Option (i.e. treat it as if the Process Option was Latest Version)
Version Not Found Behavior - Throw an Exception	Function: Rather than initiating the Latest Version, this option would cause the Engine to throw an exception at runtime when the desired version is not found. This way the System Administrator gets a chance to correct the error.

Log on to AgilePoint Server

The first time you configure the shape, this dialog will be shown to get the credentials for connecting to the Process Engine (AgilePoint Server), in order to list the published sub-processes.

Note: The credentials are saved and reused in subsequent accesses to the Process Engine.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM AgileDialogs 2011**
3. Do one of the following:
   - On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Subprocess** or **Subprocess (Multi)** AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
     - **SubDialog** AgilePart
     - **Dialog Task** AgileWork
     - **Intranet Dialog Task** AgileWork
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Sub Process**
   - **Sub Dialog**
   - **Dialog**

Field Definitions

Field Name	Definition
Server Url	Definition: This is the URL of the Process Engine (AgilePoint Server). Whenever a new URL is used it is added to the drop-down list-box, so next time it is needed, it is easier to select than reenter it.
Logon as current user	Definition: Authenticates using the local machine's Windows user account. This option can be used with Windows authentication only.
Logon as the following user	Definition: Authenticates using the credentials you specify.

Field Name	Definition
	Allowed Values: • **Selected** - The domain, username and password fields are enabled to fetch the input from an user. • **Deselected** - Specifies that the logon as current user (AD2008R2\Administrator) option is enabled. Default Value: Deselected
Domain	Definition: The authentication domain. This does not apply to Forms-Based Authentication.
User Name	Definition: The user name you want to associate with the action. Allowed Values: A user name, not including the domain. Default Value: None Custom Attributes: No
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes

Dialog Task

This shape is used in AgileXRM processes (not in AgileDialogs models) and creates a Manual Task for the participant. When the task is opened, the AgileDialog starts for the user to interact with.

When the AgileDialog is completed this activity is completed and the process continues.

Use this shape rather than one of the Manual Activities shapes (with an associated ALF form), when the user needs to be guided to complete the task.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM AgileDialogs 2011** stencil.
3. On the **XRM AgileDialogs 2011** stencil, drag the **DialogTask** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
ConfigureParticipants	Opens the Following Window: Participants Window - Assign Mode Purpose of this Window: Default value: ${ProcessInitiator} Click the ellipsis button to open the configuration dialog:
ActivityProperties	Opens the Following Window: Set Additional Activity Properties Window Purpose of this Window: Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:
Dialog	Opens the Following Window: Process Selector Window Purpose of this Window: This opens the Process Selector dialog for choosing which process and version to initiate.

Field Name	Definition
InParameters	Opens the Following Window: Parameters Window - In Parameters Purpose of this Window: Optional This is for passing parameters to the dialog. These process variables will be available in the dialog. Click the ellipsis button to open the config window:
OutParameters	Opens the Following Window: Parameters Window - Out Parameters Purpose of this Window: Optional This is for passing parameters from Dialogs to the calling Parent Process. It is also possible to use the Update Parent Process shape in the Dialog itself to update Process Variables in the parent process, but this way it is simpler, especially when the calling process could be any or it is not known when designing the Dialog. Click the ellipsis button to open the config window:
OwnerID	Definition: When an activity is assigned to a Queue, this is the ID (systemuserid) of the Owner of the activity record
Subject	Definition: This sets the subject field of the activity in CRM, this value can be either static or dynamic. Clicking the ellipsis button opens a window for setting the subject content: This window accepts dynamic values by typing these special characters ${ which opens the Schema Selector Dialog
TaskDescription	Definition: This sets the value of the description field in the CRM activity. Clicking the ellipsis button opens a window for setting the description content. This window accepts dynamic values by typing these special characters ${ which opens the Schema Selector Dialog

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

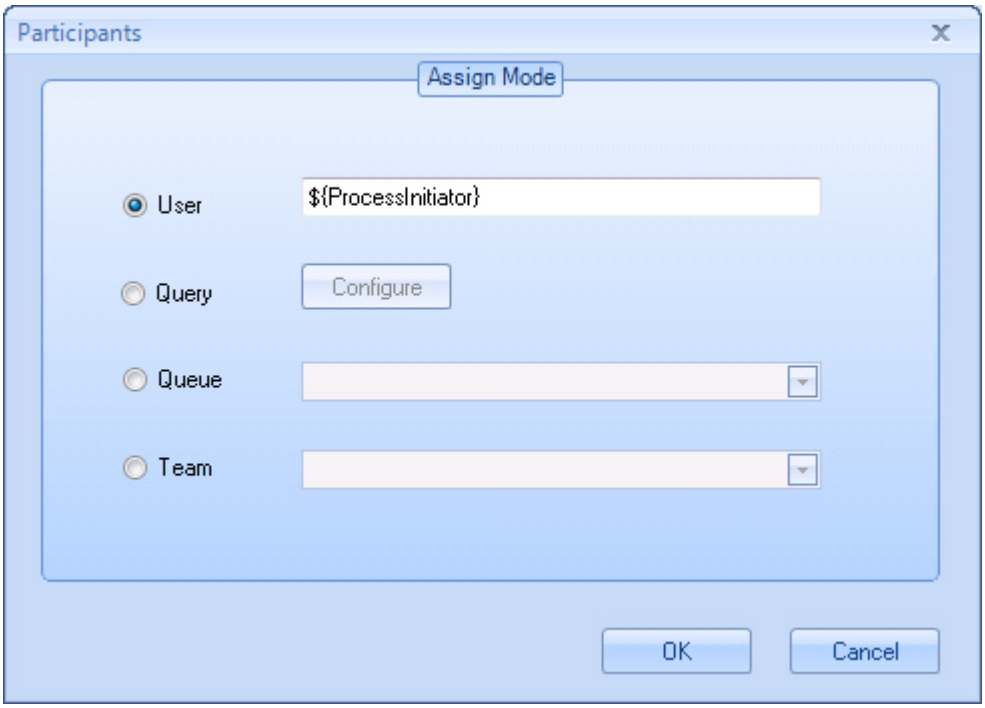
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Participants Window - Assign Mode

Default value: ${ProcessInitiator} Click the ellipsis button to open the configuration dialog:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ConfigurePartcipants** field, click the **Ellipses** button.

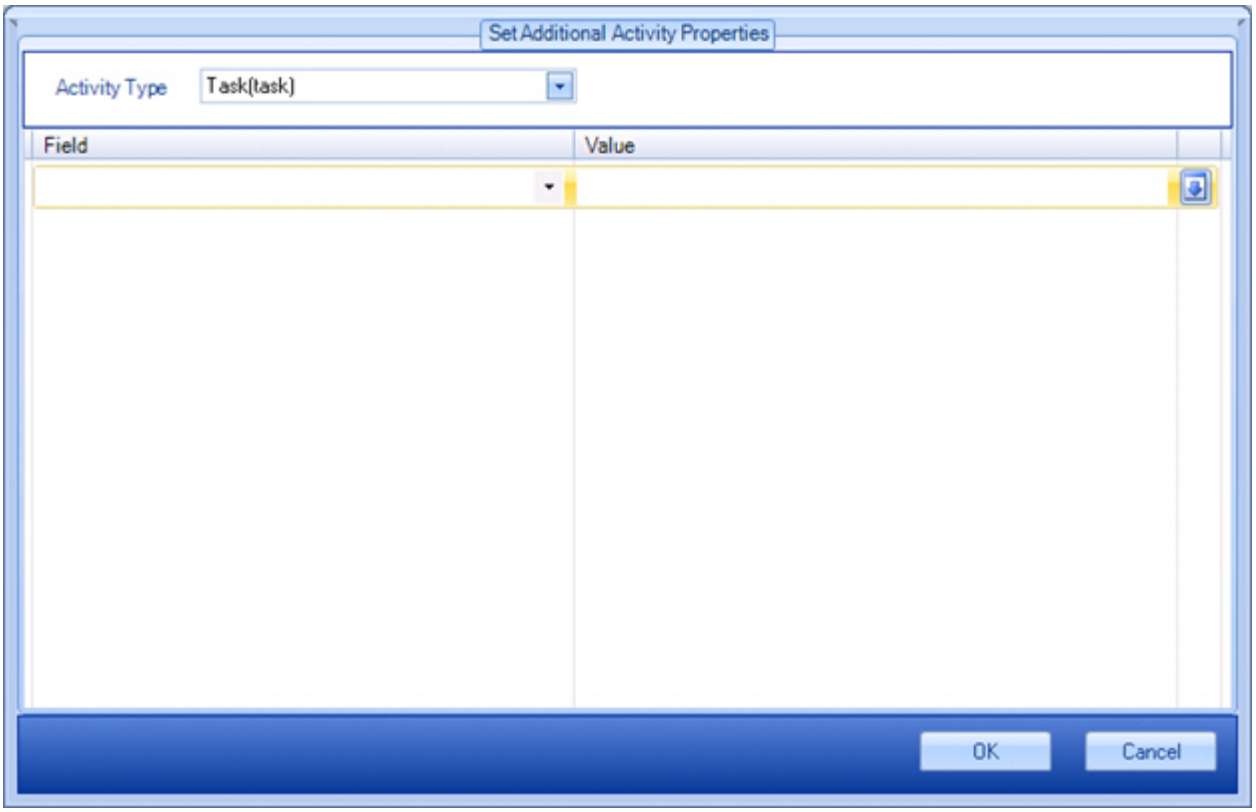
Field Definitions

Field Name	Definition
User	Definition: Can contain a static or dynamic value which can be one or more user IDs or user names. Multiple values should be separated by a semicolon ";" When multiple values are used, each participant gets a task and the shape is not Completed until all

Field Name	Definition
	the participants have Completed (or Cancelled) their corresponding tasks. Type ${ to open the Schema Selector Dialog.
Query	Function: Click to open the Query Expression Builder. The query should return 1 or more values of one of these types: • systemuserid (e.g. ownerid of an account) • username (e.g. DOMAIN\loginid) SeeQuery Expression Builder
Queue	Definition: Select the corresponding Queue from the list. The task will appear in the selected Queue. When this is selected, the OwnerID property can also be set.
Team	Definition: Select the corresponding Team from the list. The task will be assigned to the chosen Team. If any member of the Team completes (or Cancels) the task, the shape is Completed and the process progresses to the next step(s).

Set Additional Activity Properties Window

Optional Click the ellipsis button to open the configuration dialog which can be used to update any activity fields including custom fields:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM Manual Activities 2011** or **XRM AgileDialogs 2011** stencil.
3. Do one of the following:
   - On the **XRM Manual Activities 2011** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011** stencil, drag the **Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **ActivityProperties** field, click the **Ellipses** button.

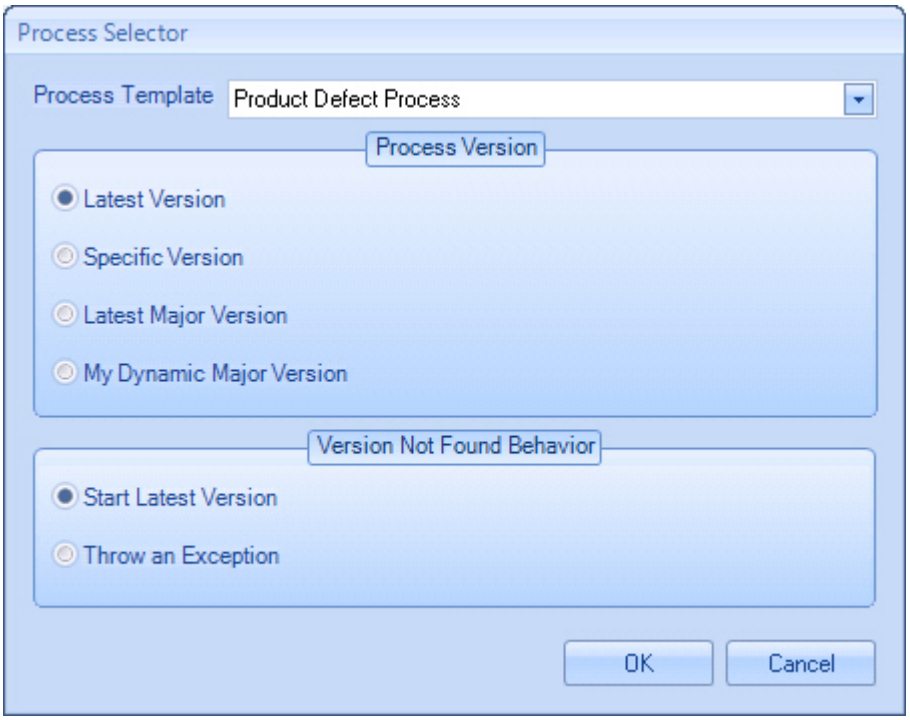
Field Definitions

Field Name	Definition
ActivityType	Definition: Shows all the activity types including custom activity types
Field	Definition:

Field Name	Definition
	Select the field for the selected Activity Type
Value	Definition: Sets the value of the Field. Type ${ to open the Schema Selector Dialog to enter a dynamic value
Down Arrow	Function: Add new Field-Value pair or Remove existing Field-Value pair

Process Selector Window

This opens the Process Selector dialog for choosing which process and version to initiate.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM AgileDialogs 2011**

3. Do one of the following:
   - On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Subprocess** or **Subprocess (Multi)** AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
     - **SubDialog** AgilePart
     - **Dialog Task** AgileWork
     - **Intranet Dialog Task** AgileWork
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Sub Process**
   - **Sub Dialog**
   - **Dialog**
6. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

Field Name	Definition
Process Template	Definition: This drop-down list will show all the processes that are already published in the Process Engine (AgilePoint Server). Select the name of the process that you want to initiate as a sub-process.
Process Version - Latest Version	Function: The process model version that has the status of Released is initiated, (usually, but not necessarily, the latest version of the model)
Process Version - Specific Version	Function: When this is chosen, all the available versions (including ones with the status of Retired) are listed in the drop-down list. Select the specific version of the model that you want to initiate as a sub-process.
Process Version - Latest Major Version	Function: Version numbers are in the form Major.Minor (e.g. 4.06 or 3.50). When this option is selected, all the available Major versions of the selected Process Template are listed in the drop-down (including ones with the status of Retired). When the process

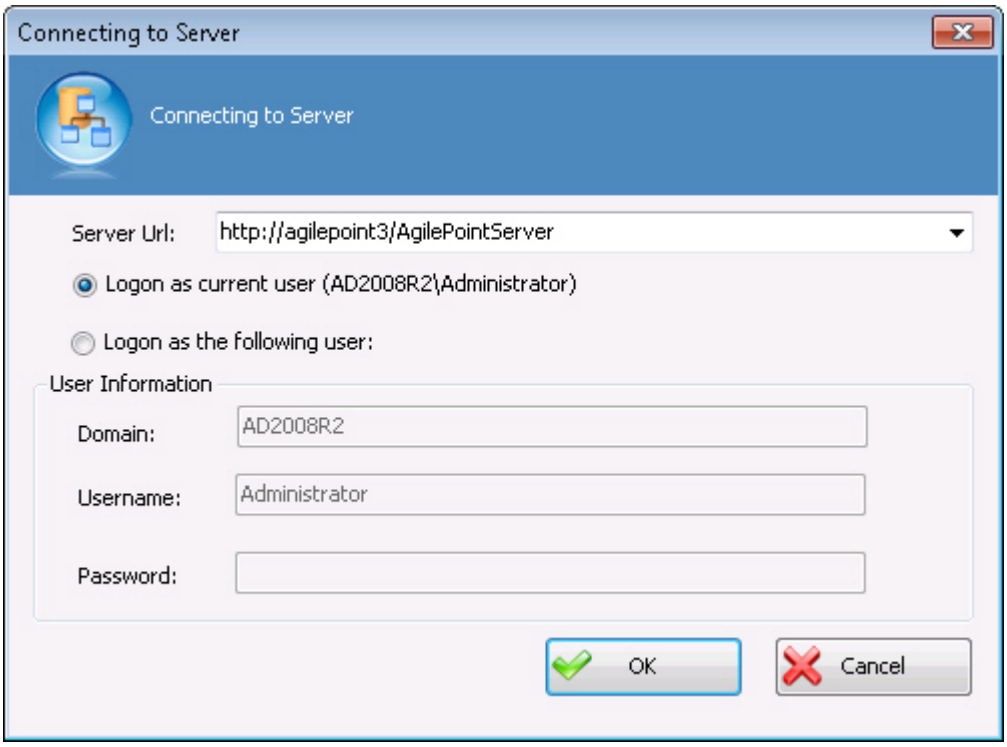
Field Name	Definition
	arrives to this shape, it starts the highest Minor version of the chosen Major version.
Process Version - My Dynamic Major Version	Function: The calling parent process has a Major version. The version of the sub-process that is initiated is the highest Minor version of this Major version. This functionality is useful under 2 circumstances: 1. You only have one environment (production) and it is not possible to test your new processes in another environment before publishing them to the production environment. 2. Although you do have a test environment, you need to keep running these interdependent processes in the same version. It is best to set the Major version for all these related processes to the same value. When you want to deploy many new Templates, increment the Major version for all of them, so that existing running processes do not initiate the new Templates but the corresponding Template in their own Major version. For example, you have 3 related processes: • Process A at version 1.04 • Sub-Process B at version 1.34 – initiated from A • Sub-Process C at version 1.20 – initiated from B Let's say you continue enhancing these processes and you then publish B 2.0 first and C 2.0 on another day. If the sub-processes shapes were configured with this option, new A process instances will continue initiating B 1.34, and B in turn would continue to initiate C 1.20. This is even though there are new versions of B and C available in the Process Engine. Once you publish A 2.0, then the new instances of A would initiate the new versions of B and C (i.e. 2.0).
Version Not Found Behavior - Start Latest Version	Function: This is default behavior. If the Process Option above was Specific Version, Latest Major Version or My Dynamic Major Version; and at runtime such a version is not available, then the Engine is instructed to run the latest version of the process irrespective of the Process Option (i.e. treat it as if the Process Option was Latest Version)

Field Name	Definition
Version Not Found Behavior - Throw an Exception	Function: Rather than initiating the Latest Version, this option would cause the Engine to throw an exception at runtime when the desired version is not found. This way the System Administrator gets a chance to correct the error.

Log on to AgilePoint Server

The first time you configure the shape, this dialog will be shown to get the credentials for connecting to the Process Engine (AgilePoint Server), in order to list the published sub-processes.

Note: The credentials are saved and reused in subsequent accesses to the Process Engine.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM AgileDialogs 2011**
3. Do one of the following:

- On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Subprocess** or **Subprocess (Multi)** AgileShape, and drop it on the process template.
- On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
  - **SubDialog** AgilePart
  - **Dialog Task** AgileWork
  - **Intranet Dialog Task** AgileWork

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Sub Process**
   - **Sub Dialog**
   - **Dialog**

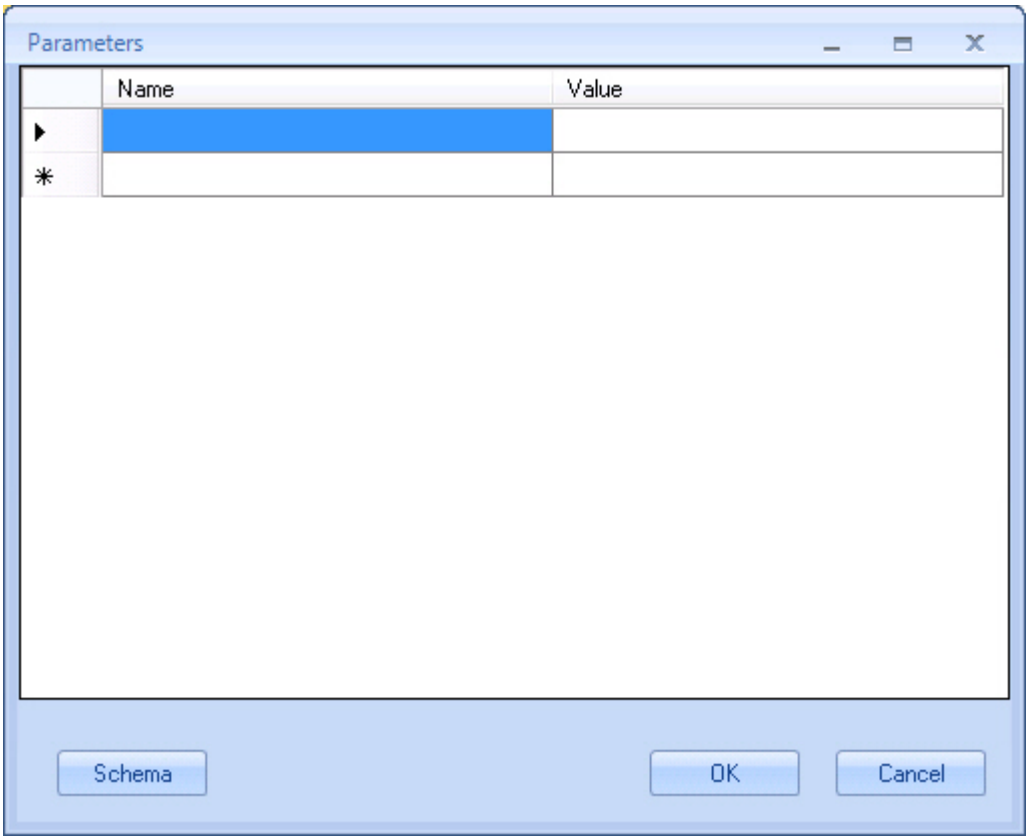
Field Definitions

Field Name	Definition
Server Url	Definition: This is the URL of the Process Engine (AgilePoint Server). Whenever a new URL is used it is added to the drop-down list-box, so next time it is needed, it is easier to select than reenter it.
Logon as current user	Definition: Authenticates using the local machine's Windows user account. This option can be used with Windows authentication only.
Logon as the following user	Definition: Authenticates using the credentials you specify. Allowed Values: • **Selected** - The domain, username and password fields are enabled to fetch the input from an user. • **Deselected** - Specifies that the logon as current user (AD2008R2\Administrator) option is enabled. Default Value:

Field Name	Definition
	Deselected
Domain	Definition: The authentication domain. This does not apply to Forms-Based Authentication.
User Name	Definition: The user name you want to associate with the action. Allowed Values: A user name, not including the domain. Default Value: None Custom Attributes: No
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes

Parameters Window - In Parameters

Optional This is for passing parameters to the dialog. These process variables will be available in the dialog. Click the ellipsis button to open the config window:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM AgileDialogs 2011** stencil.
3. On the **XRM AgileDialogs 2011** stencil, drag the **DialogTask** or **Intranet Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **InParameters** field, click the **Ellipses** button.

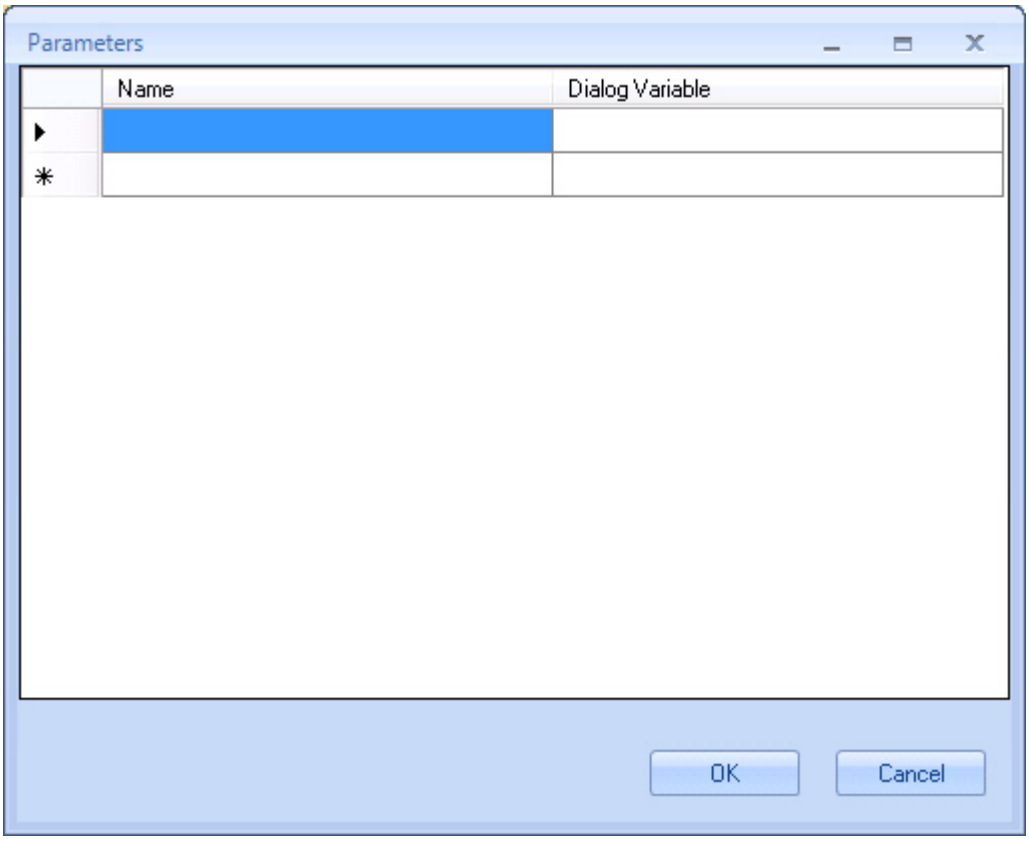
Field Definitions

Field Name	Definition
Name	Definition: This is the name of the Process Variable (aka Custom Attribute) to be created in the sub-process
Value	Definition:

Field Name	Definition
	This is the value that the variable is going to have. It can be a static value, a Process Variable or a value from the Schema
Schema	Function: This opens the Schema Selector Dialog to select one for the Value column.

Parameters Window - Out Parameters

Optional This is for passing parameters from Dialogs to the calling Parent Process. It is also possible to use the Update Parent Process shape in the Dialog itself to update Process Variables in the parent process, but this way it is simpler, especially when the calling process could be any or it is not known when designing the Dialog. Click the ellipsis button to open the config window:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM AgileDialogs 2011** stencil.

3. On the **XRM AgileDialogs 2011** stencil, drag the **DialogTask** or **Intranet Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **OutParameters** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Name	Definition: This is the name of the Process Variable (aka Custom Attribute) to be created in the sub-process Do not use this format ${ProcessVariable1}, just the name
DialogVariable	Definition: This is the name of the Dialog Variable whose value we want to assign to our process variable Do not use this format ${DialogVariable1}, just the name

Intranet Dialog Task

This shape is used in AgileXRM processes (not in AgileDialogs models) and creates an Intranet Manual Task for the participant. When the task is opened, the AgileDialog starts for the user to interact with.

When the AgileDialog is completed this activity is completed and the process continues.

Use this shape rather than the Intranet Manual Task shape (with an associated ALF form), when the user needs to be guided to complete the task.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM AgileDialogs 2011** stencil.
3. On the **XRM AgileDialogs 2011** stencil, drag the **Intranet Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
Dialog	Opens the Following Window: Process Selector Window Purpose of this Window: This opens the Process Selector dialog for choosing which process and version to initiate.
InParameters	Opens the Following Window: Parameters Window - In Parameters Purpose of this Window: Optional This is for passing parameters to the dialog. These process variables will be available in the dialog. Click the ellipsis button to open the config window:
OutParameters	Opens the Following Window: Parameters Window - Out Parameters Purpose of this Window: Optional This is for passing parameters from Dialogs to the calling Parent Process. It is also possible to use the Update Parent Process shape in the Dialog itself to update Process Variables in the parent process, but this way it is simpler, especially when the calling process could be any or it is not known when designing the Dialog. Click the ellipsis button to open the config window:

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity

- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

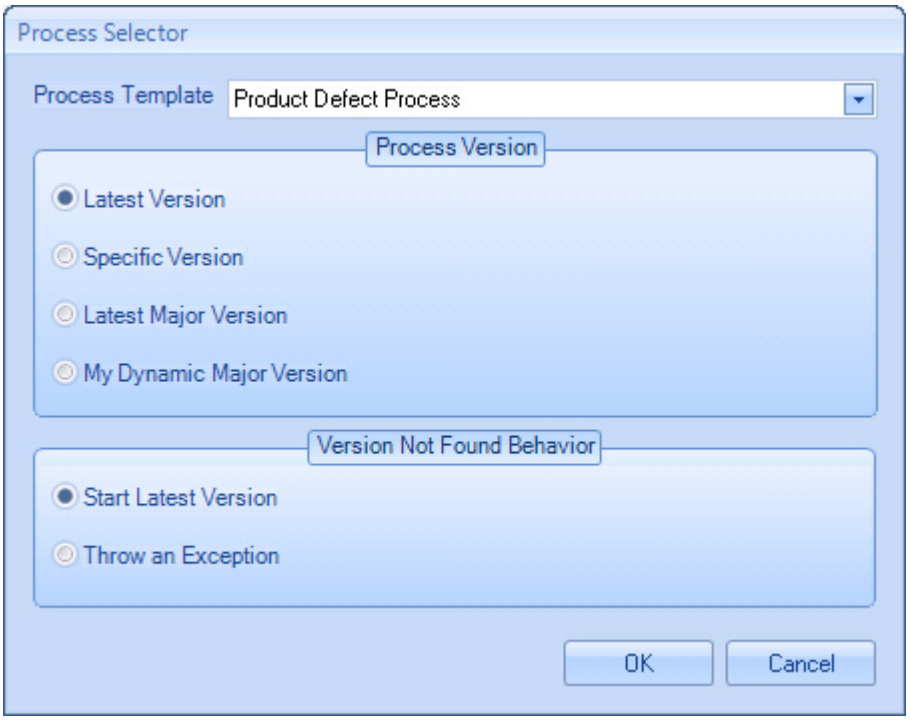
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Process Selector Window

This opens the Process Selector dialog for choosing which process and version to initiate.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM AgileDialogs 2011**

3. Do one of the following:
   - On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Subprocess** or **Subprocess (Multi)** AgileShape, and drop it on the process template.
   - On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
     - **SubDialog** AgilePart
     - **Dialog Task** AgileWork
     - **Intranet Dialog Task** AgileWork
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Sub Process**
   - **Sub Dialog**
   - **Dialog**
6. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

Field Definitions

Field Name	Definition
Process Template	Definition: This drop-down list will show all the processes that are already published in the Process Engine (AgilePoint Server). Select the name of the process that you want to initiate as a sub-process.
Process Version - Latest Version	Function: The process model version that has the status of Released is initiated, (usually, but not necessarily, the latest version of the model)
Process Version - Specific Version	Function: When this is chosen, all the available versions (including ones with the status of Retired) are listed in the drop-down list. Select the specific version of the model that you want to initiate as a sub-process.
Process Version - Latest Major Version	Function: Version numbers are in the form Major.Minor (e.g. 4.06 or 3.50). When this option is selected, all the available Major versions of the selected Process Template are listed in the drop-down (including ones with the status of Retired). When the process

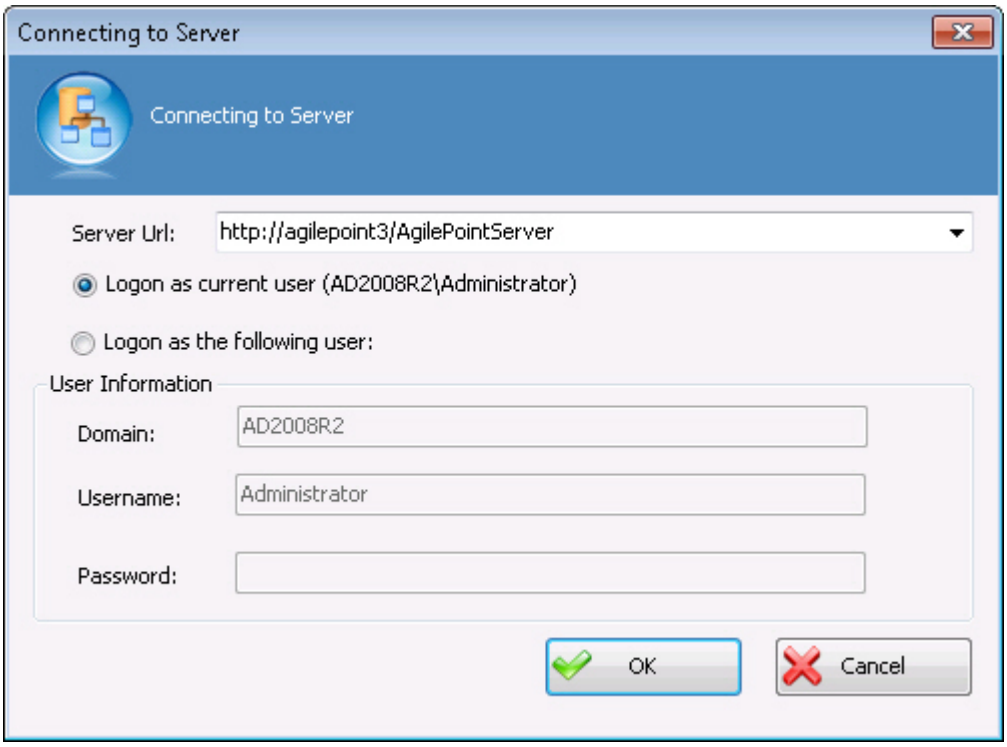
Field Name	Definition
	arrives to this shape, it starts the highest Minor version of the chosen Major version.
Process Version - My Dynamic Major Version	Function: The calling parent process has a Major version. The version of the sub-process that is initiated is the highest Minor version of this Major version. This functionality is useful under 2 circumstances: 1. You only have one environment (production) and it is not possible to test your new processes in another environment before publishing them to the production environment. 2. Although you do have a test environment, you need to keep running these interdependent processes in the same version. It is best to set the Major version for all these related processes to the same value. When you want to deploy many new Templates, increment the Major version for all of them, so that existing running processes do not initiate the new Templates but the corresponding Template in their own Major version. For example, you have 3 related processes: • Process A at version 1.04 • Sub-Process B at version 1.34 – initiated from A • Sub-Process C at version 1.20 – initiated from B Let's say you continue enhancing these processes and you then publish B 2.0 first and C 2.0 on another day. If the sub-processes shapes were configured with this option, new A process instances will continue initiating B 1.34, and B in turn would continue to initiate C 1.20. This is even though there are new versions of B and C available in the Process Engine. Once you publish A 2.0, then the new instances of A would initiate the new versions of B and C (i.e. 2.0).
Version Not Found Behavior - Start Latest Version	Function: This is default behavior. If the Process Option above was Specific Version, Latest Major Version or My Dynamic Major Version; and at runtime such a version is not available, then the Engine is instructed to run the latest version of the process irrespective of the Process Option (i.e. treat it as if the Process Option was Latest Version)

Field Name	Definition
Version Not Found Behavior - Throw an Exception	Function: Rather than initiating the Latest Version, this option would cause the Engine to throw an exception at runtime when the desired version is not found. This way the System Administrator gets a chance to correct the error.

Log on to AgilePoint Server

The first time you configure the shape, this dialog will be shown to get the credentials for connecting to the Process Engine (AgilePoint Server), in order to list the published sub-processes.

Note: The credentials are saved and reused in subsequent accesses to the Process Engine.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **XRM Automatic Activities 2011**
   - **XRM Automatic Activities 4**
   - **XRM AgileDialogs 2011**
3. Do one of the following:

- On the **XRM Automatic Activities 2011** or **XRM Automatic Activities 4** stencil, drag the **Subprocess** or **Subprocess (Multi)** AgileShape, and drop it on the process template.
- On the **XRM AgileDialogs 2011**, drag one of the following AgileShapes, and drop it on the process template:
  - **SubDialog** AgilePart
  - **Dialog Task** AgileWork
  - **Intranet Dialog Task** AgileWork

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Sub Process**
   - **Sub Dialog**
   - **Dialog**

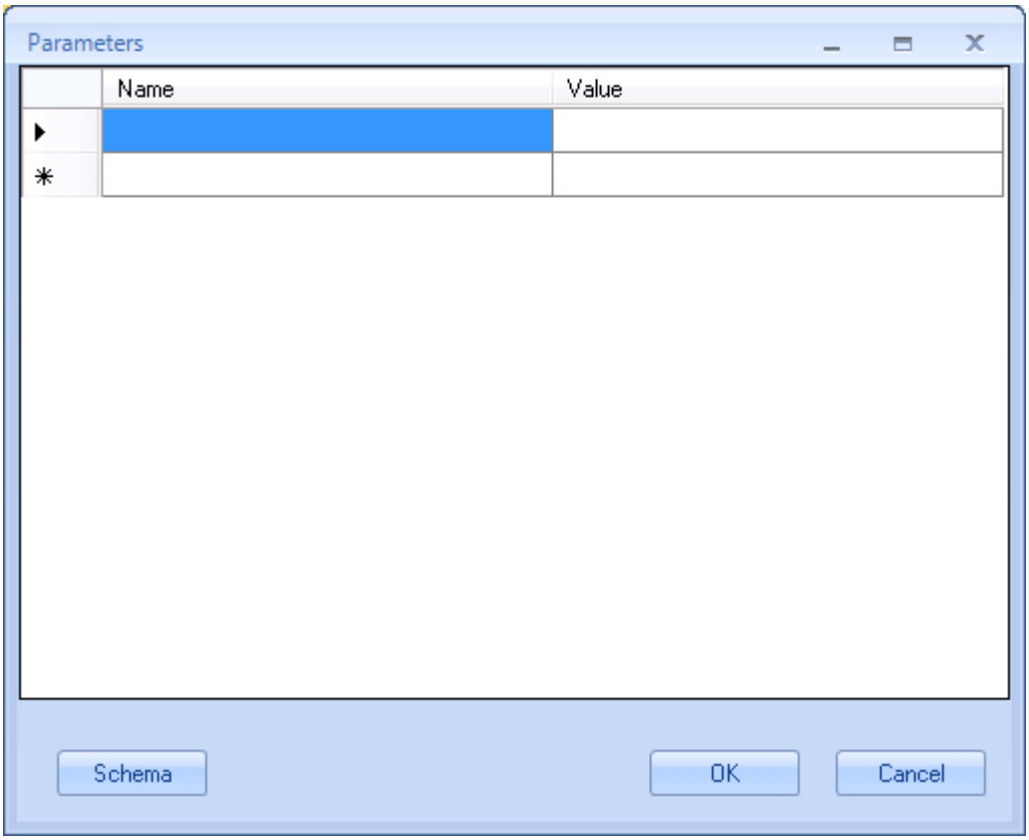
Field Definitions

Field Name	Definition
Server Url	Definition: This is the URL of the Process Engine (AgilePoint Server). Whenever a new URL is used it is added to the drop-down list-box, so next time it is needed, it is easier to select than reenter it.
Logon as current user	Definition: Authenticates using the local machine's Windows user account. This option can be used with Windows authentication only.
Logon as the following user	Definition: Authenticates using the credentials you specify. Allowed Values: • **Selected** - The domain, username and password fields are enabled to fetch the input from an user. • **Deselected** - Specifies that the logon as current user (AD2008R2\Administrator) option is enabled. Default Value:

Field Name	Definition
	Deselected
Domain	Definition: The authentication domain. This does not apply to Forms-Based Authentication.
User Name	Definition: The user name you want to associate with the action. Allowed Values: A user name, not including the domain. Default Value: None Custom Attributes: No
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes

Parameters Window - In Parameters

Optional This is for passing parameters to the dialog. These process variables will be available in the dialog. Click the ellipsis button to open the config window:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM AgileDialogs 2011** stencil.
3. On the **XRM AgileDialogs 2011** stencil, drag the **DialogTask** or **Intranet Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **InParameters** field, click the **Ellipses** button.

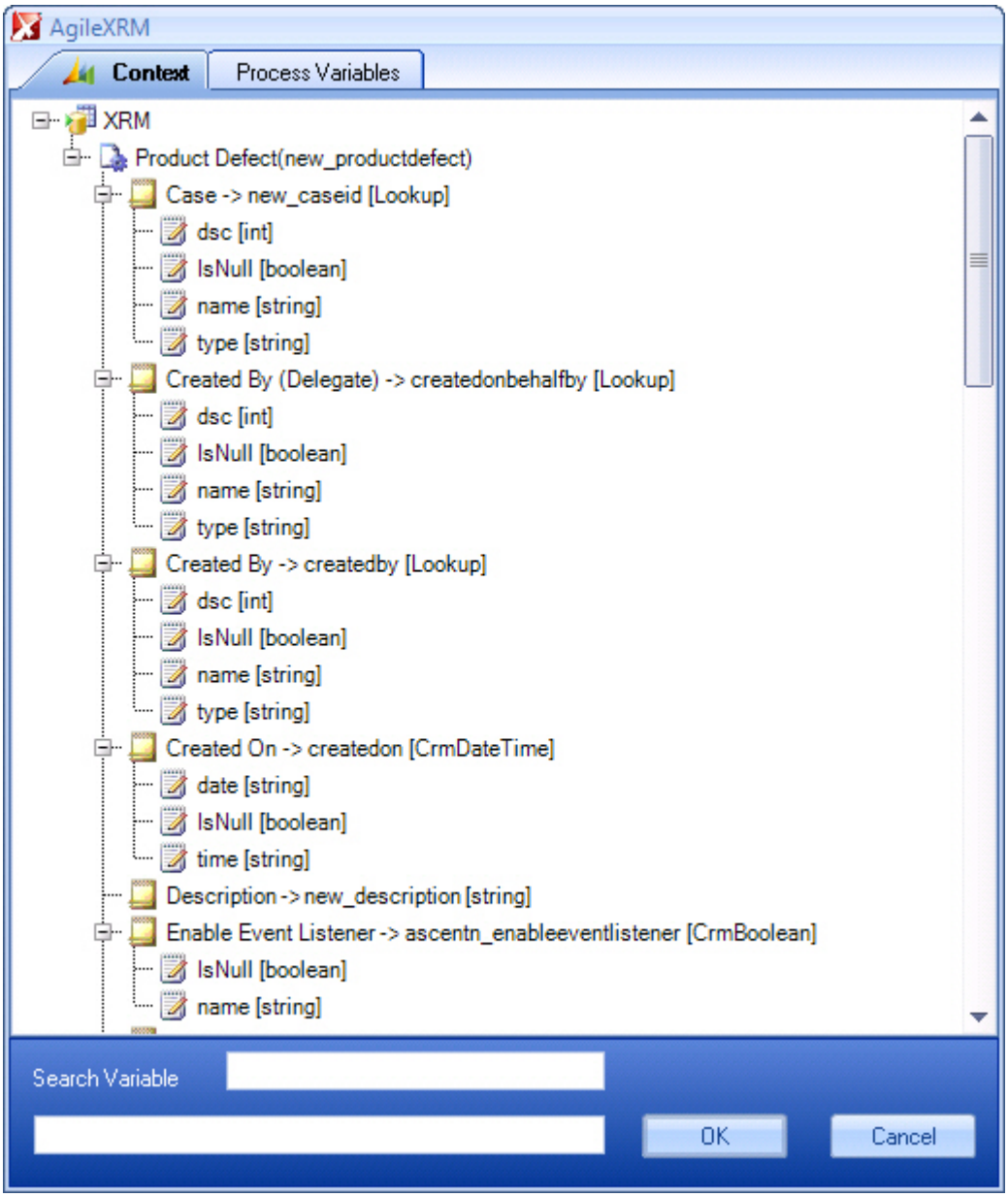
Field Definitions

Field Name	Definition
Name	Definition: This is the name of the Process Variable (aka Custom Attribute) to be created in the sub-process
Value	Definition:

Field Name	Definition
	This is the value that the variable is going to have. It can be a static value, a Process Variable or a value from the Schema
Schema	Function: This opens the Schema Selector Dialog to select one for the Value column.

Schema Selector Dialog

When configuring some shapes, it is possible to pass dynamic context data or process variables as the value of the parameters. The procedure is always the same, either there is an ellipsis button (…), a button called Schema or the user can invoke the dialog by typing the characters ${ in which case the following dialog would appear:

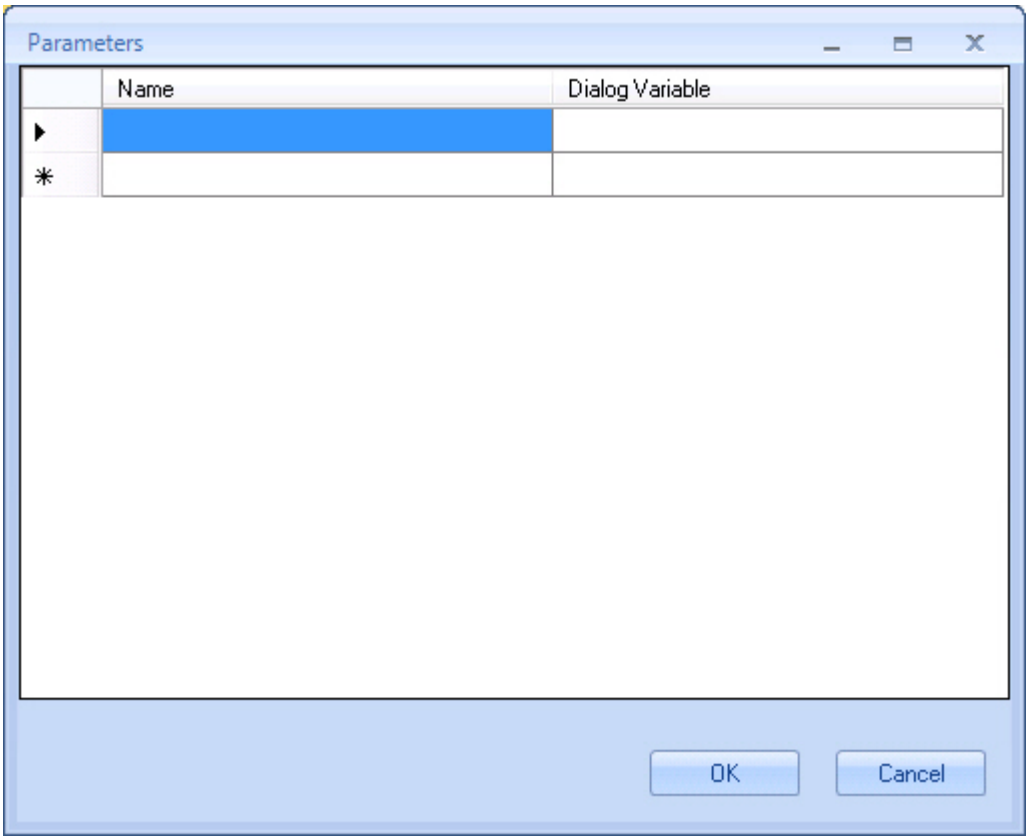


The user can then select the correct attribute from the tree and press OK to insert it in the corresponding place where the dialog was invoked.

When writing in Search Variable field, fields are auto-filtered to make selection easier.

Parameters Window - Out Parameters

Optional This is for passing parameters from Dialogs to the calling Parent Process. It is also possible to use the Update Parent Process shape in the Dialog itself to update Process Variables in the parent process, but this way it is simpler, especially when the calling process could be any or it is not known when designing the Dialog. Click the ellipsis button to open the config window:



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM AgileDialogs 2011** stencil.
3. On the **XRM AgileDialogs 2011** stencil, drag the **DialogTask** or **Intranet Dialog Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **OutParameters** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Name	Definition: This is the name of the Process Variable (aka Custom Attribute) to be created in the sub-process Do not use this format ${ProcessVariable1}, just the name
DialogVariable	Definition:

Field Name	Definition
	This is the name of the Dialog Variable whose value we want to assign to our process variable Do not use this format ${DialogVariable1}, just the name

XRM External Connector Stencil

This AgileXRM stencil holds the AgileShapes that allow extending the platform to External Users (i.e. Users who are not in the organization's Active Directory, rather they are stored in CRM Contacts)

Note: In order to use this stencil, the AgileXRM External Connector should be licensed.

Internet Task

This shapes creates a task for an External User (a user which is not in the Active Directory of the organization).

These users are CRM Contacts and have a corresponding Username and Password stored in custom AgileXRM fields.

These users are identified in AgileXRM as a single user called [DOMAIN]\EXTERNALUSER.

The task will be presented to the user via the Task List WebPart in SharePoint, where the user can interact with it.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM External Connector** stencil.
3. On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Properties for This AgileShape

Field Name	Definition
ExternalUserLogin	Definition:

Field Name	Definition
	This is either the ID of the Contact (each external user has a corresponding Contact record) or the login name of the external user (the ascentn_login field in Contact stores the login name). This value can be configured dynamically using ${ which opens the See "Schema Selector Dialog"
Form	Opens the Following Window: Form Configuration Window Purpose of this Window: This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

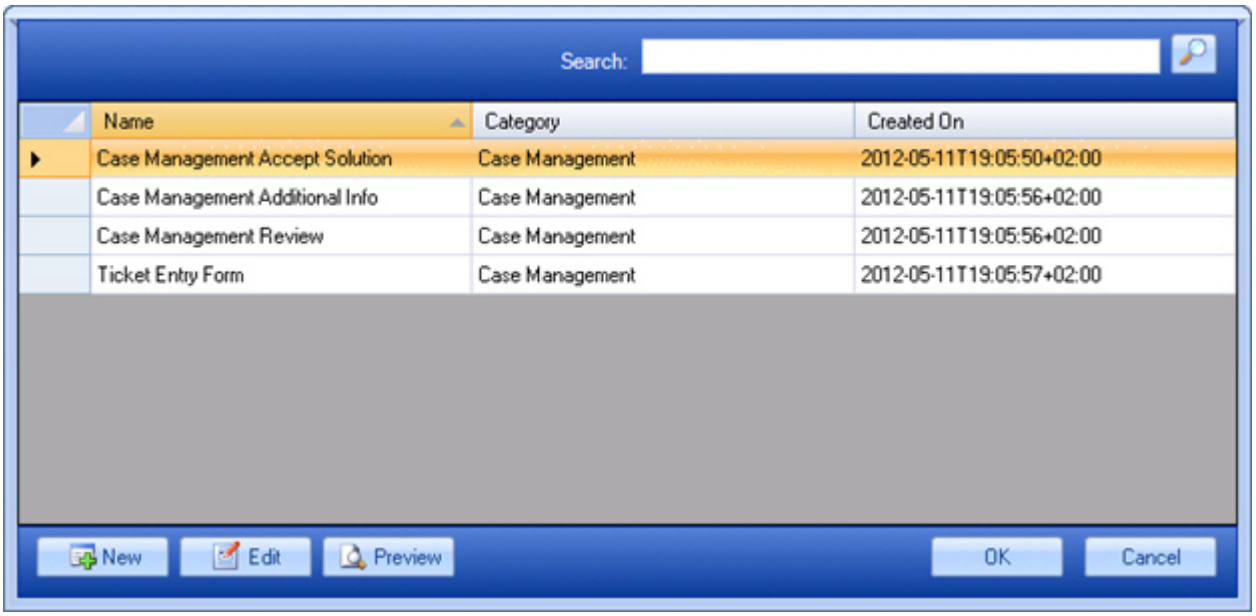
Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

Form Configuration Window

This property allows associating a form created with AgileXRM Form Designer to an activity. Click the ellipsis button to select the form when this window is opened:



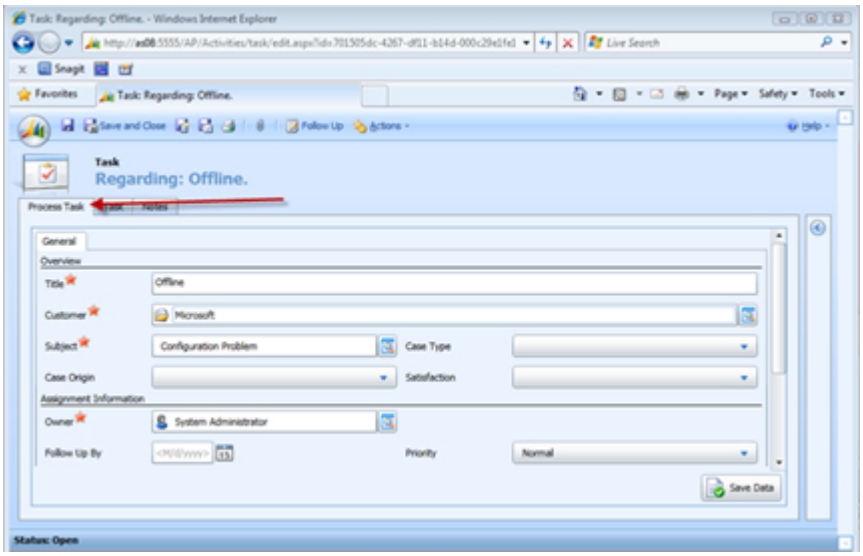
When the process is run and the task is opened, the form is presented to the user (In CRM, the form is shown in the activity's form within a new tab called Process Task):

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencil:
   - **XRM Manual Activities 2011**
   - **XRM Manual Activities 4**
   - **XRM External Connector**
3. Do one of the following:
   - On the **XRM Manual Activities 2011** or **XRM Manual Activities 4** stencil, drag the appropriate AgileShape, and drop it on the process template.
   - On the **XRM External Connector** stencil, drag the **Create Internet Task** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Form** field, click the **Ellipses** button.

Form Example

The following is an example of a form created using the AgileXRM Form Designer.



Internet Dialog Task

This shape is used in AgileXRM processes (not in AgileDialogs models) and creates an Internet Manual Task for the participant. When the task is opened, the AgileDialog starts for the user to interact with.

When the AgileDialog is completed this activity is completed and the process continues.

Use this shape rather than the Internet Manual Task shape (with an associated ALF form), when the user needs to be guided to complete the task.

This shapes creates a task for an External User (a user which is not in the Active Directory of the organization).

These users are CRM Contacts and have a corresponding Username and Password stored in custom AgileXRM fields of the Contact entity.

These users are identified in AgileXRM as a single user called [DOMAIN] \EXTERNALUSER.

The task will be presented to the user via the Task List WebPart in SharePoint, where the user can interact with it.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **XRM External Connector** stencil.
3. On the **XRM External Connector** stencil, drag the **Internet Dialog Task** AgileShape, and drop it on the process template.

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Common AgileWork Properties

This AgileWork inherits the following common properties. For more information, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

BPMN Properties

Each AgileShape includes a set of BPMN properties. For more information, see Adding or Modifying BPMN Properties for an AgileShape in the Documentation Library.

Common AgileWork Tasks

- Associating a Form with an AgileWork
- Adding Participants to an Activity
- Attaching Files to Activities at Runtime
- Using Email Templates and Notifications
- Data Binding
- Using Process Attributes

Add/Remove Timer

Right-clicking the shape brings up the Add Timer menu action. Clicking it adds a timer to the shape, allowing the process modeler to add an alternative route out of the shape when the configured Time Span times out.

Right-clicking a shape with a Timer shows a Remove Timer menu action, which would remove the timer from the shape.

SAP Integration

This section describes the AgileShapes in the SAP Integration stencil. These AgileShapes enable integration between SAP and AgilePoint.

Note: Each copy of the AgilePoint SAP Integration installation software is unique, and a unique license key is created for each installation package. If you installed an evaluation copy of AgilePoint SAP Integration during your AgilePoint trial, you must uninstall the evaluation copy and reinstall the software using the official production installation software. The the production license key will not work with an evaluation software installation. For more information, contact AgilePoint Support.

Prerequisites

- The standard SAP AgileConnector requires a .NET 3.5 environment. For .NET 4.0 environments, you must use a custom web service to connect to the ERPLink SAP connector installed on a .NET 3.5 machine. For more information, contact AgilePoint Professional Services.
- Before you can use SAP integration AgileParts, you must install, and configure the iNet BPS SAP integration software and set up the SAP AgileConnector on the AgilePoint Server.

Configuring iNet BPS

The iNetServer component of ERP Link must be installed on one of the machines in the network. Once the iNetServer components are installed, the connections to SAP systems are configured using the Connection Server Console.

See the document iNetConnectorAdminGuide.chm for details regarding setting up connection pools and other components. This help file is included with the ERP-Link software.

To configure the iNET BPS:

1. Click **Start > All Programs > iNetServer > Administration Console**.
2. On the **iNet Connection Server** window, complete the following fields:

Field Name	Definition
Connection Pool	Identifies the connection pool for the SAP system. The first time you set up the SAP AgileConnector, you must select one of the "unconfigured" default connection pools, and then configure it to meet your needs.
Description	A free text description of the connection pool.
Destination String	• ASHOST - IP address or host name of the SAP server. • SYSNR - The system number the SAP server.
Connection mode	Determines the manner in which AgilePoint connects to SAP. Select **Shared & anonymous**.
Client	The SAP client number.
User	The SAP user name.
Password	The SAP password.
Language	The language abbreviation for your SAP language. The default value is **EN**.
Pool size	• Max - **10** • Min - **1**

3. Click **Validate**.

   A "Validation succeeded" message displays in the bottom field, and the **System** field auto-populates.
4. Click **Save**.
5. On the pop-up, click **Yes** to restart the SAP connection service.
6. Once the status field shows the "restarted" message, click **Exit**.

SAP Integration AgileConnector

This AgilePoint Server extension (AgileConnector) enables you to run the SAP Integration component of the AgilePoint BPMS Suite.

Prerequisites

- The standard SAP AgileConnector requires a .NET 3.5 environment. For .NET 4.0 environments, you must use a custom web service to connect to the ERPLink SAP connector installed on a .NET 3.5 machine. For more information, contact AgilePoint Professional Services.

Enabling the SAP AgileConnector

To configure the SAP AgileConnector, do the following.

Prerequisites

- The standard SAP AgileConnector requires a .NET 3.5 environment. For .NET 4.0 environments, you must use a custom web service to connect to the ERPLink SAP connector installed on a .NET 3.5 machine. For more information, contact AgilePoint Professional Services.

Navigation

1. On the AgilePoint Server machine, click **Start > All Programs > AgilePoint > AgilePoint Configuration**.
2. On the **AgilePoint Server Configuration Tool** window, click the **Extensions** tab.

Instructions

1. On the **Extensions** tab, click **Add**.
2. Browse to the assembly **[AgilePoint Server installation folder]\bin \Ascentn.AgileConnector.SAPIntegration.dll**, and then click **OK** to add this extension to AgilePoint Server.

Configuring the SAP AgileConnector

To configure the SAP AgileConnector, do the following.

Prerequisites

- The standard SAP AgileConnector requires a .NET 3.5 environment. For .NET 4.0 environments, you must use a custom web service to connect to the ERPLink SAP connector installed on a .NET 3.5 machine. For more information, contact AgilePoint Professional Services.

Navigation

1. On the AgilePoint Server machine, click **Start > All Programs > AgilePoint > AgilePoint Configuration**.
2. On the **AgilePoint Server Configuration Tool** window, click the **Extensions** tab.

Instructions

1. On the **Extensions** tab, select the **SAPIntegration** AgileConnector.
2. Click the **Configure** button.
3. In the configuration window for the SAP Integration AgileConnector, configure the following fields as required.

Field Name	Definition
Max Threads for SAP Integration	Definition: Specifies the maximum number of concurrent connections between AgilePoint Server and SAP. Allowed Values: Any integer. Default Value: 5
Send Notification for Suspended Processes	Definition: Specifies whether the SAP Integration AgileConnector sends a notification to the AgilePoint system administrator if a process instances is suspended as a result of an SAP integration error. Allowed Values: • **Deselected** - No email notification is sent. • **Selected** - Sends an email notification if a process instance is suspended. Default Value: Deselected

Call SAP Function

An AgilePart that calls a function in an SAP database. This AgilePart can be used alone to call a single function, or with other Call SAP Function AgileParts and Start and End SAP Transaction AgileParts to create a more complex transaction. For more information, see the *AgilePoint BPMS User's Guide*.

Note: For Generic processes, create the schema before using the Call SAP Function AgilePart. The process schema is required to use this AgilePart. If you want to map the schema to an SAP query, you must design the schema to accommodate the data the query returns.

Properties for This AgilePart

Field Name	Definition
Configuration	Opens the SAP Connection Browser window, where you can set up and select a connection to an SAP system. You can use this window to access the configuration for an SAP function.

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

SAP Connection Browser

The SAP Connection Browser window enables you to set up and select a connection to an SAP system. You can use this screen to access the configuration for an SAP function.

To configure an SAP connection and map the SAP data to your schema, do the following:

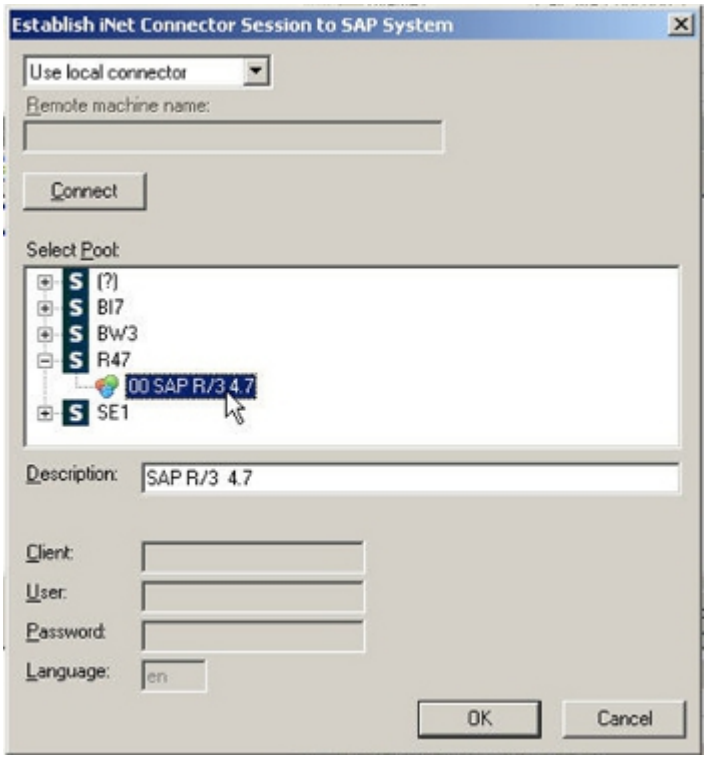
1. In AgilePoint Envision, create or open a process model of any type.

   Note: For Generic processes, create the schema before using the Call SAP Function AgilePart. The process schema is required to use this AgilePart. If you want to map the schema to an SAP query, you must design the schema to accommodate the data the query returns.

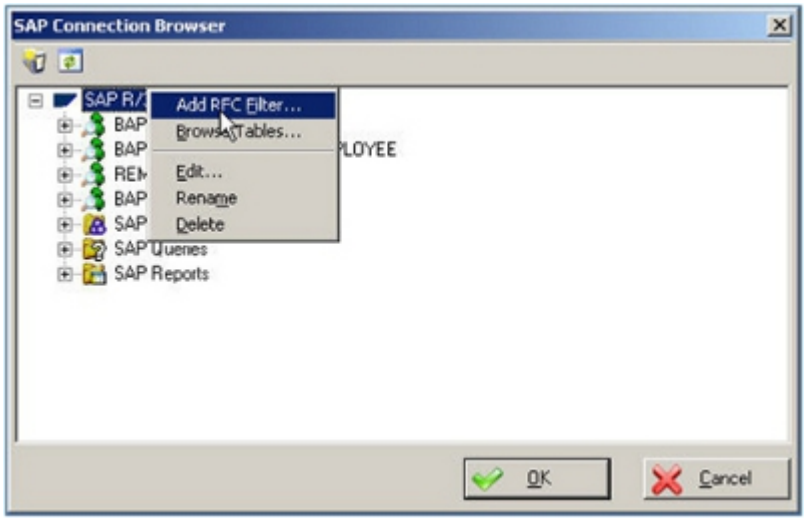
2. Add a **Call SAP Function** AgilePart to your process model from the **SAP Integration** stencil.
3. Select the **Call SAP Function** AgilePart. In the Configuration field, click the **Ellipses** .
4. In the **SAP Connection Browser** window, click the **Add SAP System** icon.



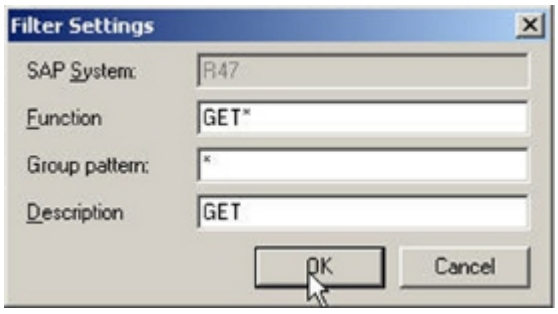
5. In the **Establish iNet Connector Session to SAP System** window, select the SAP server you set up through iNet BPS. The exact steps vary based on your configuration. When you have finished, click **OK**.



6. If you want to filter the functions for your connection, in the **SAP Connection Browser** window right-click the server name, and click **Add RFC Filter**.



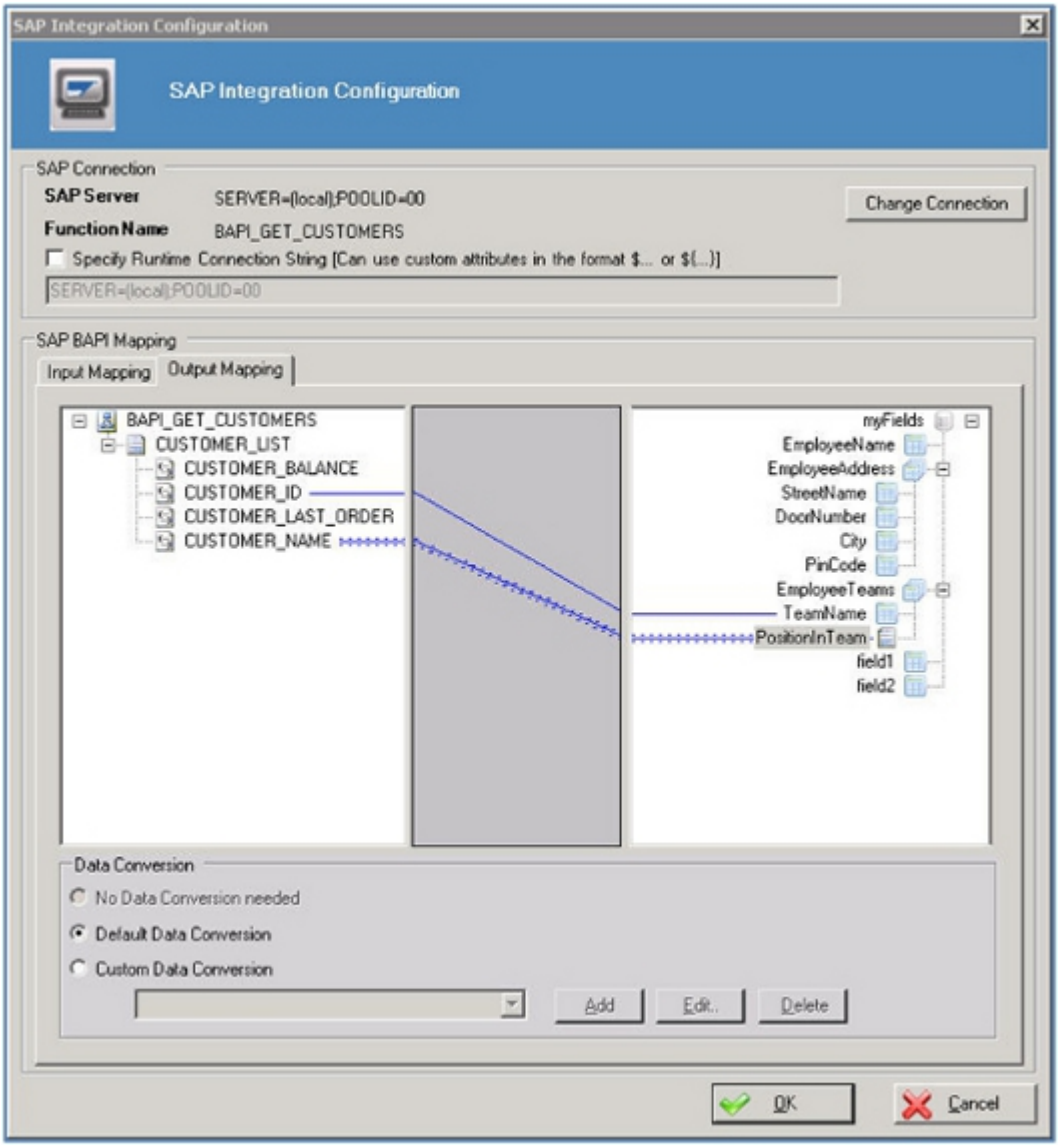
7. In the **RFC Filter** window, in the **Function** field, enter a wildcard search term. For example, to retrieve all the functions that start with GET, you can enter **GET***.



8. In the **Description** field, enter a name for the filter.
9. When you have finished creating the filter, click **OK**.
10. In the **SAP Connection Browser** window, select the SAP function you want, and click **OK**. The **SAP Integration Configuration** window opens.
11. (Optional) On the **SAP Integration Configuration** window, specify a runtime connection string.
12. (Optional) Click **Change Connection** to select a different SAP database. (This starts the procedure over.)
13. (SAP Queries Only) If you are configuring an SAP query, on the **Query Filter** tab, enter the following information in the fields provided:
    - **Query column**
    - **Comparison operator**
    - **Value**
    - **Conjunction**

    Note: Queries can return a large number of rows. You must ensure that the filter conditions narrow the results to a manageable number.
14. (SAP BAPI Only) If you are configuring an SAP BAPI, on the **Input Mapping** tab, enter map the fields in your schema to the SAP fields.
15. (Queries or BAPI) On the **Output Mapping** tab, enter map the fields in your schema to the SAP fields.

    Note: SAP queries can return multiple rows. Therefore, if you want to map to SAP queries, the schema must be designed to accommodate repeating group nodes. If a field is not mapped to a repeating group, only the first row of a query result is updated in the schema.



16. When you have finished, click **OK**.

Begin SAP Transaction

An AgilePart that starts an SAP Transaction. This AgilePart is used with two or more Call SAP Function AgileParts and an End SAP Transaction AgilePart to create a complex SAP transaction. For more information, see the *AgilePoint BPMS User's Guide*.

TransactionName

A unique name that identifies the transaction. To complete a transaction, the value of this property must match the value of the TransactionName property for an End SAP Transaction AgilePart.

Properties for This AgilePart

Field Name	Definition
TransactionName	A unique name that identifies the transaction. To complete a transaction, the values of this property in the Begin SAP Transaction and End SAP Transaction AgileParts must match.

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

End SAP Transaction

An AgilePart that ends an SAP Transaction. This AgilePart is used with two or more Call SAP Function AgileParts and Begin SAP Transaction AgilePart to create a complex SAP transaction. For more information, see the *AgilePoint BPMS User's Guide*.

TransactionName

A unique name that identifies the transaction. To complete a transaction, the value of this property must match the value of the TransactionName property for an Begin SAP Transaction AgilePart.

Properties for This AgilePart

Field Name	Definition
TransactionName	A unique name that identifies the transaction. To complete a transaction, the values of this property in the Begin SAP Transaction and End SAP Transaction AgileParts must match.

Common AgilePart Properties

This AgilePart inherits the properties of the AgilePart AgileShape. For a list of these properties, see AgilePart - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

AgileForms Stencil

This section describes the AgileShapes in the AgileForms stencil.

AgileForm Shape

Generates an AgileForm you define. This form appears as an activity in the participant's Task List. For detailed information regarding AgileForms, see the AgileForms Online Help.

Note: The default value of the Work To Perform property for this shape is **FormRender**. Do not change this value.

Properties for This AgilePart

Field Name	Definition
Edit Form	Opens the AgileForms form editor, which edits the form. For detailed information about editing forms in AgileForms, see the AgileForms online help.
Export Form	Saves the form as an AgileForms XML form file.
Import Form	Imports an AgileForms XML form file, and replaces the form for this shape with the imported one. All fields from the imported form are added to the form library for the current process.
Preview Form	Opens the AgileForms preview window, where you can preview the form.
ReportView	Default value: False Specifies whether an AgileForms AgileShape will be used in Report View. This property can be set to the following values: • **True** - The AgileShape will serve as the Report View form. Only one AgileShape can have this value in a single process model. • **False** - The AgileShape will not serve as the Report View form. If all AgileForms AgileShapes in a process model are set to False, the AgileForm for the Submit step is used for the Report View, as if it were set to True.
SaveOptionField	Definition: A field that enables the process participant to save an AgileForm, rather than submitting it, at runtime. Allowed Values:

Field Name	Definition
	A schema node. Default Value: None Custom Attributes: No Example: • Yes/No • Text • Select One, with the values "Save" and "Do not Save".
SaveOptionText	Definition: Specifies the label of the SaveOptionField. Allowed Values: A text string. Default Value: None Custom Attributes: No Example: • Yes • Save
SubmitStep	Default value: False This property should be set to 'True' if the Form is used as the Submit step (i.e. the first step where you are creating the list item). **Note:** If you have set a custom field as required in a SharePoint list, it must be editable on the Submit step, otherwise SharePoint throws an exception. **Note:** If you have set a field to be of type Multiple lines of text, the field cannot be set as Read Only.
Transfer Form	Transfers a form from one AgileForm AgileShape to another within a process. If you transfer a form to an

Field Name	Definition
	AgileShape the current form is overwritten with the one that is transferred.
Edit Library	Opens the AgileForms form library editor. Each field you add to an AgileForm is added to the form library for the process. The fields in a form library are available for use for to all forms within a process.
Export Library	Saves the form as an AgileForms XML form library file.
Import Library	Imports an AgileForms XML form library file. **Note:** If you import a form library, the current form library will be overwritten with the imported form library. If you want to add form fields to an existing form library, AgilePoint recommends importing a form, instead of a form library.

AgileWork Properties

This AgileWork inherits the properties of the AgileWork AgileShape. For a list of these properties, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

AgileForm Serial

Generates an AgileForm for serial, or sequential, approvals. This form appears as an activity in the identified participants' Task List.

In a serial approval model, the task cannot move forward until a defined set of participants submits an approval in a specified order. (For approvals that do not require a particular approval sequence, use the AgileForm Parallel AgileShape.) You can define the set of approvers and number of required approvers. All approvers for the AgileForm Serial AgileShape use the same approval form.

For detailed information regarding AgileForms, see the AgileForms Online Help.

Note: The default value of the Work To Perform property for this shape is **FormRender**. Do not change this value.

Properties for This AgilePart

Field Name	Definition
Approvers	Default value: $Approvers This property specifies the name of the custom attribute that (initially) contains the user names of the

Field Name	Definition
	approvers. The user names should be separated by a semicolon. Each time this AgileShape is entered at runtime, the AgileShape will assign a task to the first username specified by this property. Then the custom attribute associated with this property will be modified to remove the username so that the next username will be assigned the task during the next iteration through the loop. **Note:** The value of this property must be the name of a custom attribute. The value of the custom attribute must be initialized elsewhere using an Update Custom Attributes AgileShape.
LoopCondition	Default value: $HasMoreApprover This property specifies the name of the custom attribute that will be updated each time the AgileShape is exited to indicate whether more Approvers are still waiting to be assigned the task. The value of the specified custom attribute should be checked (using a SingleCondition AgileShape within the loop) to determine whether the loop should be exited or not. **Note:** The value of this property must be the name of a custom attribute. The value of the custom attribute must be initialized elsewhere using an Update Custom Attributes AgileShape.
Configuration	This property allows the process modeler to configure the participants for the approval task. Click the Ellipses button to open the configuration dialog.
Edit Form	Opens the AgileForms form editor, which edits the form. For detailed information about editing forms in AgileForms, see the AgileForms online help.
Export Form	Saves the form as an AgileForms XML form file.
Import Form	Imports an AgileForms XML form file, and replaces the form for this shape with the imported one. All fields from the imported form are added to the form library for the current process.
Preview Form	Opens the AgileForms preview window, where you can preview the form.
ReportView	Default value: False

Field Name	Definition
	Specifies whether an AgileForms AgileShape will be used in Report View. This property can be set to the following values: • **True** - The AgileShape will serve as the Report View form. Only one AgileShape can have this value in a single process model. • **False** - The AgileShape will not serve as the Report View form. If all AgileForms AgileShapes in a process model are set to False, the AgileForm for the Submit step is used for the Report View, as if it were set to True.
SaveOptionField	Definition: A field that enables the process participant to save an AgileForm, rather than submitting it, at runtime. Allowed Values: A schema node. Default Value: None Custom Attributes: No Example: • Yes/No • Text • Select One, with the values "Save" and "Do not Save".
SaveOptionText	Definition: Specifies the label of the SaveOptionField. Allowed Values: A text string. Default Value: None Custom Attributes: No Example:

Field Name	Definition
	• Yes • Save
SubmitStep	Default value: False This property should be set to 'True' if the Form is used as the Submit step (i.e. the first step where you are creating the list item). **Note:** If you have set a custom field as required in a SharePoint list, it must be editable on the Submit step, otherwise SharePoint throws an exception. **Note:** If you have set a field to be of type Multiple lines of text, the field cannot be set as Read Only.
Transfer Form	Transfers a form from one AgileForm AgileShape to another within a process. If you transfer a form to an AgileShape the current form is overwritten with the one that is transferred.
Edit Library	Opens the AgileForms form library editor. Each field you add to an AgileForm is added to the form library for the process. The fields in a form library are available for use for to all forms within a process.
Export Library	Saves the form as an AgileForms XML form library file.
Import Library	Imports an AgileForms XML form library file. **Note:** If you import a form library, the current form library will be overwritten with the imported form library. If you want to add form fields to an existing form library, AgilePoint recommends importing a form, instead of a form library.

AgileWork Properties

This AgileWork inherits the properties of the AgileWork AgileShape. For a list of these properties, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

AgileForm Parallel

Generates an AgileForm for parallel (non-sequential) approvals. This form appears as an activity in the identified participants' Task List.

In a parallel approval model, the task cannot move forward until a defined set of participants submits an approval. However, the approvers need not approve in any particular order. (For approvals that require a particular sequence, use the AgileForm Serial AgileShape.) Each approver must be defined as an individual participant, using either an ID or a custom attribute. Each participant can also use a unique AgileForm.

For detailed information regarding AgileForms, see the AgileForms Online Help.

Note: The default value of the Work To Perform property for this shape is **FormRender**. Do not change this value.

Properties for This AgilePart

Field Name	Definition
Configuration	Opens the AgileForm Parallel Configuration Window, where you can configure an AgileForm Parallel approval.
Edit Library	Opens the AgileForms form library editor. Each field you add to an AgileForm is added to the form library for the process. The fields in a form library are available for use for to all forms within a process.
Export Library	Saves the form as an AgileForms XML form library file.
Import Library	Imports an AgileForms XML form library file. **Note:** If you import a form library, the current form library will be overwritten with the imported form library. If you want to add form fields to an existing form library, AgilePoint recommends importing a form, instead of a form library.
SaveOptionField	Definition: A field that enables the process participant to save an AgileForm, rather than submitting it, at runtime. Allowed Values: A schema node. Default Value: None

Field Name	Definition
	Custom Attributes: No Example: • Yes/No • Text • Select One, with the values "Save" and "Do not Save".
SaveOptionText	Definition: Specifies the label of the SaveOptionField. Allowed Values: A text string. Default Value: None Custom Attributes: No Example: • Yes • Save

AgileWork Properties

This AgileWork inherits the properties of the AgileWork AgileShape. For a list of these properties, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

AgileForm Parallel Configuration Window

This property allows the process modeler to configure the participants for the approval task and the form each participant sees.

1. Click the **Ellipses** button to open the configuration dialog.
2. On the **Dynamic Parallel Configuration** dialog box, click **Add**, or select a participant and click **Edit**.
3. Add a participant in the **Participant** field. You must use a single participant (as opposed to a role or group), but you can use a custom attribute to identify the participant.
4. Define the form for the approval using the following buttons on this dialog box.

Field Definitions

Field Name	Definition
Edit	Opens the AgileForms form editor, which enables you to edit the form. For detailed information about editing forms in AgileForms, see the AgileForms online help.
Preview	Opens the AgileForms preview window, where you can preview the form.
Export	Saves the form as an AgileForms XML form file.
Import	Imports an AgileForms XML form file, and replaces the form for this shape with the imported one. All fields from the imported form are added to the form library for the current process.
Transfer	Transfers a form from one AgileForm AgileShape to another within a process. If you transfer a form to an AgileShape the current form is overwritten with the one that is transferred.

AgileForm Dynamic Group

This AgileShape can be used as similar to the Manual AgileShape, however it facilitates dynamic group functionality. When users are added/removed from a group, the change is persisted at runtime.

Properties for This AgilePart

Field Name	Definition
Group/Role	Default value: AgilePointGroup Specifies whether an AgilePoint Group or an AgilePoint Role will be used to perform the work.
Group/RoleName	Specifies the name of the AgilePoint group or AgilePoint role that will be used to perform the work.
ReportView	Default value: False Specifies whether an AgileForms AgileShape will be used in Report View. This property can be set to the following values: • **True** - The AgileShape will serve as the Report View form. Only one AgileShape can have this value in a single process model.

Field Name	Definition
	• **False** - The AgileShape will not serve as the Report View form. If all AgileForms AgileShapes in a process model are set to False, the AgileForm for the Submit step is used for the Report View, as if it were set to True.
SaveOptionField	Definition: A field that enables the process participant to save an AgileForm, rather than submitting it, at runtime. Allowed Values: A schema node. Default Value: None Custom Attributes: No Example: • Yes/No • Text • Select One, with the values "Save" and "Do not Save".
SaveOptionText	Definition: Specifies the label of the SaveOptionField. Allowed Values: A text string. Default Value: None Custom Attributes: No Example: • Yes • Save
SubmitStep	Default value: False This property should be set to 'True' if the Form is used as the Submit step (i.e. the first step where you are creating the list item).

Field Name	Definition
	Note: If you have set a custom field as required in a SharePoint list, it must be editable on the Submit step, otherwise SharePoint throws an exception. **Note:** If you have set a field to be of type Multiple lines of text, the field cannot be set as Read Only.

AgileWork Properties

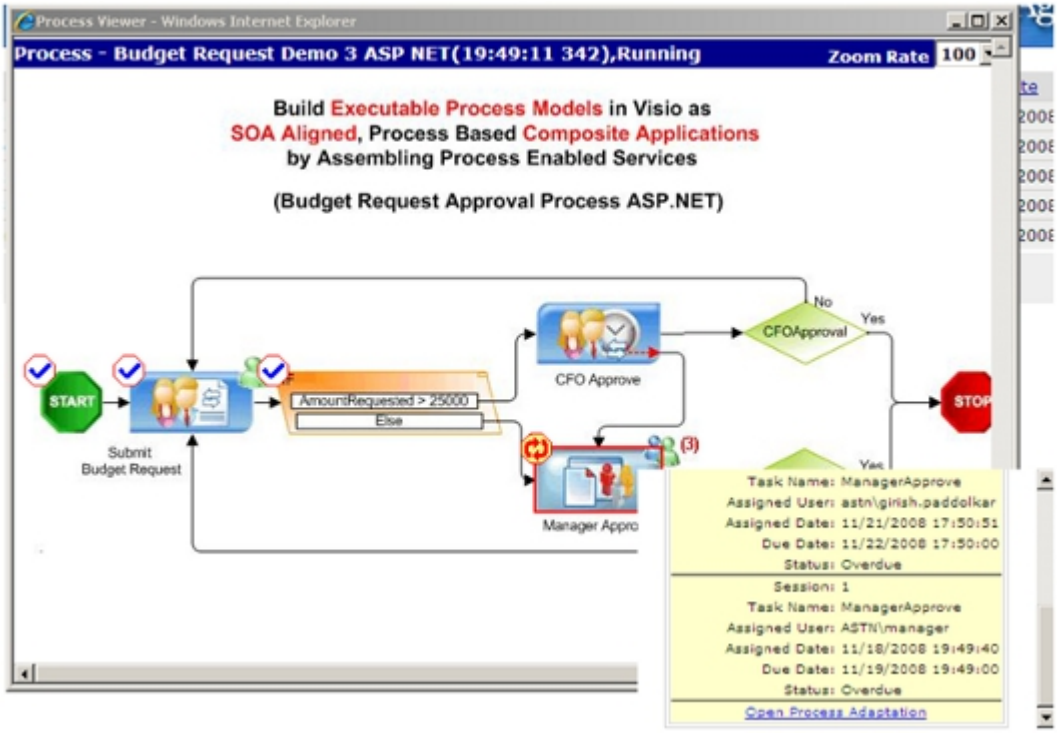
This AgileWork inherits the properties of the AgileWork AgileShape. For a list of these properties, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

AgileForm Process Adaptation

This AgileShape is a combination of the Dynamic Parallel, Dynamic Sequential, and Voting AgileWork. It allows for a running process instance to adapt by adding a new participant to complete a task in either a Parallel or Sequential fashion at runtime to support dynamic processes. Manageability at runtime is accomplished either through the AgilePoint Enterprise Manager or the Process Viewer.

Note: A user must have **Create a Task** and **Cancel a Task** access rights in AgilePoint Enterprise Manager in order to see the Process Adaptation functionality in AgilePoint Enterprise Manager.

Note: A modification to the Process Viewer web.config file is required in order to see the Process Adaptation functionality in the Process Viewer.



To enable the **Open Process Adaptation** link in the Process Viewer, make the following modification to the AgilePoint Web application's web.config file:

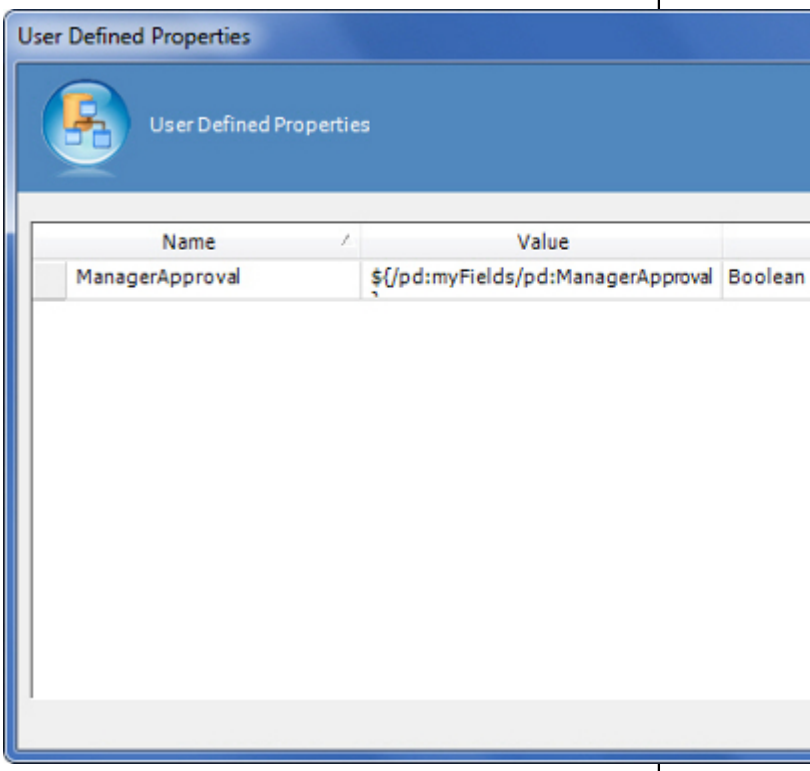
```
<appSettings>
         <add key="ProcessAdaptationUrl"
              value="http://[AgilePoint Server host]:[port]/EnterpriseManager/
ProcessAdaptation/LinkedTasks.aspx"/>
</appSettings>
```

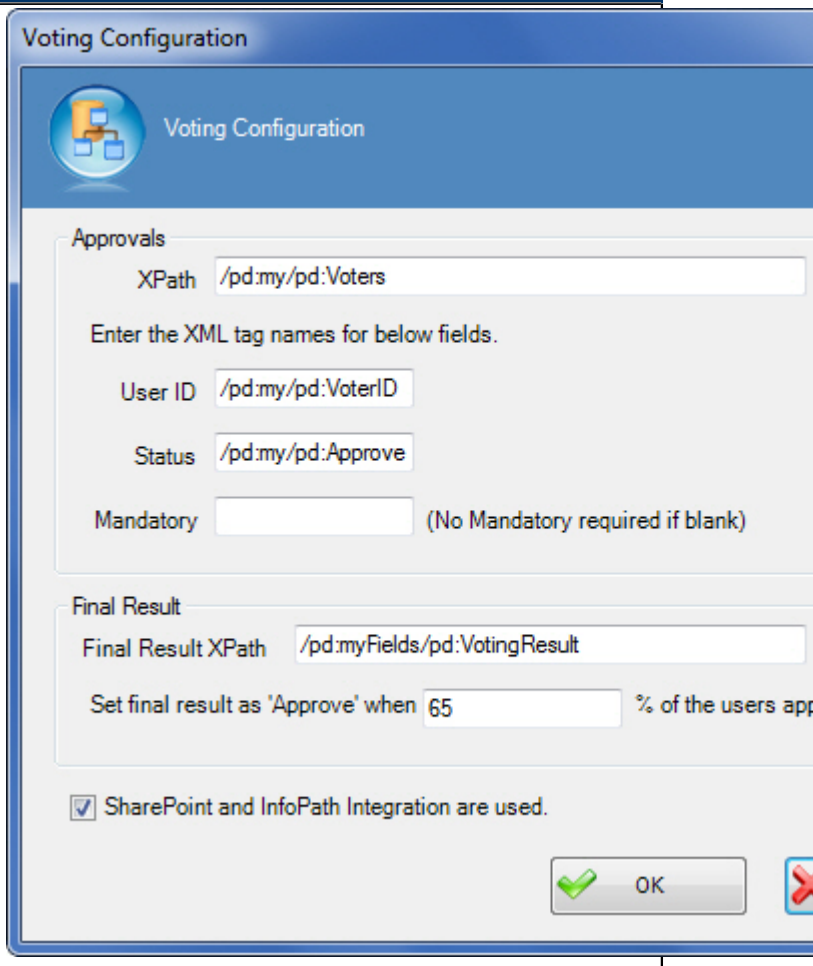
The value for the Process Adaptation is the URL of the process adaptation URL in AgilePoint Enterprise Manager.

For the Process Viewer in SharePoint using AgileForms, add the key entry into the SharePoint web.config at C:\Inetpub\wwwroot\wss\VirtualDirectories\8000\web.config.

Properties for This AgilePart

Field Name	Definition
UserDefinedProperties	**Note:** Developers may need to write code to fully implement this. This property allows the process modeler to configure initial ClientData values that will be associated with the AgileShape's associated task(s) at runtime. This is basically a way of allowing you to specify a set of name/value pairs that are passed to your Web page via an object called a WorkItem. This is an alternative to passing data via URL parameters. In your Web page you can retrieve this data via the ClientData

Field Name	Definition
	property of the WorkItem. It is then up to you to decide how to use the data. Click the **Ellipses** button to open the configuration dialog. 
Voting Configuration	This property allows the process modeler to configure data binding to the data schema within a repeating table for which to establish the approval data. The "Mandatory" option provides an added level of functionality, requiring any participants that have been identified as "Mandatory" to approve, or the final decision will be not-approved. The final result is also configured here by setting a custom attribute to store the final result and specifying the percentage of participants that will need to approve before the final decision is considered as approved. For example, the process designer specifies the voting percentage as 60%. If 60% of the approvers approve the preceding request, then the final decision is considered as approved. Click the **Ellipses** button to open the configuration dialog.

Field Name	Definition
	
ApprovalType	The property can be set to Sequential or Parallel at design time. This property determines a runtime whether the task will be delivered in a sequential or parallel fashion to the participants of the task. This can be changed at runtime via AgilePoint Enterprise Manager or the Process Viewer. Sequential means that the task will be delivered in a sequential fashion to 1 participant at a time. Parallel means that all the tasks will be delivered to each of the participants at the same time, there is no particular order for which the task is assigned to the participants.
UpdateCustomAttribute	This property allows the process modeler to configure an update to a custom attribute value based on an event type.
SubmitStep	Default value: False

Field Name	Definition
	This property should be set to 'True' if the Form is used as the Submit step (i.e. the first step where you are creating the list item). **Note:** If you have set a custom field as required in a SharePoint list, it must be editable on the Submit step, otherwise SharePoint throws an exception. **Note:** If you have set a field to be of type Multiple lines of text, the field cannot be set as Read Only.
SaveOptionField	Definition: A field that enables the process participant to save an AgileForm, rather than submitting it, at runtime. Allowed Values: A schema node. Default Value: None Custom Attributes: No Example: • Yes/No • Text • Select One, with the values "Save" and "Do not Save".
SaveOptionText	Definition: Specifies the label of the SaveOptionField. Allowed Values: A text string. Default Value: None Custom Attributes: No Example: • Yes

Field Name	Definition
	• Save

AgileWork Properties

This AgileWork inherits the properties of the AgileWork AgileShape. For a list of these properties, see AgileWork - Common Setup. Note that only the relevant properties are available in AgilePoint Envision. Unneeded properties are hidden.

Common AgileShape Configuration Windows

This section describes the configuration windows that are shared across multiple AgileShapes.

Attaching Files to Activities at Runtime

You an attach one or more files from a process repository to an activity at runtime, so that if a participant or administrator clicks the activity in the Process Viewer, The file title is displayed with a hyperlink to the file.

To attach a file to an activity, do the following.

Prerequisites

- Set up an AgilePoint process repository in SharePoint.

Navigation

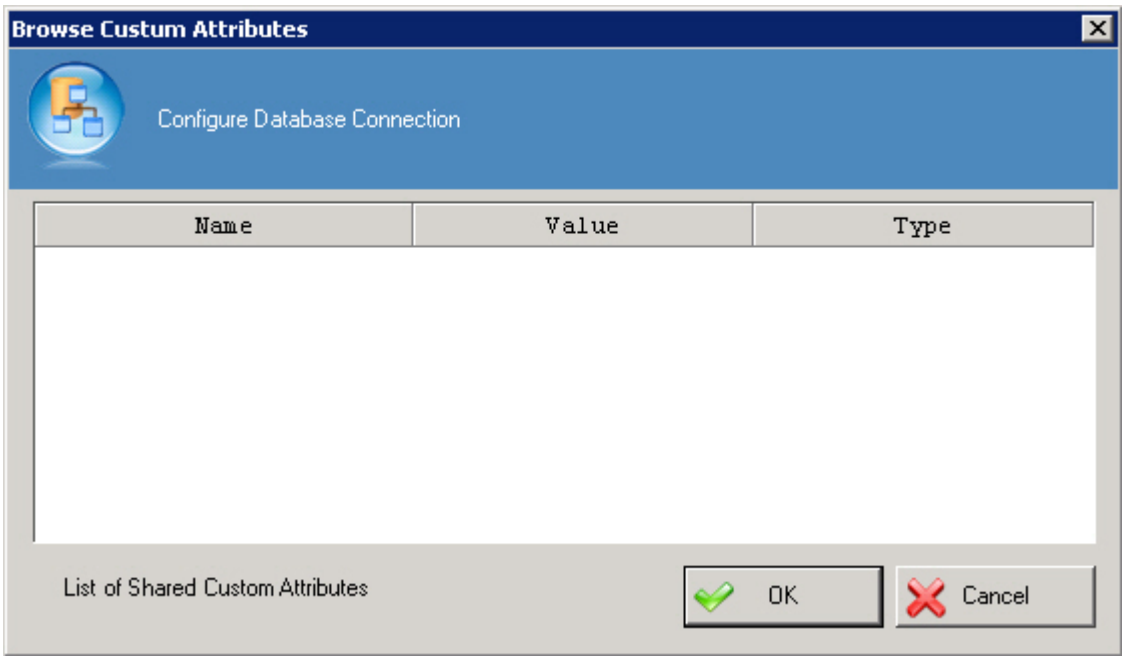
1. In AgilePoint Envision, open a process template.
2. Drag any AgileShape, and drop it on the process model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. On the **Configure Attachments** field, click the **Ellipses** button.

Instructions

1. On the Configure Attachments Window, click **Add**.
2. On the Get SharePoint Document Library Window, enter the **SharePoint Server URL** for the SharePoint site where your file attachment resides.
3. Modify the authentication information as required.
4. Click **Get Document Libraries**.
5. In the **Document Library** list, select the library where your file attachment resides.
6. In the **Select a document** list, select your file.

Browse Custom Attributes Window

Specifies a connection string from a list of shared custom attributes.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. In one of the following windows, click **Choose**. The specific windows that display vary, depending upon the AgileShape you are using:
   - Configuration for Inserting Database Record Window
   - Configuration for Batch Inserting Database Record Window
   - Configuration for Updating Database Record(s) Window
   - Configuration for Deleting Database Record(s) Window
   - Configuration for Stored Procedure or Generic SQL Window
   - Database Queries Window
   - Database Stored Procedure Window
7. On the Log on to AgilePoint Server, specify the logon credentials to connect to AgilePoint Server.

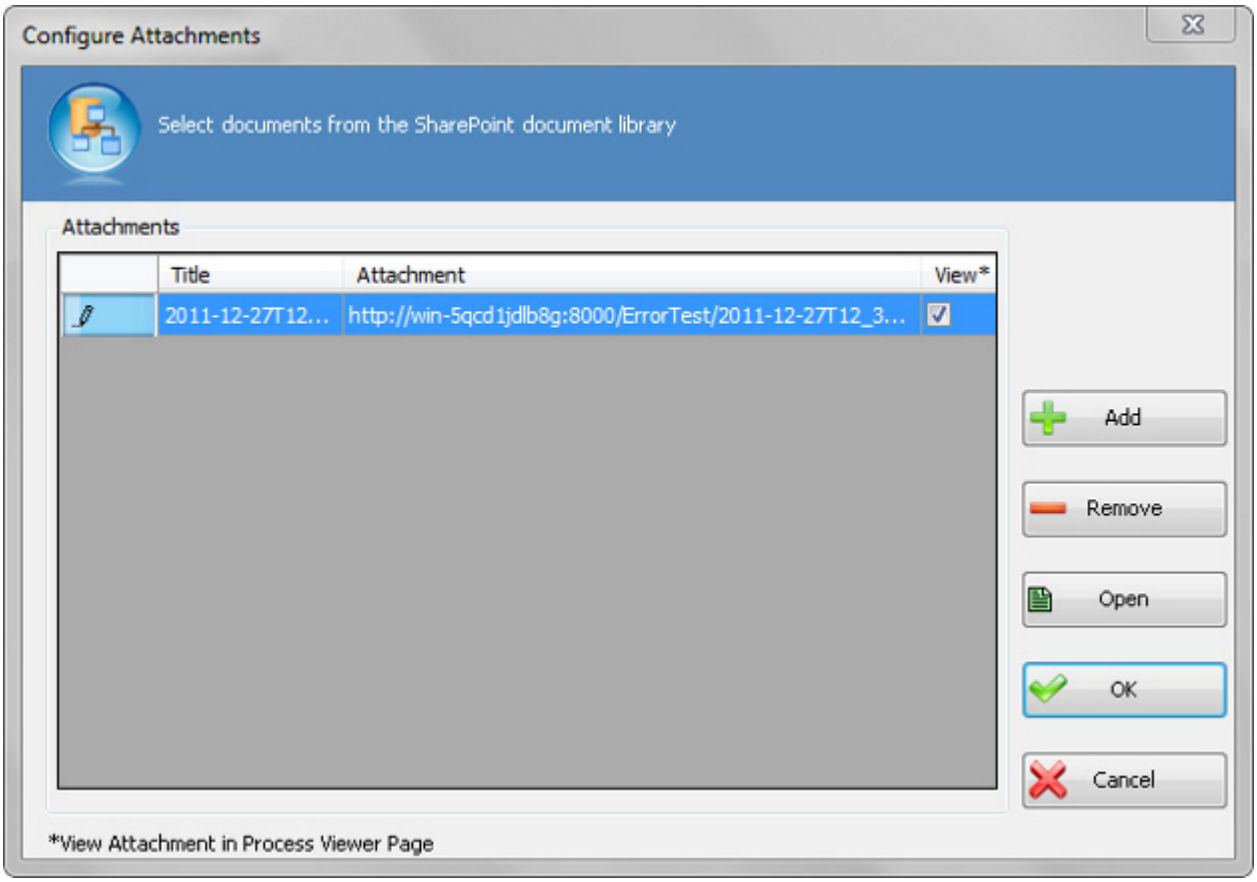
Field Definitions

Field Name	Definition
Name	Definition:

Field Name	Definition
	Specifies the name of custom attribute. Allowed Values: Read only.
Value	Definition: This field contains the value of the shared custom attribute. Allowed Values: Read only.
Type	Definition: Specifies the data type of the shared custom attributes. Allowed Values: Read only.

Configure Attachments Window

Specifies files to attach to an AgileShape from a process repository.



Prerequisites

- Set up an AgilePoint process repository in SharePoint.

Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileShape, and drop it on the process model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. On the **Configure Attachments** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Add	Opens the Following Window: Get SharePoint Document Library Window Purpose of this Window:

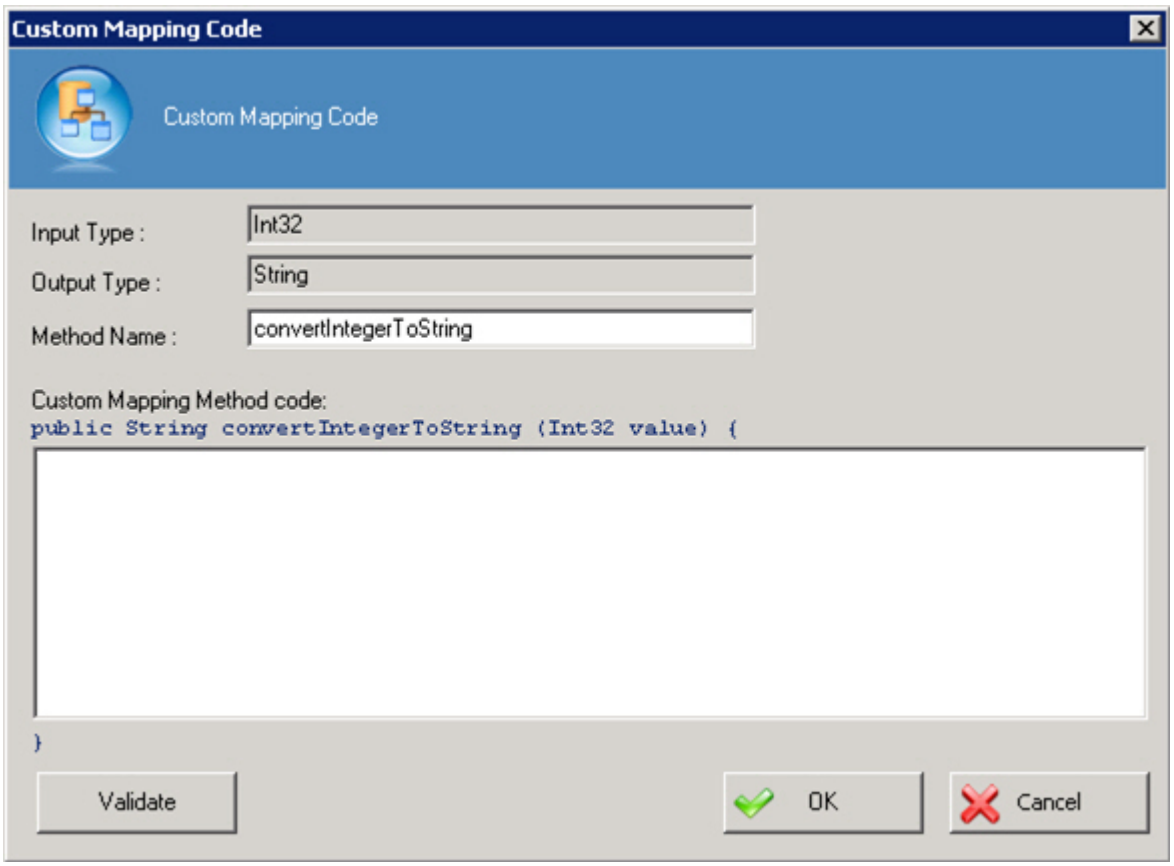
Field Name	Definition
	Specifies files to attach to an AgileShape from a process repository.
Remove	Function: Removes a document from the Attachments list.
Open	Function: Opens a document in the Attachments list for preview.
Other Predecessor Activities	Definition: Specifies whether to display a link to the attached file in the AgilePoint Process Viewer. Allowed Values: • **Selected** - The link is displayed in the process viewer. • **Deselected** - The link is not displayed in the process viewer. Default Value: Selected

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Custom Mapping Code Window

Specifies custom C# code that can be used to map fields to an XML schema.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **SharePoint**
   - **Web Services**
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **CAML Query**
   - **WSE (Web Service Extension)**
   - **WCF (Windows Communication Foundation)**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The fields that display vary, depending upon the AgsileShape you are using. For example, **Configure**.
6. On one of the following windows, under the **Output Mapping** or **Request/Response** tab, click the **Ellipses** button:
   - CAML Query Builder Configuration Window - Output Mapping Tab
   - WebService Configuration Window - Request Tab
   - WebService Configuration Window - Response Tab

- Configuration for WCF Service Window - Request Tab
- Configuration for WCF Service Window - Response Tab

Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options:

- **Reset All Mappings** - Deletes all mappings that have been made in the Schema Mapper for this activity.
- **Remove Invalid Mappings only** - Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same.
- **Cancel** - Aborts opening the Schema Mapper window.

7. On the Schema Mapper Window, select the **Custom Data Conversion** option, and then click **Add**.

Field Definitions

Field Name	Definition
Input Type	Definition: Specifies the data type of a source schema data field. This indicates that the data type of the source schema field didn't match to the destination schema field on the Schema Mapper Window. Allowed Values: Read only.
Output Type	Definition: Specifies the data type of a destination schema data field. This indicates that the data type of the source schema field didn't match to the destination schema field on the Schema Mapper Window. Allowed Values: Read only.
Method Name	Definition: Specifies the name of a method you want to create for custom data conversion. Allowed Values: Any method name. Default Value:

Field Name	Definition
	Populated on the basis of the data type of the selected schema fields on the Schema Mapper Window. Custom Attributes: No
Custom Mapping Method Code	Definition: Specifies the code for the custom mapping data conversion. Allowed Values: A valid code. Default Value: None Custom Attributes: No

Common Configuration Tasks

- Data Binding
- Using Process Attributes

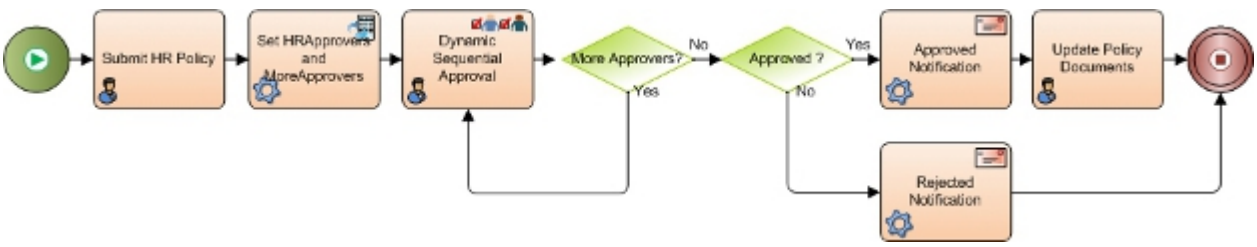
Enabling Sequential Approvals by Multiple Participants

This example demonstrates how to create a task with multiple approvals in an ordered sequence using the Dynamic Sequential Approval AgileShape. This example uses process attributes to loop through a specified list of approvers in sequential order. At runtime, the process does not move forward until all the identified reviewers have approved the activity in the prescribed order.

Instructional Goals

- Demonstrate how to set up sequential approvals for an activity.

Example Process: Create or Update a Human Resources Policy



Problem Statement

Create or update a human resources (HR) policy within an organization.

Business Requirements

- The process is initiated when an HR employee submits an update to the company HR policies.
- The policy must be approved by multiple reviewers in sequential order.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Premier Extension** stencil.
3. On the **Premier Extension** stencil, drag the **Dynamic Sequential Approval** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.

Instructions

1. On the **Dynamic Sequential Approval** AgileShape, complete the following fields.

Field Name	Value
Approvers	$HRApprovers
LoopCondition	$MoreHRApprovers
Work to Perform	Your ASP.NET or InfoPath form

2. On the **Premier Extension** stencil, drag the **Update Custom Attributes** AgileShape, and drop it on the process template.
3. On the **Configuration** field, click the **Ellipses** button.
4. On the **Create or Update Custom Attribute** window, click **Add**.
5. In the **AttributeName** column, enter **HRApprovers**.

   You can also click the **Schema** button to select the **HRApprovers** attribute from your InfoPath or ASP.NET XML schema.
6. In the **Expression** column, enter a C# expression that indicates the list of approvers for your Dynamic Sequential Approval task.

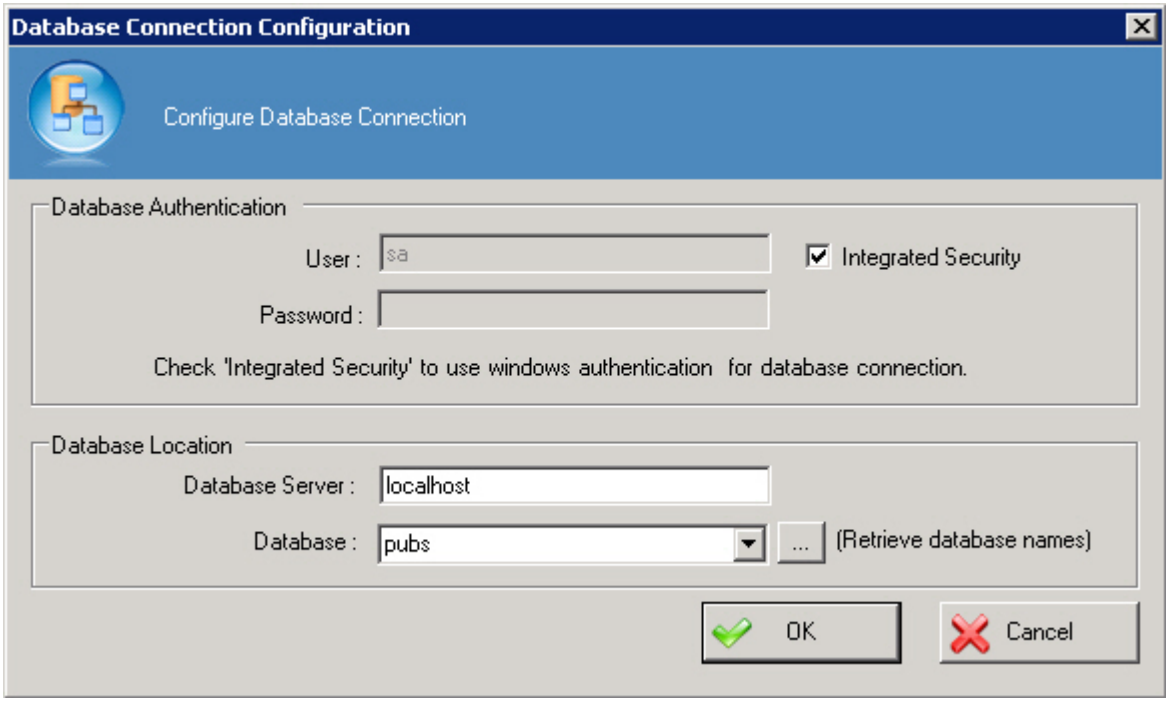
Field Name	Value
Expression	Definition: Specifies a value that is assigned to the custom attribute at runtime by a code snippet. Allowed Values: A C# code snippet. The following rules apply:

Field Name	Value
	• You can specify simple expressions only. For example, assignment, call, increment, decrement, and new object expressions. • The string value must be enclosed within the quotation marks. For example, "Name". • You cannot leave the **Expression** field empty. Default Value: None Custom Attributes: Yes Example: • "True" • @"AP5\John; AP5\Bob; AP5\Lily; AP5\Fred";

7. On the **Create or Update Custom Attribute** window, click **Add**.
8. In the **AttributeName** column, enter **MoreHRApprovers**.
9. In the **Expression** column, enter **"True"**.

Database Connection Configuration Window

Creates a connection string with specified information.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. In one of the following windows, click **Create**. The specific windows that display vary, depending upon the AgileShape you are using:
   - Configuration for Inserting Database Record Window
   - Configuration for Batch Inserting Database Record Window
   - Configuration for Updating Database Record(s) Window
   - Configuration for Deleting Database Record(s) Window
   - Configuration for Stored Procedure or Generic SQL Window
   - Database Queries Window
   - Database Stored Procedure Window

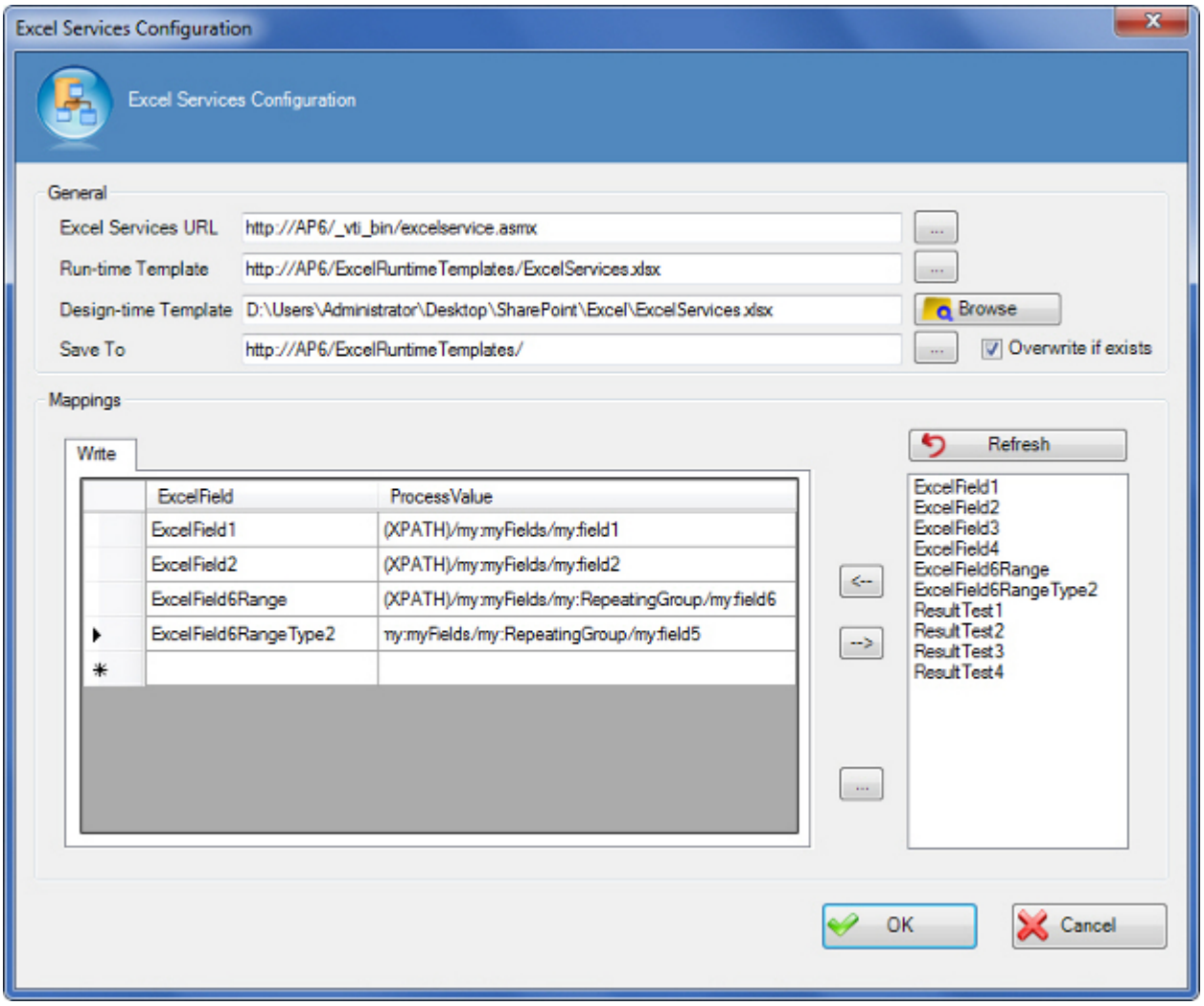
Field Definitions

Field Name	Definition
User	Definition: The user name for the database account AgilePoint Server uses to connect to the database. Allowed Values: A valid user name for the database. Default Value: sa
Password	Definition: Specifies a password for the specified user. Allowed Values: A valid password. Default Value: None Custom Attributes: No

Field Name	Definition
Integrated Security	Definition: When integrated security is selected, the current windows account credentials are used for authentication. Allowed Values: • **Selected** - The windows account credentials are used for authentication automatically. • **Deselected** - The user and password fields are enabled for database authentication. Default Value: Selected
Database Server	Definition: Specifies a database server name that provides database services. Allowed Values: A valid database server name. Default Value: localhost Custom Attributes: No
Database	Definition: List all the database names that are available for the authenticated user. Allowed Values: • A valid database server host name. • A valid IP address. Default Value: pubs Custom Attributes: No

Excel Services Configuration Window - Write Tab

Sets up an operation to create an Excel file.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **Excel Write**
   - **Excel Calculate**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Excel Services URL	Definition:

Field Name	Definition
	Specifies the URL of the SharePoint Excel Services. Allowed Values: • A valid SharePoint Excel Services URL. • A custom attribute. • XML metadata To add XML metadata, use the Ellipses button. Default Value: None Custom Attributes: Yes Example: • URL - http://ind-01:8888/_vti_bin/ExcelService.asmx • A custom attribute - $\{SharePointURL\}$\{ExcelService\}
Run-time Template	Definition: Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. Allowed Values: • A valid Excel template file name with the full path. • A custom attributes. For example, $\{SharePointURL\}$\{RuntimeTemplateLibrary\}$\{ExcelFilename\} • XML metadata To add XML metadata, use the Ellipses button. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content. • This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. Default Value:

Field Name	Definition
	None Custom Attributes: Yes Example: http://ind-01:8888/ExcelServicesDemo/ExcelServices.xlsx
Design-time Template	Definition: Specifies the name of an Excel template file that is used at design time. Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. Allowed Values: A valid Excel template file name with the full path. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content. • Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. Default Value: None Custom Attributes: No Example: C:\Excel\ExcelSheet\ExcelServices.xlsx
Save To	Definition: Specifies the location where you want to save the resulting Excel document. Allowed Values: • A valid URI.

Field Name	Definition
	The URI can be the URL for a SharePoint document library, or a directory path. • A custom attributes. For example, $ \{SharePointURL\}$\{ExcelDocLibrary\}$ \{ExcelFilename\}. • XML metadata To add XML metadata, use the Ellipses button. Default Value: None Custom Attributes: Yes Example: http://ind-01:8888/ExcelServicesDemo/${/ my:myFields/my:SaveWrite}.xlsx
Named Fields Box	Definition: Specifies the named fields populated from the Excel sheet once you specify the Design-time Template file. This field is used for the mapping purpose. You must map the Excel named fields to the process values to: • Write to an Excel document. • Read from an Excel document. A named field in Microsoft Excel is the name of a cell or range that is used instead of the cell's reference name. For example, empName, a named field, is easier to use instead of its cell's reference name, C21. Allowed Values: A named field selected from the list. Default Value: None Custom Attributes: No
Refresh	Function: Reloads the named fields from the Excel sheet to the Named Fields box.

Field Name	Definition
	Note: You must click the Refresh button if the file specified in the Design-time Template changes.
Left Arrow	Function: Populates the selected named field from the Named Fields Box box to the ExcelField column. You can add only one named field at a time.
Right Arrow	Function: Deletes the selected row.
Overwrite if exists	Definition: Overwrites an existing file specified using the Save To field. Allowed Values: • **Deselected** - The AgileShape doesn't overwrite the existing file. • **Selected** - The AgileShape overwrites the file if it already exists. Default Value: Deselected
ExcelField	Definition: Specifies the Excel named field to be mapped to the process value. The mapping is performed to update the named fields in the Excel sheet. Allowed Values: A named field. Use the Left Arrow button to move the named field from the Named Fields box to the ExcelField column. **Note:** The value of the named field in the ExcelField column can be evaluated from a string containing a custom attribute. For example, $\{MyExcelField\} or field$\{year\}$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! Default Value: None Custom Attributes:

Field Name	Definition
	Yes
ProcessValue	Definition: Specifies the process value. The value is mapped to the named field to update the named fields in the Excel sheet. Allowed Values: • A number or a text string that can contain spaces. This must be in accordance with the data type of the Excel named field. • A custom attribute. Note the following: • Once a named field is in the ExcelField column, map a named field to the process value. First, select the row, and then click the **Ellipses** button to select from the Select XPath from Attributes Window. • You can type a custom attribute directly in the ProcessValue column. **Note:** The name of the custom attribute in the ProcessValue column can be derived from a string containing another custom attribute. For example, $\{MyCustomAttribute\} or customattribute $\{year\}$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! **Note:** You can also use advance XPath expressions such as filtering. For example, (XPATH)/my:myFields/my:field2[.>32] returns all items that match the filter (field2 > 32). In addition, you can combine XPath expressions and custom attributes such as: (XPATH)/my:myFields/my:field2[.>$\{myCustomAttribute\}] **Note:** If you have an XPath expression that returns more than one value, there is a feature for mapping them with a named field that is defined as a one-dimensional range in the Excel document. The AgilePart fills the range with returned values from the XPath expression, but if the range does not contain enough cells for the number of values, the AgilePart doesn't fill past the range of cells in order to protect rest of the

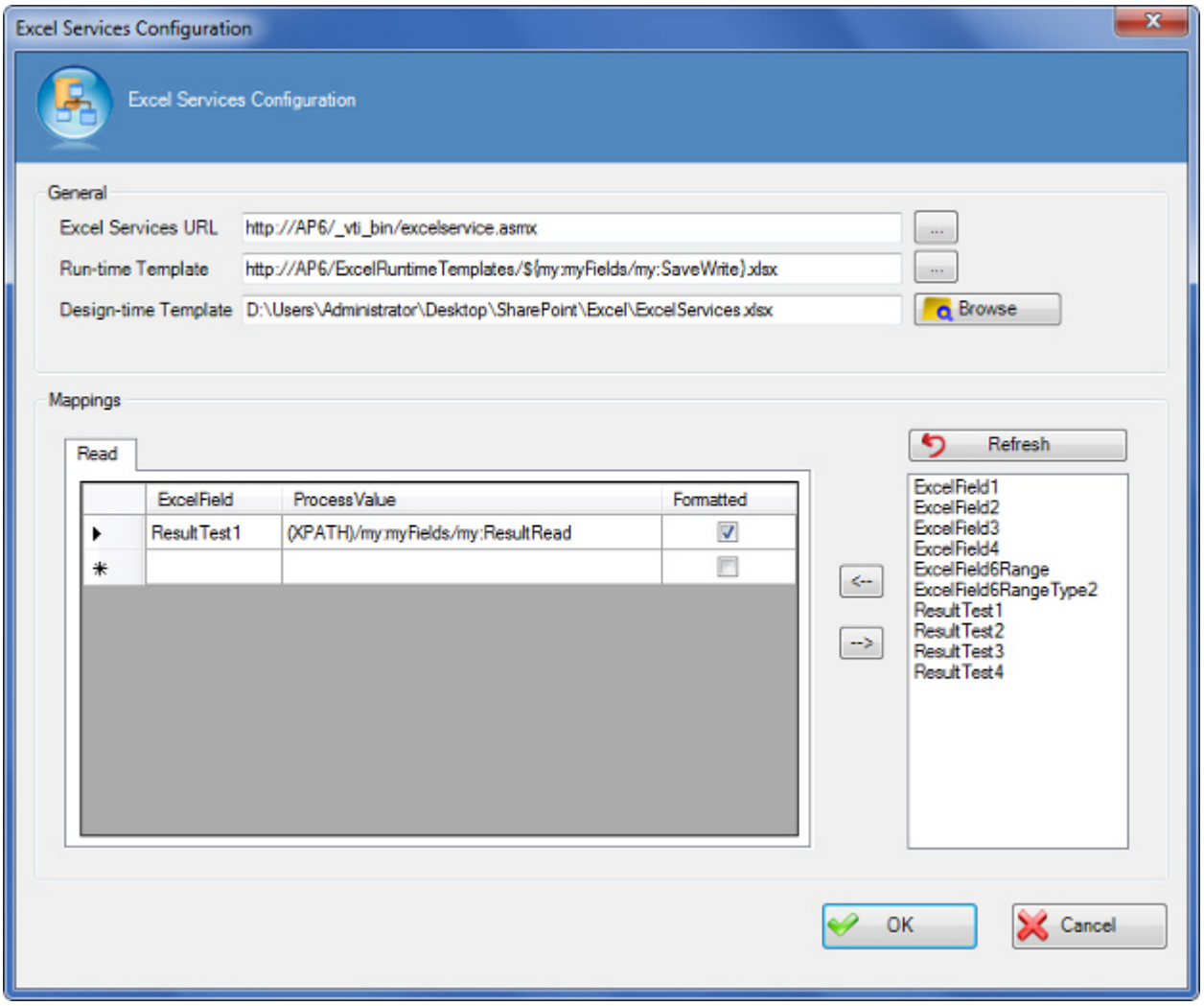
Field Name	Definition
	worksheet and the remaining values are simply discarded. Default Value: None Custom Attributes: Yes

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Excel Services Configuration Window - Read Tab

Specifies an operation to read and store data from an Excel file.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **SharePoint** stencil.
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **Excel Read**
   - **Excel Calculate**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configuration** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Excel Services URL	Definition:

Field Name	Definition
	Specifies the URL of the SharePoint Excel Services. Allowed Values: • A valid SharePoint Excel Services URL. • A custom attribute. • XML metadata To add XML metadata, use the Ellipses button. Default Value: None Custom Attributes: Yes Example: • URL - http://ind-01:8888/_vti_bin/ExcelService.asmx • A custom attribute - $\{SharePointURL\}$\{ExcelService\}
Run-time Template	Definition: Specifies the name of an Excel template file to be used at runtime. The Excel file can be either .xlsx or .xltx. Allowed Values: • A valid Excel template file name with the full path. • A custom attributes. For example, $\{SharePointURL\}$\{RuntimeTemplateLibrary\}$\{ExcelFilename\} • XML metadata To add XML metadata, use the Ellipses button. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content. • This Excel template file must be located either in a SharePoint document library or in a shared folder. Either way, the file must be added to the Trusted file locations of the Excel Services which is configured in SharePoint Central Administration - Shared Services. Default Value:

Field Name	Definition
	None Custom Attributes: Yes Example: http://ind-01:8888/ExcelServicesDemo/ExcelServices.xlsx
Design-time Template	Definition: Specifies the name of an Excel template file that is used at design time. Once you enter the Excel template file name in the Design-time Template box, the Named Fields box is populated with all the named fields from the Excel sheet. The design-time template document is used only to access the named fields of an Excel sheet. This document is not used at runtime. Allowed Values: A valid Excel template file name with the full path. Note the following: • The Run-time Template file and the Design-time Template file must have the same named fields. This indicates that both the files must have same content. • Also, while designing in Envision, the file must be accessible to the process designer from their computer using the Browse button. Default Value: None Custom Attributes: No Example: C:\Excel\ExcelSheet\ExcelServices.xlsx
Named Fields Box	Definition: Specifies the named fields populated from the Excel sheet once you specify the Design-time Template file. This field is used for the mapping purpose. You must map the Excel named fields to the process values to:

Field Name	Definition
	• Write to an Excel document. • Read from an Excel document. A named field in Microsoft Excel is the name of a cell or range that is used instead of the cell's reference name. For example, empName, a named field, is easier to use instead of its cell's reference name, C21. Allowed Values: A named field selected from the list. Default Value: None Custom Attributes: No
Refresh	Function: Reloads the named fields from the Excel sheet to the Named Fields box. **Note:** You must click the Refresh button if the file specified in the Design-time Template changes.
Left Arrow	Function: Populates the selected named field from the Named Fields Box box to the ExcelField column. You can add only one named field at a time.
Right Arrow	Function: Deletes the selected row.
ExcelField	Definition: Specifies the Excel named field to be mapped to the process value. The mapping is performed to read the value in the named field in the Excel sheet into a process attribute. Allowed Values: A named field. Use the Left Arrow button to move the named field from the Named Fields box to the ExcelField column.

Field Name	Definition
	Note: In the Read AgileShape, the named field cannot be a range in the Excel document but only a cell. **Note:** The value of the named field in the ExcelField column can be evaluated from a string containing a custom attribute. For example, $\{MyExcelField\} or field$\{year\}$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! Default Value: None Custom Attributes: Yes
ProcessValue	Definition: Specifies the name of the process attribute. The process attribute is mapped to the named field to read the value in the named field in the Excel sheet. Allowed Values: A custom attribute. **Note:** The name of the custom attribute in the ProcessValue column can be derived from a string containing another custom attribute. For example, $\{MyCustomAttribute\} or customattribute $\{year\}$\{month\} or a schema XPath. For the latter, the XPath itself is parameterizable! Default Value: None However, when you add a row for a named field using the Left Arrow button, the ProcessValue column is populated with the Excel named field's name. Custom Attributes: Yes
Formatted	Function: Determines whether the formatted value of the Excel cell is read instead of the actual value. The formatted values are useful to denote numbers or dates such as in emails.

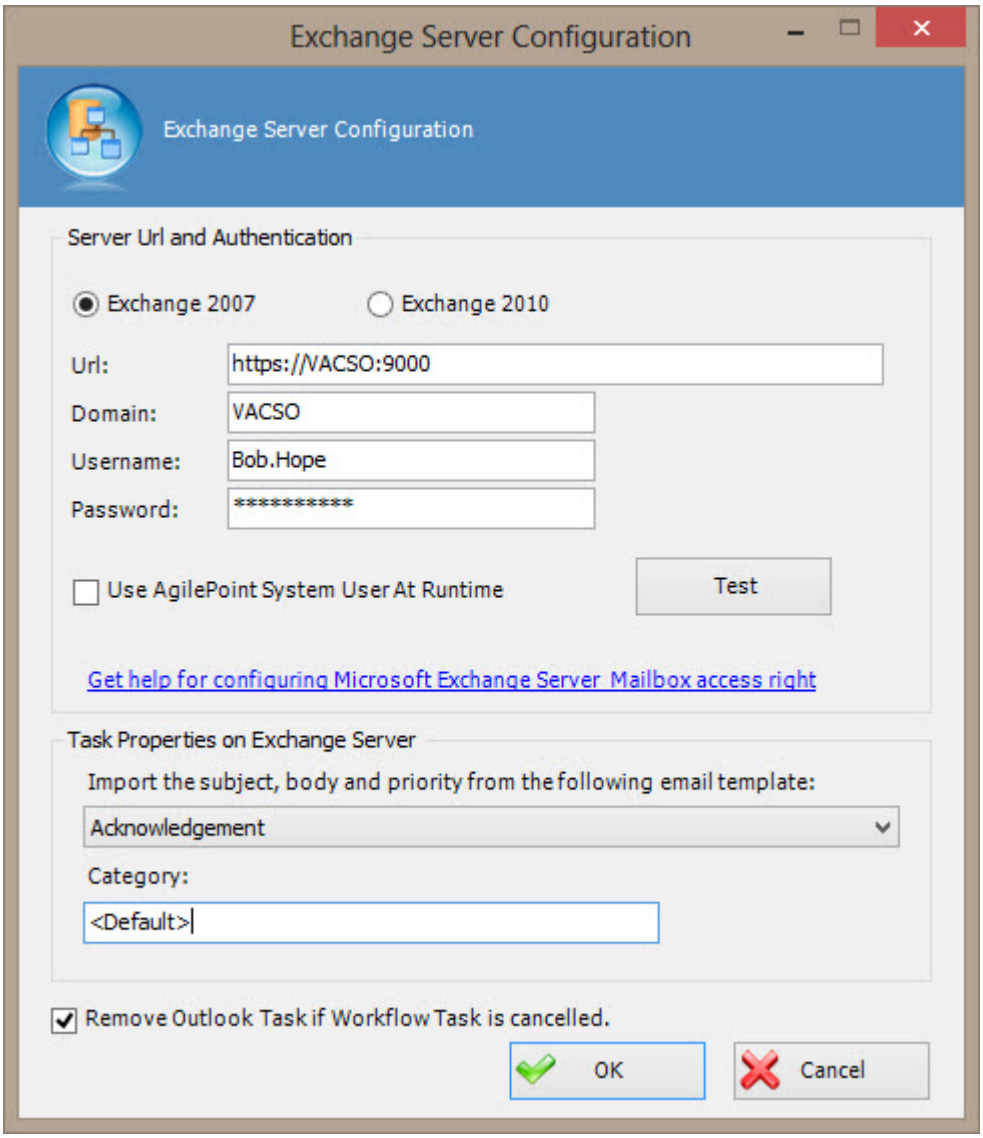
Field Name	Definition
	Allowed Values: • **Deselected** - The actual value of the cell is read. For example, 1023 • **Selected** - The formatted value of the cell is read. For example, €1,023.34 Default Value: Deselected However, when you add a row for a named field using the Left Arrow button, by default, the Formatted check box is selected. Example: When the Formatted check box is selected: • A Percentage type cell returns 15% instead of 15, where 15 is the actual value and % is the formatting code. • A Currency type cell returns €1,023.34 instead of 1023.34, where 1023.34 is the actual value and € is the formatting code. This indicates that the formatting code of the Excel cell is also read along with the cell value.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Exchange Server Configuration Window

Integrates an AgileShape with Microsoft Exchange Server. When this connection is properly configured, the AgileShape will then insert, update, and remove tasks for the assigned participants, so that the tasks can be viewed directly from Microsoft Outlook.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Premier Extension** stencil.
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **Dynamic Parallel Approval**
   - **Dynamic Sequential Approval**
   - **Vote**
   - **Web Form**
   - **Workload Balance**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In the **EnabledExchangeServer** field, click **True**.

6. In the **ExchangeServer** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Exchange 2007 or Exchange 2010	Definition: Specifies the version of your Microsoft Exchange Server. Allowed Values: • **Exchange 2007** - Enables to configure this AgileShape to access Exchange Server 2007. • **Exchange 2010** - Enables to configure this AgileShape to access Exchange Server 2010. Default Value: Exchange 2007
Url	Definition: Specifies the Exchange Server URL. Allowed Values: • **Exchange 2007** - https://[machine name]:[port] • **Exchange 2010** - https://[machine name]:[port]/EWS/Exchange.asmx Default Value: https://[MachineName]:[Port] Custom Attributes: No Example: • **Exchange 2007** - https://mydomain.com:2030 • **Exchange 2010** - https://mydomain.com:2030/EWS/Exchange.asmx
Domain	Definition: The authentication domain. Allowed Values: A valid domain. Default Value: None

Field Name	Definition
	Custom Attributes: None
Username	Definition: The user name for an Exchange Server administrator. Allowed Values: A valid user name. Default Value: None Custom Attributes: No
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes
Use AgilePoint System User at Runtime	Definition: Specifies whether to use the AgilePoint system user account (usually the same as the AgilePoint Service account) for the action when the process is running. Allowed Values: • **Selected** - Uses the AgilePoint system user account for the action at runtime. • **Deselected** - Uses the credentials specified on this window at runtime. Default Value: Deselected Custom Attributes: No

Field Name	Definition
Import the subject, body, and priority from the following email template	Definition: Specifies an email template to be used for sending emails from Microsoft Outlook. Allowed Values: • **A list of automatically populated email templates** if designed for the process. • **None** - Specifies that no email template is created within the process. Default Value: None
Category	Definition: Specifies an Outlook category to associate with the task. A category provides a way to group tasks that are created using the same AgileShape. For example, if different AgileShapes have been configured to use Exchange Server, then in this case, a category acts as a keyword which uniquely identifies the tasks created using one AgileShape. Allowed Values: A text string. Default Value: <Default> Custom Attributes: No
Remove Outlook Task if workflow Task is cancelled.	Definition: Determines whether to delete the task item from the participant's task list on Microsoft Outlook when the task is cancelled in the process. Allowed Values: • **Selected** - Deletes the task item from Microsoft Outlook when the task is cancelled in the process. • **Deselected** - The task item is not updated on Microsoft Outlook even if the task is cancelled in the process. Default Value:

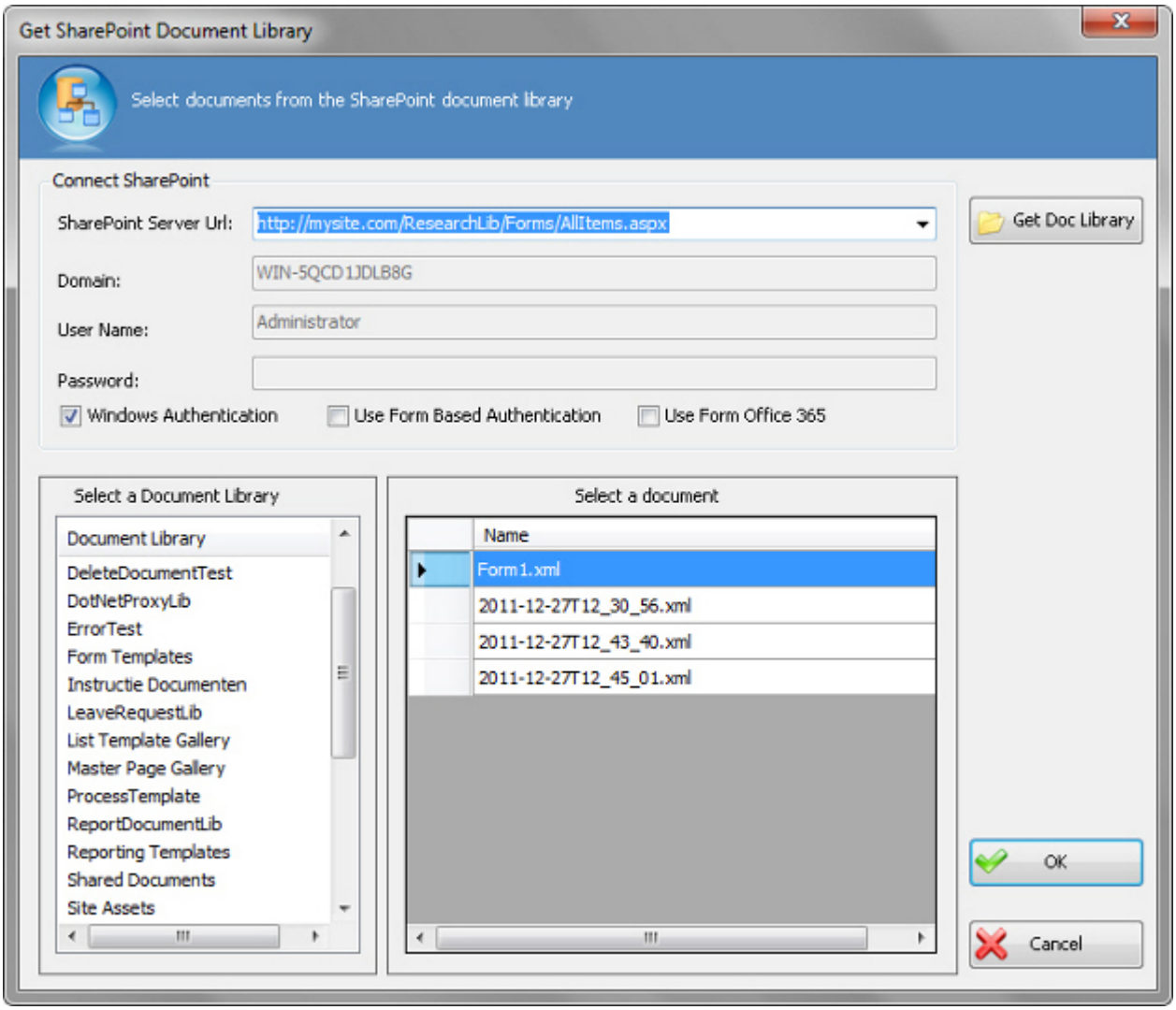
Field Name	Definition
	Selected

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Get SharePoint Document Library Window

Specifies files to attach to an AgileShape from a process repository.



Prerequisites

- Set up an AgilePoint process repository in SharePoint.

Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileShape, and drop it on the process model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. On the **Configure Attachments** field, click the **Ellipses** button.
5. On the **Configure Attachments** window, click **Add**.

Field Definitions

Field Name	Definition
SharePoint Site URL	Definition: The URL of the SharePoint site where your file resides. Allowed Values: A valid SharePoint site URL. Default Value: None Custom Attributes: Yes Example: • http://[machine name]:[port]/sites/[site name] • $\{DocUrl\}
Get Document Library	Function: Populates the dialog box with data from the specified SharePoint Document Library.
Domain	Definition: The authentication domain. This does not apply to Forms-Based Authentication.
User Name	Definition: The user name you want to associate with the action.

Field Name	Definition
	Allowed Values: A user name, not including the domain. Default Value: None Custom Attributes: No
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes
Windows Authentication	Definition: Specifies whether to use Windows authentication. Allowed Values: • **Selected** - The connection uses Windows authentication. • **Deselected** - The connection uses Forms authentication. Default Value: Selected
Use Forms Based Authentication	Definition: Specifies whether to use Forms authentication. Allowed Values: • **Selected** - The connection uses Forms-Based Authentication. • **Deselected** - The connection uses another specified type of authentication. It is possible to use Office 365 and Forms authentication together. Default Value:

Field Name	Definition
	Deselected
Use Office 365	Definition: Specifies whether to use claims authentication for Office 365. Allowed Values: • **Selected** - Forms authentication for Office 365 is enabled. • **Deselected** -Forms authentication for Office 365 is disabled. It is possible to use Office 365 and Forms authentication together. Default Value: Deselected
Document Library	Function: Displays a list of document libraries on the selected SharePoint site. Select a document library to display the list of stored documents.
Name	Function: Displays a list of documents in the selected document library. Select a document to add it as an attachment.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

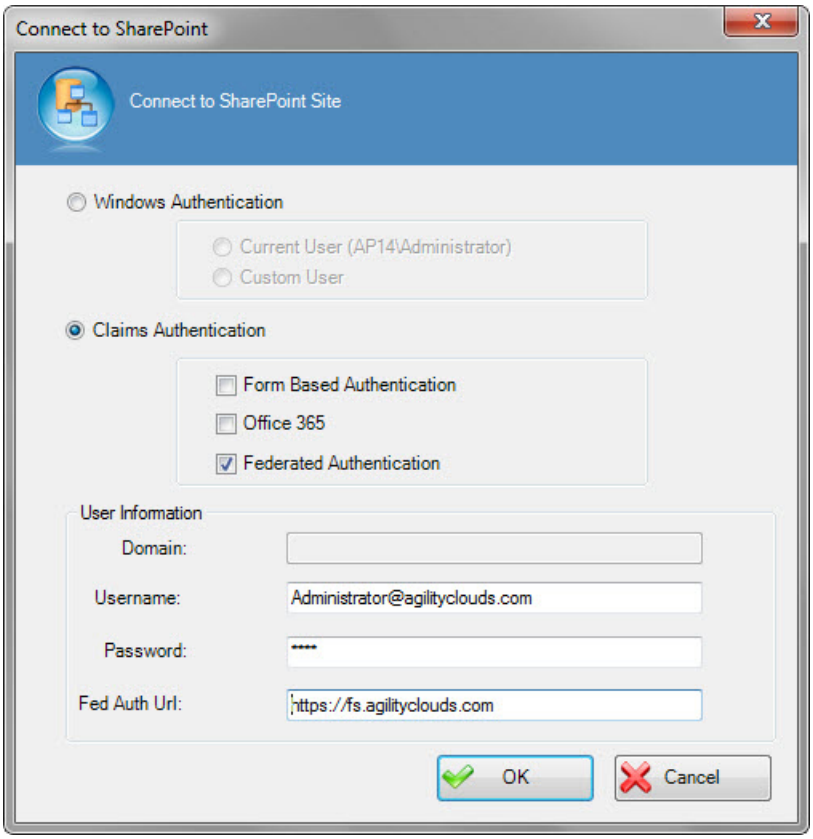
Logging on to SharePoint from a Process Template or AgileShape

For process templates and AgileShapes that uses data from SharePoint, the first time you access SharePoint during your AgilePoint Envision user session, you must link it to a SharePoint list.

Instructions

1. On the **Connect to SharePoint** dialog box, complete the fields to specify the user account you want to use to connect to SharePoint, and then click **OK**.

   These credentials will be saved and used each time you open the process model.



Field Definitions

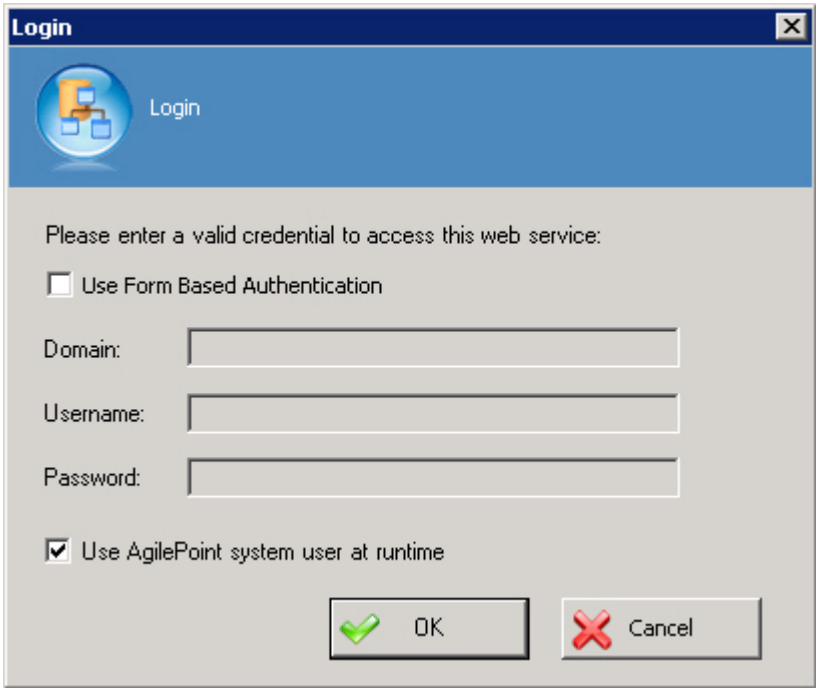
Field Name	Definition
Windows Authentication	Definition: Specifies whether, and what type, of Windows Authentication is used to connect to SharePoint.
Claims Authentication	Definition: Specifies whether to use Claims authentication, and what type of Claims authentication, to use to connect to SharePoint. Allowed Values: If this option is selected, the following types of Claims Authentication are available: • **Form Based Authentication** - Activates Forms based authentication using a custom membership provider to connect to an on-premises SharePoint environment. • **Office 365** - Activates Claims authentication to connect to SharePoint in an Office 365

Field Name	Definition
	environment. This option can be used side-by-side with on-premises SharePoint. • **Federated Authentication** - Activates Federated authentication to connect to SharePoint -- for example, ADFS.  **Note:** Out of the box, AgilePoint supports ADFS authentication. If you want to use your own authentication provider, see Federated Authentication Example in the Documentation Library. Default Value: Deselected
Domain	Definition: The authentication domain. This does not apply to Forms-Based Authentication.
Username	Definition: The user ID of the SharePoint authentication account. Allowed Values: A valid user name. Default Value: None Custom Attributes: No
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes
Fed Auth Url	Definition:

Field Name	Definition
	The URI of the federated authentication provider. This provider issues security tokens for federated authentication. Allowed Values: A valid federated authentication provider URI. Default Value: None Custom Attributes: No Example: https://fs.agilityclouds.com

Login Window

Specifies the authentication credentials to run a web service method at runtime.



Prerequisites

- A valid Web Service — for example a live, valid WSDL file.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **Windows Communication Foundation**
   - **Web Service**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Credential** field, click the **Ellipses** button.

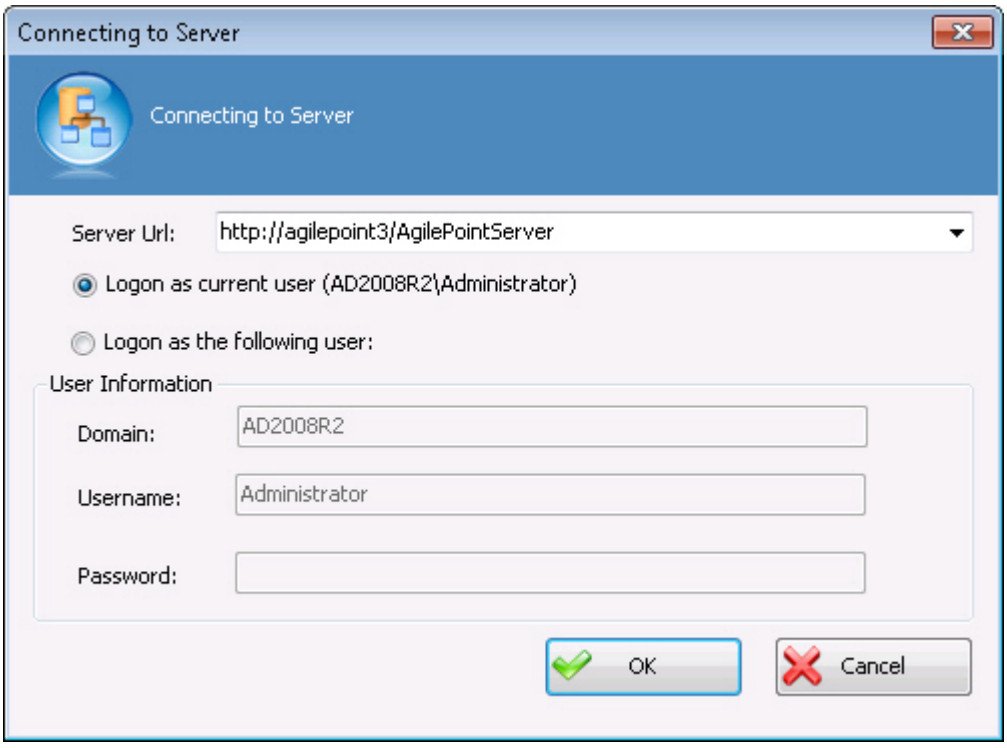
Field Definitions

Field Name	Definition
Domain	Definition: The authentication domain. This does not apply to Forms-Based Authentication.
User Name	Definition: The user name you want to associate with the action. Allowed Values: A user name, not including the domain. Default Value: None Custom Attributes: No
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes
Use AgilePoint System User at Runtime	Definition:

Field Name	Definition
	Specifies whether to use the AgilePoint system user account (usually the same as the AgilePoint Service account) for the action when the process is running. Allowed Values: • **Selected** - Uses the AgilePoint system user account for the action at runtime. • **Deselected** - Uses the credentials specified on this window at runtime. Default Value: Deselected Custom Attributes: No

Log on to AgilePoint Server

Specifies the logon credentials to connect to an AgilePoint Server.



Navigation

1. In AgilePoint Envision, open a process template.

2. Navigate to the **Database** stencil.
3. On the **Database** stencil, drag any AgileShape and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. In one of the following windows, click **Choose**. The specific windows that display vary, depending upon the AgileShape you are using:
   - Configuration for Inserting Database Record Window
   - Configuration for Batch Inserting Database Record Window
   - Configuration for Updating Database Record(s) Window
   - Configuration for Deleting Database Record(s) Window
   - Configuration for Stored Procedure or Generic SQL Window
   - Database Queries Window
   - Database Stored Procedure Window

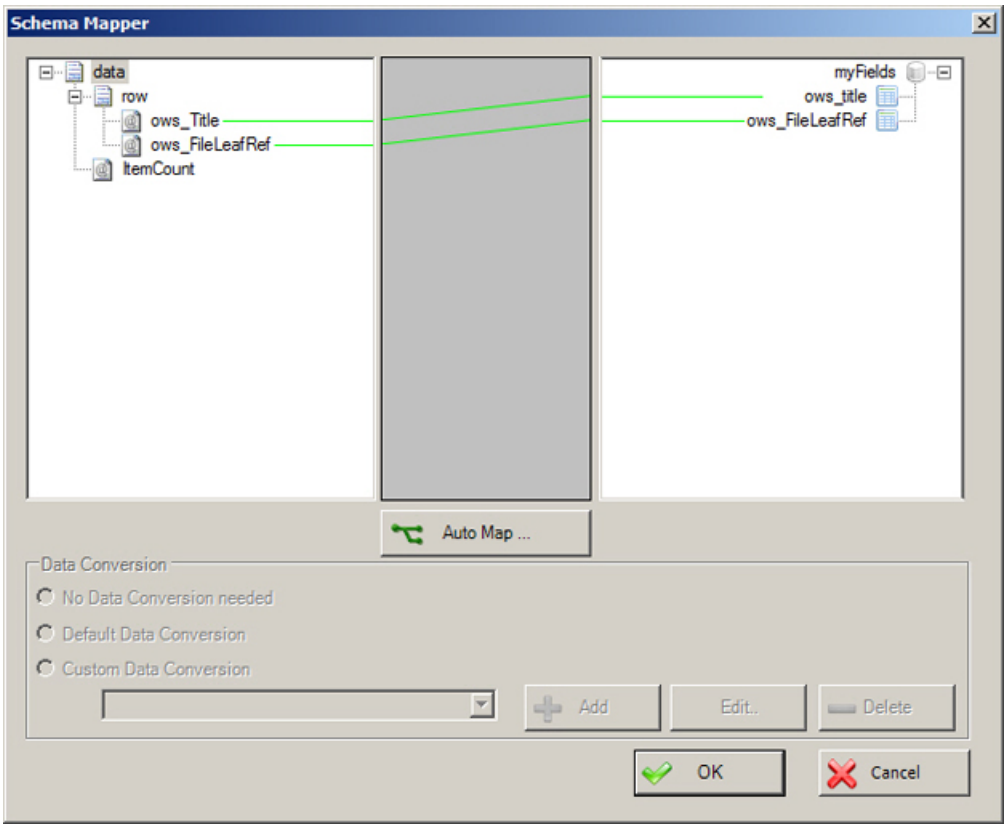
Field Definitions

Field Name	Definition
Server Url	Definition: This is the URL of the Process Engine (AgilePoint Server). Whenever a new URL is used it is added to the drop-down list-box, so next time it is needed, it is easier to select than reenter it.
Windows Authentication	Definition: Specifies whether, and what type, of Windows Authentication is used to connect to SharePoint.
Logon as the following user	Definition: Authenticates using the credentials you specify. Allowed Values: • **Selected** - The domain, username and password fields are enabled to fetch the input from an user. • **Deselected** - Specifies that the logon as current user (AD2008R2\Administrator) option is enabled. Default Value: Deselected

Field Name	Definition
Domain	Definition: The authentication domain. This does not apply to Forms-Based Authentication.
User Name	Definition: The user name you want to associate with the action. Allowed Values: A user name, not including the domain. Default Value: None Custom Attributes: No
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes

Schema Mapper Window

Maps SharePoint fields, form fields, web methods, or other input sources to an XML schema.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to one of the following stencils:
   - **SharePoint**
   - **Web Services**
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **CAML Query**
   - **WSE (Web Service Extension)**
   - **WCF (Windows Communication Foundation)**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. In one of the following fields, click the **Ellipses** button. The fields that display vary, depending upon the AgsileShape you are using. For example, **Configure**.
6. On one of the following windows, under the **Output Mapping** or **Request/Response** tab, click the **Ellipses** button:
   - CAML Query Builder Configuration Window - Output Mapping Tab
   - WebService Configuration Window - Request Tab
   - WebService Configuration Window - Response Tab
   - Configuration for WCF Service Window - Request Tab

- Configuration for WCF Service Window - Response Tab

Note: If you have changed your XML schema since the last time you opened the Schema Mapper window, when you click the button to open it, you are prompted with the following options:

- **Reset All Mappings** - Deletes all mappings that have been made in the Schema Mapper for this activity.
- **Remove Invalid Mappings only** - Deletes only the mappings that are rendered invalid by the schema change. Valid mappings remain the same.
- **Cancel** - Aborts opening the Schema Mapper window.

Field Definitions

Field Name	Definition
Mapping Schemas for Request/Response and Process Model	Definition: Maps the schemas for a service's request or response and the AgilePoint schema: • CAML query schema for a response and AgilePoint schema • WSE service schema for a request/response and the AgilePoint schema • WCF service schema for a request/response and the AgilePoint schema The source and the destination schemas are displayed in a tree-view structure in the left and right panes. Allowed Values: Read only - However, the drag and drop operations are supported to map the schemas. Drag a data node from the source schema pane to the destination schema pane: • Green line - The data type of source and destination nodes matches. • Blue line - The data type of source and destination nodes doesn't match. The data conversion is required to map the schemas. • Red line - Specifies that the custom data conversion is required.
Automap	Function: Maps all fields in the data source and the process schema that have the same name.
No Data Conversion needed	Definition:

Field Name	Definition
	Determines whether the data conversion is not required between the source and the destination schema data fields. Allowed Values: • **Deselected** - Data conversion is required between the schema data fields. • **Selected** - Data conversion is not required between the schema data fields. Default Value: None However, the No Data Conversion needed option is selected if the data type of the source and destination schema data fields matches.
Default Data Conversion	Definition: Determines whether the default data conversion is required between the source and the destination schema fields. Allowed Values: • **Deselected** - Default data conversion is not required between the schema data fields. • **Selected** - Default data conversion is required between the schema data fields. Default Value: None However, the Default Data Conversion option is selected if the data type of the source and destination schema fields doesn't match.
Custom Data Conversion	Definition: Determines whether the custom data conversion is required. You can create your own data conversion types by using the Add button. Allowed Values: • **Deselected** - Custom data conversion is not required. • **Selected** - Custom data conversion is required. Default Value: Deselected
Add	Opens the Following Window:

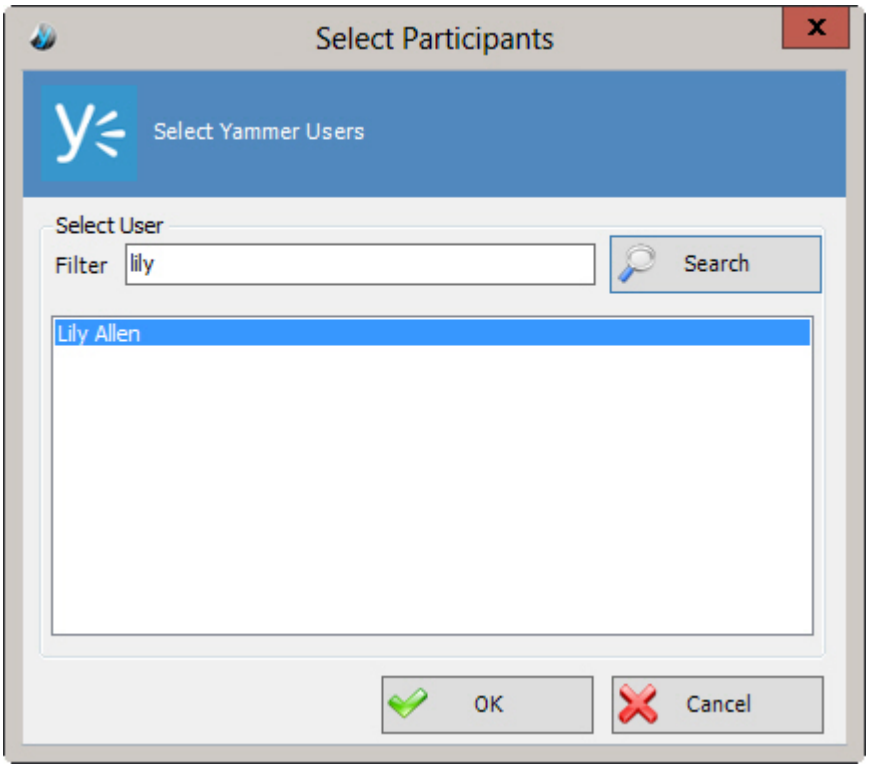
Field Name	Definition
	Custom Mapping Code Window Purpose of this Window: Specifies custom C# code that can be used to map fields to an XML schema.
Edit	Opens the Following Window: Custom Mapping Code Window Purpose of this Window: Specifies custom C# code that can be used to map fields to an XML schema.
Delete	Function: Deletes the selected custom data conversion from the list.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Select Participants Window

Specifies a Yammer user.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. >On the **Yammer** stencil, drag one of the following AgileShapes, and drop it on the process template:
   - **Post Message**
   - **Post Attachment**
4. On the **Yammer** stencil, drag the **Post Message** AgileShape, and drop it on the process template.
5. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
6. On the **Message** field, click the **Ellipses** button.
7. In one of the following windows, click **Select User**. The specific windows that display vary, depending upon the AgileShape you are using:
   - **Post Message**
   - **Post File Attachment**

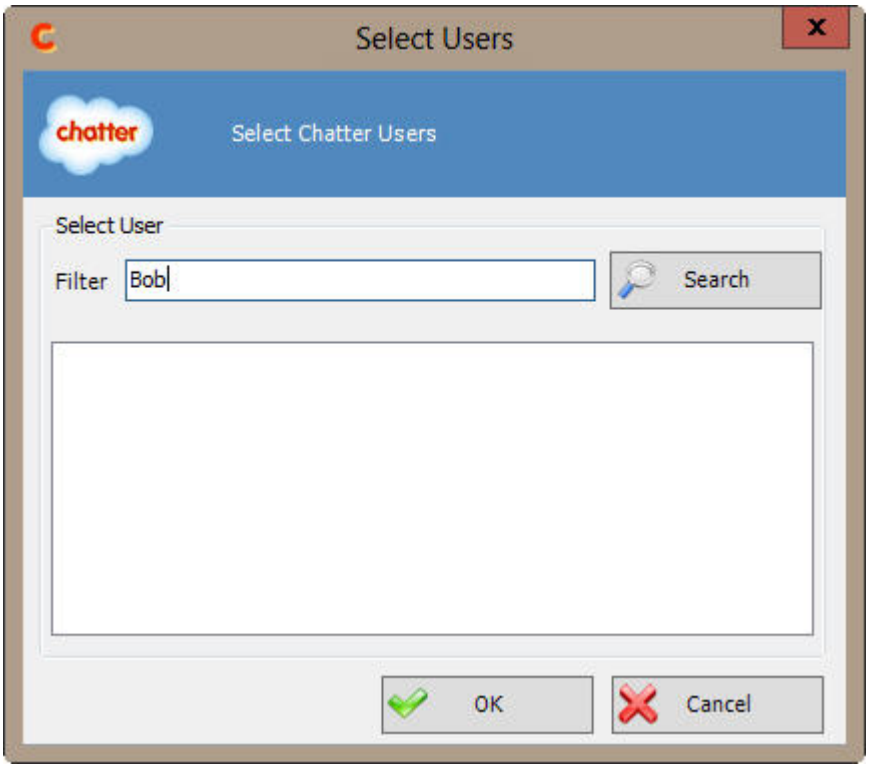
Field Definitions

Field Name	Definition
Filter	Definition:

Field Name	Definition
	Specifies the user name to search within Yammer network. Allowed Values: A single line of text. You can use asterisks (*) as wildcards. Default Value: None Custom Attributes: Yes Example: The following are some examples of filter expressions: • ***** - All user names are searched. • **a*** - All user names that start with the letter *a*. • ***a*** - All user names that contain the letter *a*.
Search	Function: Performs search operation based on the specified criteria.

Select Users Window

Specifies a Chatter user.



Navigation

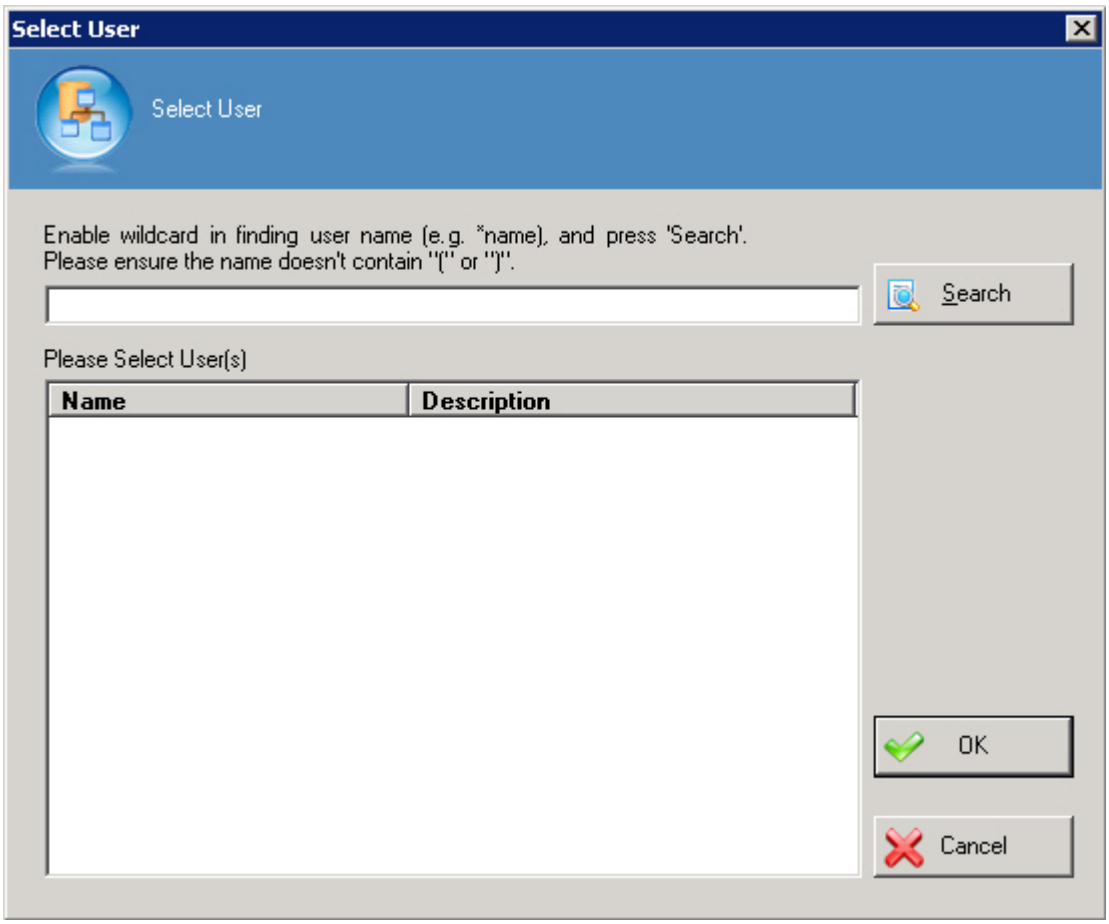
1. In AgilePoint Envision, open a process template.
2. Navigate to the **Chatter** stencil.
3. >On the **Chatter** stencil, drag one of the following AgileShapes, and drop it on the process template:
   - **Join Chatter Group**
   - **Post Feed to Chatter User**
   - **Send or Reply Chatter Message**
   - **Update User Profile**
4. On the **Chatter** stencil, drag the **Join Chatter Group** AgileShape, and drop it on the process template.
5. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
6. On the **Configure** field, click the **Ellipses** button.
7. In one of the following windows, click **Select User**. The specific windows that display vary, depending upon the AgileShape you are using:
   - **Join Group in Chatter**
   - **Post Feed to Chatter User**
   - **Send/Reply Message in Chatter**
   - **Update User Profile in Chatter**

Field Definitions

Field Name	Definition
Filter	Definition: Specifies the user name to search within Chatter network. Allowed Values: A single line of text. You can use asterisks (*) as wildcards. Default Value: None Custom Attributes: Yes Example: The following are some examples of filter expressions: • ***** - All user names are searched. • **a*** - All user names that start with the letter *a*. • ***a*** - All user names that contain the letter *a*.
Search	Function: Performs search operation based on the specified criteria.

Select User Window

This window specifies the user to select required user name from the list.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Active Directory** stencil.
3. On the **Active Directory** stencil, drag any of the following AgileShape, and drop it on the process template:
   - **Update User**
   - **Remove User**
   - **Disable User**
   - **Remove Group**
   - **Remove User From Group**
   - **Retrieve User Information**
   - **Add User To Group**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On one of the following fields, click the **Ellipses** button:
   - **UserInfo**
   - **UserNames**

- **RemoveGroup**
- **RemoveUserFromGroup**
- **AddUserToGroup**

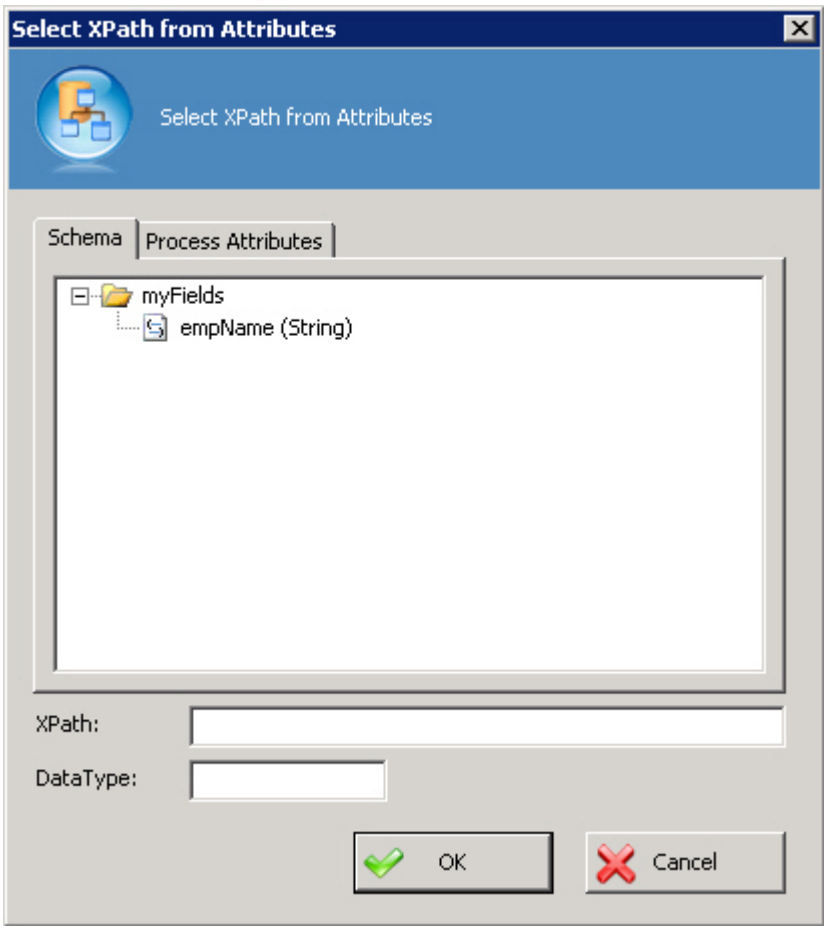
6. On the respective configuration window, click the **Search** button. The specific windows that display vary, depending upon the AgileShape you are using.

Field Definitions

Field Name	Definition
User Name box	Definition: Specifies the criteria for searching the user in an Active Directory. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes
Search	Function: Performs search operation based on the specified criteria.
Name	Definition: List all the user name which satisfies the specified criteria. Allowed Values: Read only.
Description	Definition: Displays description of corresponding user name. Allowed Values: Read only.

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.



Prerequisites

- The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the appropriate stencil.
3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the respective field/configuration window, do one of the following, as appropriate:
   - Type the characters **${** in the property box.
   - Click the **Ellipses** button.
   - Click the **Schema** button.

Field Definitions

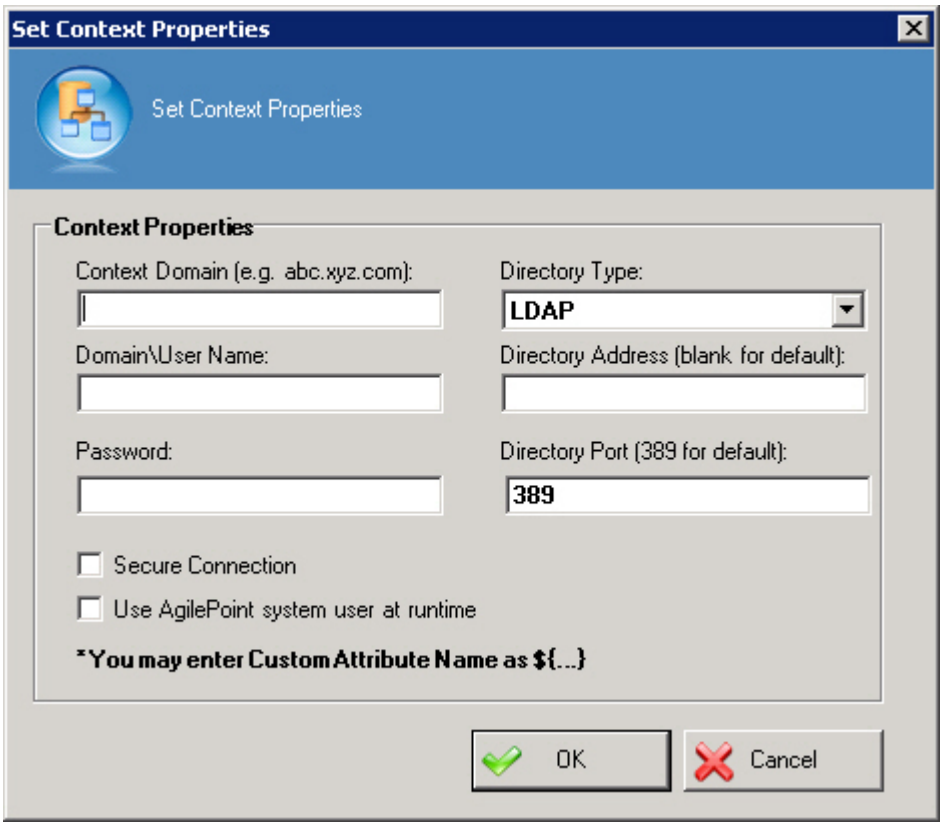
Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Set Context Properties Window

Specifies the connection details for Active Directory.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Active Directory** stencil.
3. On the **Active Directory** stencil, drag the **Create User** AgileShape, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Context** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Context Domain	Definition: The domain name for the Active Directory. Allowed Values: A valid domain. Default Value: None Custom Attributes: Yes
Domain\Username	Definition: The authentication domain and username of the account to be used to create a group in the Active Directory at run time. Allowed Values: A valid domain and user name. Default Value: None Custom Attributes: Yes Example: mydomain\jsmith
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes
Directory Type	Definition:

Field Name	Definition
	Specifies the Active Directory protocol. At this time, only LDAP is supported. Allowed Values: • **LDAP** - Specifies to use the LDAP protocol for accessing Active Directory. Default Value: LDAP Custom Attributes: No
Directory Address	Definition: Specifies a host address of the Active Directory. Allowed Values: • **IP address** - The IP address of the Active Directory. • **IP address/[relative distinguished name (RDN)]** - The IP address of the Active Directory with the container name (CN), organizational unit (OU), or both for the user. Default Value: None Custom Attributes: Yes Example: • 211.325.5.3 • 211.325.5.3/OU=MyGroup
Directory Port	Definition: Specifies a port number of the Active Directory. By default, it is In the case of a remote domain, the port should match the port of the remote domain server. Allowed Values: A valid port number. Default Value: 389 Custom Attributes: Yes

Field Name	Definition
Secure Connection	Definition: Specifies to connect to Active Directory using a secure (SSL) connection. In this version, SSL is not supported; it will be an enhancement in the future. Allowed Values: • **Deselected** - Specifies to connect to Active Directory using an unsecured connection. Default Value: Deselected Custom Attributes: No
Use AgilePoint System User at Runtime	Definition: Specifies whether to use the AgilePoint system user account (usually the same as the AgilePoint Service account) for the action when the process is running. Allowed Values: • **Selected** - Uses the AgilePoint system user account for the action at runtime. • **Deselected** - Uses the credentials specified on this window at runtime. Default Value: Deselected Custom Attributes: No

Setting Up Custom Classes in C# and Visual Basic

The Managed Code C# and Managed Code VB AgileParts allow developers to add custom classes to their code snippets. To set up support for custom classes, do the following.

Instructions

1. Create a custom assembly as a class library using managed code C# or managed code VB.
2. Deploy the custom assembly to the GAC on all AgilePoint Server and Envision machines.
3. In a text editor, create a new file.
4. In the text file, paste the following:

```
<?xml version="1.0" encoding="utf-8" ?>
```

```
<configuration>
   <assemblies>
      <Assembly>Infragistics2.WebUI.Misc.v8.1,
         Version=8.1.20081.1000, Culture=neutral,
         PublicKeyToken=7dd5c3163f2cd0cb
      </Assembly>
   </assemblies>
</configuration>
```

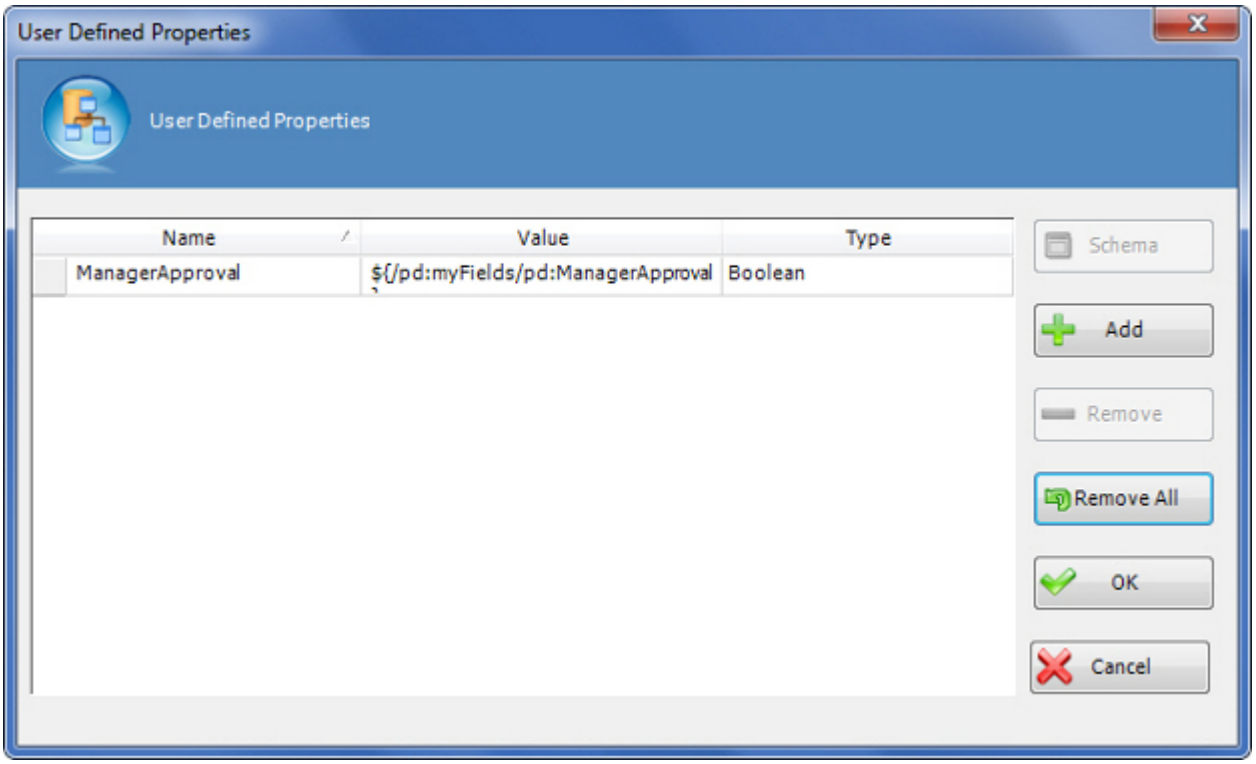
5. Replace the information in the **<Assembly>** element with the correct information for your assembly. You can add as many Assembly nodes as required.
6. Save the file with the name **CustomAssembly.xml**.
7. Place a copy of the file in all of the following locations:
   - The root installation folder for AgilePoint Server.
   - The GAC of the AgilePoint Server machine.

     This information refers to the assembly **Infragistics2.WebUI.Misc.v8.1.dll**, and not to the CustomAssembly.xml file.
   - The root installation folder for each AgilePoint Envision instance where the custom classes will be used.
   - The GAC of each AgilePoint Envision machine.

     This information refers to the assembly **Infragistics2.WebUI.Misc.v8.1.dll**, and not to the CustomAssembly.xml file.

User Defined Properties Window

Specifies ClientData values that are associated with the AgileShape's associated tasks at runtime. This is a way for you to specify a set of variable-like name/value pairs that are passed to your web page via a WorkItem object. This is an alternative to passing data via URL parameters. On your web page you can retrieve this data via the ClientData property of the WorkItem and use it however you want.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Premier Extension** stencil.
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **Dynamic Parallel Approval**
   - **Dynamic Sequential Approval**
   - **Process Adaptation**
   - **Vote**
   - **Web Form**
   - **Workload Balance**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **UserDefinedProperties** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Add	Function: Creates a row where you can specify a ClientData property.

Field Name	Definition
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want.
Name	Definition: Specifies the name for the ClientData. **Note:** The ClientData property is used to store data related to the AgileWork AgileShapes. This is like defining a variable to store specific values. Allowed Values: A text string with spaces. Default Value: None Custom Attributes: Yes
Value	Definition: The value for the ClientData variable. Allowed Values: A number or a text string that can contain spaces. You can dynamically set the value for the variable by using XML metadata. Default Value: None Custom Attributes: Yes
Type	Definition: Determines the data type for the ClientData variable. Allowed Values: • **Integer**

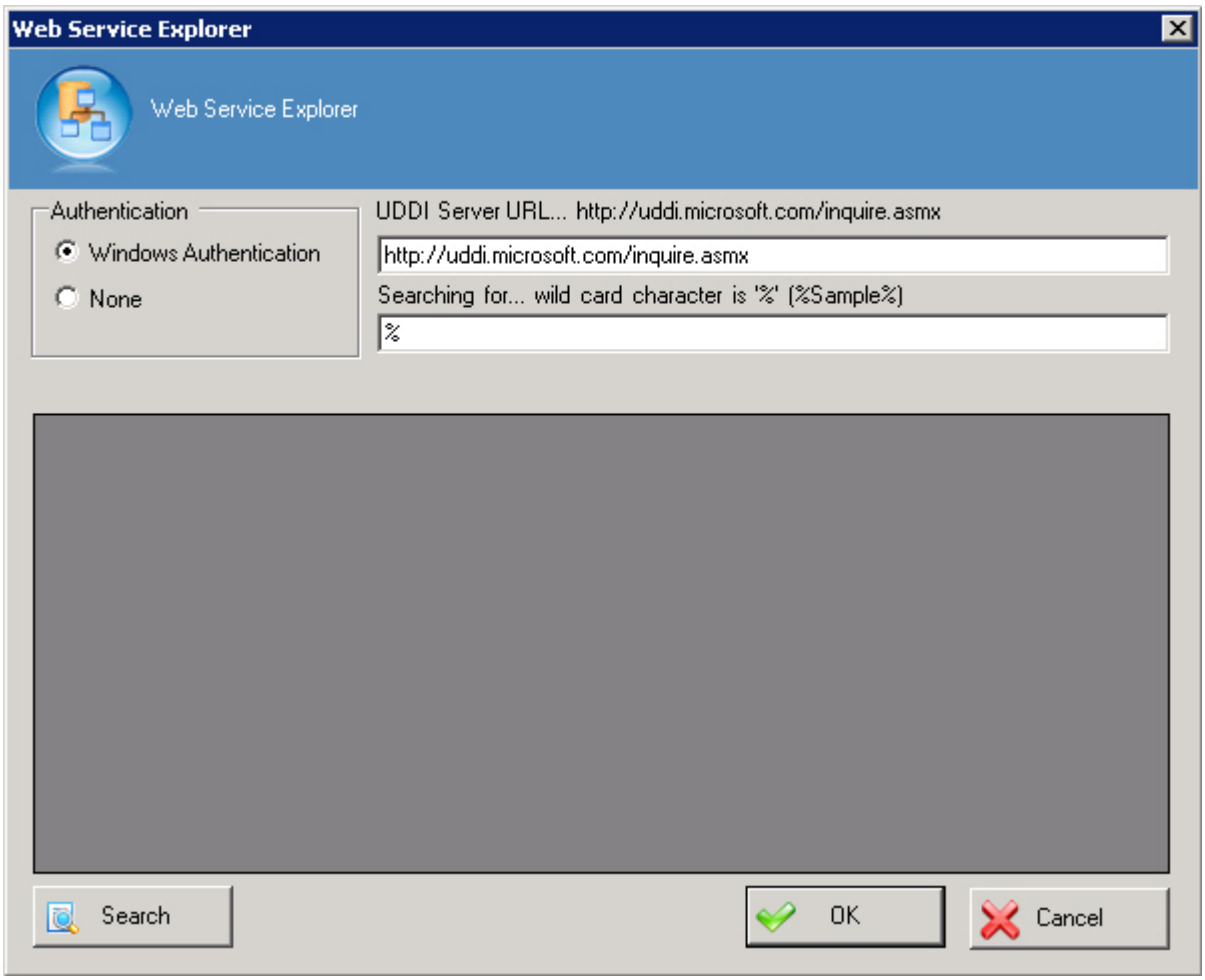
Field Name	Definition
	• **String** • **Float** • **Decimal** • **DateTime** • **Boolean** Default Value: None
Remove	Function: Deletes the selected row from the user defined properties list.
Remove All	Function: Deletes all rows from the user defined properties list.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Web Service Explorer Window

Finds and selects a web service using the Universal Description Discovery and Integration (UDDI) standard.



Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Web Services** stencil.
3. Drag one of the following AgileShapes, and drop it on the process model:
   - **Web Service Extension**
   - **Web Service**
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Configure** field, click the **Ellipses** button.
6. On the configuration window, click **uddi**:

Field Definitions

Field Name	Definition
Windows Authentication	Definition:

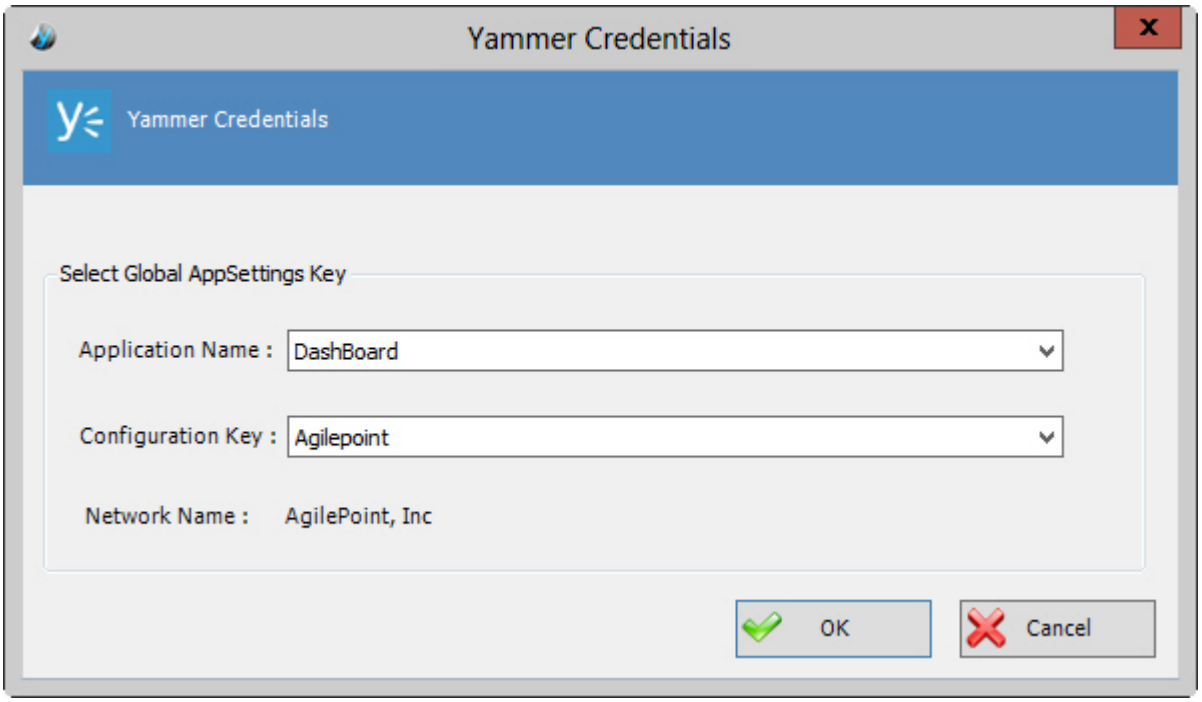
Field Name	Definition
	Specifies whether to use the Windows system user credentials to access the UDDI Server. Allowed Values: • **Windows Authentication** - Windows authentication is used. • **None** - User authentication is not required to access the UDDI Server. Default Value: Windows
UDDI Server URL	Definition: Specifies the UDDI server URL where your web service or WCF service is registered. Allowed Values: A valid UDDI server URL. Default Value: http://uddi.microsoft.com/inquire.asmx Custom Attributes: No
Searching for	Definition: Specifies the web service or WCF service you want to search on the UDDI server using the filter expression. Allowed Values: A text string used to filter the results. You can use % as a wildcard. Default Value: % Custom Attributes: No
Search	Function: Locates the specified web service or WCF service on the UDDI server.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Yammer Credentials Window

Specifies the unique identifiers for the Yammer application.



Prerequisites

- You must set up an Enterprise Social Token for the Yammer application.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the **Yammer** stencil.
3. On the **Yammer** stencil, drag the following AgileShape, and drop it on the process template.
   - Post Message
   - Reply Message
   - Post Attachment
   - Invite User
   - Create User

- Update User
- Delete User

4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the **Credential field**, click the **Ellipses** button.
6. On the **Connecting to Server** window, logon as a registered user to connect to the AgilePoint Server.

Field Definitions

Field Name	Definition
Access Token Name	Definition: Specifies the unique name for your connection to the enterprise social application. Allowed Values: An alphanumeric string with no spaces. Default Value: None Custom Attributes: No

Menu Options Overview

This section provides an overview of AgilePoint Envision's menu commands. Since AgilePoint Envision is a Microsoft Visio add-in, most of the available menu commands in AgilePoint Envision function the same as in Microsoft Visio. This section only covers menu items that are unique to AgilePoint Envision.

File Menu Options

The following menu options are available from the File menu in AgilePoint Envision.

File > **New** > **Generic**

This option allows the user to create a new process model based on the Generic process template.

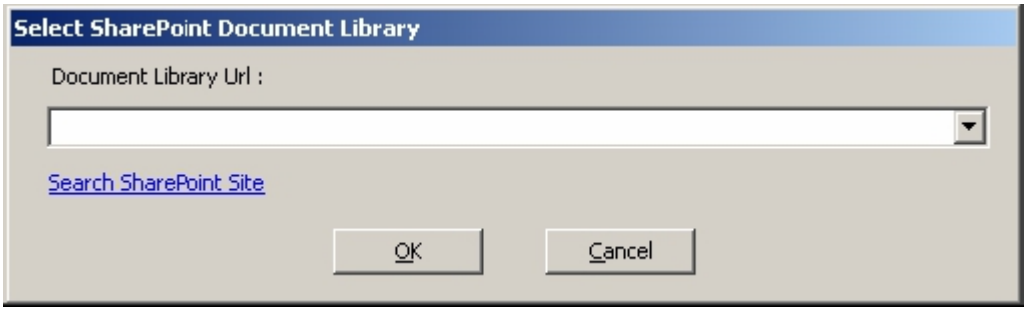
File > **New** > **Microsoft InfoPath**

This option allows the user to create a new process model based on the Microsoft InfoPath process template.

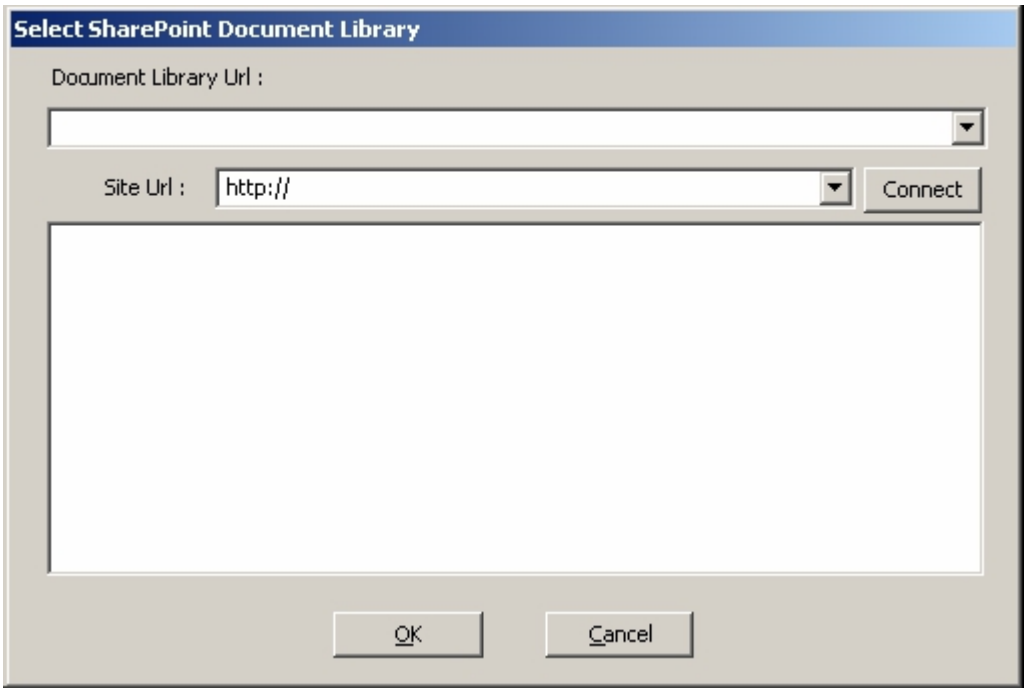
After selecting this option, you will be asked to choose the InfoPath form that will be associated with the process model.

File > **New** > **Microsoft SPDoc**

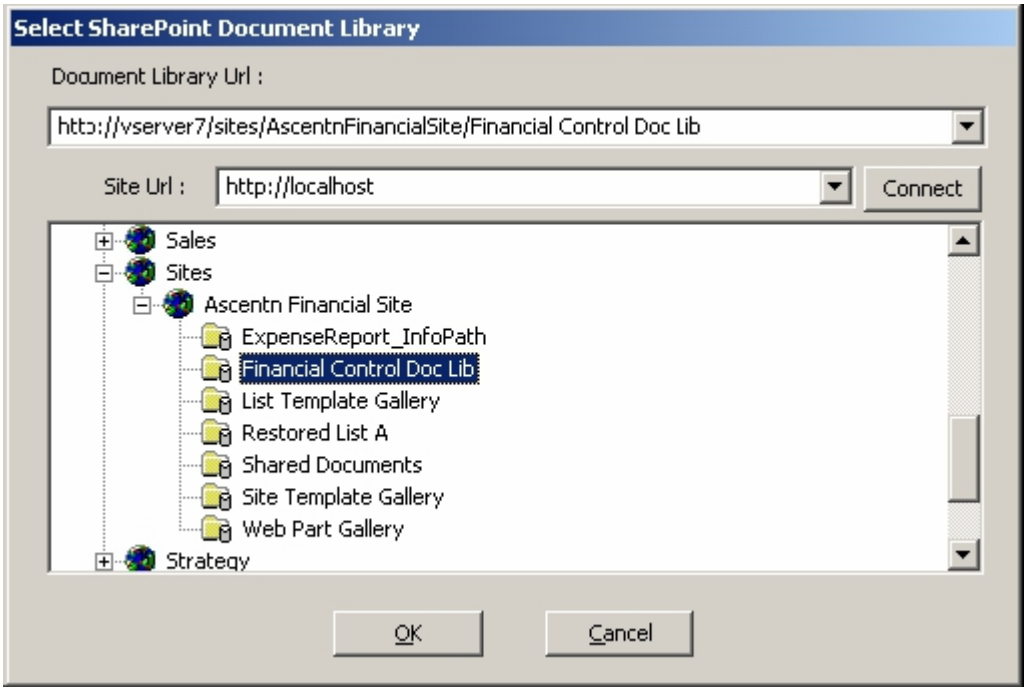
This option allows the user to create a new process model based on the Microsoft SharePoint Document Library process template. After selection this option, you will be asked to choose the SharePoint Document Library that the process model will be associated with.



If you don't know the exact URL of the Document Library, you can click the **Search SharePoint Site** link to select the Document Library.



Type or select the **SharePoint Site URL** and click **Connect**. The directories available within that site appear.

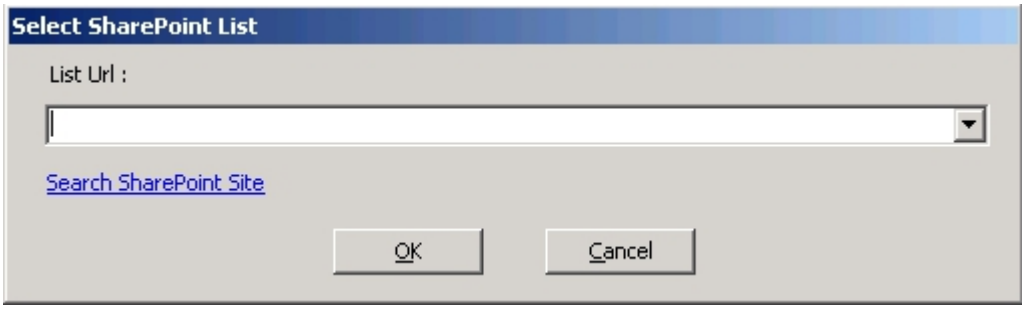


Click on the Document Library for which you would like to associate with the process model and click **OK**.

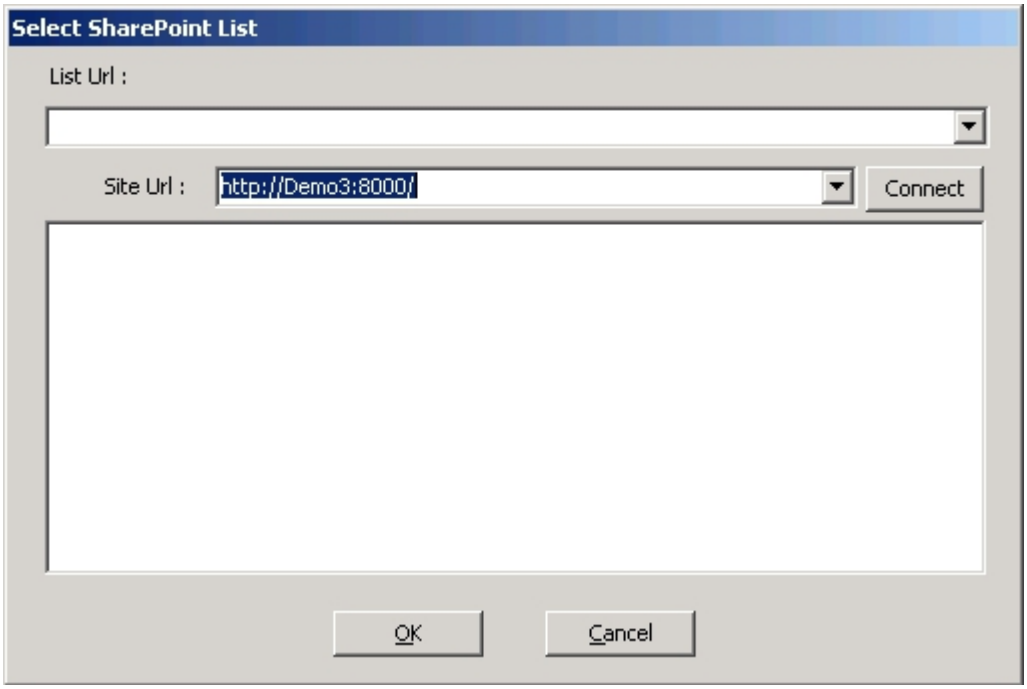
File > **New** > **Microsoft SPList**

This option allows the user to create a new process model based on the Microsoft SharePoint List template.

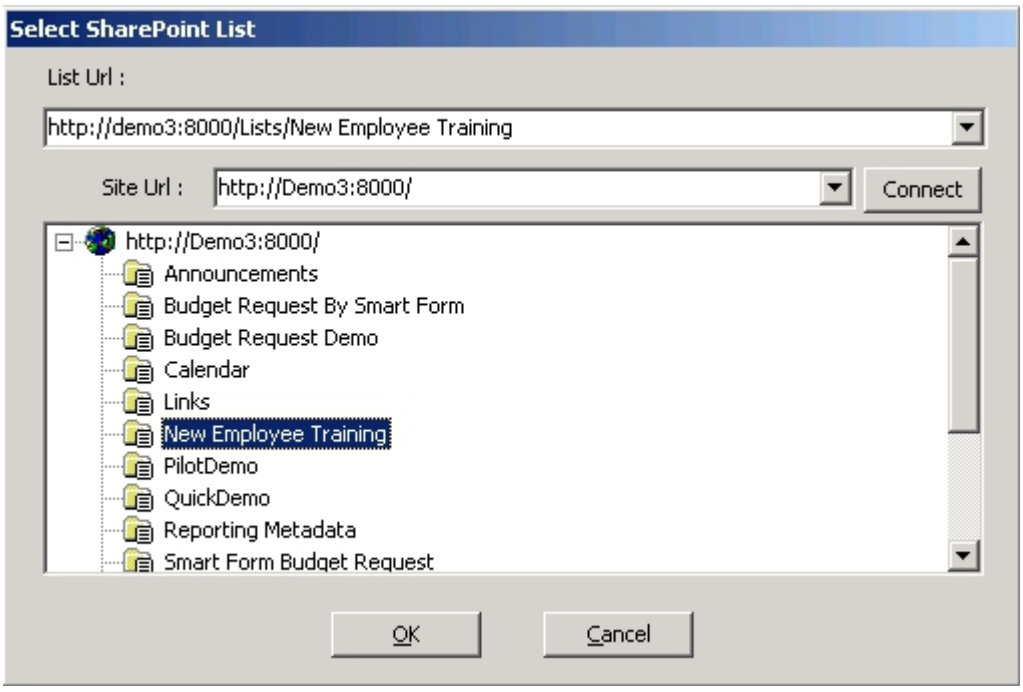
After selection this option, you will be asked to choose the SharePoint List that the process model will be associated with.



If you don't know the exact URL of the List, you can click the **Search SharePoint Site** link to select the List.

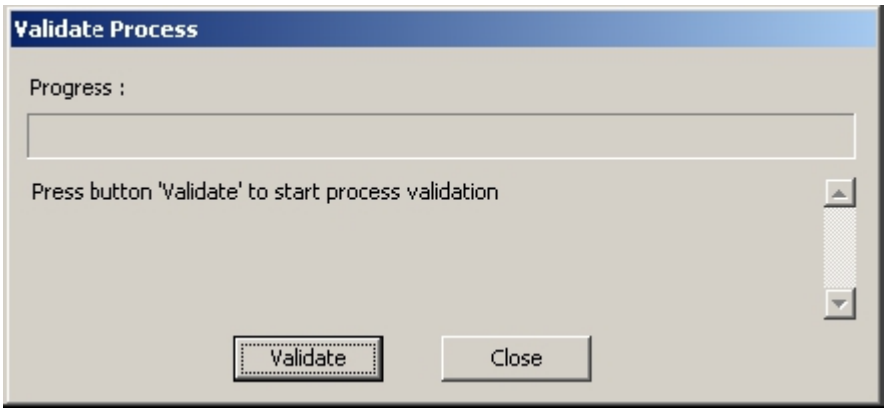


Type or select the SharePoint Site URL and click **Connect**. The directories available within that site appear.



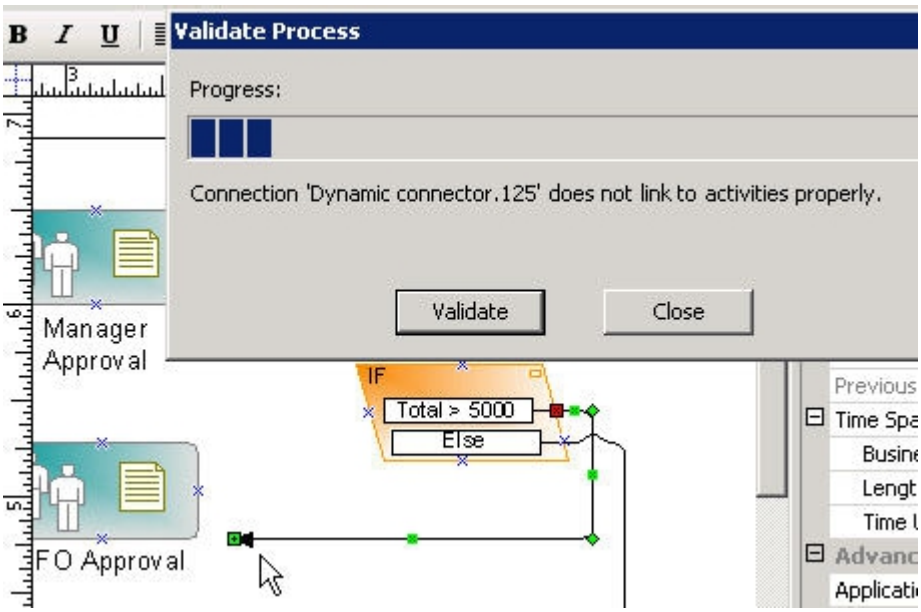
File > **Validate Process**

This option validates the contents of a process template and can be used to detect certain types of common errors, such as incorrectly connected AgileShapes. After choosing this option, the validation dialog will be displayed.



Click **Validate** to begin the validation process.

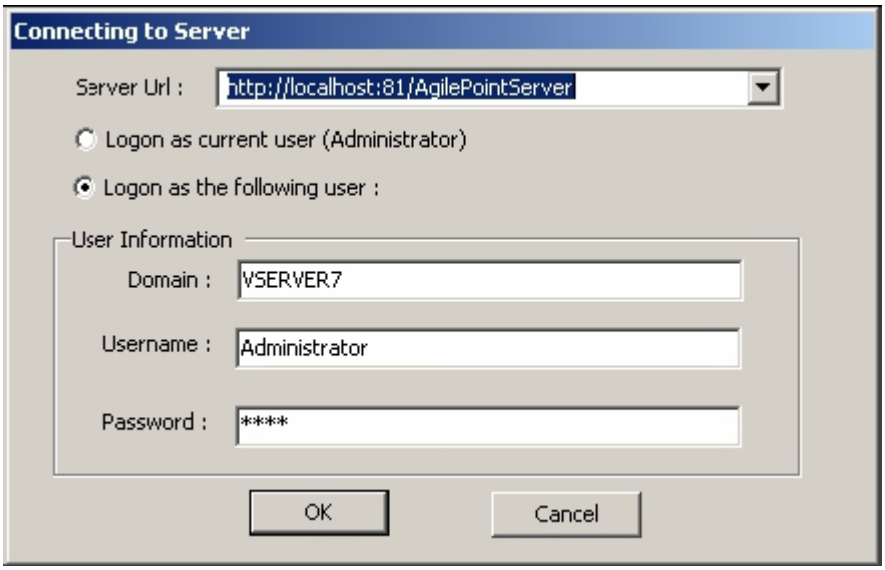
If the process template contains an error, a message will appear with information about the error and Envision will also show the source of the error highlighted in the process template so that you can correct it.



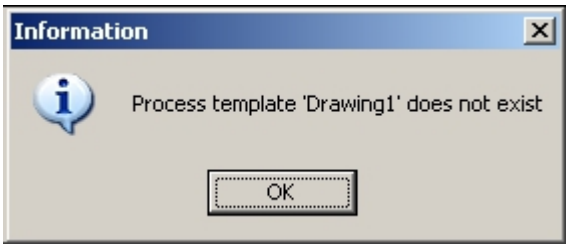
Note: The process model is automatically validated when you deploy the process model to AgilePoint Server.

File > **Update Server** > **Check out Process**

This option allows you to connect to an AgilePoint Server directly from AgilePoint Envision, and then check out the currently opened process model. This prevents more than one user from updating the same process template at the same time.

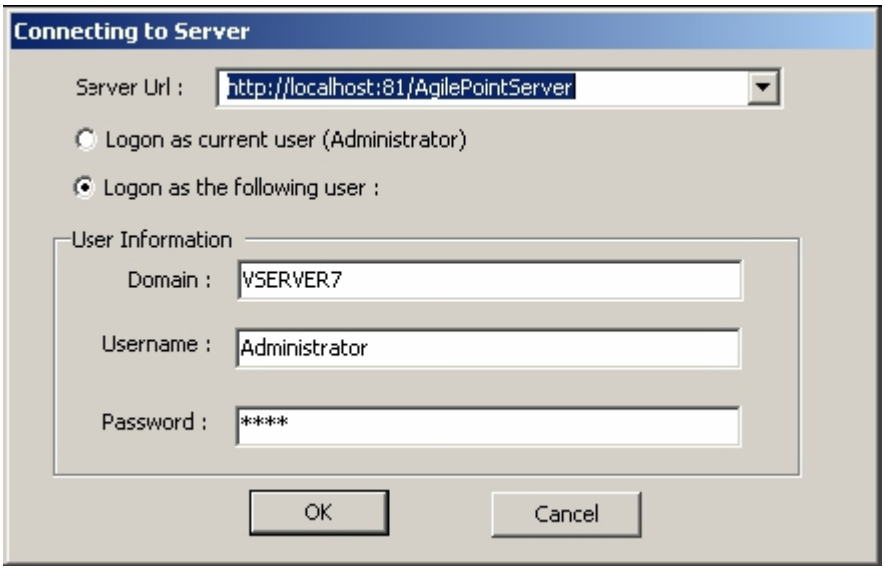


If the process template has not been previously deployed to the AgilePoint Server, the command will fail.



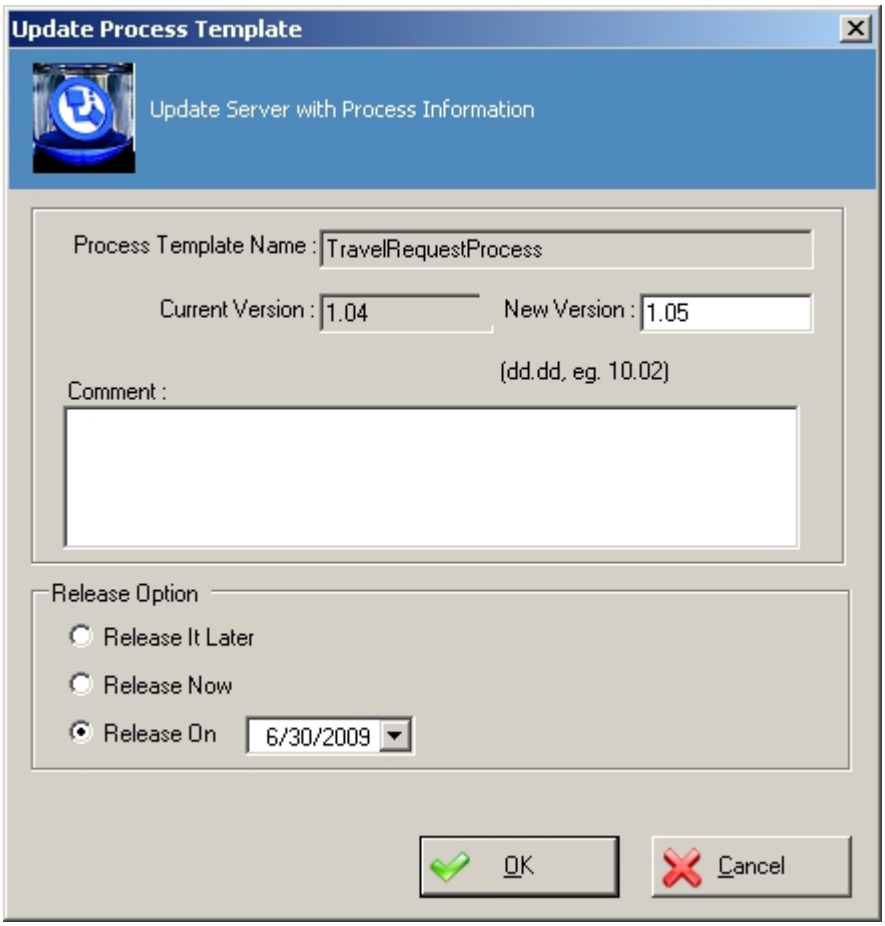
File > **Update Server** > **Create or Checkin, and Release Process**

This option allows you to connect to an AgilePoint Server directly from AgilePoint Envision and deploy the currently opened process model to the AgilePoint Server. To successfully deploy a process template to an AgilePoint Server, the process template must be valid (i.e. no invalid AgileShape connections, etc.), and any custom AgilePoint modules (e.g. AgileParts, AgileWorks, AgileStubs, etc.) used in the process template must already be deployed to the AgilePoint Server. After selecting this option, the Connecting to Server window appears where you will first need to connect to an AgilePoint Server.

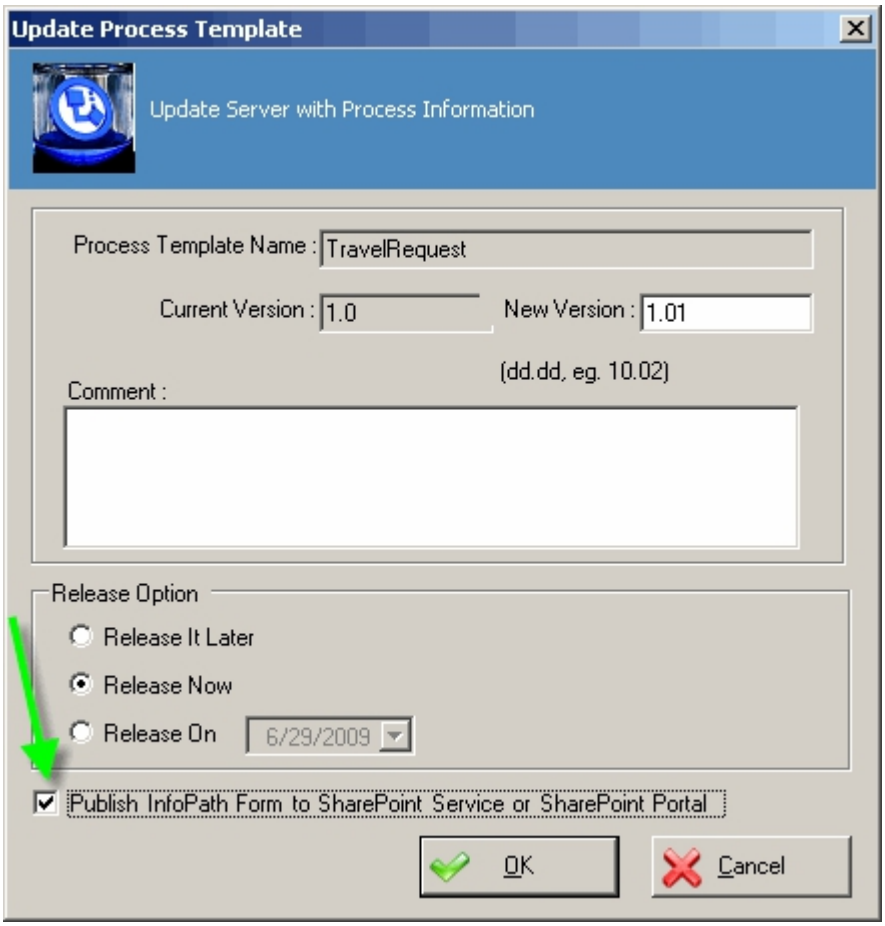


You will need to specify the URL location of the AgilePoint Server, and the Windows Authentication credentials that will be used to access the AgilePoint Server. The Logon as current user option will use your own Windows user account information to access the AgilePoint Server, or you can specify the Domain, Username, and Password of a different user account (e.g. you could use the credentials of the user account that the AgilePoint Server is configured to use as the System User).

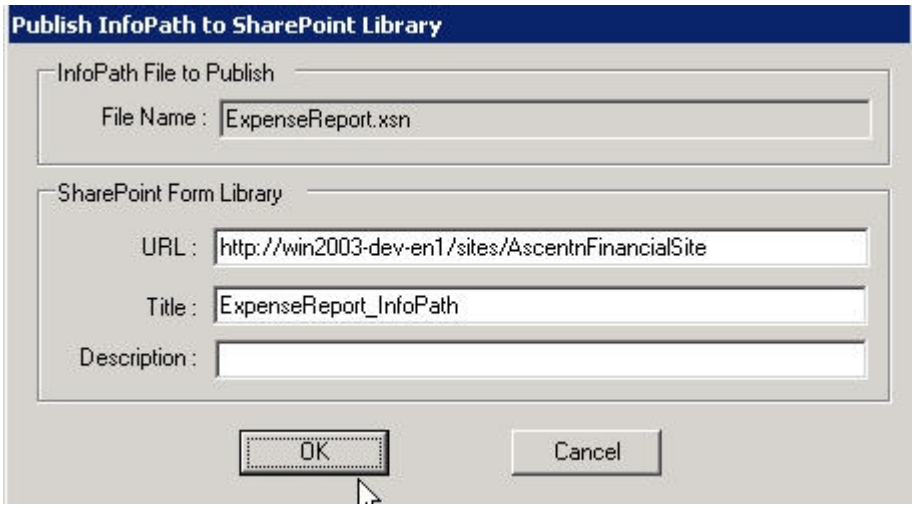
After you have successfully connected to an AgilePoint Server, you may specify a version number, comment, and release schedule for the process model.



If you are deploying a Microsoft Info process template, you will see a dialog similar to the one below.



The check box at the bottom of the window allows you to publish the process template's associated InfoPath form (to Microsoft SharePoint) directly from AgilePoint Envision. If you check the check box, you will see a window similar to the one below:



Enter the URL of the SharePoint site where you want this InfoPath form to be published and the Title for the Form Library name. Then click **OK** to publish the form to SharePoint. After clicking the final **OK** button (in either of the above windows), the process template will be validated. If validation succeeds, the process template will be deployed to the specified AgilePoint Server. If validation fails, the process template will not be deployed and you will need to fix any errors in the process template (and/or deploy any custom modules to the AgilePoint Server) before deploying the process template.

File > **Export & Import** > **Save As Deploying File(xml)**

This option converts your current process template to an XML file that can be used to deploy the process to an AgilePoint Server using AgilePoint Enterprise Manager (instead of using AgilePoint Envision). This method is most often used as an alternative in cases where AgilePoint Envision cannot connect to AgilePoint Server to deploy a process template. This method involves using AgilePoint Envision to convert your current process template to an XML file that can be deployed to AgilePoint Server using AgilePoint Enterprise Manager (instead of using AgilePoint Envision).

File > **Export & Import** > **Convert To …** > **Generic**

This option converts your current process model's underlying process template to a Generic process template. This option is not available when working with a process model based on the Generic process template.

File > **Export & Import** > **Convert To …** > **SharePoint Document**

This option converts your current process model's underlying process template to a Microsoft SPDoc process template. This option is not available when working with a process model based on the Microsoft SPDoc process template.

File > **Export & Import** > **Convert To …** > **InfoPath**

This option converts your current process model's underlying process template to a Microsoft InfoPath process template. This option is not available when working with a process model based on the Microsoft InfoPath process template.

File > **Export & Import** > **Generate Report**

This option allows you to create a HTML-formatted report for a process template. The generated report can be viewed in a Web browser. After activating this command, select the folder where you want to save the report and then click **OK**. The process definition and process diagram will be converted to HTM and GIF files, and saved to the selected folder.

File > **Export & Import** > **Import Existing Visio file**

This option creates a new AgilePoint Envision Generic process model based upon an existing Microsoft Visio diagram. The Visio shapes, connectors, etc. that are imported from the Visio diagram can then be converted into AgileShapes in order to create a working process model.

File > **Export & Import** > **Import Process Template XML**

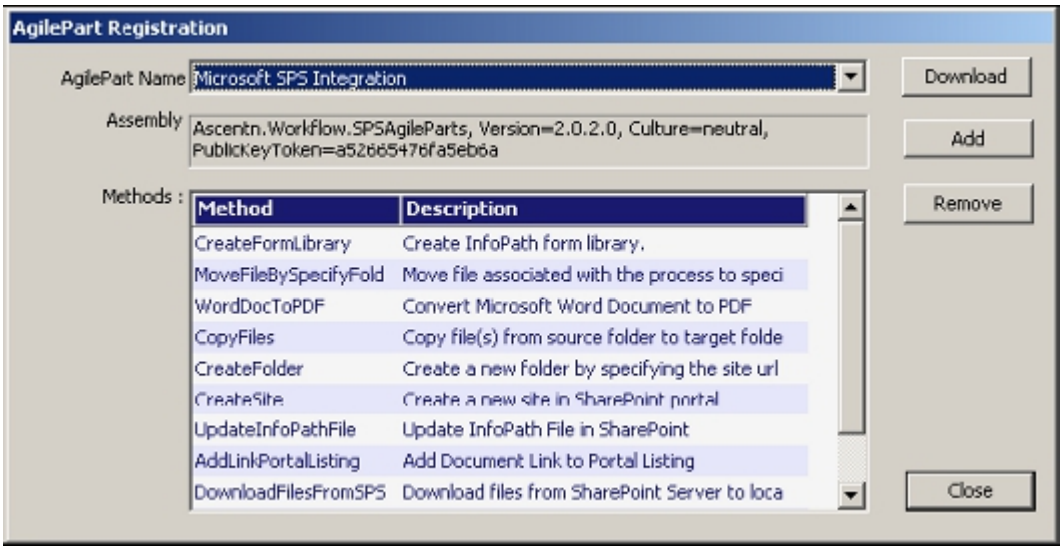
This option allows for the Process Template XML to be imported from AgilePoint Enterprise Manager into AgilePoint Envision and saved as a .vsd file. This can be helpful if you have lost your master process template .vsd and want to recover it.

File > **Process Simulation**

This option allows you to run a simulation of how a process model will behave at runtime.

File > **Extend AgilePoint** > **Register AgilePart**

This option registers a custom AgilePart component with AgilePoint Envision. Custom AgilePart components must be registered before they can be used in a process template. After selecting this option, the AgilePart Registration window appears.



To download and register an AgilePart that has already deployed to AgilePoint Server:

1. Click the **Download** button.
2. Connect to the AgilePoint Server.
3. Select an AgilePart that is available on the server and click **OK**.

Note: If the same AgilePart (or a previous version of the same AgilePart) was already registered, you will be prompted to overwrite it or cancel the download.

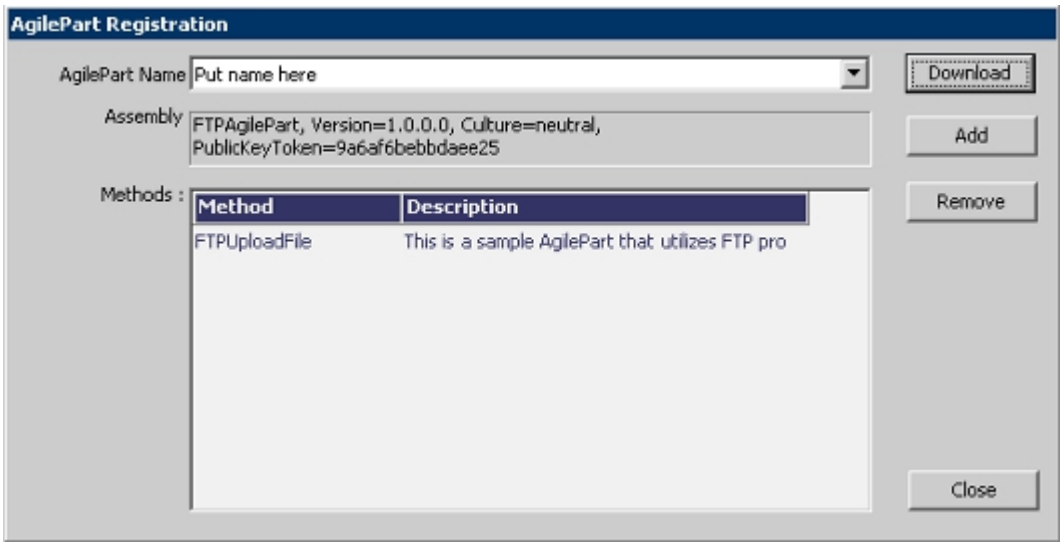
If a previous version of the assembly was already loaded into memory by AgilePoint Server, any changes to the assembly would not take effect until after AgilePoint Server is restarted. Modifying any file in the bin directory will automatically cause IIS to restart AgilePoint Server.

However, modifying the assembly will not automatically cause a restart, so if you want any DLL changes to take effect immediately, you would need to restart IIS or the AgilePoint Server.

To register an AgilePart DLL that is located on your computer's file system:

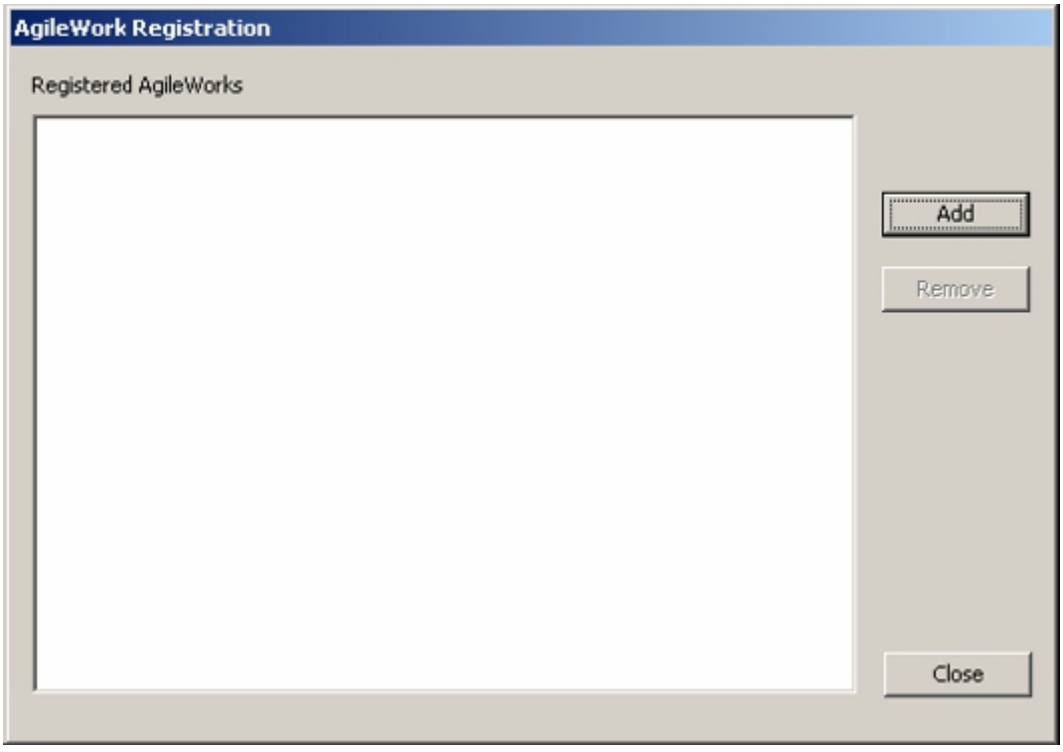
1. Click the **Add** button.
2. Select the appropriate DLL file and click **Open**.

Once an AgilePart assembly has been registered, the AgilePart and its methods will be displayed in the AgilePart Registration window and they can be used in process templates.



File > **Extend AgilePoint** > **Register AgileWork**

This command registers a custom AgileWork component with AgilePoint Envision. Custom AgileWork components must be registered before they can be used in a process template. After selecting this option, the registration dialog will be displayed.



To register an AgileWork DLL that is located on your computer's file system:

1. Click the **Add** button.
2. Select the appropriate DLL file and click **Open**.

Once an AgileWork assembly has been registered, the AgileWork and its methods will be displayed in the AgileWork Registration window and they can be used in process templates.

Registering an AgileExtender in Envision

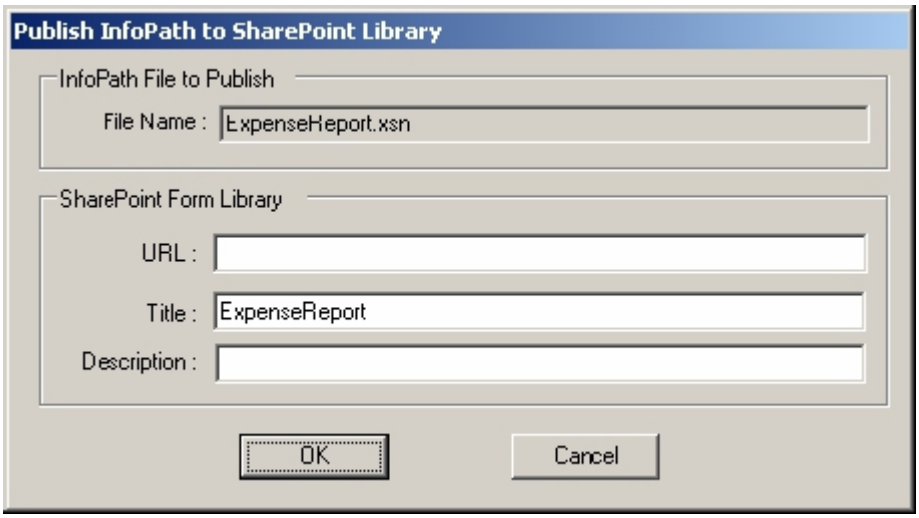
This command registers a custom AgileExtender component with AgilePoint Envision. Custom AgileExtender components must be registered before they can be used in a process template. After selecting this option, the registration dialog will be displayed.

1. In Envision, click **File > Extend AgilePoint > Register AgileExtender**.
2. On the **AgileExtender Registration** dialog box, click **Add**.
3. Select the DLL file for the AgileExtender , and click **Open**.

Once an AgileExtender assembly has been registered, the AgileExtender and its methods will be displayed in the AgileExtender Registration dialog, and the methods can be used in process templates.

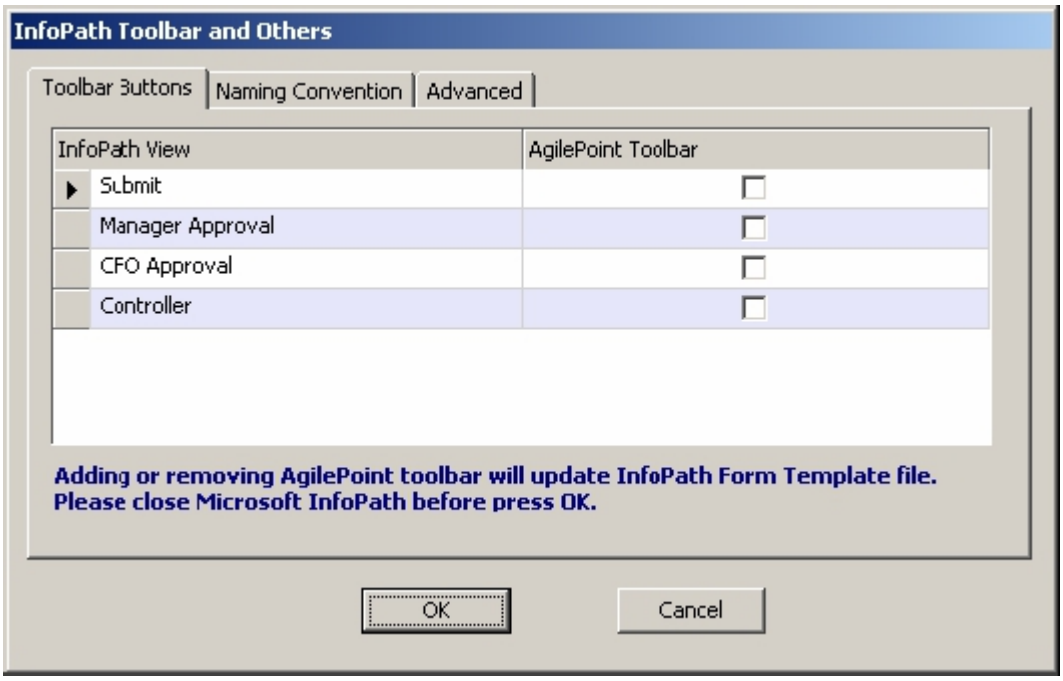
File > **InfoPath** > **Publish InfoPath to SharePoint Library**

This option is only available when working with a process model based on the Microsoft InfoPath process template. This command allows you to publish the InfoPath form associated with your process model to a Microsoft SharePoint Form Library directly from AgilePoint Envision.

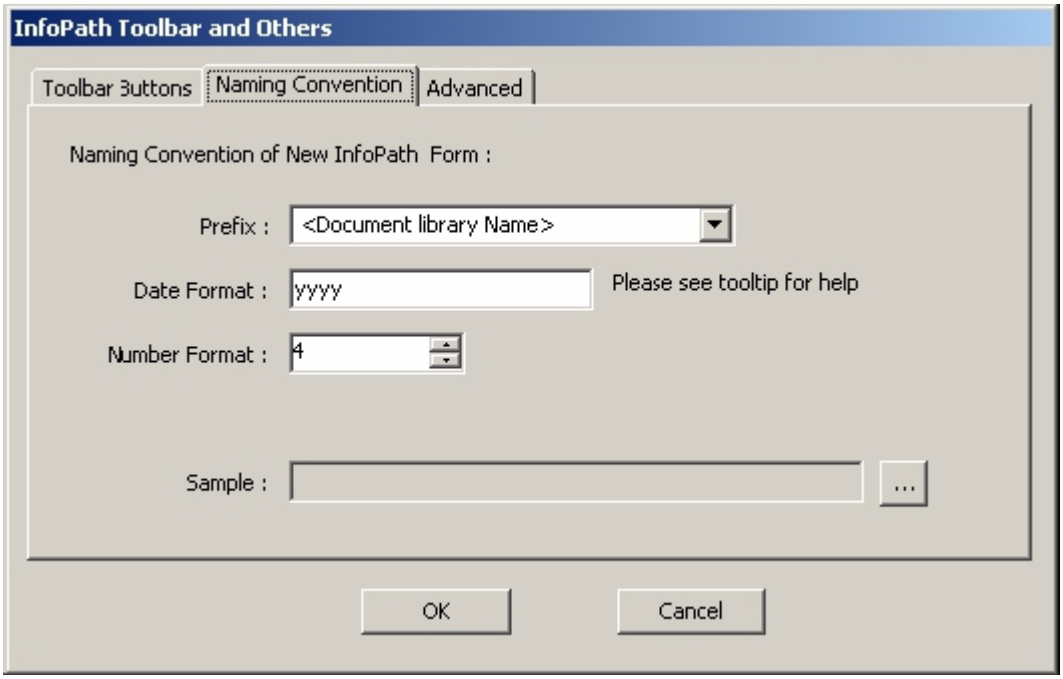


File > **InfoPath** > **InfoPath Toolbar, Auto Naming and Others**

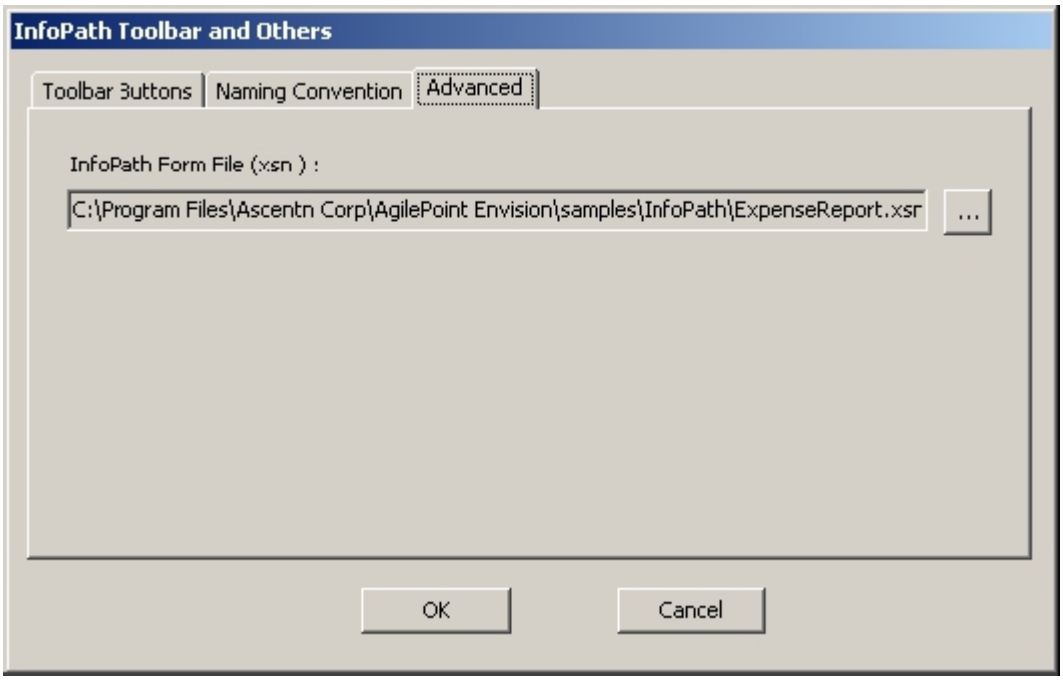
This option is only available when working with a process model based on the Microsoft InfoPath process template. This option allows you to configure various InfoPath-specific properties of your process template. The Toolbar Buttons tab allows you to configure which views (in your InfoPath form) will display the AgilePoint Toolbar. The AgilePoint Toolbar displays the **Submit and Close** button when the InfoPath form is open.



The **Naming Convention** tab allows you to configure how file names are generated for new documents in the SharePoint Form Library associated with your process template's InfoPath form.



The **Advanced** tab allows you to associate your existing process template with a different InfoPath form.



File > **SharePoint …** > **Change Document Library**

This option is only available when working with a process model based on the Microsoft SPDoc process template. This option allows you to associate your existing process template with a different SharePoint Document Library.

File > **SharePoint …** > **Retrieve Meta Data Schema**

This option is only available when working with a process model based on the Microsoft SPDoc process template. This option allows you to retrieve information about the metadata columns of the SharePoint Document Library associated with the current process model. This option is most often used when you add a new metadata column to SharePoint and want to bind to it from an existing process template.

File > **Shapes** > **Generic**

This option displays the **Generic** Visio Stencil (i.e. Shapes window) containing the basic AgilePoint AgileShapes.

File > **Shapes** > **Microsoft SPS**

This option displays the **Microsoft SPS** Visio Stencil (i.e. Shapes window) containing the predefined AgilePoint AgileShapes related to Microsoft SharePoint functionality.

File > **Shapes** > **Premier**

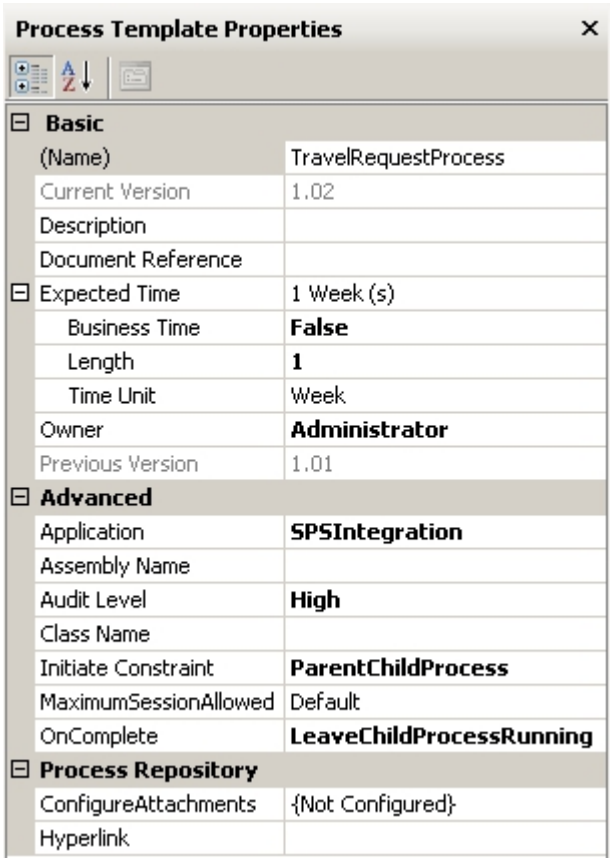
This option displays the **Premier Extension** Visio Stencil (i.e. Shapes window) containing additional predefined AgilePoint AgileShapes. These AgileShapes are used for various purposes, including database access, database updates, Web service calls, etc.

View Menu Options

The following menu options are available from the View menu in AgilePoint Envision.

View > **Process Template Properties**

This option displays the Process Template Properties pane. This pane displays the design-time properties of the process or the selected AgileShape. This option is most often used if the properties window has been closed.

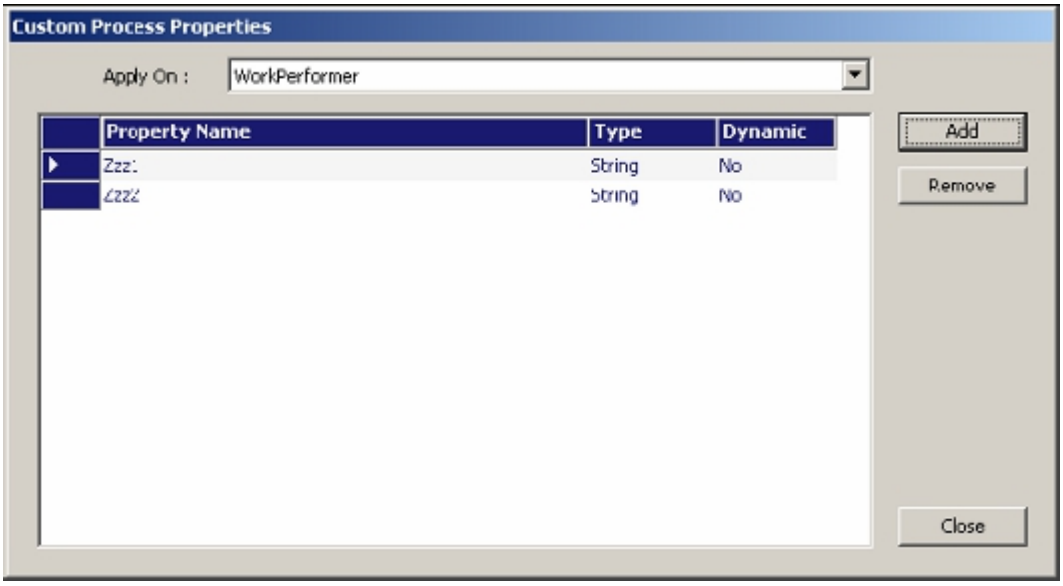


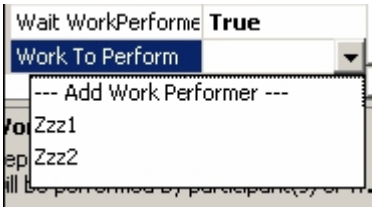
View > **Email Templates Wizard**

This option displays the Email Templates Wizard. The wizard allows you to create, modify, and/or delete the email notification templates that can be used within a process template.

View > **Custom Process Properties**

This option displays the Custom Process Properties window. This window provides a convenient way to review all of the different values used within the entire process from a single location. It also allows you to add and/or remove custom values to the drop-down lists displayed (in the Activity Properties toolbar) next to certain AgileShape properties. Adding custom process property values provides a convenient way to easily define common values that will be used (for certain AgileShape properties) in multiple AgileShapes. For example, adding two new **WorkPerformer** values (as shown below) will cause both values to appear in the drop-down list for the Work To Perform property (as shown below) for all of the Manual and Manual with Timeout AgileShapes in the process template.



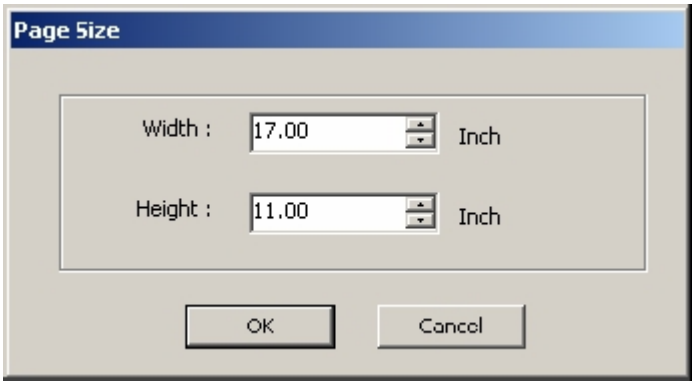


Shape Menu Options

The following menu options are available from the Shape menu in AgilePoint Envision.

Shape > **Actions** > **Page Size**

This option allows you to change the size of your process template. This option is not available when you have an AgileShape selected.



Help Menu Options

The following menu options are available from the Help menu in AgilePoint Envision.

Help > **AgilePoint Envision Help**

This command opens the Help file for AgilePoint Envision.

Process Templates

AgilePoint process templates are created using one of the special AgilePoint business process model templates built into AgilePoint Envision. These process templates are different than regular Visio templates in that they can be deployed directly to AgilePoint Server to execute the workflow process they model.

Process Template Types

The process template types in this section are available in AgilePoint Envision.

Generic Process Template

Generic is the simplest type of process template. This type of process model can be used to represent virtually any business process. However, certain specific types of business processes may be more easily modeled using one of the more specialized process template.

Microsoft InfoPath Process Template

The Microsoft InfoPath process template can be used to represent a business process where the entire process is associated with a single Microsoft SharePoint Form Library (and the Microsoft InfoPath form associated with that Form Library). Each runtime process instance will be associated with a specific copy of that InfoPath form. For this type of process model, the views of the InfoPath form are used as the user interface for any of the process' manual tasks, and user input is stored directly within the form's XML schema.

Microsoft SPDoc Process Template

The Microsoft SPDoc process template can be used to represent a business process where the entire process is associated with a specific Microsoft SharePoint Document Library. Each runtime process instance will be associated with a specific item (i.e. document) within the specified Document Library. This type of process model is typically used to create workflow solutions for document control and management. This type of process model allows the library's metadata columns to be bound directly to the process so that the documents' metadata values can be easily used within the process model.

For this type of process model, the user interfaces for any of the process' manual tasks are usually implemented as ASP.NET pages that can be placed in and accessed from the same SharePoint site that contains the Document Library.

Note: For process templates and AgileShapes that uses data from SharePoint, the first time you access SharePoint during your AgilePoint Envision user session, you must log on to SharePoint.

Microsoft SPList Process Template

The Microsoft SPList process template can be used to represent a business process where the entire process is associated with a specific Microsoft SharePoint List. Each runtime process instance will be associated with a specific list item within the specified List.

This type of process model allows the list's metadata columns to be bound directly to the process so that the lists' metadata values can be easily used within the process model. A typical usage scenario would be to initiate a process with a new list item, then use a sub process to implement forms interaction.

Note: For process templates and AgileShapes that uses data from SharePoint, the first time you access SharePoint during your AgilePoint Envision user session, you must log on to SharePoint.

AgileForms Process Template

The AgileForms process template can be used to represent a business process that uses AgileForms. To use this template, you must have the AgileForms Envision Add-On installed.

Select a Process Template Type

To begin creating an AgilePoint process, you must first select an AgilePoint process template type:

1. In Envision, click **File > New > AgilePoint > [Process Model Type]**.

Note: For process templates and AgileShapes that uses data from SharePoint, the first time you access SharePoint during your AgilePoint Envision user session, you must log on to SharePoint.

Open an existing Process Template

To create an existing process template, start AgilePoint Envision, then use the **File > Open** menu command to open the VSD file that contains the process template.

Convert a Visio Diagram to a Process Model

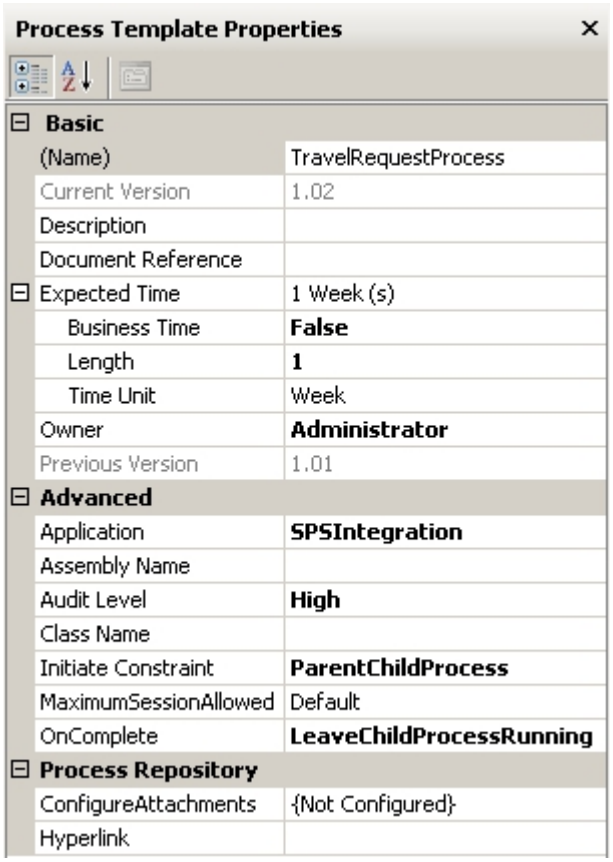
To convert an existing Visio diagram into a process template:

1. Start AgilePoint Envision.
2. Create (or open) a process template.
3. Click **File** > **Export & Import** > **Import Existing Visio file**.
4. Select the VSD file that contains the Visio diagram you want to convert. This will import the contents of the selected Visio diagram into your process template.
5. Once the diagram's contents are imported, convert the Visio shapes into AgilePoint AgileShapes. Once all of the imported shapes and connectors are completely converted and integrated into the process template, you can continue to work on the process template like you would normally.

Process Template Properties

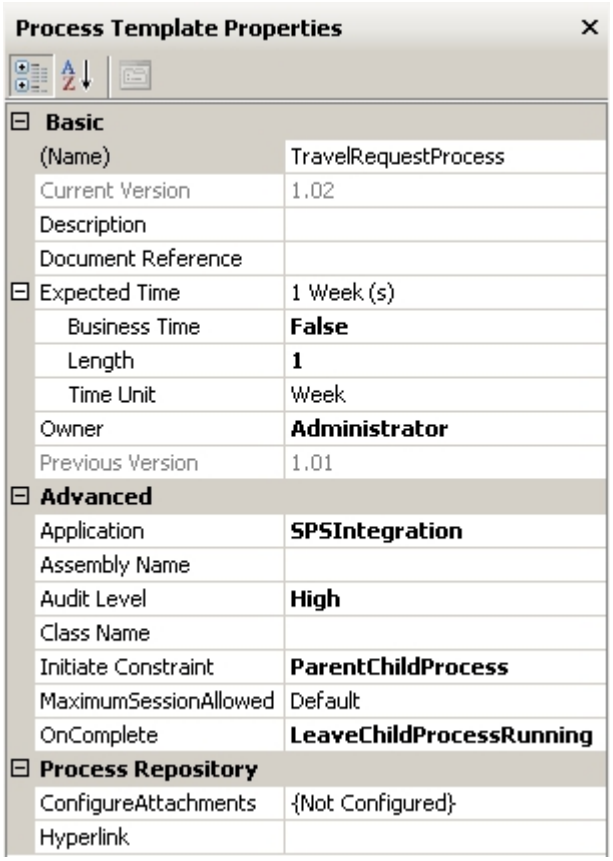
Process Template Properties Overview

The following properties are available at the process template level in AgilePoint Envision.



Process Template Properties

The Process Template Properties are visible when no activities are selected in the process model. A definition for each property can be found below.



Design-Time Properties

(Name)

The actual name of the process template that AgilePoint retains.

Current Version

The current version of the process template. The next time the process template is deployed to AgilePoint Server, the process version will be updated.

Description

Provides a text box pop for which to enter a description for the process template.

Document Reference

A reference to a document associated with the process template.

Expected Time

The amount of time that is configured for the process to complete.

Business Time

Specifies if the expected completion time will be based on business days. This property can be set to the following specific values:

- **True** - This value indicates that the expected time will be based on business days, where 5 days is equal to 1 week.
- **False** - This value indicates that the expected time will be not be based on business days, where 7 days is equal to 1 week.

Length

The number of time units for the expected time (e.g. 1 second, minute, hour, etc.).

Time Unit

The unit of time to be used for the expected time.

Owner

A name given to the owner of the process template.

Previous Version

The previous version of the process template.

Application

The process template application type (e.g. SPSIntegration for SharePoint based process templates that will be associated with a SharePoint library or list, or a custom name given as the name of an ASP.NET application).

Assembly Name

The name of the custom assembly that the process template is associated with.

Audit Level

Default value: High

This property determines the amount of process related data that is recorded to the workflow database. This property can be set at either the Process Template Properties layer or at the individual AgileShape layer. This property allows you to control the level of granularity in terms of the amount of process related data that is recorded to the workflow database. This property can be set to the following specific values:

- **High** - This value indicates that AgilePoint will record all data about the activity or process to the database.
- **Low** - This value indicates that AgilePoint will only allow a certain amount of data to be recorded to the database. This option provides a level of control over the granularity of AgilePoint process-related data that is stored in the AgilePoint workflow database, giving some flexibility in the audit trail records by filtering out unnecessary data.

Class Name

The name of the custom class that the process template is associated with.

Initiate Constraint

The type of process model. This determines the category for which this process model is associated under the license model. If the process model is of type ChildProcess, it cannot be initiated as a stand alone process. A ParentChildProcess can be initiated as either a Parent or Child process, it counts as a Parent process.

MaximumSessionAllowed

MaximumSessionAllowed allows you to set the MaxloopAllowed at the process model level to avoid an infinite loop scenario. Now you can set the MaxLoop to a number where the engine will then mark the process as suspended. The process level MaxLoop setting overwrites the global/server level setting in the Netflow.cfg file. If this property is set to the 'Default' the process will inherit the global/server level setting in the NetFlow.cfg.

OnComplete

Determines the fate of the child process once the parent process completes. This property can be set to the following specific values:

- **LeaveChildProcessRunning** - This value indicates that the child process will continue to run after the parent process completes.
- **CancelChildProcesses** - This value indicates that child processes will be canceled once the parent process completes.

- **InheritParentProcess** - This value indicates that child processes will inherit the OnComplete properties of the parent process.

ConfigureAttachments

Allows you to attach documents at the process model level that are accessed from the process repository. For more information, see Process Repository in the Documentation Library.

Reference URL

Allows you to associate an URL at the process model level that is used in the process repository. For more information, see Process Repository in the Documentation Library.

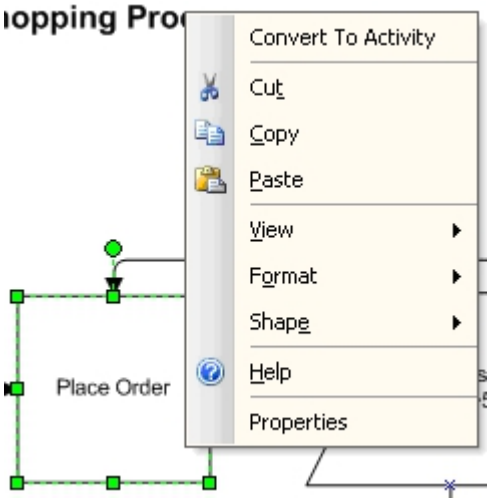
Convert a Visio Shape to an AgileShape

When you import an existing Visio diagram or copy a regular Visio shape and paste it into a process template, you will need to convert the Visio shape(s) into one or more AgileShapes before those shapes can be a part of the Process Model.

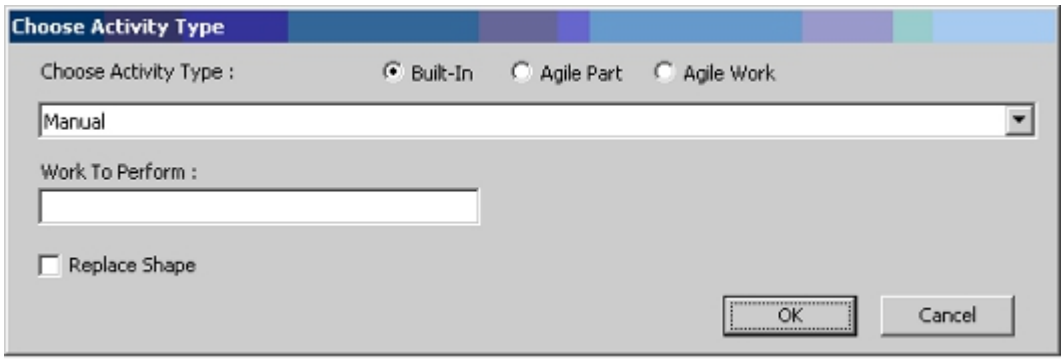
Visio shapes larger than 1.5 inches x 1.5 inches cannot be directly converted into an AgileShape, and will need to be replaced with (rather than converted into) an AgileShape.

Visio shapes that do not represent an "activity" (e.g. flowchart shapes that represent conditional logic or decisions) cannot be directly converted into an AgileShape, and will need to be replaced with (rather than converted into) an AgileShape (see below).

1. Click on the shape you want to convert to select it.
2. Right-click the selected shape and click **Convert to Activity**.



3. In the Choose Activity Type window, select the type of AgileShape the shape should be converted into.



See Process Template AgileShapes for more information about the types of AgileShapes and how the Work To Perform property is used for each type of AgileShape.

4. (Optional) Check the "Replace Shape" check box if you want the converted shape to appear like the type of AgileShape you selected. Uncheck the "Replace Shape" check box if you want the converted shape to be displayed in the process model with the same graphical appearance as it had prior to conversion.
5. Click the **OK** button.
6. (Optional) Configure additional properties of the converted AgileShape as you would for a normal AgileShape (i.e. using the Activity Properties window).

To replace a Visio shape with an AgileShape:

1. Add one or more AgileShapes to your process template, and configure them as appropriate.
2. Change any connectors that are connected to the Visio shape so that they are now connected to the AgileShapes you just added.
3. Remove/delete the Visio shape from the process template.

Add an AgileShape to a Process Model

Adding an AgileShape to a Process Model is the same as adding a Visio shape to a Visio diagram. Simply click and drag an AgileShape (from a stencil in the Shapes window) onto your process template.

Remove an AgileShape from a Process Model

Removing an AgileShape from a Process Model is the same as removing a Visio shape from a Visio diagram. Simply click the AgileShape to select it, and then press the delete key.

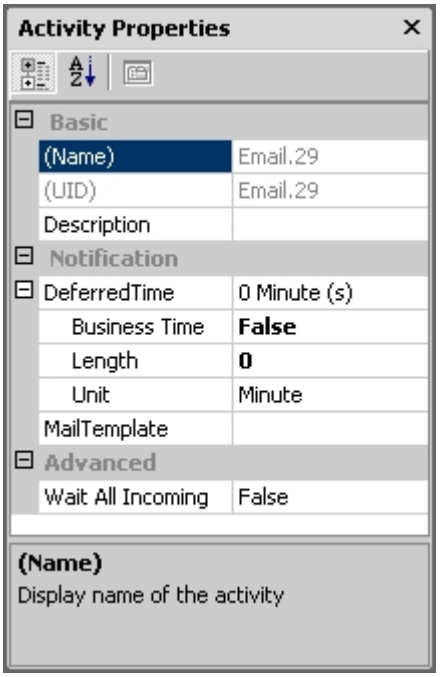
Change an AgileShape's Display Name

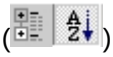
To change an AgileShape display name:

1. Double-click the AgileShape, and then type a new name.

Configure AgileShape Properties

To configure the properties of an AgileShape instance, first click the AgileShape to select it. Then use the Activity Properties toolbar (shown below) to modify any of the AgileShape's configurable properties.



You can switch between the view using the toggle buttons () at the top of the toolbar. See Process Template AgileShapes for more information about each of the properties listed in the Activity Properties toolbar.

Connecting AgileShapes To Each Other

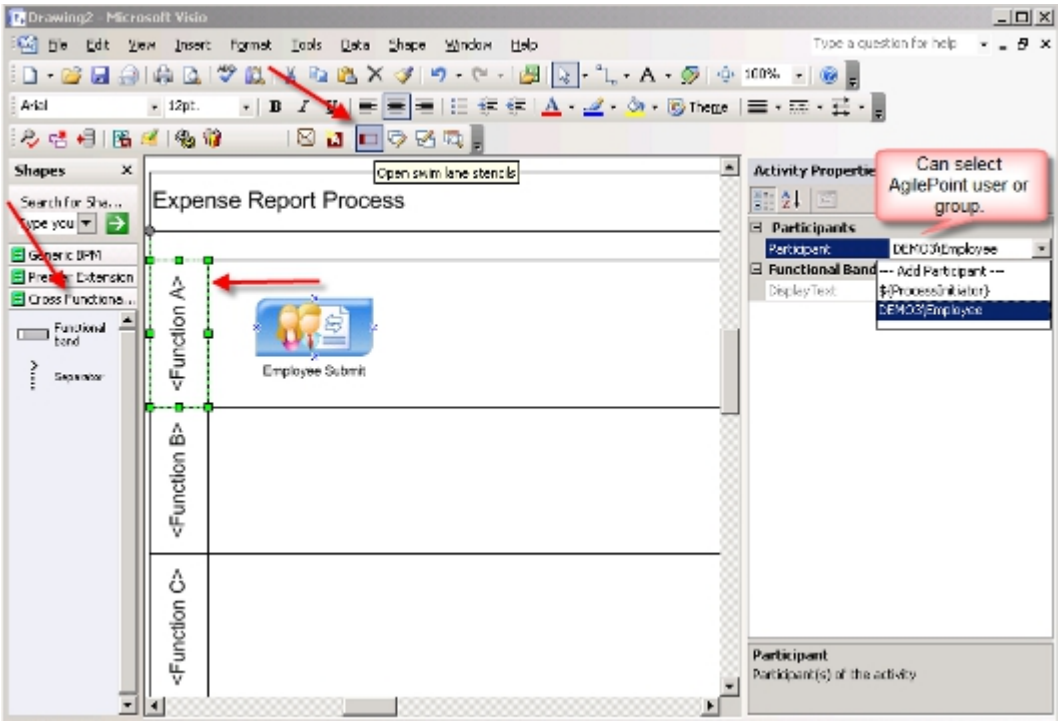
Connecting AgileShapes in a process template is similar to the process of connecting Visio shapes in a Visio diagram. First you would select Visio's Connector Tool (). Next you would click and hold on to an Out Connection Point of an AgileShape, and then drag the mouse pointer to an In Connection Point of another AgileShape (and then release the mouse button).

Some AgileShapes have Connection Points that can be used as either an In Connection Point or an Out Connection Point, while others have Connection Points that may only be used in a specific direction. For example, the Single Condition AgileShape has 2 Connection Points labeled Yes and No. These 2 Connection Points must always be used as Out Connection Points, while the unlabeled Connection Points must always be used as In Connection Points. However, you can configure which side the labeled points are positioned on by Right-Clicking and selecting **Flip Yes** or **Flip No**.

Using Swim Lanes in Envision

Swim Lanes allow for blocks to be added to the modeling canvas that belong to a particular AgilePoint group, role, or a single participant. When a manual activity is added to a Swim Lane, the AgilePoint group, role, or participant is automatically assigned based on which Swim Lane the manual activity is dropped (i.e. where Swim Lanes are tied to participant(s).

Note: This feature is only for Microsoft Visio 2007 and later.



Registering a custom AgileShape

Custom AgilePart and AgileWork components must be registered before they can be used in a process template. Registration requires that a .NET assembly (containing at least one AgilePart and/or AgileWork component) be imported into AgilePoint Envision.

To register a custom AgilePart:

1. Use the **File > Extend AgilePoint > Register AgilePart** menu command.

To register a custom AgileWork:

1. Use the **File > Extend AgilePoint > Register AgileWork** menu command.

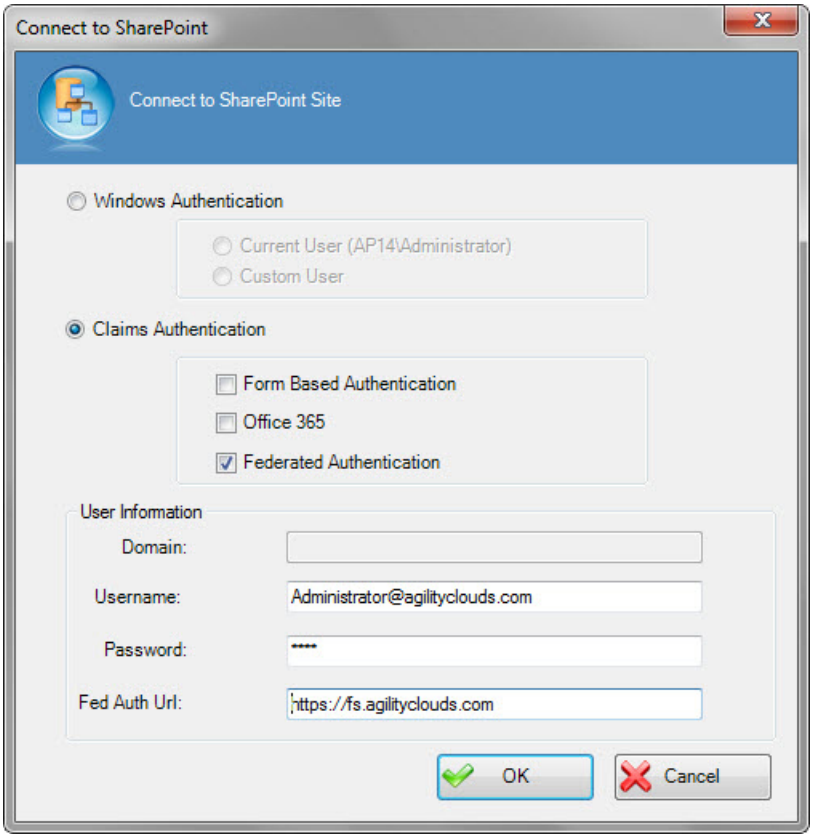
Logging on to SharePoint from a Process Template or AgileShape

For process templates and AgileShapes that uses data from SharePoint, the first time you access SharePoint during your AgilePoint Envision user session, you must link it to a SharePoint list.

Instructions

1. On the **Connect to SharePoint** dialog box, complete the fields to specify the user account you want to use to connect to SharePoint, and then click **OK**.

   These credentials will be saved and used each time you open the process model.



Field Definitions

Field Name	Definition
Windows Authentication	Definition: Specifies whether, and what type, of Windows Authentication is used to connect to SharePoint.

Field Name	Definition
Claims Authentication	Definition: Specifies whether to use Claims authentication, and what type of Claims authentication, to use to connect to SharePoint. Allowed Values: If this option is selected, the following types of Claims Authentication are available: • **Form Based Authentication** - Activates Forms based authentication using a custom membership provider to connect to an on-premises SharePoint environment. • **Office 365** - Activates Claims authentication to connect to SharePoint in an Office 365 environment. This option can be used side-by-side with on-premises SharePoint. • **Federated Authentication** - Activates Federated authentication to connect to SharePoint -- for example, ADFS. **Note:** Out of the box, AgilePoint supports ADFS authentication. If you want to use your own authentication provider, see Federated Authentication Example in the Documentation Library. Default Value: Deselected
Domain	Definition: The authentication domain. This does not apply to Forms-Based Authentication.
Username	Definition: The user ID of the SharePoint authentication account. Allowed Values: A valid user name. Default Value: None Custom Attributes: No

Field Name	Definition
Password	Definition: The password for the authentication account. Allowed Values: A valid password. Default Value: None Custom Attributes: Yes
Fed Auth Url	Definition: The URI of the federated authentication provider. This provider issues security tokens for federated authentication. Allowed Values: A valid federated authentication provider URI. Default Value: None Custom Attributes: No Example: https://fs.agilityclouds.com

Logging on to AgilePoint Server from Envision

If you need to directly access AgilePoint Server data (for example, users, groups, or roles) from a process model, the first time you access AgilePoint Server during your AgilePoint Envision user session, you must log on.

Navigation

1. In AgilePoint Envision, open a process template.
2. Click **AgilePoint > Publish Process to Server**.

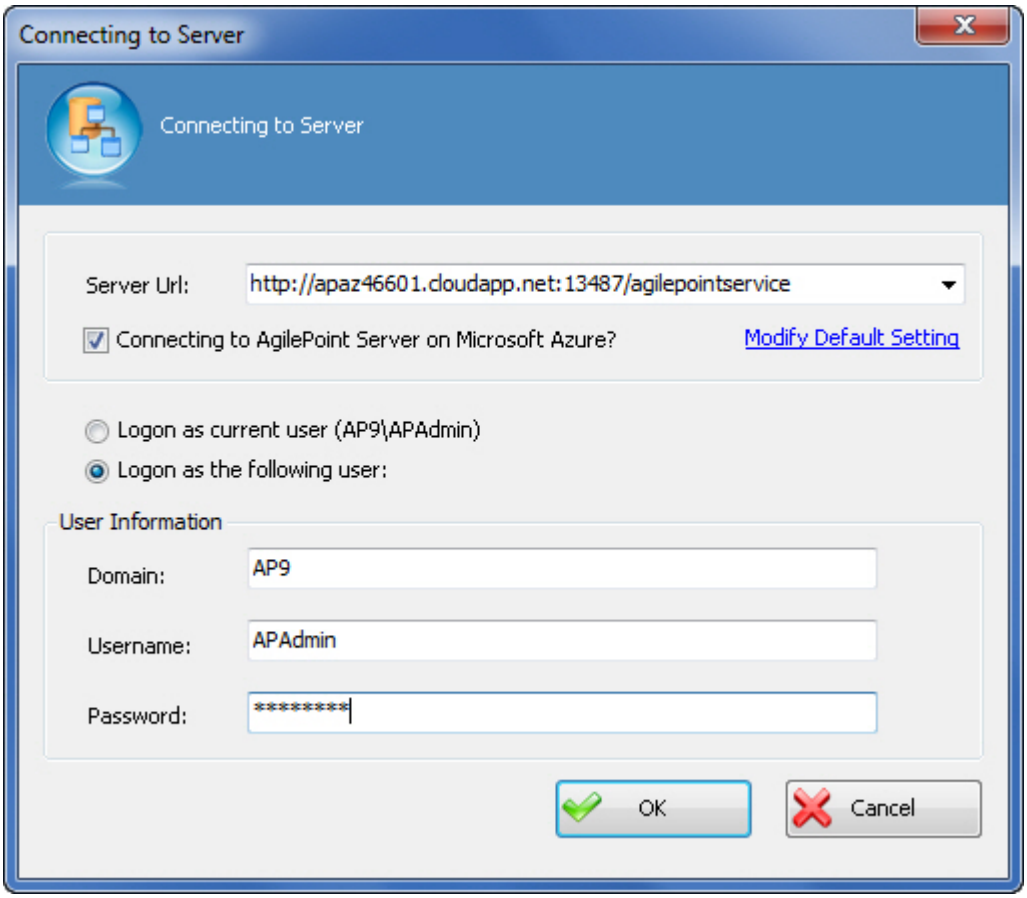
Instructions

1. On the Connecting to Server window, complete the fields to specify the user account you want to use to connect to AgilePoint Server.

   These credentials will be saved and used each time you open the process model.

Connecting to Server Window

Enables Envision to bind and authenticate to AgilePoint Server.



Navigation

1. In AgilePoint Envision, open a process template.
2. Click **AgilePoint > Publish Process to Server**.

Field Definitions

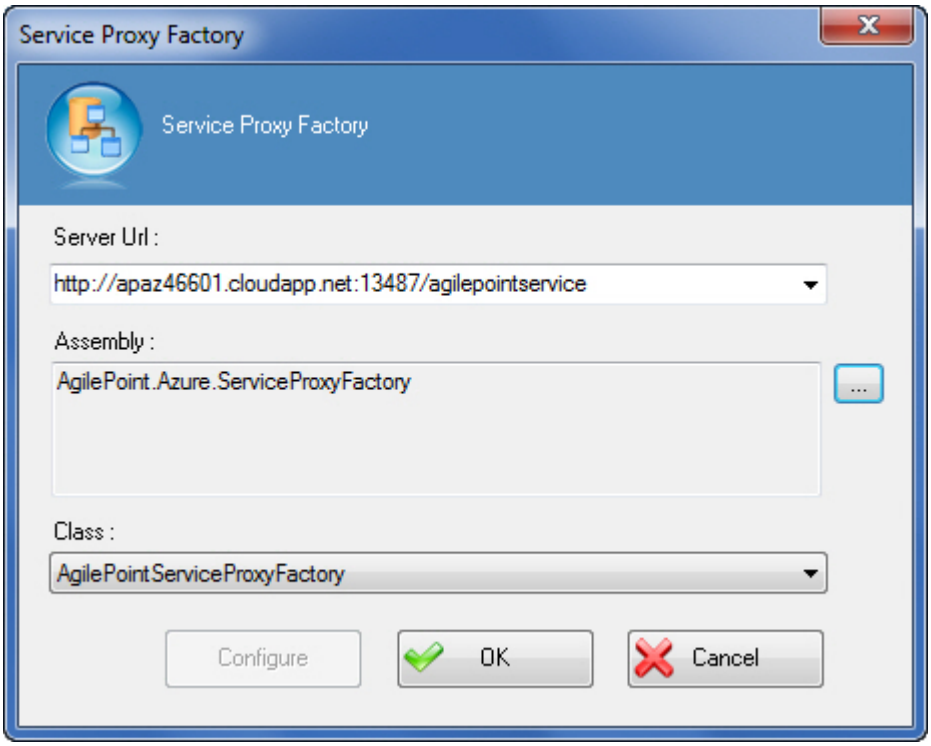
Field Name	Definition
AgilePoint Server URL	Definition: The URL of your AgilePoint Server. Allowed Values: A valid AgilePoint Server URL.

Field Name	Definition
	Default Value: In AgilePoint BPMS for Azure, the default value is the value of the default AgilePoint evaluation environment. Custom Attributes: No
Connecting to AgilePoint Server on Microsoft Azure?	Definition: Specifies whether AgilePoint Server is running on premises or on Windows Azure.
Modify Proxy Factory	Opens the Following Window: Service Proxy Factory Window Purpose of this Window: Specifies the connection parameters for the Service Proxy Factory to connect to AgilePoint Server on Windows Azure.
Logon as current user	Authenticates using the local machine's Windows user account. If you select this option, you do not need to complete the remaining fields.
Logon as the following user	Authenticates using the credentials you specify.
Domain	Definition: The authentication domain. This does not apply to Forms-Based Authentication.
Username	Definition: The user ID of the AgilePoint Server authentication account. Allowed Values: A valid user name for an AgilePoint Server administrator account. Default Value: None Custom Attributes: No
Password	The password for the authentication account.

Service Proxy Factory Window

Specifies the connection parameters for the Service Proxy Factory to connect to AgilePoint Server on Windows Azure.

By default, you do not need to change this information. You need only change this if the assembly name or class name changes for your Service Proxy Factory custom authorization mechanism. This is not common.



Navigation

To access this window in Envision:

1. In AgilePoint Envision, open a process template.
2. Click **AgilePoint > Publish Process to Server**.
3. On the **Connecting to Server** window, select **Connecting to AgilePoint Server on Microsoft Azure?**
4. Click **Modify Default Setting**.

To access this window in AgilePoint Service Bus configuration:

1. On the AgilePoint Service Bus machine, click **Start > AgilePoint > AgilePoint Service Bus Configuration**.
2. Click the **AgilePoint Service** tab.
3. Click **Modify Default Setting**.

Field Definitions

Field Name	Definition
Server URL	The URL of your AgilePoint Server.
Assembly	Definition: The assembly for your service proxy factory. Allowed Values: A valid assembly name. Default Value: AgilePoint.Azure.ServiceProxyFactory Custom Attributes: No
Class	Definition: The class for your service proxy factory. Allowed Values: A valid class name Default Value: AgilePointServiceProxyFactory Custom Attributes: No

Data Services

This section provides information and instructions about how AgilePoint Data Services is used to collect and track application data.

The Data Services includes two core components:

- **Data Population** - Data Population allows you to write to a database the desired application data values. The data can then be used for reporting purposes.
- **Data Tracking** - Data Tracking provides the functionality to set up fields in AgilePoint Envision to be monitored for changes to application data, for example you can see for a specific field on a form, the **Old Value** and if the data changes, the **New Value**. This viewpoint is provided via the AgilePoint Enterprise Manager Data Tracking tab.

Note: Ensure that you have installed and configured the AgilePoint Data Services AgileConnector.

Configure the Windows Service for Data Services

Note: In a NLB installation scenario, only one AgilePointDataServices Windows Service should be started.

1. Open **[AgilePoint Data Services installation folder]\DataServicesWindowsService.exe.config**, and change the following properties accordingly:
   - **DbConnectionString:** This connection string should point to the Database which contains the **WF_DATA_TRACKING** table where the output of the data tracking is stored.
   - **TempDbConnectionString:** This connection string should point to the Database which contains **WF_DATA_SERVICE_TEMPDB** which is populated by the AgileConnector with the before and after XML values. Set this to the same value that is configured for the AgileConnector.
   - **EnableDataPopulation:** Set this to **true** to enable Data Population.
   - **EnableDataTracking:** Set this to **true** to enable Data Tracking.
   - **TimerInterval:** This is the timer interval used by the Windows Service to check for any new entries in the Temporary database. On a production system, this can be set to a high interval like 3600 (i.e. one hour).

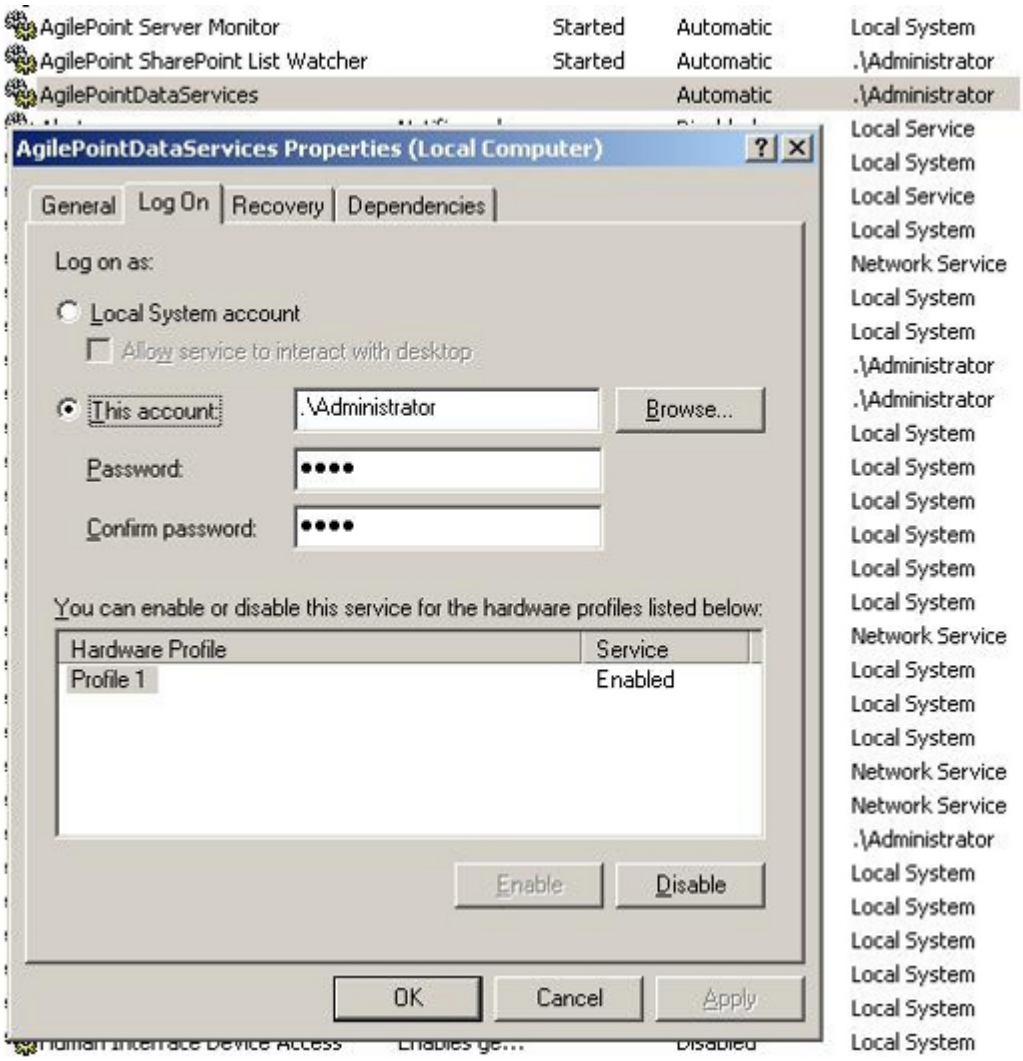
   Note: The Database connection string and the table information for Data Population are obtained from the Process Template.

Change the Logon Credentials

Before starting the Windows Service, change the Log On credentials to Administrator (as the Local Service account which is the default used by the Windows Service does not have enough access privileges to AgilePoint Server). This can be done as follows:

1. Open the Services console.
2. Right-click on the **AgilePointDataServices** and open the Properties window.

3. On **Log On** tab, select **This account**, and enter the Administrator account information as follows:



4. When finished, click **OK**.
5. Start the Windows Service.

Modify the Enterprise Manager web.config

1. Add the following element under **<AppSettings>** in the Enterprise Manager **web.config** file:

```
<add key="DataTrackingConnectionString"
  value="<Connection string>" />
```

Add a valid connection string depending on your database that is used for data tracking.

Example:

```
<add key="DataTrackingConnectionString"

 value="server=[hostname];database=AgilePointTracking;trusted_connection=true"
    />
```

The web.config file for Enterprise Manager can be located at: C:\<AgilePointServer>\EnterpriseManager

Enabling the DataService AgileConnector

To enable the DataService AgileConnector, do the following.

Good to Know

- To support multiple applications, you can configure multiple AgileConnectors, or list multiple applications within the Application Filter of one AgileConnector.

Navigation

1. On the AgilePoint Server machine, click **Start > All Programs > AgilePoint > AgilePoint Configuration**.
2. On the **AgilePoint Server Configuration Tool** window, click the **Extensions** tab.

Instructions

1. On the **Extensions** tab, click **Add**.
2. Click the **Ellipses** button next to the **Assembly** field to browse the assembly **[AgilePoint Server installation folder] \bin\Ascentn.AgileConnector.DataService.dll**.

   Note the following:

   - The **Name** field appears with the default AgileConnector name. Do not change this value.
   - The **Impersonator** field must be blank.
3. Click **Configure**.
4. On the **Data Service Configuration** window, complete the following fields as required.

Field Name	Definition
Application Filter	Definition: Filters the process template based on the process model type or name. Allowed Values: • **SPSIntegration** - Uses only process models created using InfoPath, SPList and SPDoc process templates. • **AgileForms** - Uses only process models created using AgileForms process templates. • **MyApplication** - Uses only process models created using Generic process templates — usually ASP.NET applications. • **Custom application name** - Uses only process models with a custom application name specified in the process template.

Field Name	Definition
	Multiple application names must be separated with a semicolon (;). Default Value: MyApplication
Connection String	Definition: Specifies the connection string to be used to connect to the Data Tracking database. Allowed Values: A valid connection string. Default Value: Data Source=.;Integrated Security=SSPI;Initial Catalog=AgilePointTracking Example: Data Source=mydomain;Integrated Security=SSPI;Initial Catalog=AgilePointTracking

Data Population

Data Population allows you to write to a database (SQL or Oracle) the desired application data values. The data can then be used for reporting purposes.

Setting Up Data Population

To set up Data Population, do the following.

Prerequisites

- For Data Population, the data tracking database that is created should include table columns based on the fields from the form.
- The primary key must be the process instance ID.

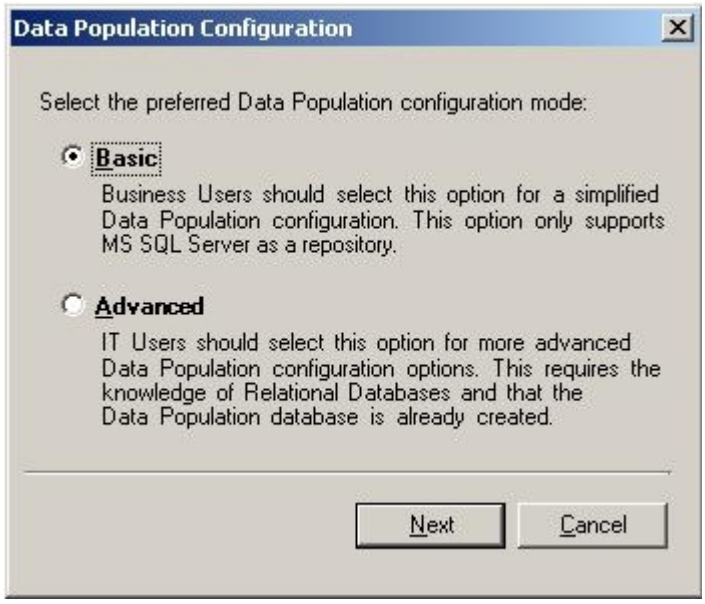
Navigation

1. In **Envision**, open a process model.
2. In the **Process Model Properties** pane, click **Data Population**.

Instructions

1. On the **Connecting to Server** window, select the Logon type and click **OK**.

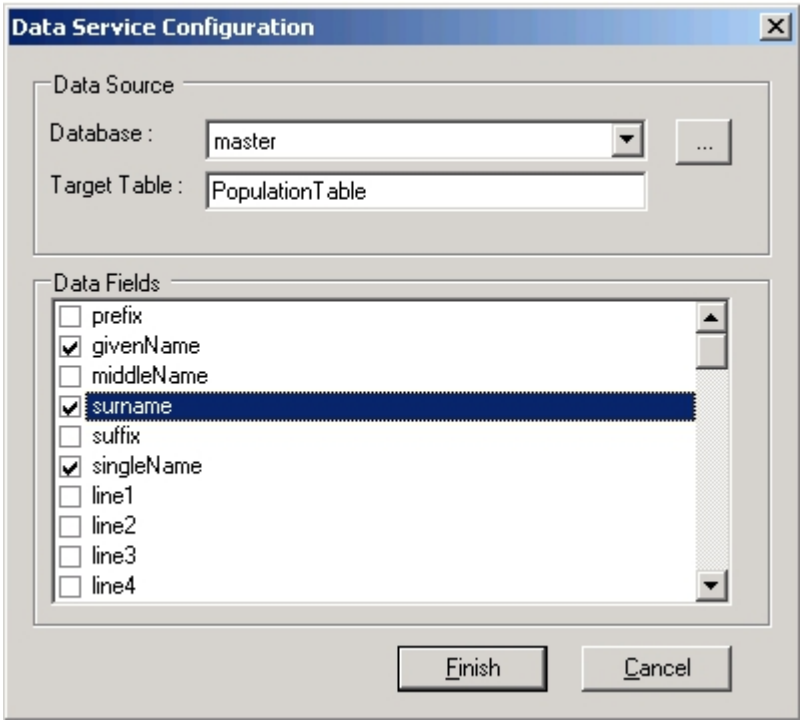
   The Data Population Configuration window appears. This windows allows you to select either a **Basic** or **Advanced** way of configuring the repository and setting up the mapping for data population.



2. Select one of the following:

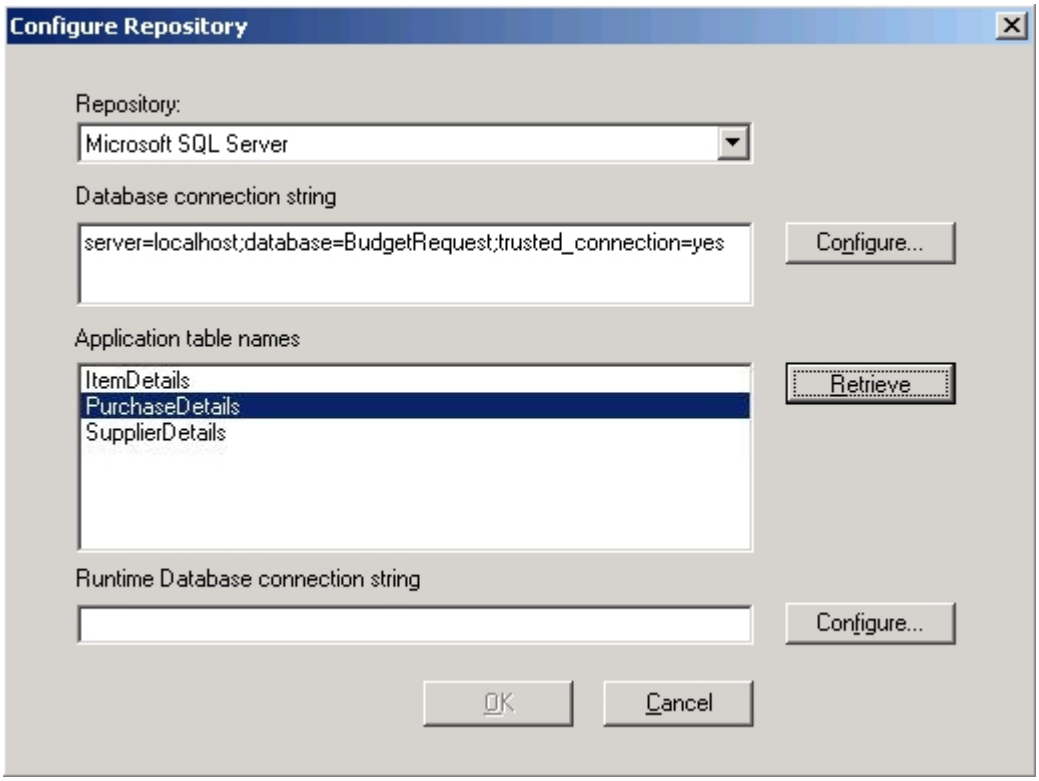
- **Basic** - Suitable only for development environments where the data source resides on the same machine as the AgilePoint Envision client.
- **Advanced** - Suitable for environments where the data source resides on a separate machine from the AgilePoint Envision client.

If you selected the **Basic** option, the Data Service Configuration window appears.



1. Click the **Ellipses** button to populate the database list with all the databases on the server.
2. (Optional) Change the **Target Table** name if desired.
3. Select the Data Fields from the forms schema for which to populate data to the database.
4. Click **Finish**.

If you selected the **Advanced** option, the Configuration Repository window appears.



1. In the **Repository** field, select either Microsoft SQL Server or Oracle to write the data to a database, or SharePoint list to write the data to a SharePoint list.
2. Do one of the following:

- If you have chose to write the data to a database:

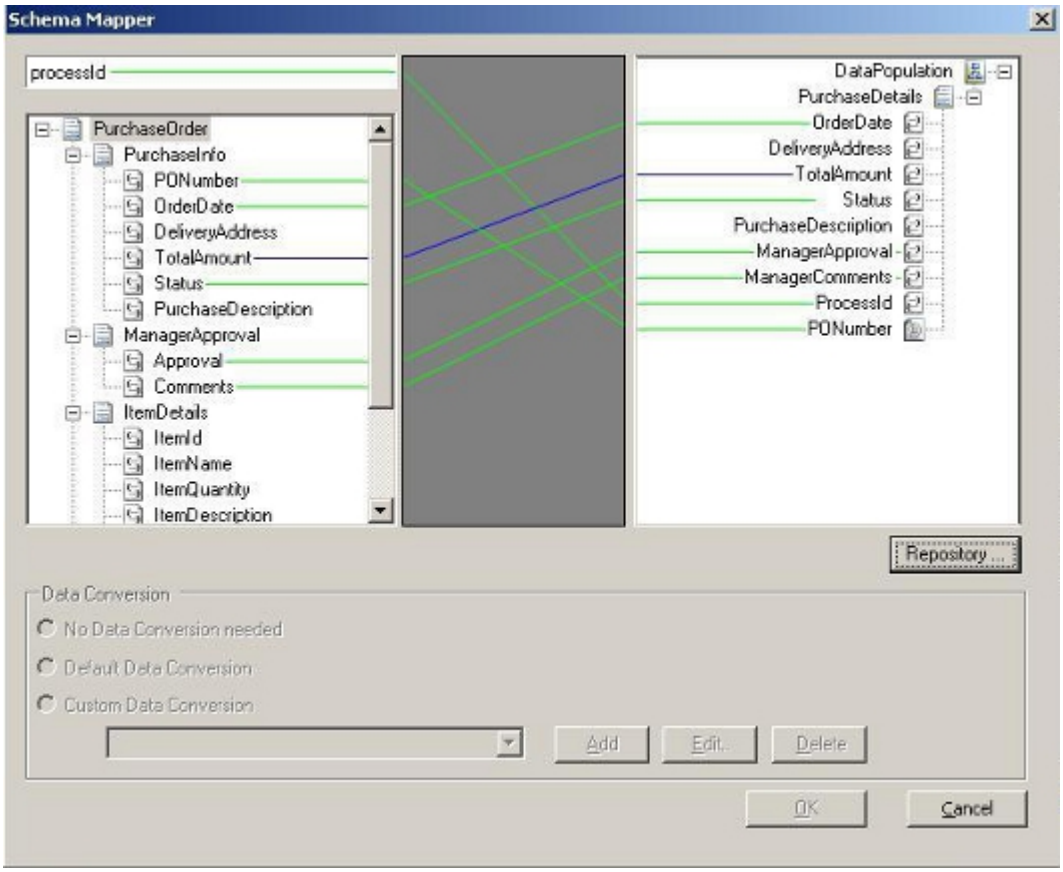
1. Click the **Configure** button to configure the database connection details.
2. Click the **Retrieve** button to retrieve the database table names.
3. (Optional) In the **Runtime Database connection string** field, enter the database connection string that will be used at runtime.
4. Click **OK**.

- If you have chosen to write data to a SharePoint list:

1. In the **Site URL** field, enter the SharePoint Site URL for the list and click the green arrow to sync with the list.
2. In the **List Name** field, select the list(s) name(s) for which to populate data. Also select the Primary Key to be used for each list.
3. (Optional) In the **Runtime Server URL** field, enter the SharePoint site URL that will be used at runtime.

4. Click **OK**. The Schema Mapper window appears.

Note: If the selected tables have more than one foreign key reference, an error message is displayed, also if the selection does not contain a master table that is referenced by a detail table, a warning message is displayed. The Repository dialog closes and opens the Schema mapper. If a selected table does not contain a primary key field, an error will be shown.



The left window pane shows the form's Schema, the right side shows the database structure.

5. Map the fields accordingly from the form's schema on the left to the database fields (and all the attributes on the right). To map an element to the processId drag and drop as usual to the respective field, while mapping to a processed, the right element must be of type string, else it will give an error message.
6. You will see the connection lines appear as shown above. The connection lines may show different colors based on the compatibility of the data types as follows:
   - **Green** - The data type matches.
   - **Blue** - The data type does not match, the system will handle the conversion.
   - **Red** - The data type does not match, custom data conversion is required. In this case, click the Add button and add the custom mapping code as necessary to handle the data conversion.

Note: At any point of time, you can change the Repository Configuration by clicking the **Repository…** button to reopen the Configure Repository window. On successful configuration of the repository, the right tree view will be refreshed to load the modified Data Population schema, and restores the mappings that are still valid.

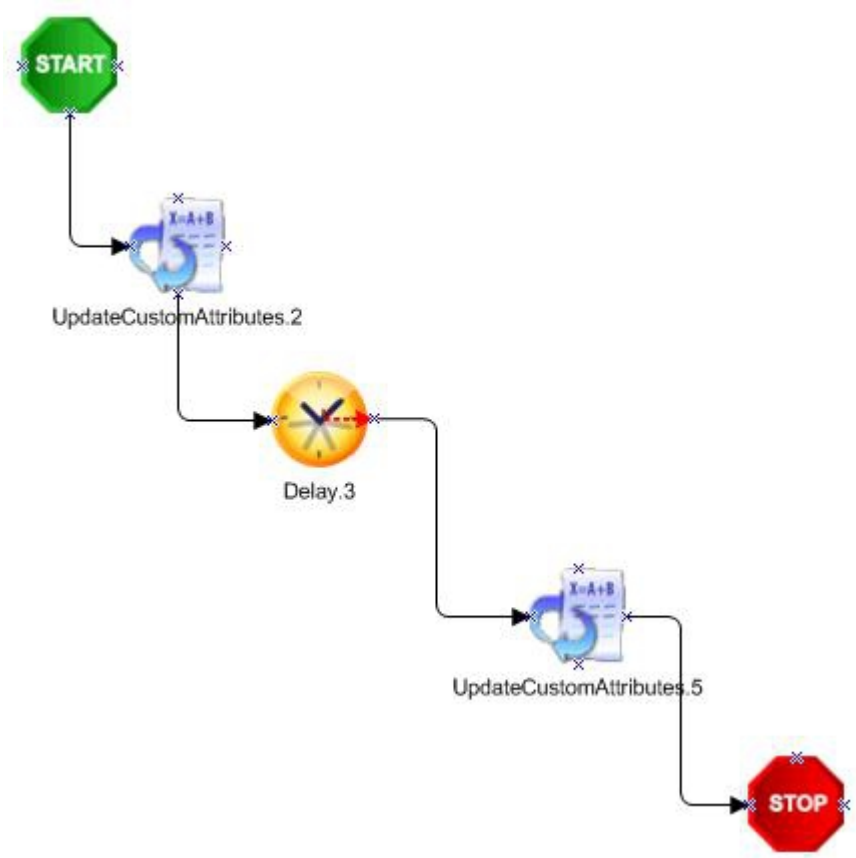
Note: If the children of a recurring element are mapped, then compulsorily map the recurring elements also for proper result. If you do not map the recurring element, but map its children, and if the source XML contains multiple entries, the destination XML after transformation will contain only one element and hence it will create only one entry in the detail table.

7. After the mapping is complete, click **OK** to save the mapping and close. At runtime, the database or SharePoint List is populated with the values of the form fields.

Mapping Custom Attributes to Multiple Tables

The following instructions are a use case for mapping custom attributes to multiple tables.

1. Create a Generic AgilePoint application without a schema.
2. Add a couple of Update Custom Attribute activities to change the Custom Attribute values. Add a Delay shape in between to observe the changes. The AgilePoint process will look something like this:

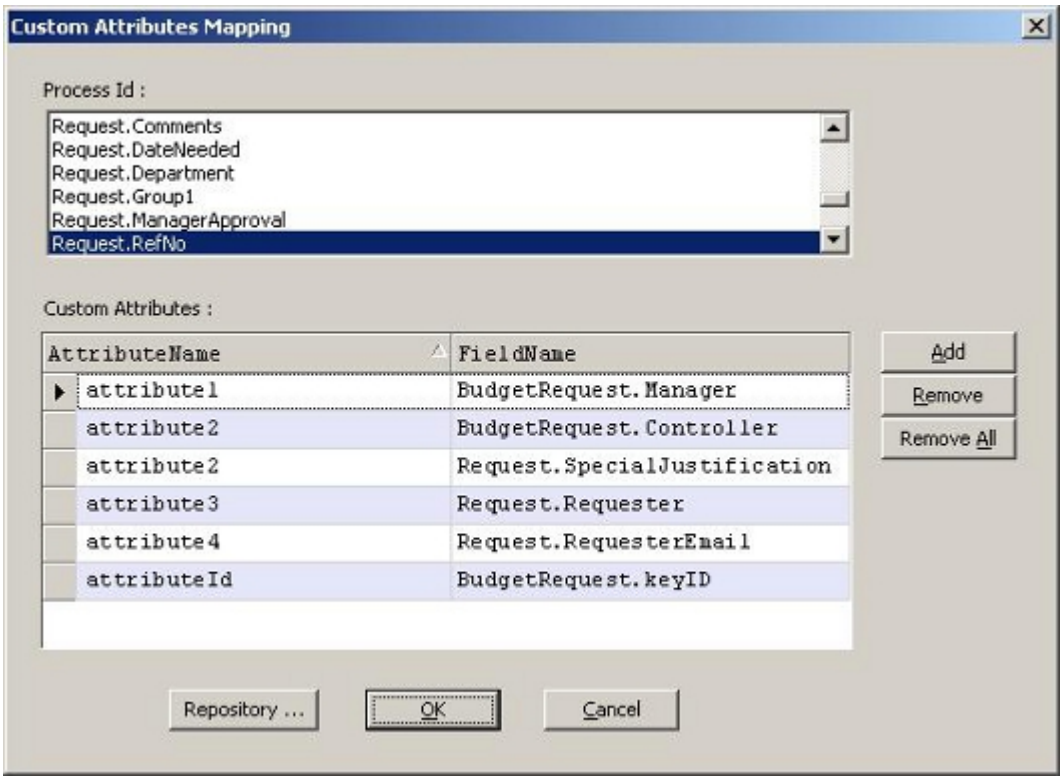


3. Click the **Data Population** link to open the Configure Repository dialog. Select the **Database as Repository** and set the Database connection string and click the **Connect** button to display the list of tables present in the specified database.
4. Select the tables that are required and set the **Runtime address string** (optional), then click **OK**.

Note: All the detail tables are hidden (i.e. not displayed) in the Application table names list box. This is because Detail tables are not supported for custom attribute mapping.

5. In the **Custom Attributes Mapping** window, enter the attribute name in the **AttributeName** column and select the **FieldName** to which the attribute has to be mapped.

Note: All the primary key fields must be mapped to an attribute compulsorily or selected in the Process Id list box, else an error message will be displayed. An attribute can be mapped to more than one field (i.e. One to Many mapping is allowed).



Data Tracking

Use this procedure to set up the Data Tracking.

Note: This feature only supports InfoPath and ASP.NET based process models where a schema is associated.

1. Click the **Modify Tracking** link in the Process Templates Properties pane.

   The **Attributes Tracking Dialog** appears.

2. The **Conditional Data Tracking** field can be used to enable conditional data tracking and would take an expression (e.g. enter ${ to bring up the list of friendly names, select Amount and type >500 to track the data only if the Amount is greater than 500).

3. In the **Attributes to be tracked** box, select the fields for which to track from the schema.

   This information is then provided via the AgilePoint Enterprise Manager **Data Tracking** tab.

Messages and Notifications

You can send notifications from a manual activity (AgileWork) using email, Lync, Yammer, or SMS. You define message templates that can be reused for any activity within a process. For some types of messages, you can also allow replies that can interact with a process. This is most commonly used for approvals.

You can send multiple types of notifications for the same activity. For example, you might want to send messages to certain participants via Lync, and others via Yammer. You may want to send a task assignment to mobile devices via SMS, but send reminders via email.

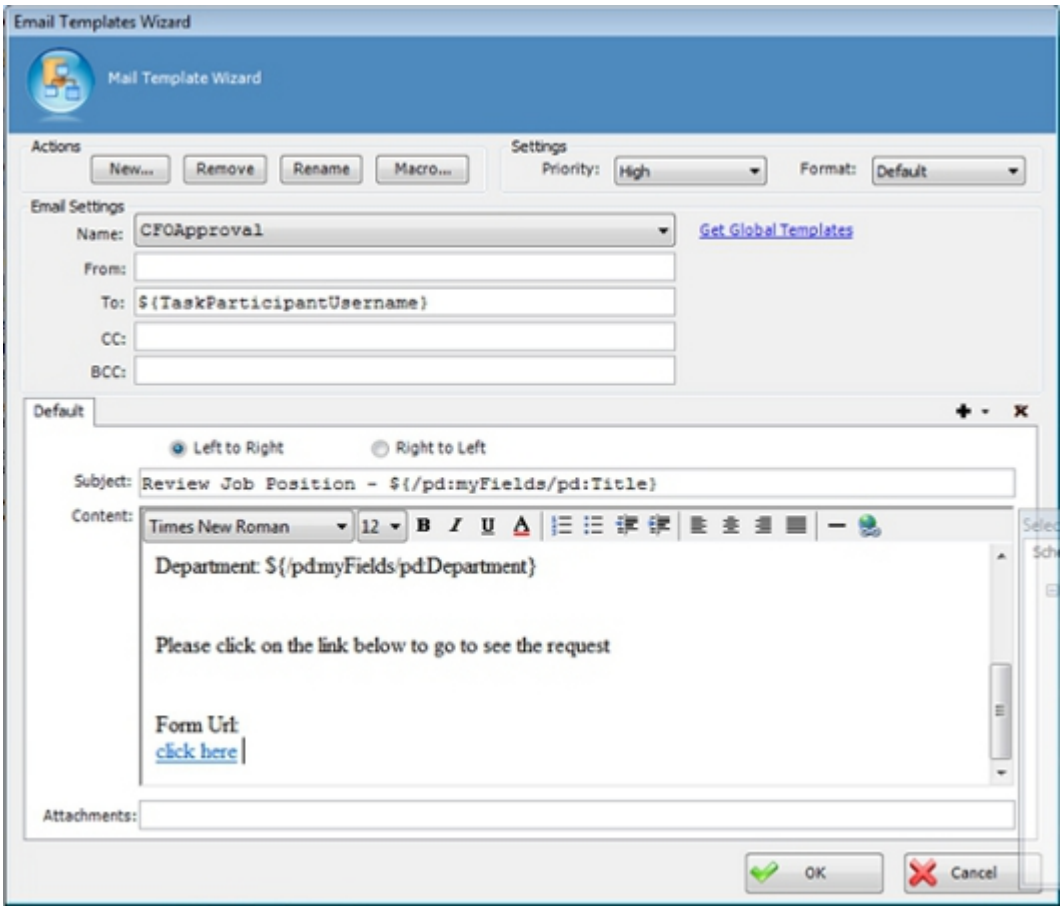
This section provides information about setting up notifications and messages, creating message templates, and working with variables in messages and notifications.

Message Template Windows

This section describes the windows used to create messages and notifications for various messaging technologies in AgilePoint Envision.

Email Template Wizard

Specifies the content of an email template. An email template determines recipients, subject, body, and other aspects of an automated email template sent from AgilePoint.



Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Activity Entry Message (Email)**
   - **Reminder Message (Email)**
   - **Task Completed Message (Email)**
   - **Task Reassigned Message (Email)**
5. On the **Email Template Wizard**, do one of the following:
   - To modify an existing message template, in the **Name** list, select the name of the template you want to modify.
   - To create a new message template:
     1. Click **New**.
     2. On the **New Name** window, enter the name you want to identify your message template.

3. Click **OK**.

Field Definitions

Field Name	Definition
New	Function: Opens the New Name window, where you can enter the name of the message template. Allowed Values: Free text in text format. Default Value: None Custom Attributes: No
Rename	Function: Opens the New Name window, where you can change the name of the message template. Allowed Values: A single line of text. Default Value: None Custom Attributes: No
Remove	Function: Deletes the message template from the Name list.
Name	Definition: Specifies the Email Template you want to modify. Allowed Values: A single line of text. Default Value: An email template, if one exists.
From	Definition:

Field Name	Definition
	Specifies the recipients in the From field of an Email Notification. Allowed Values: A semicolon-delineated list of valid email addresses. If process attributes are used, domain\username is converted automatically to a valid email format. Default Value: None Custom Attributes: Yes Example: me@mydomain.com; ${ProcessInitiator}; ${ProcessParticipantUserNames}
To	Definition: Specifies the recipients in the To field of an Email Notification. Allowed Values: A semicolon-delineated list of valid email addresses. If process attributes are used, domain\username is converted automatically to a valid email format. Default Value: None Custom Attributes: Yes Example: me@mydomain.com; ${ProcessInitiator}; ${ProcessParticipantUserNames}
CC	Definition: Specifies the recipients in the CC field of an Email Notification. Allowed Values: A semicolon-delineated list of valid email addresses.

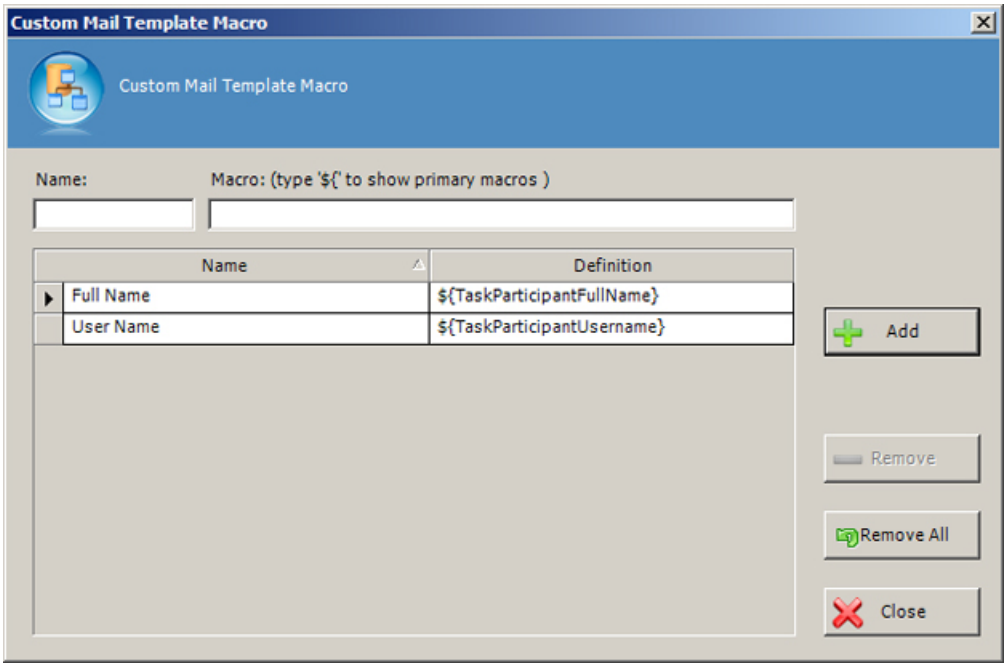
Field Name	Definition
	If process attributes are used, domain\username is converted automatically to a valid email format. Default Value: None Custom Attributes: Yes Example: me@mydomain.com; ${ProcessInitiator}; ${ProcessParticipantUserNames}
Subject	Definition: Specifies the subject line of an email notification. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes Example: ${ActivityName} in ${ProcessName} is complete
Multi-language List (+)	Definition: Specifies an additional language for which you can define the content of an email. Allowed Values: A list of languages. Example: af-ZA sq-AL am-ET
Priority	Definition: Specifies the priority setting for an email notification. Allowed Values: • High • Normal

Field Name	Definition
	• Low Default Value: Normal
Format	Definition: Specifies the display format for an email. Allowed Values: • **HTML** - Displays the email in HTML format. • **Text** - Displays the email in text-only format. • **Default** - Displays the email in your organization's default format. This is set by your AgilePoint system administrator. Typically this is HTML. Default Value: Default
Left to Right/Right to Left	Definition: Specifies the alignment of text in the content section of an email. Allowed Values: • Left to Right • Right to Left Default Value: Left to Right
Content	Definition: Specifies the content of the body of an email. Allowed Values: Rich text in HTML format, or free text in text format. Default Value: None Custom Attributes: Yes
Attachments	Definition: Specifies one or more files you want to include in an email.

Field Name	Definition
	Allowed Values: The full path and file name for the attachments you want to include. Lists are separated by semicolons. **Note:** The file that you would like to attach must reside on the local machine. Default Value: None Custom Attributes: Yes Example: C:\My Documents\sample1.doc; ${HomeDirectory}\sample2.doc; ${AttachDoc}

Custom Mail Template Macro Window

A custom macro is used to simplify the data entry task when constructing an email notification by using a single attribute name (or macro) to refer to a combination of process attributes. Custom macros are stored in the process attribute list with a "*" for easy identification and can be reused when constructing additional email notification templates in the future.



Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Activity Entry Message (Email)**
   - **Reminder Message (Email)**
   - **Task Completed Message (Email)**
   - **Task Reassigned Message (Email)**
5. On the **Email Template Wizard**, do one of the following:
   - To modify an existing message template, in the **Name** list, select the name of the template you want to modify.
   - To create a new message template:
     1. Click **New**.
     2. On the **New Name** window, enter the name you want to identify your message template.
     3. Click **OK**.
6. Click **Macro**.

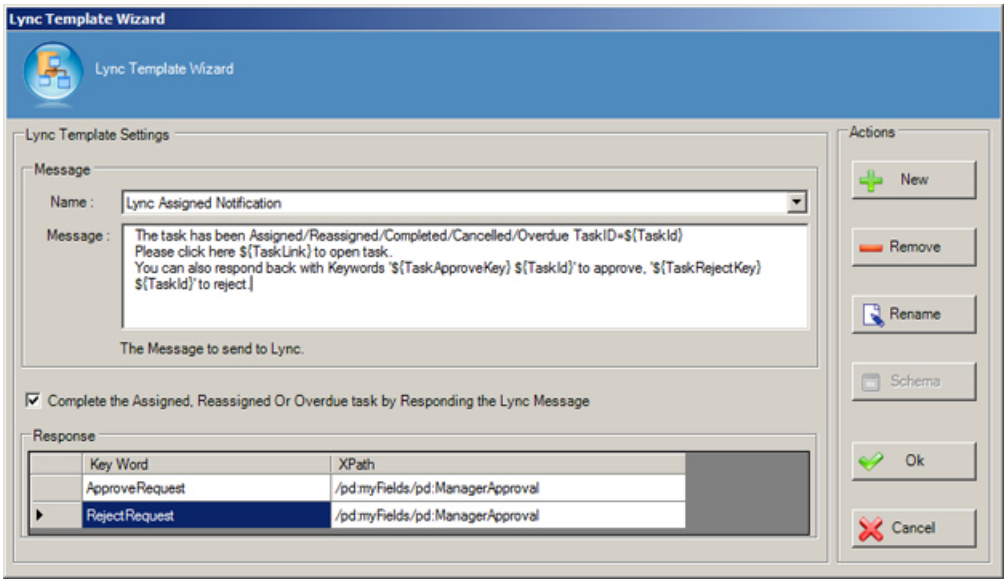
Field Definitions

Field Name	Definition
Name	Definition: Specifies a name for your macro. Allowed Values: A single line of text. Default Value: None
Macro	Definition: Specifies your custom macro Allowed Values: A single line of text. You can enter ${ to show a list of the built-in (primary) macros. Default Value:

Field Name	Definition
	None
Definition	Definition: Displays the description of your custom macro to the list. Allowed Values: A valid custom macro. Default Value: None
Add	Function: Adds your custom macro to the list.
Remove All	Function: Deletes all rows in the list.

Lync Template Wizard

Specifies the content of the Lync template. The Lync template determines message, name, and response of an automated Lync template sent from AgilePoint.



Navigation

1. In AgilePoint Envision, open a process template.

2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. In one of the following fields, click **Add Lync Template**. The exact fields that display vary, depending upon the AgileShape you are using:
   - **Reminder Message**
   - **Task Assigned Message**
   - **Task Cancelled Message**
   - **Task Completed Message**
   - **Task Reassigned Message**
5. On the **Lync Template Wizard**, do one of the following:
   - To modify an existing message template, in the **Name** list, select the name of the template you want to modify.
   - To create a new message template:
     1. Click **New**.
     2. On the **New Name** window, enter the name you want to identify your message template.
     3. Click **OK**.

Field Definitions

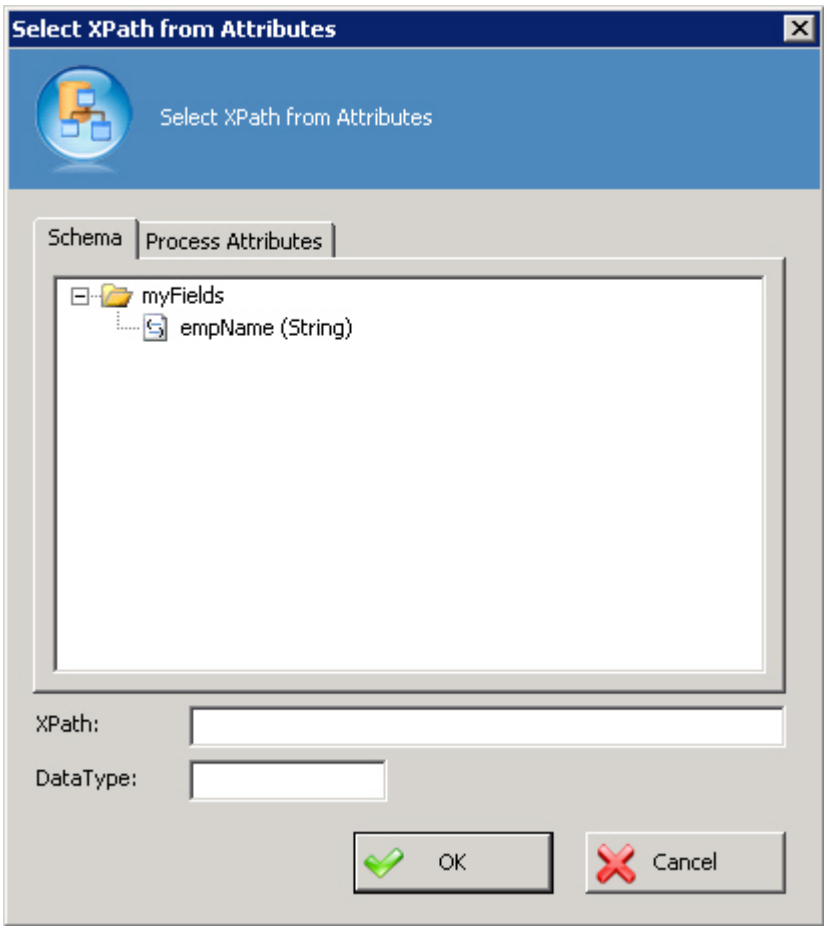
Field Name	Definition
Name	Definition: Specifies the message template you want to modify. Allowed Values: A single line of text. Default Value: A message template, if one exists.
Message	Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes
New	Function:

Field Name	Definition
	Opens the New Name window, where you can enter the name of the message template. Allowed Values: Free text in text format. Default Value: None Custom Attributes: No
Remove	Function: Deletes the message template from the Name list.
Rename	Function: Opens the New Name window, where you can change the name of the message template. Allowed Values: A single line of text. Default Value: None Custom Attributes: No
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want.
Complete the Assigned, Reassigned Or Overdue task by Responding the Lync Message	Definition: Completes a task using a response to the automated message. The message must come from the same message technology as the outgoing message. For example, the user must use Lync to respond to a Lync message.
Key Word	Definition:

Field Name	Definition
	A value which, when entered in a message response, sets the Xpath node to True or False. This is typically used for approve/reject functionality. Allowed Values: A text string. Default Value: None Custom Attributes: Yes
XPath	Definition: Specifies a schema node whose value is set when the keyword is entered in the message response. This is typically used for approve/reject functionality. The keyword determines the value that is set. Allowed Values: An XPath to a schema node that represents a Boolean value. Default Value: None Custom Attributes: Yes Example: /pd:myFields/pd:ApproveReject

Select XPath from Attributes Window

Enables you to select a schema node from the XML schema for your process.



Prerequisites

- The XML metadata or process attribute you want to use must already be created for the process template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Navigate to the appropriate stencil.
3. On the specific stencil, drag the AgileShape that needs to use XML metadata or process attributes, and drop it on the process template.
4. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
5. On the respective field/configuration window, do one of the following, as appropriate:
   - Type the characters **${** in the property box.
   - Click the **Ellipses** button.
   - Click the **Schema** button.

Field Definitions

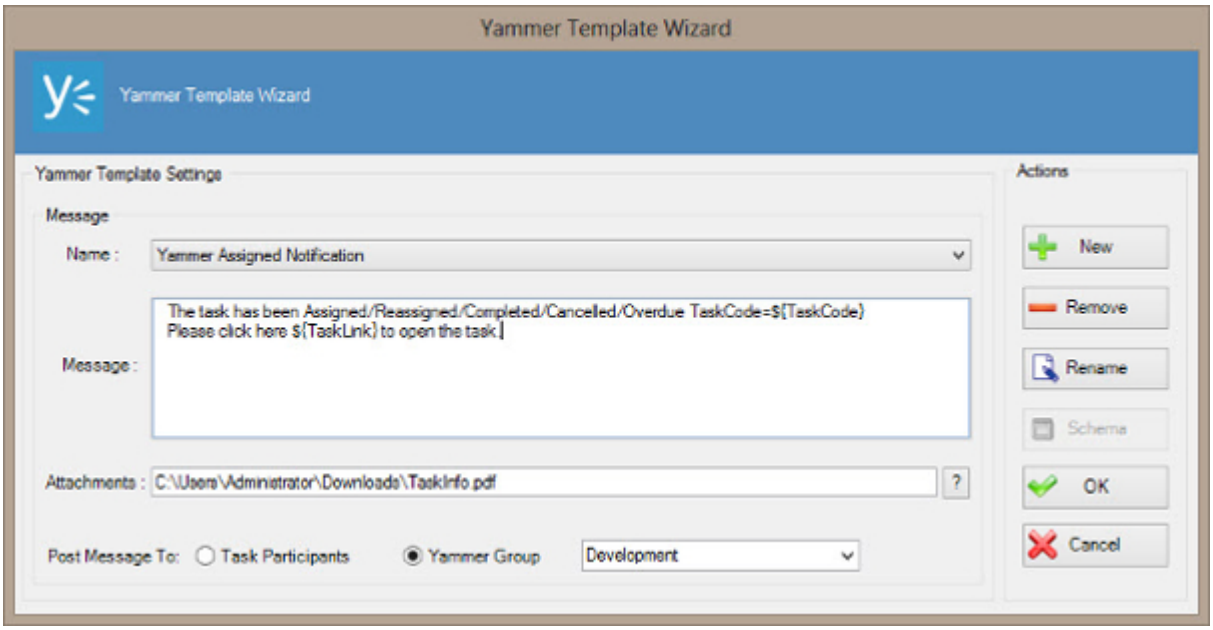
Field Name	Definition
Schema	Definition: Displays the XML metadata associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the XML node you want to use.
XPath	Definition: Displays the XPath of the selected node. Allowed Values: Read only. Example: /pd:my/pd:empName
DataType	Definition: Displays the data type of the selected node. Allowed Values: Read only.
Process Attributes	Definition: Displays the process attributes associated with the process in a tree-view structure. Allowed Values: Read only. Click to select the process attribute you want to use.
OK	Function: Completes the task and inserts the selected metadata or attribute in the place where this window was invoked. Note the following: • First, you must select the metadata or attribute you want, and then click OK. • You can select only one metadata or attribute at a time.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Yammer Template Wizard

Specifies the content of a message template for a message sent using Yammer template.



Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. In one of the following fields, click **Add Yammer Template**. The exact fields that display vary, depending upon the AgileShape you are using:
   - **Reminder Message**
   - **Task Assigned Message**
   - **Task Cancelled Message**
   - **Task Completed Message**
   - **Task Reassigned Message**
5. On the **Yammer Template Wizard**, do one of the following:
   - To modify an existing message template, in the **Name** list, select the name of the template you want to modify.

- To create a new message template:
  1. Click **New**.
  2. On the **New Name** window, enter the name you want to identify your message template.
  3. Click **OK**.

Field Definitions

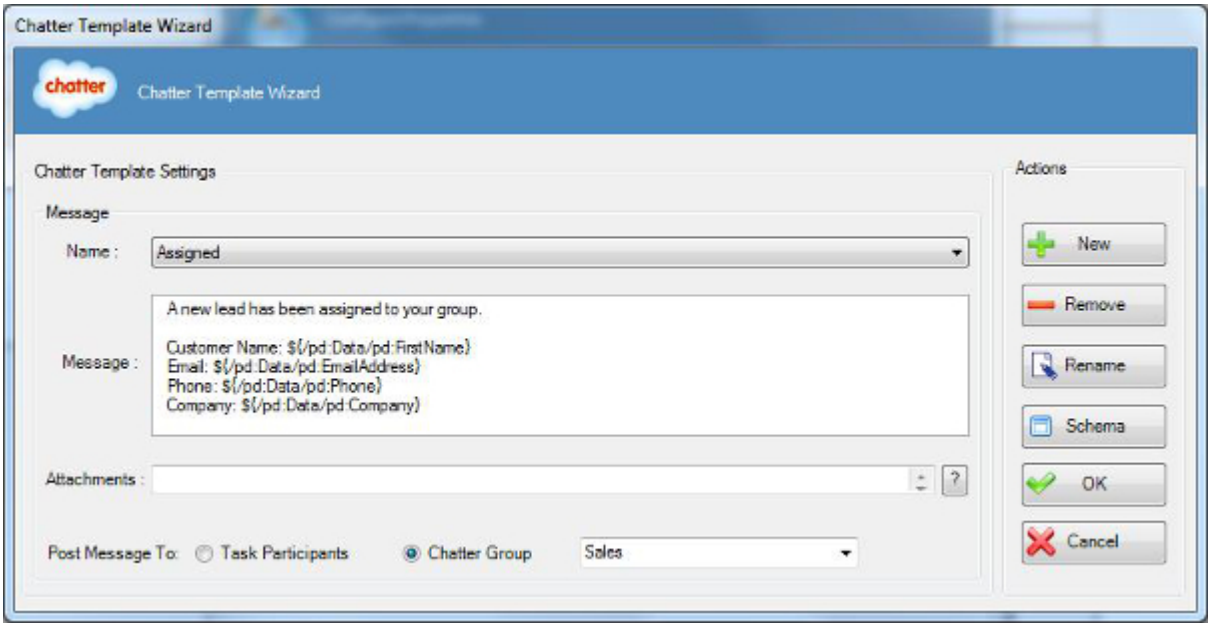
Field Name	Definition
Name	Definition: Specifies the message template you want to modify. Allowed Values: A single line of text. Default Value: A message template, if one exists.
Message	Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes
Attachments	Definition: Specifies the file you want to include in your message. Allowed Values: The full path and file name for the attachment you want to include. • This field supports a single attachment with maximum size of 5 MB. • The absolute path to the file must be on the AgilePoint Server or SharePoint Server. Default Value: None Custom Attributes:

Field Name	Definition
	Yes Example: • C:\My Documents\sample1.doc • ${HomeDirectory}\sample2.doc
Post Message To	Definition: Specifies to whom you want to send the message. Allowed Values: • **Task Participants** - Sends the message to the Yammer accounts of the participants for the AgileWork. • **Yammer Group** - Sends the message to a specified Yammer group. Default Value: Task Participants Custom Attributes: No
New	Function: Opens the New Name window, where you can enter the name of the message template. Allowed Values: Free text in text format. Default Value: None Custom Attributes: No
Remove	Function: Deletes the message template from the Name list.
Rename	Function: Opens the New Name window, where you can change the name of the message template. Allowed Values: A single line of text. Default Value:

Field Name	Definition
	None Custom Attributes: No
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want.

Chatter Template Wizard

Specifies the content of a message template for a message sent using Chatter template.



Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. In one of the following fields, click **Add Chatter Template**. The exact fields that display vary, depending upon the AgileShape you are using:

- **Reminder Message**
- **Task Assigned Message**
- **Task Cancelled Message**
- **Task Completed Message**
- **Task Reassigned Message**

5. On the **Chatter Template Wizard**, do one of the following:
   - To modify an existing message template, in the **Name** list, select the name of the template you want to modify.
   - To create a new message template:
     1. Click **New**.
     2. On the **New Name** window, enter the name you want to identify your message template.
     3. Click **OK**.

Field Definitions

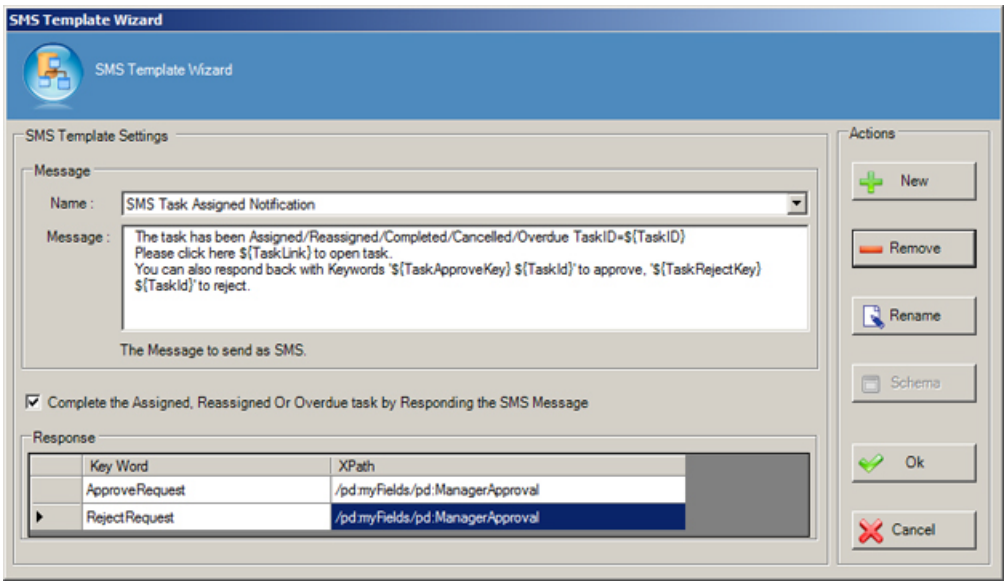
Field Name	Definition
Name	Definition: Specifies the message template you want to modify. Allowed Values: A single line of text. Default Value: A message template, if one exists.
Message	Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes
Attachments	Definition: Specifies the file you want to include in your message. Allowed Values:

Field Name	Definition
	The full path and file name for the attachment you want to include. • This field supports a single attachment with maximum size of 5 MB. • The absolute path to the file must be on the AgilePoint Server or SharePoint Server. Default Value: None Custom Attributes: Yes Example: • C:\My Documents\sample1.doc • ${HomeDirectory}\sample2.doc
Post Message To	Definition: Specifies to whom you want to send the message. Allowed Values: • **Task Participants** - Sends the message to the Chatter accounts of the participants for the AgileWork. • **Chatter Group** - Sends the message to a specified Chatter group. Default Value: Task Participants Custom Attributes: No
New	Function: Opens the New Name window, where you can enter the name of the message template. Allowed Values: Free text in text format. Default Value: None Custom Attributes: No

Field Name	Definition
Remove	Function: Deletes the message template from the Name list.
Rename	Function: Opens the New Name window, where you can change the name of the message template. Allowed Values: A single line of text. Default Value: None Custom Attributes: No
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want.

SMS Template Wizard

Specifies the content of an SMS template. An SMS template determines name, message, and response of an automated SMS template sent from AgilePoint.



Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. In one of the following fields, click **Add SMS Template**. The exact fields that display vary, depending upon the AgileShape you are using:
   - **Reminder Message**
   - **Task Assigned Message**
   - **Task Cancelled Message**
   - **Task Completed Message**
   - **Task Reassigned Message**
5. On the **SMS Template Wizard**, do one of the following:
   - To modify an existing message template, in the **Name** list, select the name of the template you want to modify.
   - To create a new message template:
     1. Click **New**.
     2. On the **New Name** window, enter the name you want to identify your message template.
     3. Click **OK**.

Field Definitions

Field Name	Definition
Name	Definition:

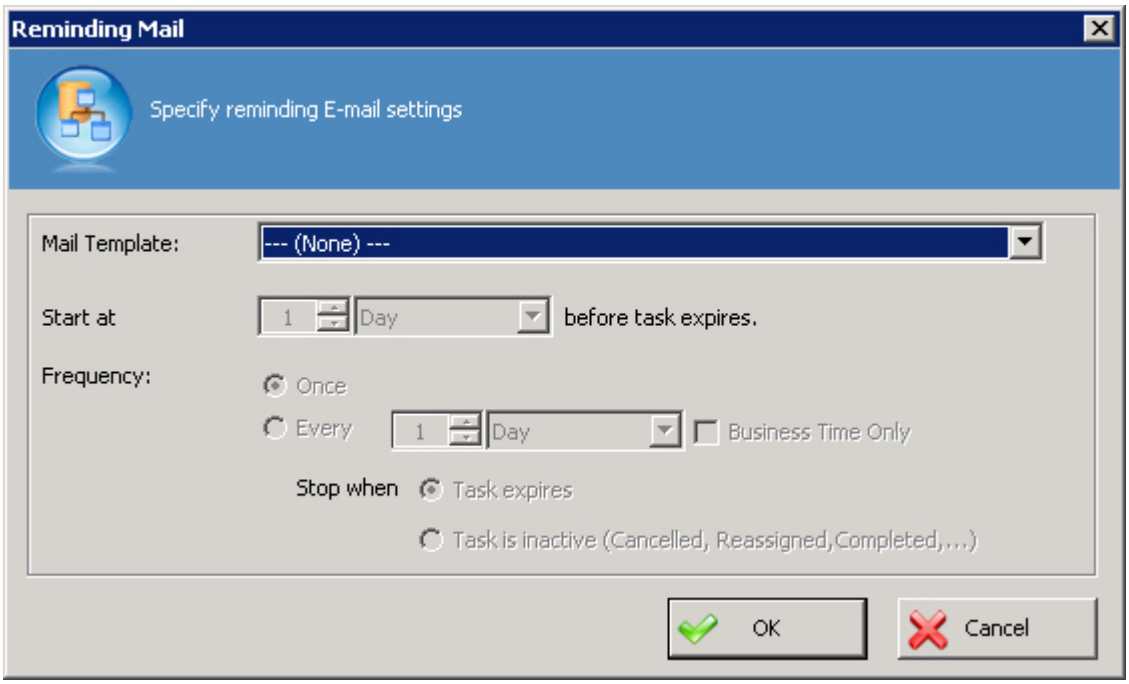
Field Name	Definition
	Specifies the message template you want to modify. Allowed Values: A single line of text. Default Value: A message template, if one exists.
Message	Definition: Specifies the content of the message. Allowed Values: Multiple lines of text in text-only format. Default Value: None Custom Attributes: Yes
New	Function: Opens the New Name window, where you can enter the name of the message template. Allowed Values: Free text in text format. Default Value: None Custom Attributes: No
Remove	Function: Deletes the message template from the Name list.
Rename	Function: Opens the New Name window, where you can change the name of the message template. Allowed Values: A single line of text. Default Value: None Custom Attributes:

Field Name	Definition
	No
Schema	Opens the Following Window: Select XPath from Attributes Window Purpose of this Window: Enables you to select a schema node from the XML schema for your process. To activate the Schema button, select the row you want.
Complete the Assigned, Reassigned Or Overdue task by Responding the SMS Message	Definition: Completes a task using a response to the automated message. The message must come from the same message technology as the outgoing message. For example, the user must use Lync to respond to a Lync message.
Key Word	Definition: A value which, when entered in a message response, sets the Xpath node to True or False. This is typically used for approve/reject functionality. Allowed Values: A text string. Default Value: None Custom Attributes: Yes
XPath	Definition: Specifies a schema node whose value is set when the keyword is entered in the message response. This is typically used for approve/reject functionality. The keyword determines the value that is set. Allowed Values: An XPath to a schema node that represents a Boolean value. Default Value: None Custom Attributes:

Field Name	Definition
	Yes Example: /pd:myFields/pd:ApproveReject

Reminding Mail Window

Specifies the email template and schedule for a reminder email.



Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. On the **Reminder Email** field, click the **Ellipses** button.

Field Definitions

Field Name	Definition
Mail Template	Definition:

Field Name	Definition
	Specifies the name of an email template used to generate an automatic reminder email notification when based on a schedule at runtime. Allowed Values: • **An existing email template name** - Applies the selected, predefined template to the email. • **None** - Specifies that no email is sent. Default Value: None
Start at _ before task expires	Definition: Specifies a start time for the reminder, relative to the value of the Time Span for the activity. Allowed Values: A number of minutes, hours, days, or weeks. Default Value: 1 Day
Frequency	Definition: Specifies the frequency to send a reminder email. Allowed Values: • **Once** - Specifies to send the reminder email only one time. • **Every** - Specifies the frequency to send repeated reminder emails. You can specify a number of minutes, hours, days, or weeks, whether to use business time and whether to stop sending the reminders after the task expires, or after it is inactive for some other reason. Default Value: Once
Business Time Only	Definition: Determines whether the time span represents actual time, or business hours only. Allowed Values: • **True** - The time span represents a span of business hours only. For example, 5 days of business time might be equivalent to 7 days of

Field Name	Definition
	actual time. 8 hours of business time might be equivalent to 24 hours of actual time. • **False** - The time span represents actual time. It is unaffected by any business time configuration settings. Default Value: Deselected Example: The Business Time property is set to True, and business hours are configured as 9 a.m. to 5 p.m. A Manual AgileShape with a Time Span of 6 business hours is entered at 4 p.m. on Tuesday, then the activity must be completed by 2 p.m. on Wednesday.

Common Configuration Tasks

- Data Binding
- Using Process Attributes

Creating Messages and Notifications

This section describes how to create and modify messages and notifications for AgilePoint processes.

Creating a Notification Message

To create a notification message, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. Select the message type you want. Not all message types are available from all message channels.
   - **Task Assigned (Message Channel)**
   - **Task Reassigned (Message Channel)**
   - **Task Completed (Message Channel)**
   - **Task Cancelled (Message Channel)**
   - **Reminder Message (Message Channel)**
   - **Activity Entry Message (Message Channel)**

Instructions

1. On the message **Template Wizard** window, click **New**.
2. In the **Name** field, enter a name for your message template.
3. In the **Message** field, enter the text for your message.
4. Complete any additional fields as required on the following window, as appropriate for your message type.
   - Email Template Wizard
   - Lync Template Wizard
   - Yammer Template Wizard
   - SMS Template Wizard
   - Chatter Template Wizard

More Information

- Using Variables in Notification Messages
- Creating Message Responses
- Working with Links in the Email Template Wizard
- Setting Up Email Templates in Multiple Languages

Creating a Reminder Email Notification

To create a reminder email notification, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. On the **Reminder Email** field, click the **Ellipses** button.

Instructions

1. Select an email template to generate your reminder email notifications.
2. Complete the following fields as required.

Field Name	Definition
Start at _ before task expires	Definition: Specifies a start time for the reminder, relative to the value of the Time Span for the activity. Allowed Values: A number of minutes, hours, days, or weeks.

Field Name	Definition
	Default Value: 1 Day
Frequency	Definition: Specifies the frequency to send a reminder email. Allowed Values: • **Once** - Specifies to send the reminder email only one time. • **Every** - Specifies the frequency to send repeated reminder emails. You can specify a number of minutes, hours, days, or weeks, whether to use business time and whether to stop sending the reminders after the task expires, or after it is inactive for some other reason. Default Value: Once
Business Time Only	Definition: Determines whether the time span represents actual time, or business hours only. Allowed Values: • **True** - The time span represents a span of business hours only. For example, 5 days of business time might be equivalent to 7 days of actual time. 8 hours of business time might be equivalent to 24 hours of actual time. • **False** - The time span represents actual time. It is unaffected by any business time configuration settings. Default Value: Deselected Example: The Business Time property is set to True, and business hours are configured as 9 a.m. to 5 p.m. A Manual AgileShape with a Time Span of 6 business hours is entered at 4 p.m. on Tuesday, then the activity must be completed by 2 p.m. on Wednesday.

More Information

- Reminding Mail Window
- Email Template Wizard

Setting Up Email Templates in Multiple Languages

To configure an email template in an alternate language, do the following.

Prerequisites

- You must specify a language for each user.

  For more information, see Add or Edit User Information Window.

Good to Know

- When the process sends an email, AgilePoint Server attempts to match each recipient's default language, as defined in Enterprise Manager, with an email template in their language.
- If a recipient's language does not match one of your alternate language email templates, the user receives the email in the default language email template.

Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Activity Entry Message (Email)**
   - **Reminder Message (Email)**
   - **Task Completed Message (Email)**
   - **Task Reassigned Message (Email)**
5. On the **Email Template Wizard**, do one of the following:
   - To modify an existing message template, in the **Name** list, select the name of the template you want to modify.
   - To create a new message template:
     1. Click **New**.
     2. On the **New Name** window, enter the name you want to identify your message template.
     3. Click **OK**.

Instructions

1. On the **Email Template Wizard**, in the **Multi-language List (+)**, select the language for which you want to define an email template.

2. Click the tab for the language you selected.
3. On the **Email Template Wizard**, complete the following fields as required.

Field Name	Definition
Left to Right/Right to Left	Definition: Specifies the alignment of text in the content section of an email. Allowed Values: • Left to Right • Right to Left Default Value: Left to Right
Subject	Definition: Specifies the subject line of an email notification. Allowed Values: A single line of text. Default Value: None Custom Attributes: Yes Example: ${ActivityName} in ${ProcessName} is complete
Content	Definition: Specifies the content of the body of an email. Allowed Values: Rich text in HTML format, or free text in text format. Default Value: None Custom Attributes: Yes
Attachments	Definition: Specifies one or more files you want to include in an email.

Field Name	Definition
	Allowed Values: The full path and file name for the attachments you want to include. Lists are separated by semicolons. **Note:** The file that you would like to attach must reside on the local machine. Default Value: None Custom Attributes: Yes Example: C:\My Documents\sample1.doc; ${HomeDirectory}\sample2.doc; ${AttachDoc}

More Information

- Email Template Wizard
- Creating a Notification Message

Creating Message Responses

This section describes how to create and modify message responses using various messaging technologies. You can use responses to complete a task, or for approve/reject functionality.

Creating Email Templates for Approvals

You can create an email template for the Activity Entry Email that participants will use to indicate approvals. These templates can be optimized for desktop or mobile devices.

Create a Text-Based Approval Email Template

You can create an email template for the Activity Entry Email that participants will use to approve a request using a text-only format.

Prerequisites

- Some mobile devices do not allow you to edit text in the replies. For more information, see Email Approval on Mobile Devices

Navigation

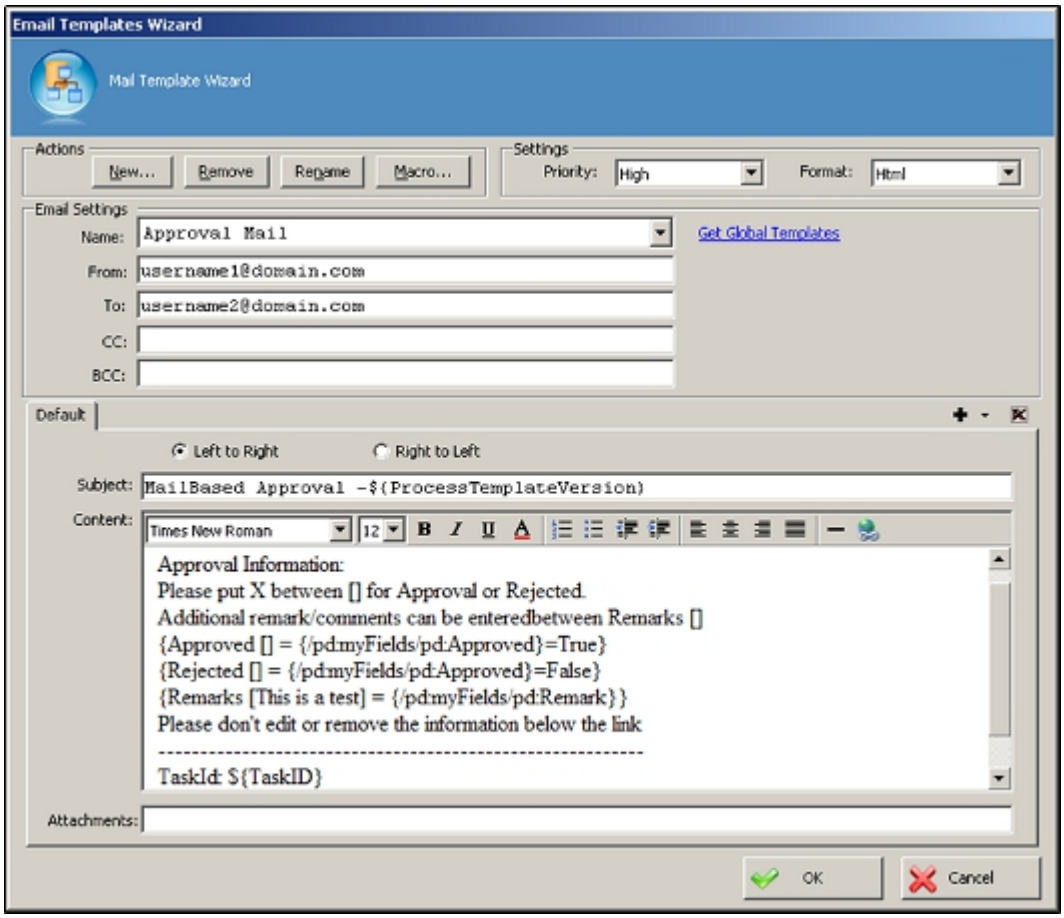
1. In AgilePoint Envision, open a process template.

2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Activity Entry Message (Email)**
   - **Reminder Message (Email)**
   - **Task Completed Message (Email)**
   - **Task Reassigned Message (Email)**
5. On the **Email Template Wizard**, do one of the following:
   - To modify an existing message template, in the **Name** list, select the name of the template you want to modify.
   - To create a new message template:
     1. Click **New**.
     2. On the **New Name** window, enter the name you want to identify your message template.
     3. Click **OK**.

Instructions

1. On the Email Template Wizard, complete the fields, with the exception of the email body, as required.
2. Complete the body field using the following guidelines. Note the following information:
   - ***Xpath-Node*** represents a valid Xpath node — for example, {/pd:MyFields/pd:Approval}
   - ***Value*** represents the value you want to pass when the user selects this option. A common usage is True or False. The action that is selected with the X will be processed along with any information in the remarks section.

   Use the following example as a guide.



- Approved or rejected options:

  Note that the terms used in the email can follow the format approved/rejected, or yes/no.

Approval Keywords	Rejection Keywords
{Approve [] = {*Xpath-Node*}=*Value*}	{Reject [] = {*Xpath-Node*}=*Value*}
{Approved [] = {*Xpath-Node*}=*Value*}	{Rejected [] = {*Xpath-Node*}=*Value*}
{Yes [] = {*Xpath-Node*}=*Value*}	{No[] = {*Xpath-Node*}=*Value*}

- {Remarks [] = {*Xpath-Node*}}

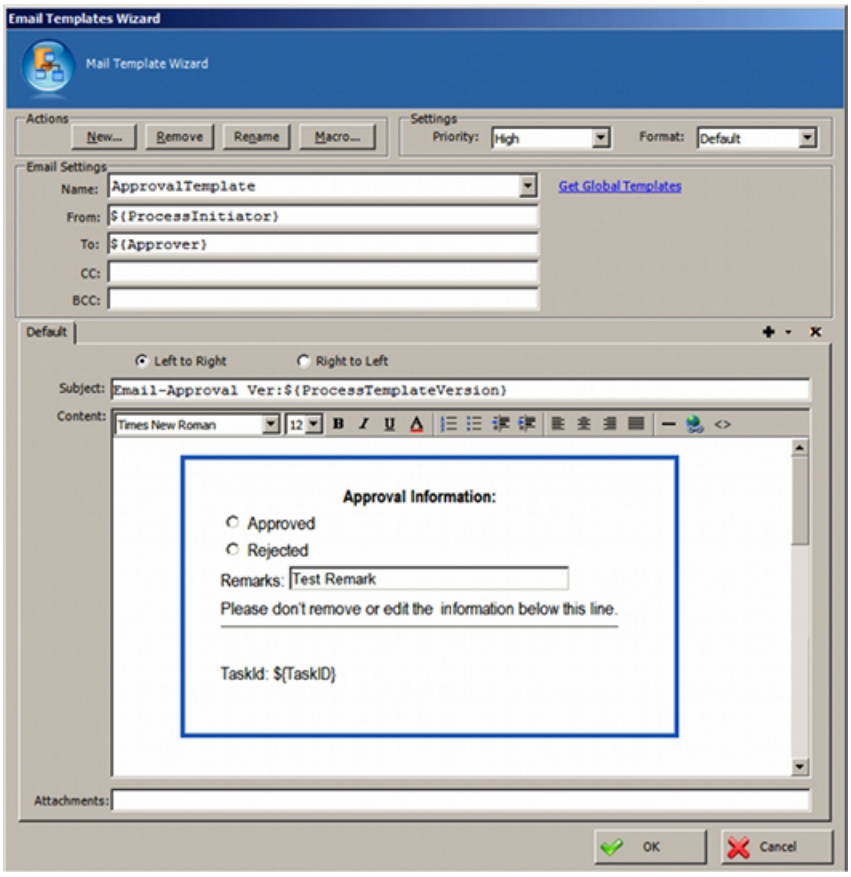
  Note: The Remarks should be entered between the [] in Remarks [].

Create an HTML-Based Approval Email Template

You can create an HTML-based email template for the Activity Entry Email that participants will use to approve a request. To create an HTML-based email templates for approval, do the following.

Prerequisites

- HTML-based approval templates work only with mobile or web-based email. This functionality does not work with the Outlook client application for Windows.
- Some mobile devices do not allow you to edit text in the replies. For more information, see Email Approval on Mobile Devices



Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Activity Entry Message (Email)**
   - **Reminder Message (Email)**
   - **Task Completed Message (Email)**
   - **Task Reassigned Message (Email)**

5. On the **Email Template Wizard**, do one of the following:
   - To modify an existing message template, in the **Name** list, select the name of the template you want to modify.
   - To create a new message template:
     1. Click **New**.
     2. On the **New Name** window, enter the name you want to identify your message template.
     3. Click **OK**.

Instructions

1. In the **Email Templates Wizard**, click the **HTML code** button (**< >**).
2. In the email body, paste the following HTML code.

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
<HTML><HEAD><TITLE></TITLE>
<META http-equiv=Content-Type content="text/html; charset=utf-8">
<META content="MSHTML 6.00.6001.18319" name=GENERATOR>
   </META></HEAD>
<BODY bgColor=#ffffff>
<STYLE type=text/css>
<!--
p.one
{border-left-color:#397dd0;
border-bottom-color:#397dd0;
margin-left:50px;
width:500px;
border-top-style:solid;
border-top-color:#397dd0;
border-right-style:solid;
border-left-style:solid;
height:225px;
border-right-color:#397dd0;
border-bottom-style:solid}
-->
</STYLE>
<P class=one style="WIDTH: 444px;
   HEIGHT: 257px"><BR>
<TABLE name="ApprovalInfo">
<COLGROUP width=25></COLGROUP>
<TBODY>
<TR>
<TD></TD>
<TH><SPAN style="FONT-FAMILY: Arial Narrow">
   Approval Information:</SPAN></TH></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">
   <INPUT type=radio
   name={/pd:myFields/pd:Approved}> Approved</INPUT>
   </SPAN></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">
   <INPUT type=radio  name={/pd:myFields/pd:Approved}>
   Rejected</SPAN></TD></TR>
<TR>
<TD></TD>
```

```
<TD><SPAN style="FONT-FAMILY: Arial Narrow">Remarks:
   </SPAN><INPUT
style="WIDTH: 250px" size=25 value="Test Remark"
name={/pd:myFields/pd:Remarks}></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">Please
   don't remove or edit the information below this line.
   </SPAN></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">
<HR>
</SPAN></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">
   TaskId: ${TaskID}</SPAN></TD>
</TR>
<TR></TR>
<TR></TR>
</TBODY>
</TABLE></P></BODY></HTML>
```

3. Complete the fields on the Email Template Wizard as required.

Email Approval on Mobile Devices

If an approver is using a mobile device, he or she cannot use the standard email approval methods because it is not possible to edit email histories on many mobile email applications.

As an alternative to the standard text or HTML email approval methods, an approver can reply to the approval email with one of the following keywords as the **first word in the email body**.

Approval Keywords	Rejection Keywords
Approve	Reject
Approved	Rejected
Yes	No

Remarks are not supported using this method.

Setting Up Responses Using Lync

To Set Up Responses, do the following.

Prerequisites

- Create the message to which you want the participant to reply.

Navigation

1. In AgilePoint Envision, open a process template.

2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. In one of the following fields, click **Add Lync Template**. The exact fields that display vary, depending upon the AgileShape you are using:
   - **Reminder Message**
   - **Task Assigned Message**
   - **Task Cancelled Message**
   - **Task Completed Message**
   - **Task Reassigned Message**
5. On the **Lync Template Wizard**, do one of the following:
   - To modify an existing message template, in the **Name** list, select the name of the template you want to modify.
   - To create a new message template:
     1. Click **New**.
     2. On the **New Name** window, enter the name you want to identify your message template.
     3. Click **OK**.

Instructions

1. Select **Complete the Assigned, Reassigned Or Overdue task by Responding the Lync Message**.
2. Complete the following field.

Field Name	Definition
Key Word	Definition: A value which, when entered in a message response, sets the Xpath node to True or False. This is typically used for approve/reject functionality. Allowed Values: A text string. Default Value: None Custom Attributes: Yes
XPath	Definition: Specifies a schema node whose value is set when the keyword is entered in the message response. This is typically used for approve/reject

Field Name	Definition
	functionality. The keyword determines the value that is set. Allowed Values: An XPath to a schema node that represents a Boolean value. Default Value: None Custom Attributes: Yes Example: /pd:myFields/pd:ApproveReject

Setting Up Responses Using SMS

To Set Up Responses, do the following.

Prerequisites

- Create the message to which you want the participant to reply.

Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. In one of the following fields, click **Add SMS Template**. The exact fields that display vary, depending upon the AgileShape you are using:
   - **Reminder Message**
   - **Task Assigned Message**
   - **Task Cancelled Message**
   - **Task Completed Message**
   - **Task Reassigned Message**
5. On the **SMS Template Wizard**, do one of the following:
   - To modify an existing message template, in the **Name** list, select the name of the template you want to modify.
   - To create a new message template:
     1. Click **New**.
     2. On the **New Name** window, enter the name you want to identify your message template.
     3. Click **OK**.

Instructions

1. Select **Complete the Assigned, Reassigned Or Overdue task by Responding the Lync Message**.
2. Complete the following field.

Field Name	Definition
Key Word	Definition: A value which, when entered in a message response, sets the Xpath node to True or False. This is typically used for approve/reject functionality. Allowed Values: A text string. Default Value: None Custom Attributes: Yes
XPath	Definition: Specifies a schema node whose value is set when the keyword is entered in the message response. This is typically used for approve/reject functionality. The keyword determines the value that is set. Allowed Values: An XPath to a schema node that represents a Boolean value. Default Value: None Custom Attributes: Yes Example: /pd:myFields/pd:ApproveReject

Using Variables in Notification Messages

You can use several types of variables in notification messages:

- Process attributes

- XML schema elements from a process model or form
- Custom macros (email notifications only)
- SharePoint or InfoPath metadata

To use variables in a message template, do the following.

Good to Know

- The process attributes TaskCode and TaskLink are supported. For more information, see Common Process Attributes

Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. Select the message type you want. Not all message types are available from all message channels.
   - **Task Assigned (Message Channel)**
   - **Task Reassigned (Message Channel)**
   - **Task Completed (Message Channel)**
   - **Task Cancelled (Message Channel)**
   - **Reminder Message (Message Channel)**
   - **Activity Entry Message (Message Channel)**

Instructions

1. Place your cursor in the **Message** field.

   For email messages, you can also use the **To**, **Form**, **Cc**, **Bcc**, **Subject**, or **Attachment** field.
2. Do one of the following:
   - To use an XML schema element, drag a schema node from the list of **Select Xpath from XML Schema** window.

     For email messages this window appears automatically when your cursor is in a field that accepts process attributes. For other message types, you must click **Schema** to see this window.
   - To use a process attribute, do the following:
     1. Enter **${**.
     2. Select your attribute from the context menu.
   - To use SharePoint list column in an SPDoc or SPList process model, do the following:
     1. Enter **${**.
     2. On the context menu, click **<XML Schema>**
     3. On the Select SharePoint Library Column Window, select your element.
   - To use a custom macro in an email message, do the following:
     1. Click **Macro**.

2. Complete the select or create your macro on the Custom Mail Template Macro Window.

Creating a Custom Macro

A custom macro is used to simplify the data entry task when constructing an email notification by using a single attribute name (or macro) to refer to a combination of process attributes. Custom macros are stored in the process attribute list with a "*" for easy identification and can be reused when constructing additional email notification templates in the future.

To create a custom macro, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Activity Entry Message (Email)**
   - **Reminder Message (Email)**
   - **Task Completed Message (Email)**
   - **Task Reassigned Message (Email)**
5. On the **Email Template Wizard**, do one of the following:
   - To modify an existing message template, in the **Name** list, select the name of the template you want to modify.
   - To create a new message template:
     1. Click **New**.
     2. On the **New Name** window, enter the name you want to identify your message template.
     3. Click **OK**.
6. Click **Macro**.

Instructions

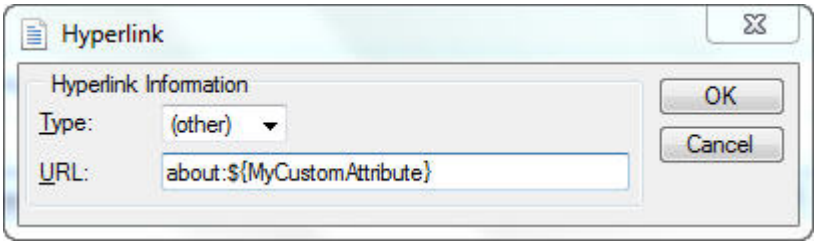
1. On the **Custom Mail Template Macro** window, in the **Name** field, enter a name of the macro.
2. In the **Macro** field, do one of the following:
   - Enter your custom macro name.
   - Enter **${** to show a list of the built-in (primary) macros, and the select from the list.
3. Click **Add**.

More Information

- Custom Mail Template Macro Window

Working with Links in the Email Template Wizard

The rich text controls for the Email Template Wizard come from a third-party vendor and use typical, industry-standard behavior. When creating or editing a hyperlink that includes a custom attribute, if no protocol is present in the URL field, the control adds the default prefix **about:** to the URL.



This prefix is not visible until the email template has been saved, but it appears in the process at runtime.

Creating a Hyperlink in an Email Template

To create a hyperlink in an email template, do the following.

Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Activity Entry Message (Email)**
   - **Reminder Message (Email)**
   - **Task Completed Message (Email)**
   - **Task Reassigned Message (Email)**
5. On the **Email Template Wizard**, do one of the following:
   - To modify an existing message template, in the **Name** list, select the name of the template you want to modify.
   - To create a new message template:
     1. Click **New**.
     2. On the **New Name** window, enter the name you want to identify your message template.
     3. Click **OK**.

Instructions

1. On the **Email Template Wizard** window, select the text you want to be hyperlink.

2. Click the **Hyperlink** button.
3. On the **Hyperlink** window, you want to complete the following fields as required:

Field Name	Definition
Type	Definition: Specifies the protocol type. Allowed Values: • **file:** • **ftp:** • **http:** • **https:** • **emailto:** • **news:** • **telnet:** • **(other)** - Specifies a protocol that is not in the list. If you select (other), you must specify your protocol in the URL field. Default Value: http:
URL	Definition: Specifies your URL. Allowed Values: A valid URL. • If you are using a custom attribute to store your URL, it is recommended that you do not store the protocol, or Type, within the custom attribute. Instead, use the Type field to define the protocol, and the custom attribute to represent the remainder of the URL. If you do not follow this best practice, and you have a custom attribute with a URL that includes the protocol, in certain cases the default Type prefix **about:** is added automatically when the URL is modified. In this situation, if you modify the URL, you must manually remove the **about:** prefix. For more information, see Why Do URLs in Email Templates Appear with the Prefix "about:"? in the Documentation Library.

Field Name	Definition
	Default Value: http:// Custom Attributes: Yes Example: • http://agilepoint.com • http://${MyServer}/

4. Click **OK**.

Modifying a Hyperlink in an Email Template

To modify a hyperlink in an email template, do the following.

Prerequisites

- In the existing email template, the URL uses the custom attribute.

Good to Know

- If you are using the custom attribute in your URL, and there is no protocol specified in the URL field, in certain cases the **about:** prefix is added when modify the email URL.

  As a best practice, AgilePoint recommends if you are using a custom attribute with no specified protocol, you follow this procedure each time you modify the URL.

Navigation

1. In AgilePoint Envision, open a process template.
2. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Activity Entry Message (Email)**
   - **Reminder Message (Email)**
   - **Task Completed Message (Email)**
   - **Task Reassigned Message (Email)**
3. On the **Email Template Wizard**, in the **Name** list, select your email template.
4. Select your **URL**, and click the **Hyperlink** button.

Instructions

1. On the **Hyperlink** window, modify the URL as required in the **URL** field.
2. Click **OK**.
3. On the **Email Template Wizard** window, click **OK**.

4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
   - **Activity Entry Message (Email)**
   - **Reminder Message (Email)**
   - **Task Completed Message (Email)**
   - **Task Reassigned Message (Email)**
5. On the **Email Template Wizard**, in the **Name** list, select your email template.
6. Select your **URL**, and click the **Hyperlink** button.
7. In the **URL** field, delete the prefix **about:**.
8. Click **OK**.

Process Repository

Process Repository enhances collaboration and process documentation where you store the .vsd file to a SharePoint Document Library, and also attach documents or a URL hyperlink to any AgilePart or AgileWork. Also supported is the ability to attach process documentation at the process level. SharePoint is used as the process repository where all artifacts of a process can be accessed.

In order to utilize the Process Repository functionality, first verify that the AgilePointProcessRepository template is available in SharePoint.

Verify the Process Repository Template Exists

To verify the existing process repository, do the following.

Instructions

1. On the SharePoint site, click **Site Actions > Create**.
2. Verify that **AgilePointProcessRepository** is available under the Libraries section.

   Note: Your SharePoint site administrator may have given this template a unique name.

   You will use this template to create the process repository in SharePoint. If the site template is not shown in the list, your SharePoint site administrator will need to deploy the ProcessRepository.stp template file.
3. If the process repository is not available, you must add it. For more information, see Deploying a SharePoint Site Template File.

Set Up a Process Repository

To setup Process Repository in SharePoint:

1. Create a new SharePoint library and select the **AgilePointProcessRepository** template type.

   Note: Your SharePoint site administrator may have given this template a unique name.
2. Name the new library **AgilePointProcessRepository** or give it a desired name.
3. The AgilePointProcessRepository library is now created for you, you will use this repository to publish the .vsd (AgilePoint Process Model) for collaboration, and also access the process documentation.
4. AgilePoint Envision allows you to attach documents or a hyperlink at the process model level, and/or at the activity level (i.e. AgileParts and AgileWorks). The documents are to be stored in a SharePoint document library. If you would like to attach documents to the process, create a document library in SharePoint (e.g. Travel Request Process Documentation) to store the process documentation.

Setup Process Discovery in AgilePoint Envision

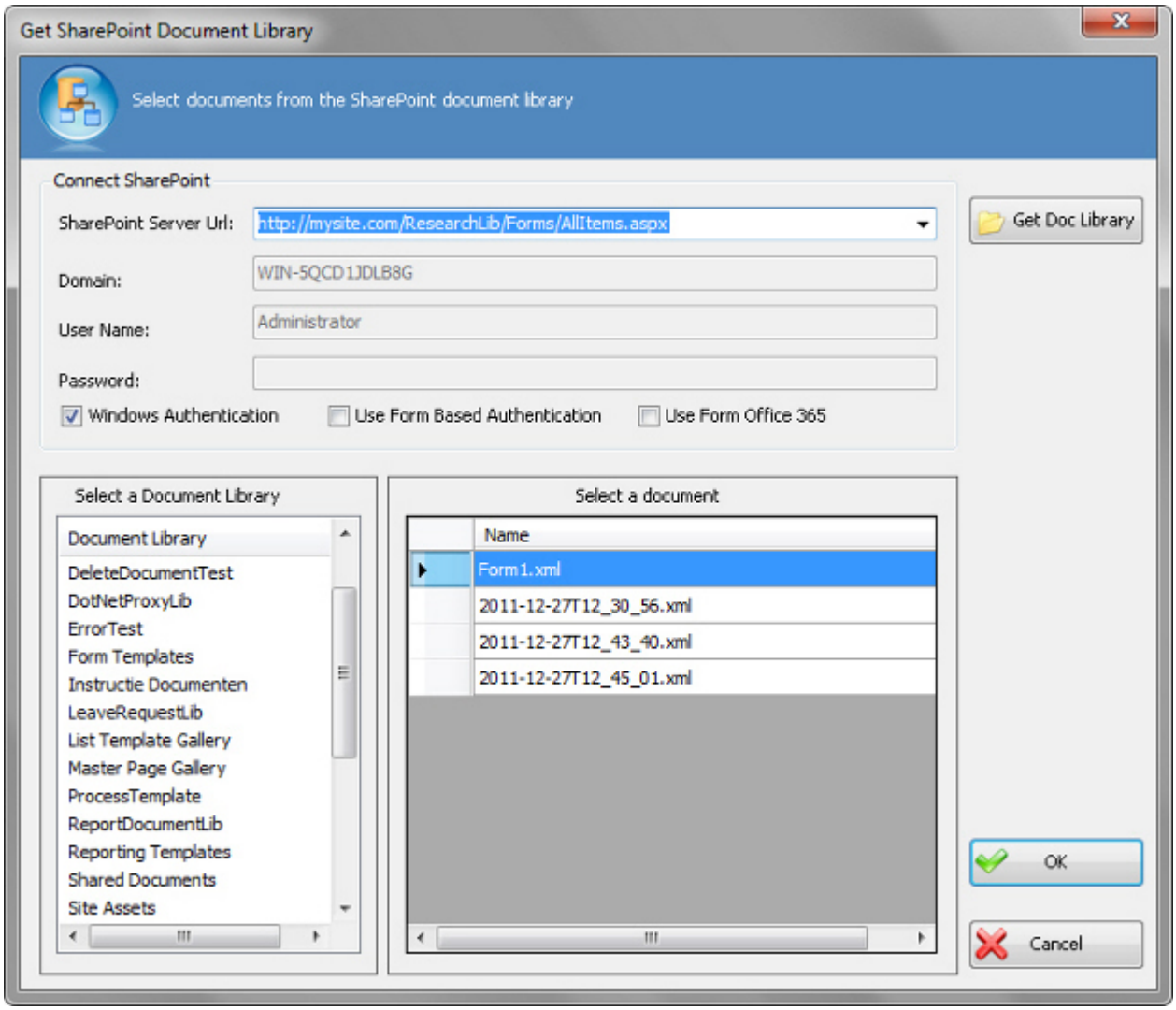
AgilePoint Envision allows you to attach documents or a hyperlink at the process model level, and/or at the activity level (i.e. AgileParts and AgileWorks).

Associate Process Documentation at the Process Model Level

1. Ensure that no activities are selected and the Process Template properties are visible.
2. In the **ProcessRepository** section, click the ConfigureAttachments property and click the **ellipses** button to open the Configure Attachments window. The Configure Attachments window appears.
3. Click **Add > SharePoint Document Library**. The Get SharePoint Document Library window appears.

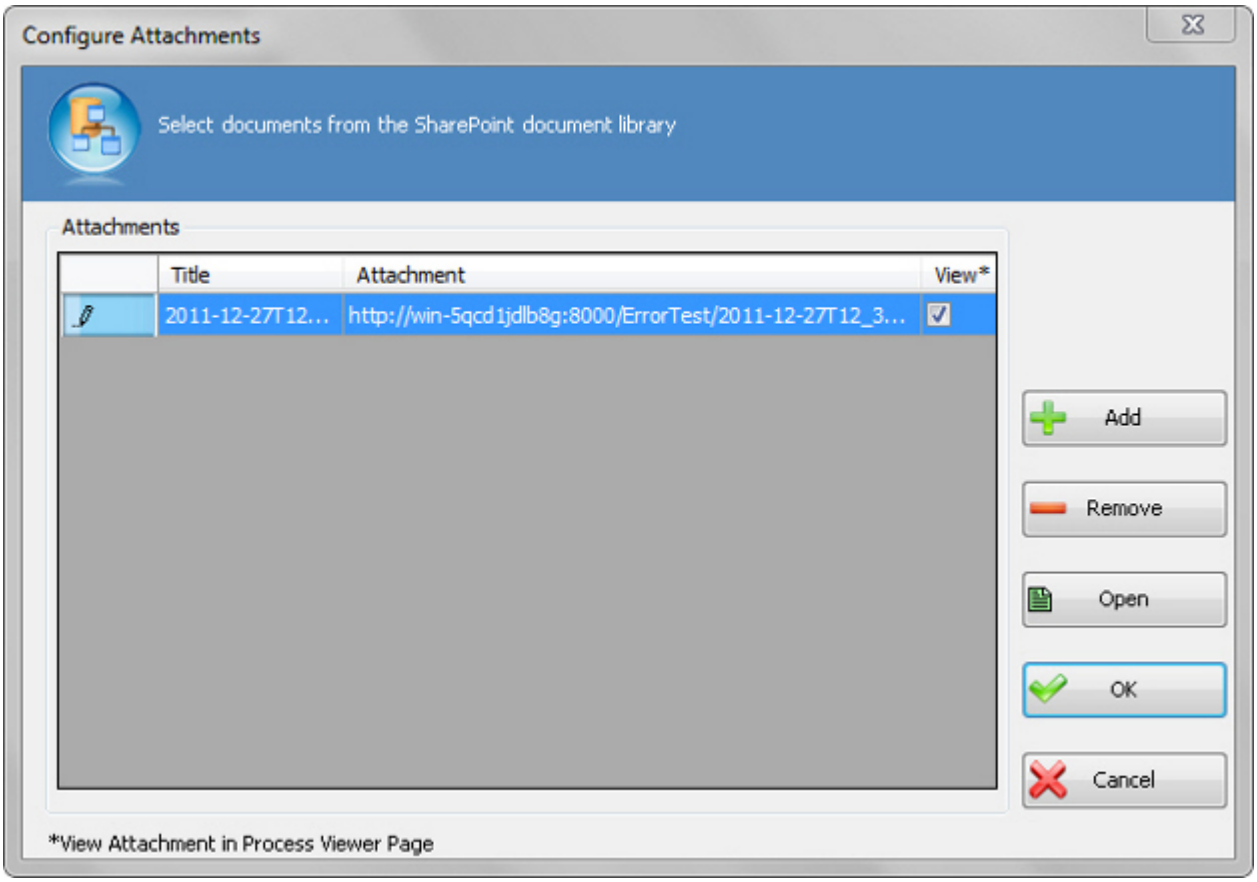
   Note: Other document repositories may be supported in a future release.

4. In the SharePoint Server URL, type in the SharePoint URL and click **Get Doc Lib**.
5. Check the Windows Authentication check box to allow the OS to authenticate you in SharePoint or provide alternative credentials in the text boxes provided to connect to SharePoint. Once connected, the Document Libraries are populated in the list.
6. Select the Document Library where your documents are stored, select the document and click **OK**.

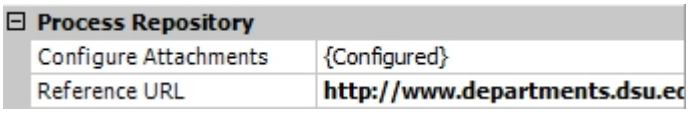


7. The Configure Attachments window appears and the document now shows in the list of attachments. To add another document click **Add**. To remove a document click the document and click **Remove**. To open the document select the document and click **Open**.

Select the check box in the View column to enable the attachment to be viewed directly from the process model diagram.



You can also add a hyperlink to any online artifact by right-clicking and pasting the URL into the **Reference URL** property.



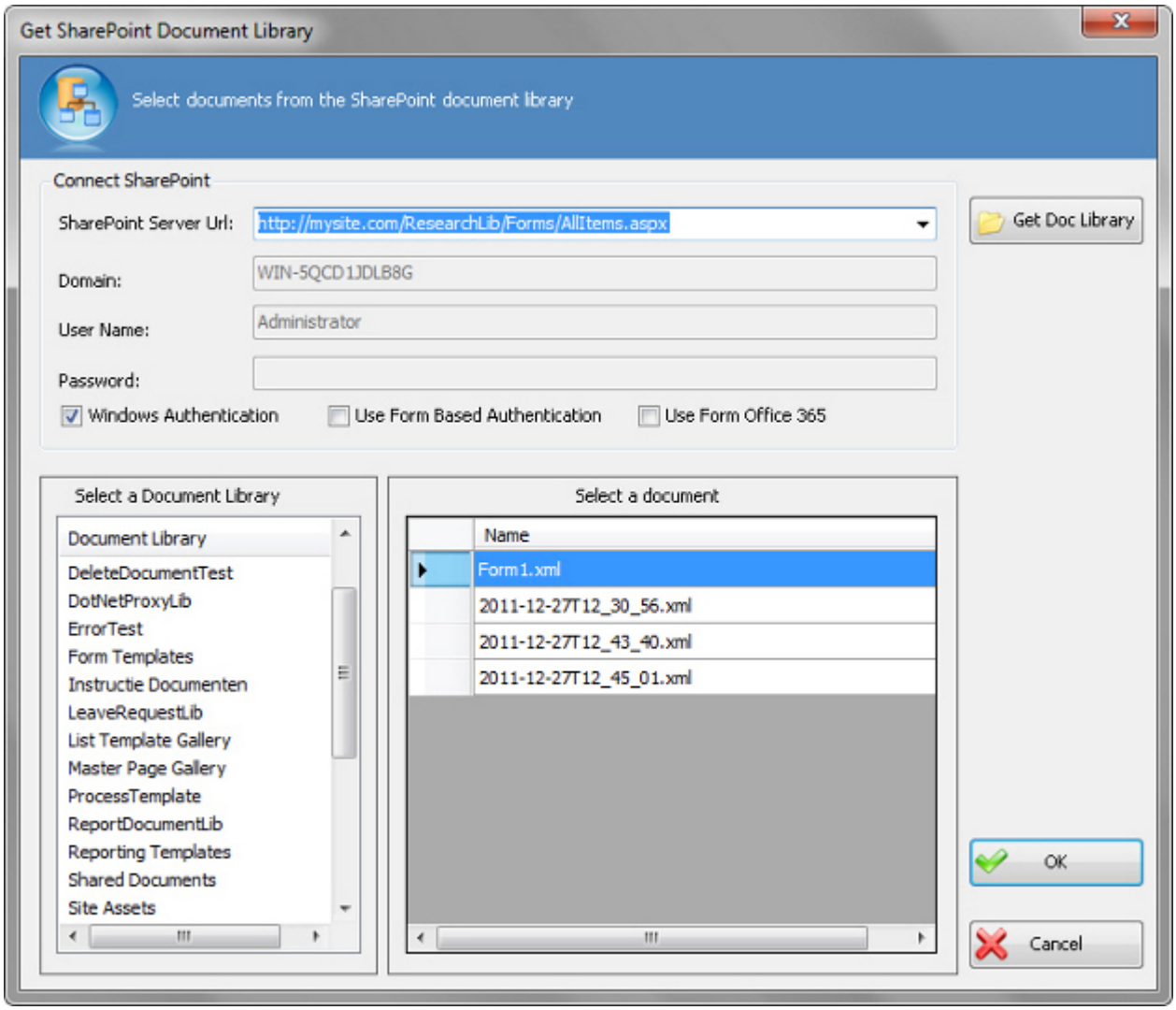
Associate Process Documentation at the Activity Level

1. In a process model, click an AgilePart or AgileWork for which you would like to associate process documentation.
2. In the **ProcessRepository** section, click the **ConfigureAttachments** property and click the **ellipses** button to open the Configure Attachments window. The Configure Attachments window appears.
3. Click **Add > SharePoint Document Library**. The Get SharePoint Document Library window appears.

   Note: Other document repositories may be supported in a future release.

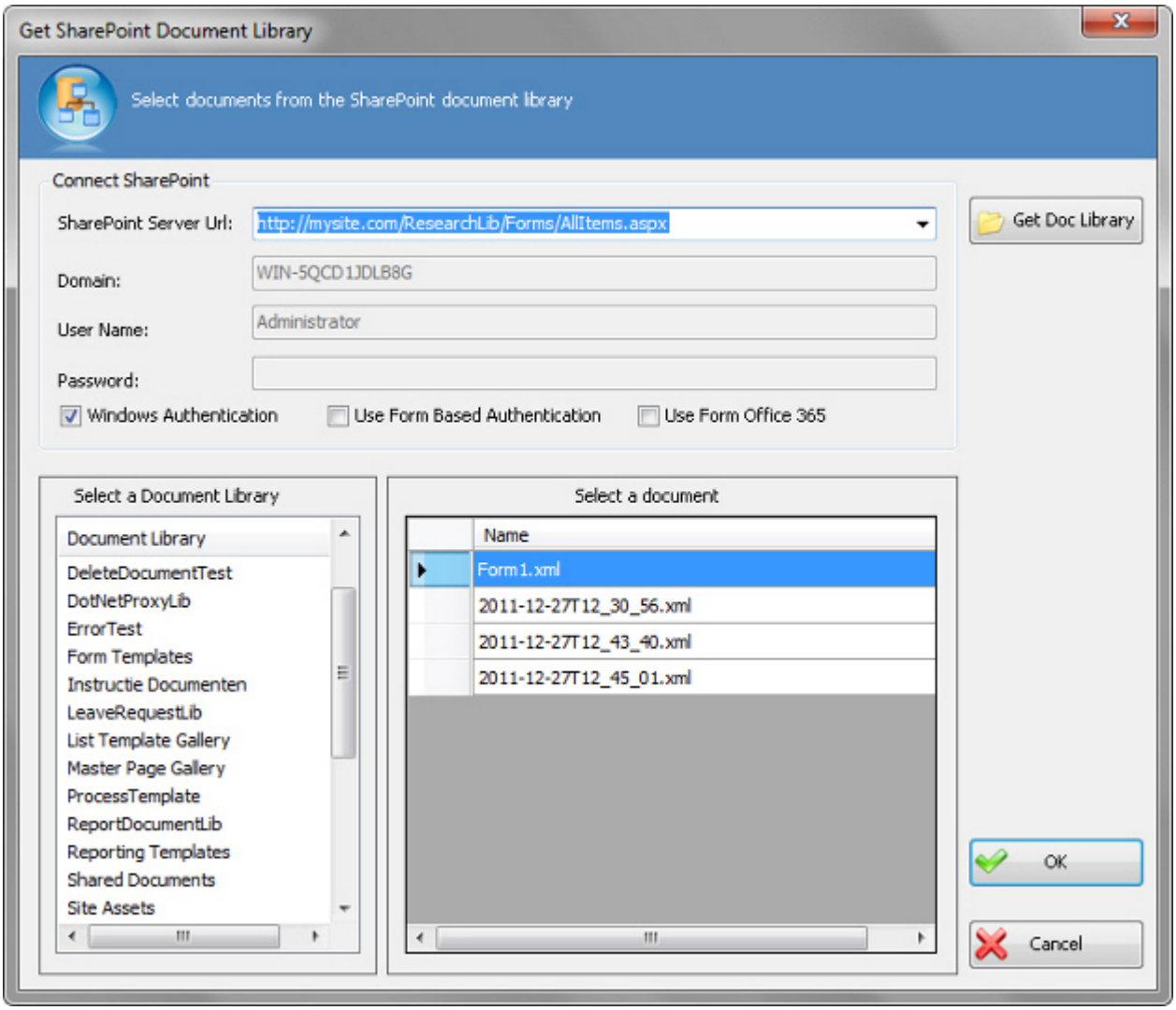
4. In the **SharePoint Server URL**, type in the SharePoint URL and click **Get Doc Lib**.

5. Check the Windows Authentication to allow the OS to authenticate you in SharePoint or provide alternative credentials in the text boxes provided to connect to SharePoint. Once connected, the Document Libraries are populated in the list.
6. Select the Document Library where your documents are stored, select the document and click **OK**.

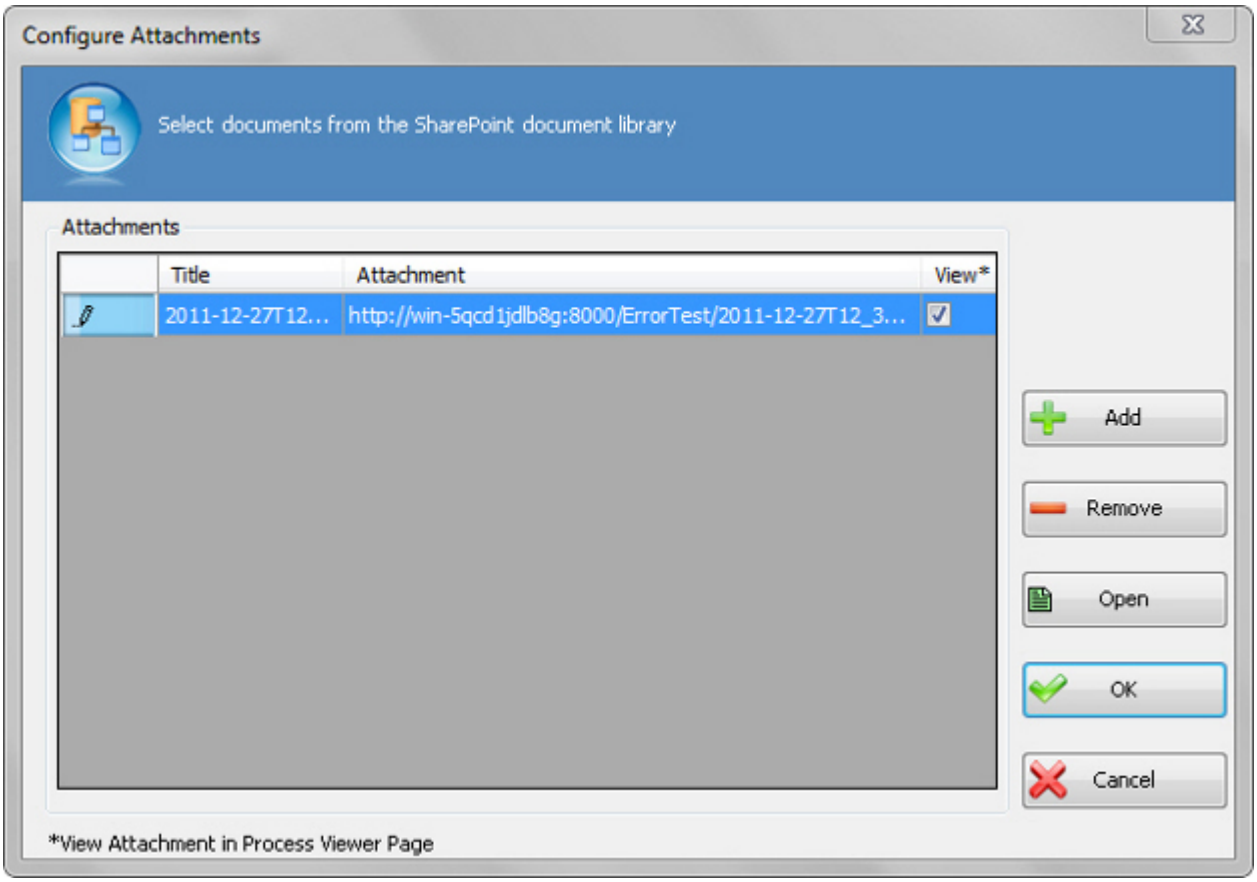


7. The Configure Attachments window appears and the document now shows in the list of attachments. To add another document, click **Add**. To remove a document click the document and click **Remove**. To open the document select the document and click **Open**.

Select the check box in the **View** column to enable the attachment to be viewed directly from the process model diagram.



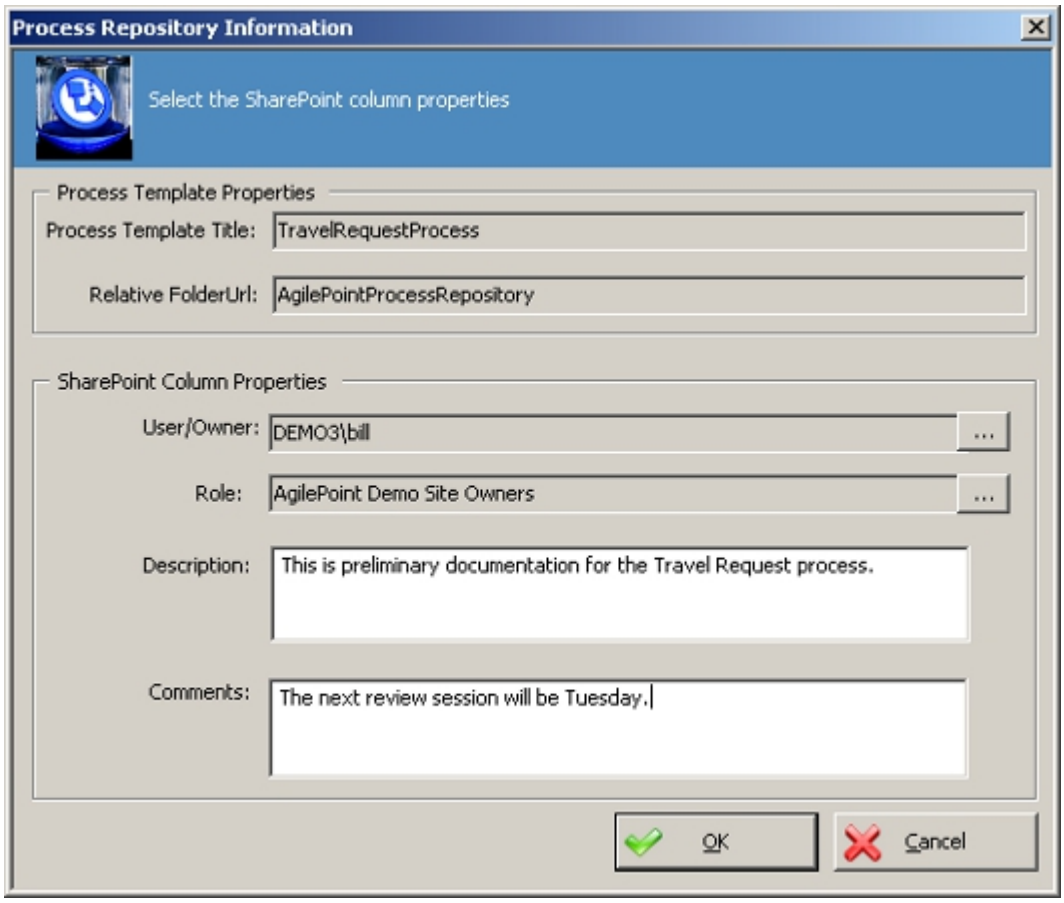
You can also add a hyperlink to any online artifact by right-clicking and pasting the URL into the **Reference URL** property.



Publish Process Documentation to SharePoint

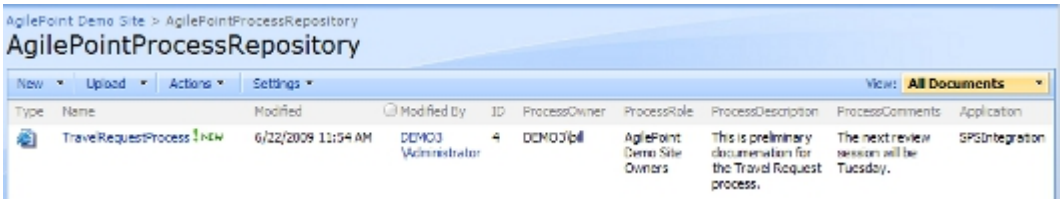
This section provides information about the publishing the process documentation to SharePoint.

1. Click **File** > **Update Server** > **Publish Process Documentation to SharePoint**. The SharePoint Process Repository window appears.
2. Enter the **SharePoint Site URL** and click **Connect**.
3. Select the **SharePoint Document Library** and click **Show Folder Tree**.
4. Select the SharePoint document repository, or click **Add Folder** to add a folder to use as the process repository and click **OK**. The Process Repository Information window appears.



The information entered in this window will be shown as metadata columns in the SharePoint process repository.

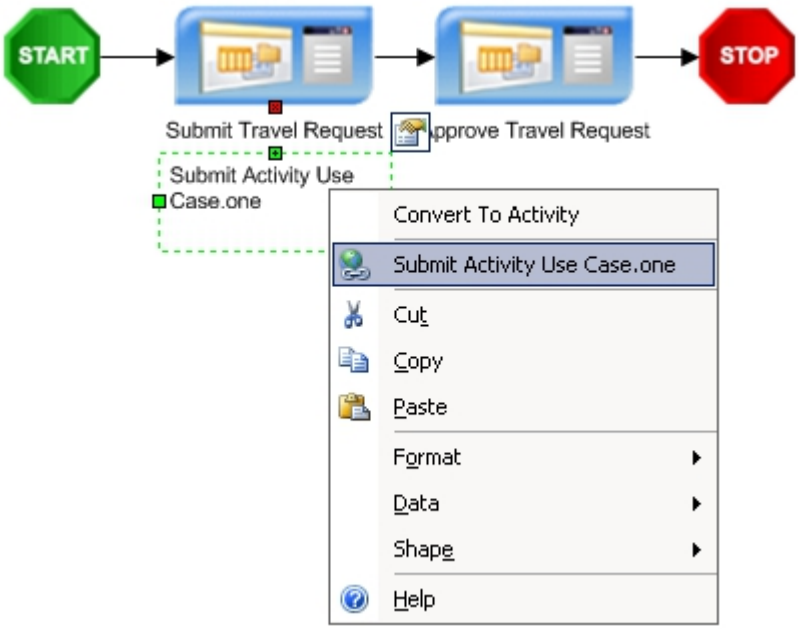
5. Click the **User/Owner** ellipses button and select the SharePoint user that is the manager or owner of this process.
6. Click the **Role** ellipses button and select the SharePoint role associated with the User/Owner.
7. Enter a description for this process and any comments and click **OK**. The process model .vsd and associated document(s) are now published to the SharePoint process repository.



Also you can see that the document association appears in the process model.



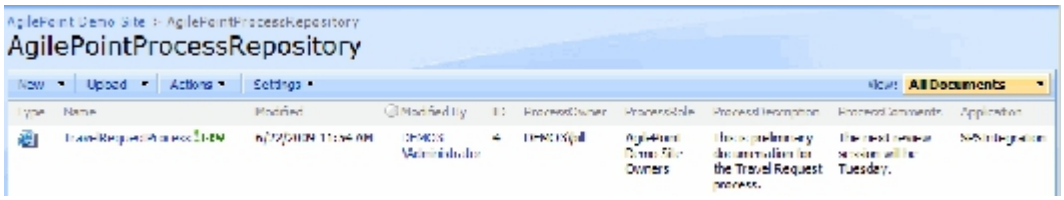
You can remove the document association text from showing in the process model, by right-clicking the activity and selecting **Hide Properties**. You can also view the document from the Envision process model by right-clicking the attachment and clicking the attachment.



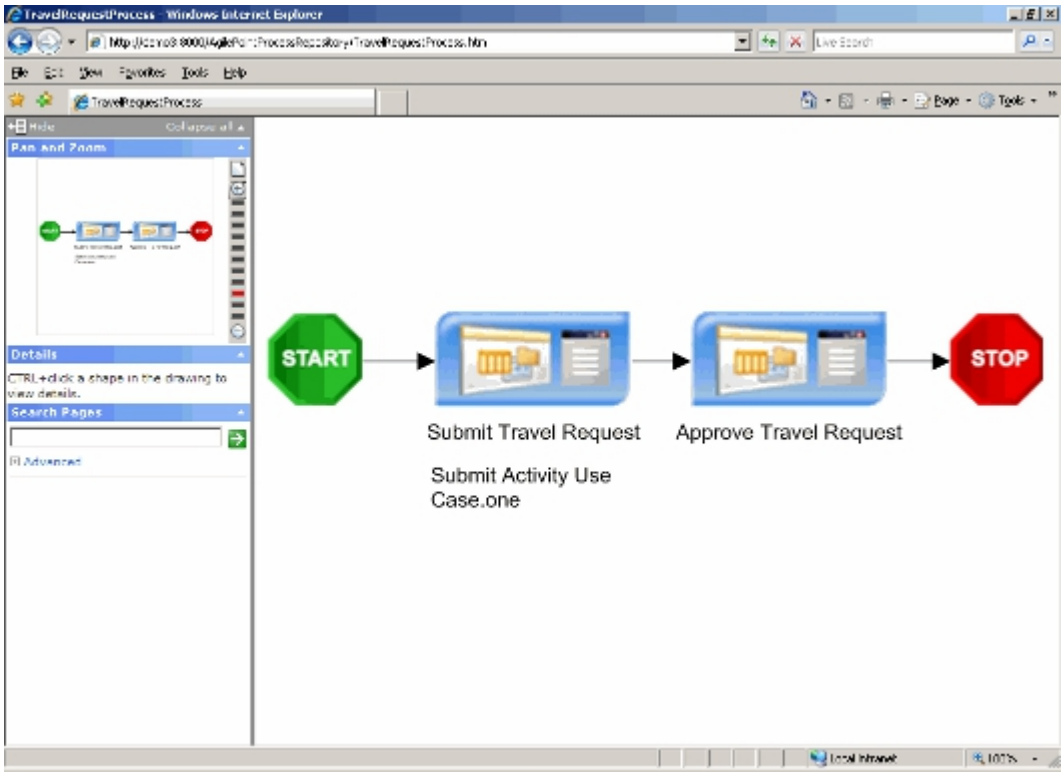
Open the Process Repository in SharePoint

Once the AgilePoint Process Repository has been setup in AgilePoint Envision and in SharePoint, you can now open the process repository in SharePoint.

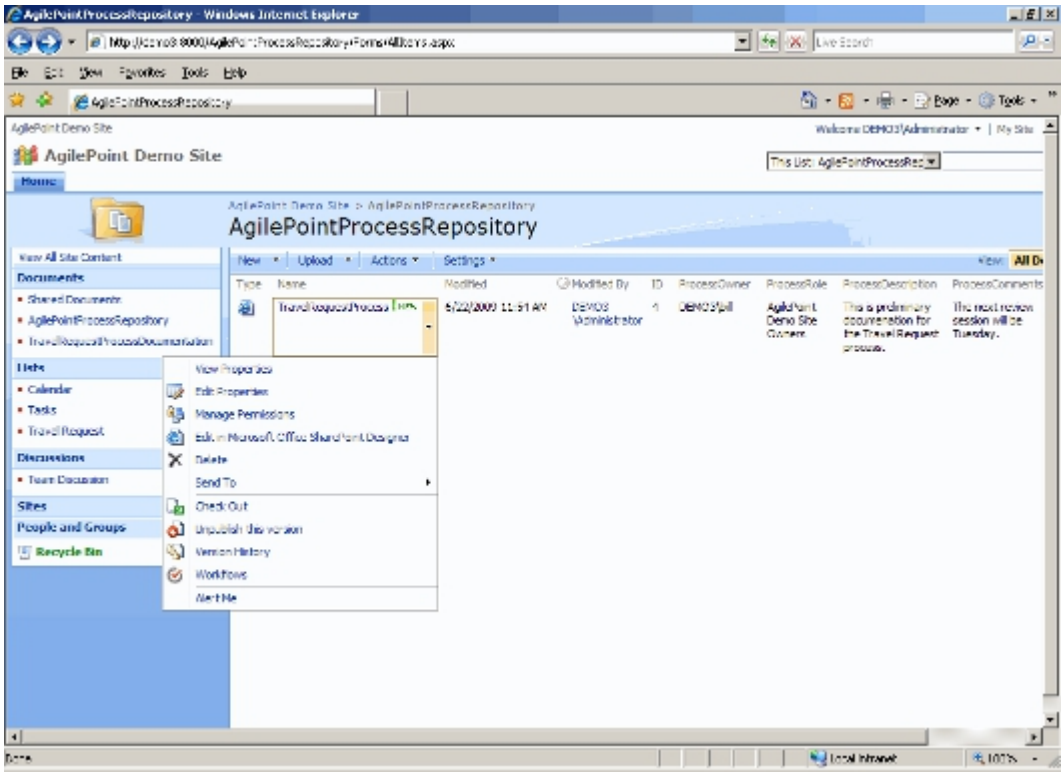
1. Open the AgilePoint Process Repository SharePoint library.



2. In the **Type** column, click the **Internet** icon. The Process Discovery page appears.



3. Click the document attachment name (e.g. Submit Activity Use Case.one) to open the document.
4. From the SharePoint process repository library, click the **Process Name** drop-down and notice that all the general SharePoint options are available for associating workflows, Check Out, etc.


AgilePoint Demo Site
AgilePointProcessRepository
New
Upload
Actions
Settings
Edit Properties
Manage Permissions
Delete
Send To
Check Out
Version History
Workflows

Edit Stencil Images

This section provides information and instructions about how to create and edit AgilePoint related stencils and their shapes in Visio, as well as how to associate shapes to AgilePoint activities. AgilePoint comes with several built-in activities that already have their own graphics and icons. You may want to substitute in your own images, or implement new stencils and shapes for your custom AgilePoint activities (e.g. AgileParts and AgileWorks). AgilePoint Envision provides you a way to customize the stencils and shapes and associate them with AgilePoint activities.

Note: Microsoft Visio Help also provides some information about editing stencil images. Access Microsoft Visio Help by clicking **Help** > **Microsoft Office Visio Help**.

Create and Save a New Stencil

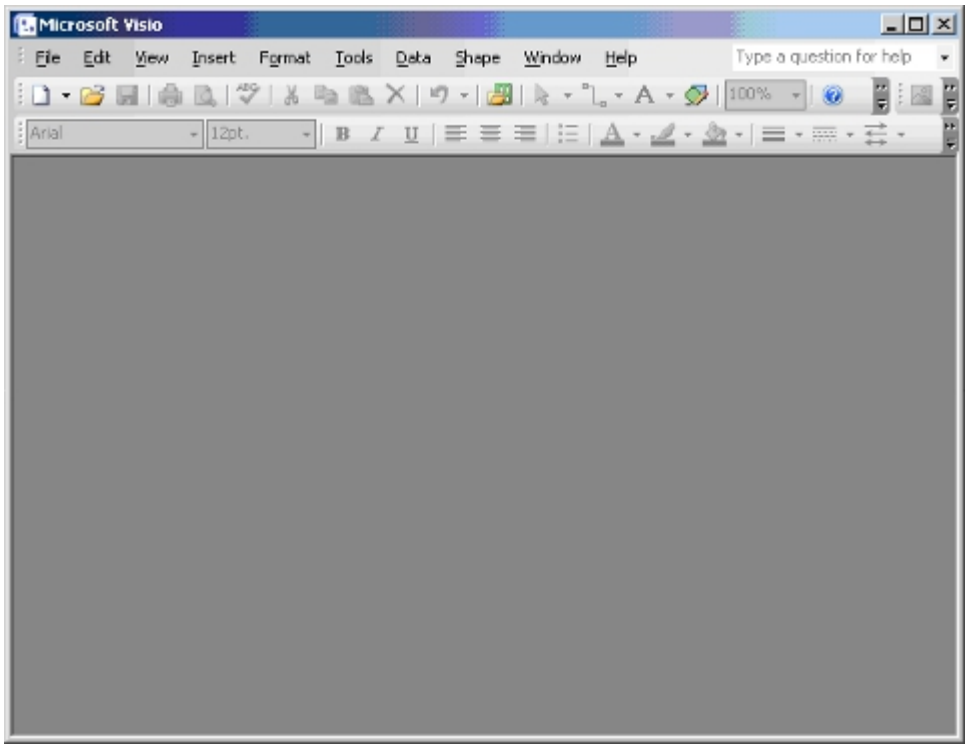
This option allows you to create a new stencil. A stencil contains a group of shapes that you can drag and drop to construct your process model. The easiest way to do this is to copy an existing AgilePoint stencil as a base and work from that.

1. In Windows Explorer navigate to [AgilePoint Envision solution files folder].
2. Make a copy of the **Generic.vss** file and place it in the same folder.
3. Give the copy a descriptive name for the new stencil (e.g. IT Assets Group 1).
4. Open AgilePoint Envision, click the **Shapes** button and click **IT Assets Group 1**.
5. The stencil appears as **Generic BPM** in the stencil pane. Rename it by right-clicking on the stencil title and clicking **Edit Stencil**. The Stencil opens in edit mode.
6. Right-click again and click **Properties**.
7. In the **Title** field, type a name for the new stencil (e.g. IT Assets Group 1) and click **OK**.
8. Delete the existing icons in the new stencil so that you have a clean slate and save the stencil by clicking on the **Save** button next to the stencil. Saving as Visio 2002 will ensure backward compatibility.

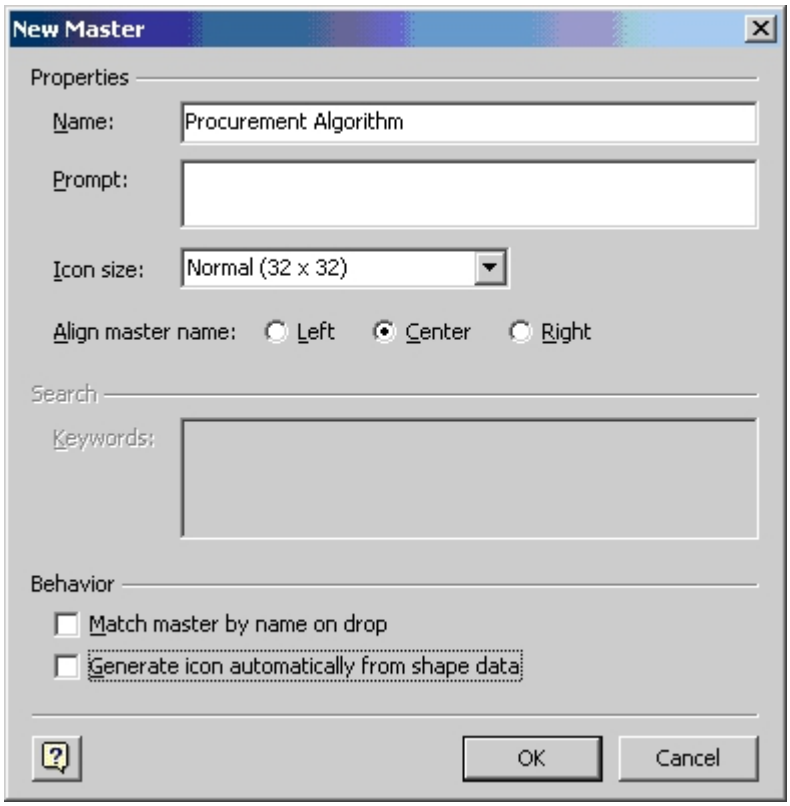
Create a New Master Icon

This part provides information for adding a new master icon to a stencil that can represent a custom AgileShape.

1. Close AgilePoint Envision and leave MS Visio open as shown below.



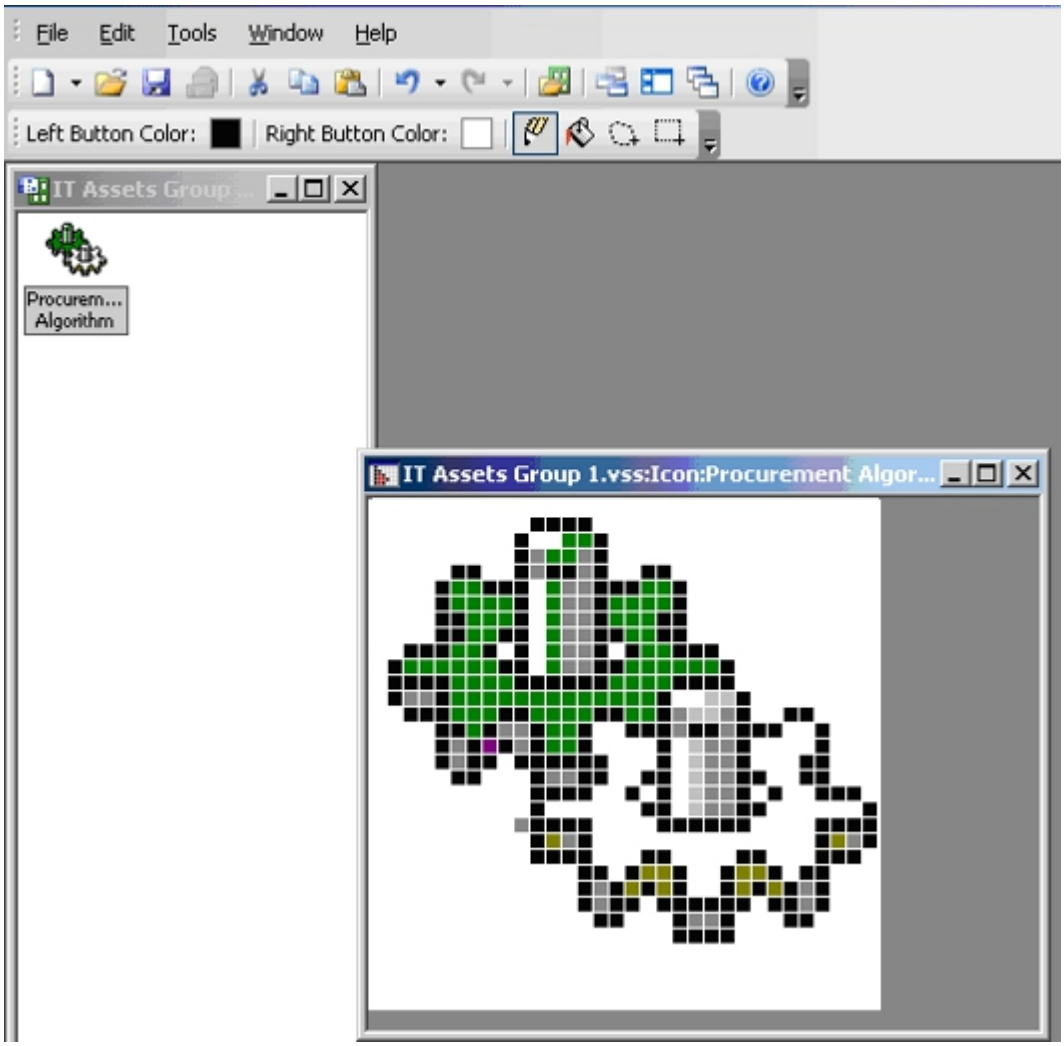
2. Click **File** > **Open**.
3. Navigate to the [AgilePoint Envision solution files folder] where the VSS files are stored, and open the new stencil (i.e. IT Assets Group 1).
4. Right-click in the new stencil pane and click **New Master**.
5. Give the new master a descriptive name (e.g. Procurement Algorithm). It is recommended to choose **Normal (32 x 32)** for the icon size and to leave the behavior check boxes unchecked.



6. Click **OK**.
7. Right-click on the **Procurement Algorithm** activity in the stencil pane and click **Edit Master** > **Edit Icon Image**.

Note: Icons are generally created by your computer graphics design department. It is recommended to use 32-bit icon images. You can either draw one by hand or copy and paste an existing icon.

8. Either draw an icon pixel by pixel, or simply copy and existing icon and paste it here.



9. When finished, close the icon window.

Associate a Master Shape with the Icon Image

This option allows you to add a master shape that represents an AgilePoint activity on the drawing canvas.

1. Right-click on the icon image in the stencil pane and click **Edit Master** > **Edit Master Shape**.
2. Click **Insert** > **Picture** > **From File**.
3. Browse and select the image file (.bmp, .gif, jpg, etc.) to add. Proceed directly to the next step to finalize the shape.

Finalize the Shape

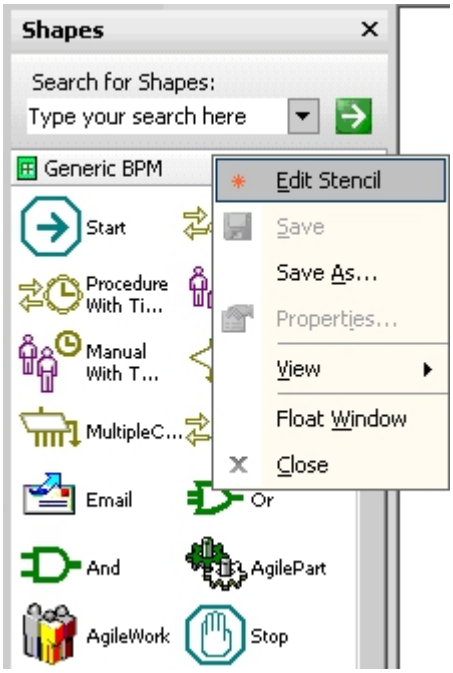
This option allows you to associate the stencil shape you just created with a custom AgilePart or AgileWork assembly.

1. Click **Tools** > **Macro** > **ThisDocument** > **FinalizeShape**. The Choose Activity Type window appears. Here are all the built in AgileShapes and custom AgileParts and AgileWorks that have been registered in AgilePoint Envision.
2. Select either **AgilePart** or **AgileWork** depending on the type of custom activity, choose the name from the list and click **OK**.

Edit an Icon Image on a Stencil

This option allows you to manually edit the icon image that displays in the stencil pane that represents an AgilePoint activity.

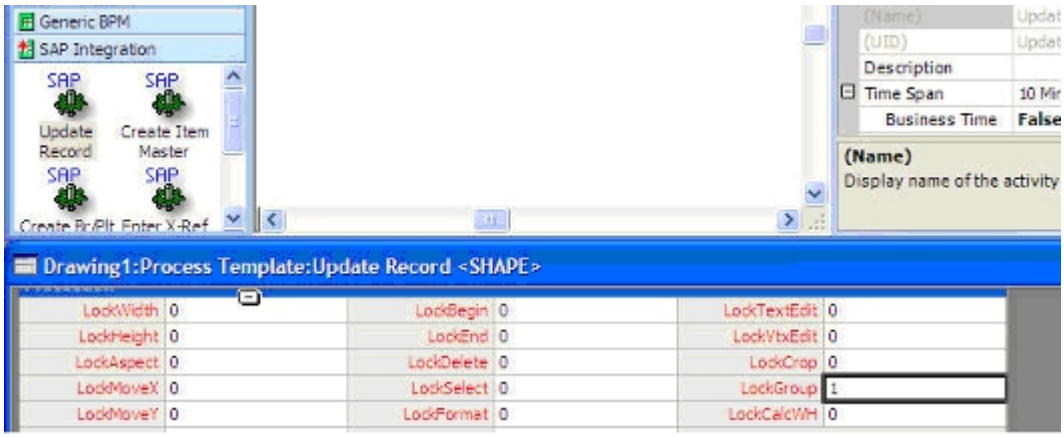
1. In AgilePoint Envision, open the stencil that includes the icon image for which you would like to edit.
2. Right-click the Stencil title (e.g. Generic) and select **Edit Stencil**. The Stencil appears in Edit mode.



3. Right-click the icon image in the stencil pane and select **Edit Master** > **Edit Icon Image**. The image file will be displayed and you can modify the icon as needed.

Edit Master Shape

1. To edit the shape itself including the label and properties of the shape, right mouse on the icon in the stencil pane and select Edit Master > Edit Master Shape. The shape image will be displayed.
2. Right-click the shape image and select **Show ShapeSheet** (you must be in the developer mode to do this).
3. In the **ShapeSheet**, look for the **LockGroup** property and change the value from 1 to **0** to unlock the group.



4. Right-click the shape image again and select **Shape** > **Ungroup**.
5. Now you can edit the image including the text in the image.

Custom Configured Stencils (My Stencil)

Envision users or administrators can modify the properties of an AgileShape, and then share them with other Envision users using a special stencil called **My Stencil**. Envision administrators can make the properties for shapes in this stencil read-only if desired.

A common use for this feature is a system administrator creating complex configuration settings for an AgileShape, where the settings are common to many users within an organization. The administrator sets up the configuration, and then shares the stencil. Business users then need only to add the shape to their process models to implement the organizational standards.

For the most part, the behavior for sharing AgileShapes in Envision is the same for sharing any shapes in Microsoft Visio. The main functionality that Envision has added are:

- Support for sharing AgileShapes, along with preconfigured properties
- Support for setting all properties collectively to read-only

Create an AgileShape with Preconfigured Properties

1. In **AgilePoint Envision**, open a process model of any type.
2. Open the stencil named **My Stencil**.
3. Drag and drop an AgileShape to the process model.
4. Modify the shape's properties as desired.
5. Drag the configured shape from the process model to **My Stencil**. You can create your own stencil or use an existing stencil. If you use an existing stencil, you will need to make it editable when prompted. When you drop the shape on the stencil, the **Edit Master Properties** dialog box appears.
6. On the **Edit Master Properties** dialog box, complete the following fields as desired:
   - **Name** – The name that appears below your shape in the stencil and by default in the process model.
   - **Tooltip Description** – The name that appears for the shape in the pop-up tooltip in a stencil.
   - **Allow everyone to edit properties** – Selected means that the shape's properties are editable by anyone. Deselected means that the shape cannot be edited, except by the creator.
7. Click **OK**.

Modify an AgileShape with Preconfigured Properties

To modify a customized AgileShape, do the following.

Note: You must have permissions to modify the AgileShape properties.

Note: This procedure creates a copy of the preconfigured AgileShape you started with. You cannot modify the original.

1. In **AgilePoint Envision**, open a process model of any type.

2. Open **My Stencil** with the customized AgileShape.
3. Drag and drop the customized shape to the process model.
4. Follow the instructions in **Creating a Customized AgileShape**.
5. Drag the modified shape from the process model back to a stencil.

BPMN

This section describes how to use Business Process Model Notation (BPMN) with AgilePoint Envision.

Adding or Modifying BPMN Properties for an AgileShape

Each AgileShape includes an optional set of properties for the BPMN standard. These are the same properties included with the AgileShape's associated BPMN shape in Visio.

To add or modify the BPMN properties for an AgileShape, do the following.

Prerequisites

- A process model with one or more AgileShapes.

Navigation

1. In Envision, open your process model.
2. Select the AgileShape you want to work with.
3. If the Design Tasks menu is not displayed in right pane, click **Design Tasks**.

Instructions

1. In Envision, on the **Design Tasks** menu, click **BPMN**.
2. In the **BPMN** properties list, complete the property values as required.

Field Definitions

Field Name	Definition
AdHoc	This specifies whether the sub-process is ad hoc.
From	The source of the assignment.
Assignments	An expression that determines the assignments for an activity.
To	The destination of the assignment.
Assign Time	Specifies at what point during an activity the assignment occurs.
Categories	Categories for purposes such as reporting and analysis.
Completion Quantity	The number of tokens that will be generated down the sequence flow.

Field Name	Definition
Correlation	The correlation set.
Documentation	Documentation for the object.
Event Type	The type of event.
Exclusive Type	The exclusive type for the gateway.
Expression Body	A mathematical expression.
Expression Language	A language that defines the syntax for the expression.
Gateway Type	Specifies the behavior of the gateway.
IORules	An expression that defines the relationship between one input set and one output set.
IsForCompensation	Specifies whether or not a compensation can be performed after the process has completed normally.
Loop Type	The loop type.
Marker Visible	Specifies whether a marker is visible in the gateway.
Name	The property name.
Performers	The human resources that will be performing the task.
Properties	Properties for use within the processing of the activity.
Start Quantity	The number of tokens that must arrive from a single sequence flow before the activity can begin.
Status	The status of an activity.
SubProcess Type	The sub-process type.
Task Type	The task type.
Trigger	The trigger type.
Type	The property type.

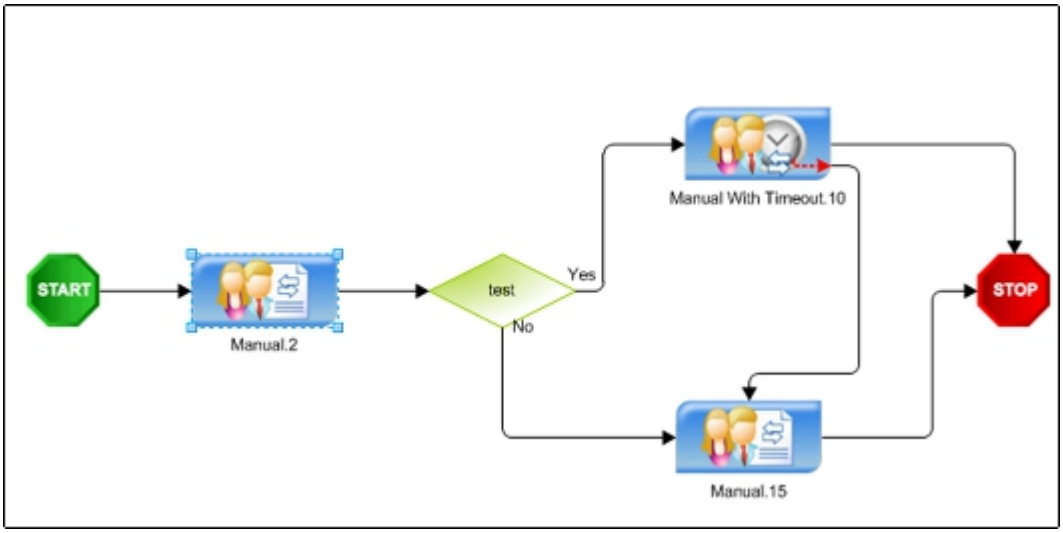
More Information

For more information about BPMN or BPMN attributes, visit the web site of the Object Management Group at bpmn.org.

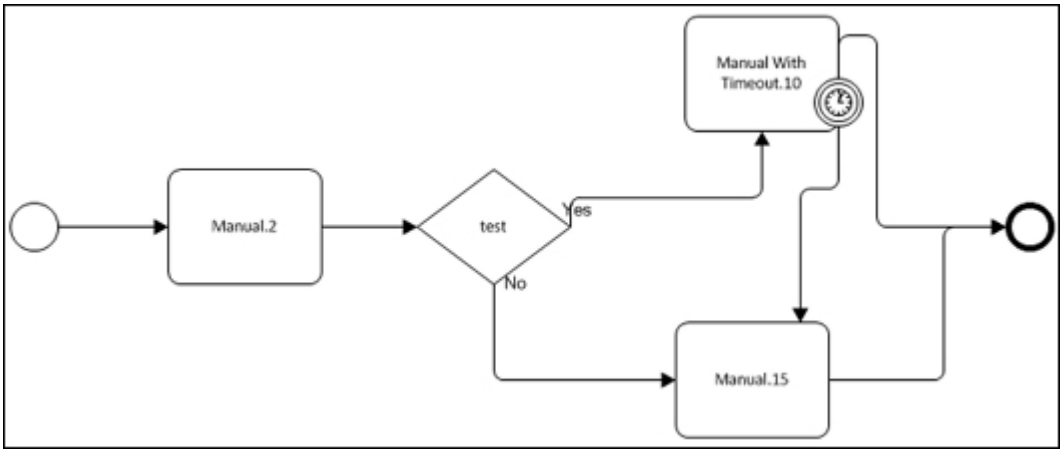
Converting an AgilePoint Process Model to BPMN

You can convert an AgilePoint process model to use the look and feel of a BPMN process model.

For example, a process model that looks like this:



Would be converted to look like this:



To convert a standard AgilePoint process model to BPMN notation, do the following.

Prerequisites

- A process model that is complete and saved with the AgileShapes and the behavior you want defined.

Navigation

1. In Envision, open your completed process model.

Instructions

1. In Envision, click **AgilePoint > Miscellaneous > Convert to BPMN**.

   The icons for your AgileShapes are converted to their BPMN counterparts, so the process model follows the visual standards for a BPMN process.

Note: If you add new AgileShapes to the process, repeat this procedure to convert those AgileShapes to the BPMN visual standard.

Data Binding

AgilePoint allows you to bind to XML Schema or SharePoint Document Library metadata.

XML Schema Support for ASP.NET Applications

For ASP.NET applications, this feature enables the creation and manipulation of XML Data Schema within AgilePoint Envision. An AgilePoint Developer created XML Data Schema file can also be imported into AgilePoint Envision.

Schema XML Binding

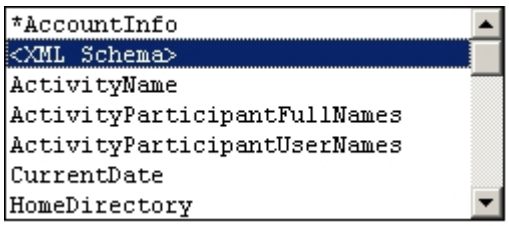
In InfoPath or ASP.NET based process templates, you can access all or part of the values stored in the schema of the form to determine the routing of your process, or to display information in an email notification. To access the InfoPath XML Schema within an email template, type ${ and select <XML Schema>. If outside an email template, such as in a Multiple Condition Activity, you can simply define the columns within the Data Binding field. You can also construct the process attribute syntax manually to access a specific section or element of the XML. This is accomplished by specifying an XPath expression ${XPathExpression} (in place of a custom attribute name). Below are a few examples that can be used:

- $/*
- $//*
- $/exp:expenseReport
- ${/exp:expenseReport/exp:startDate}

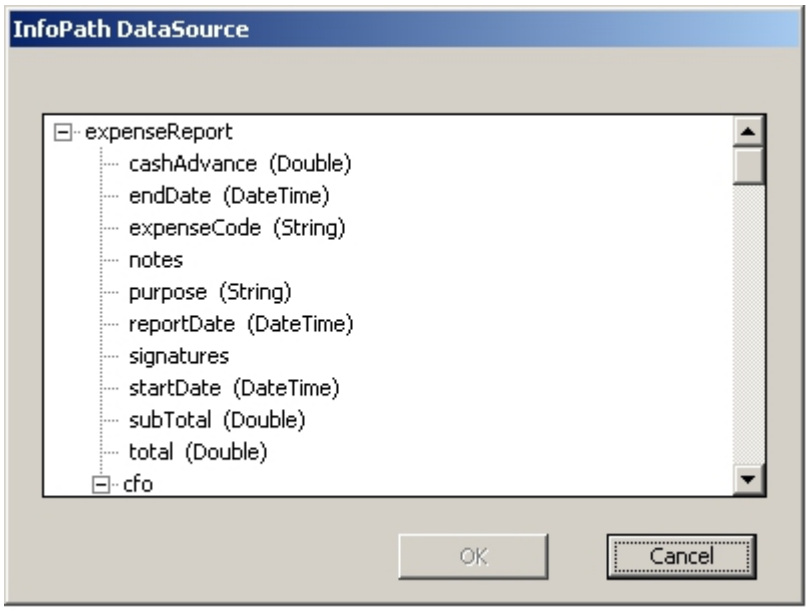
In InfoPath or ASP.NET based process instances, you can access all or part of the form's XML. Using the special $/ attribute contains the XML of the entire form. By specifying an XPath expression $/{XPathExpression} (in place of a custom attribute name), you can access a specific section or element of the XML e.g.: $/*, $//*, $/exp:expenseReport, ${/exp:expenseReport/exp:startDate}.

To access an InfoPath Form's XML Schema or SPDoc metadata:

1. Type **${** in the body of the email template to bring up the list of available process attributes.

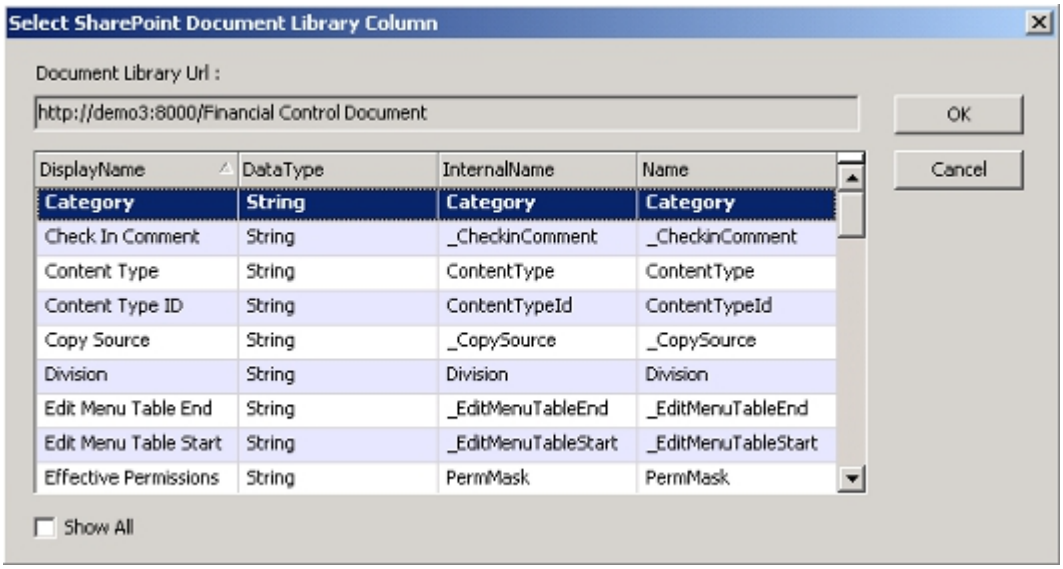


2. Select **<XML Schema>** from the list. The InfoPath DataSource window appears.

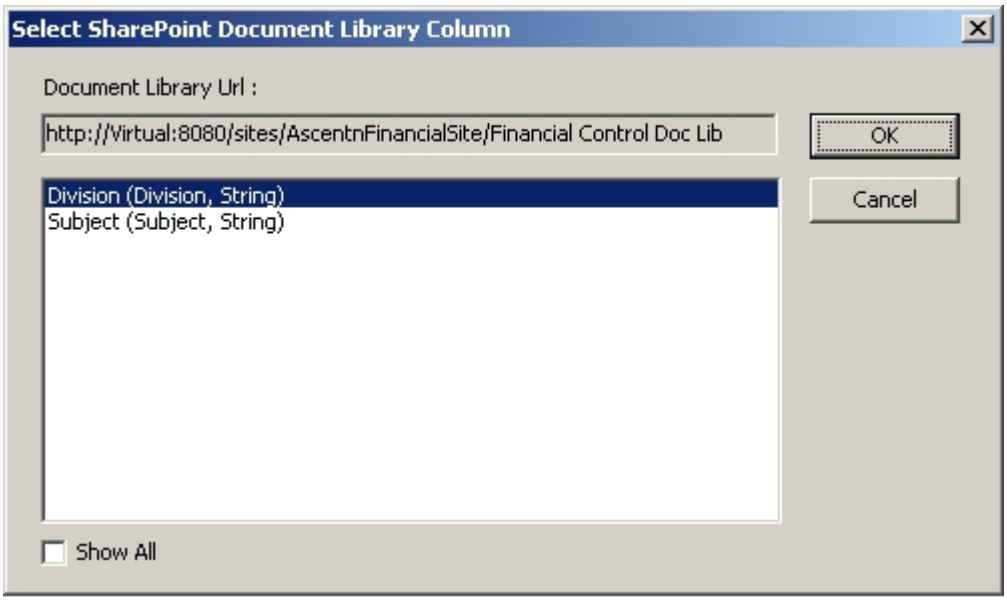


SPDoc Metadata Binding

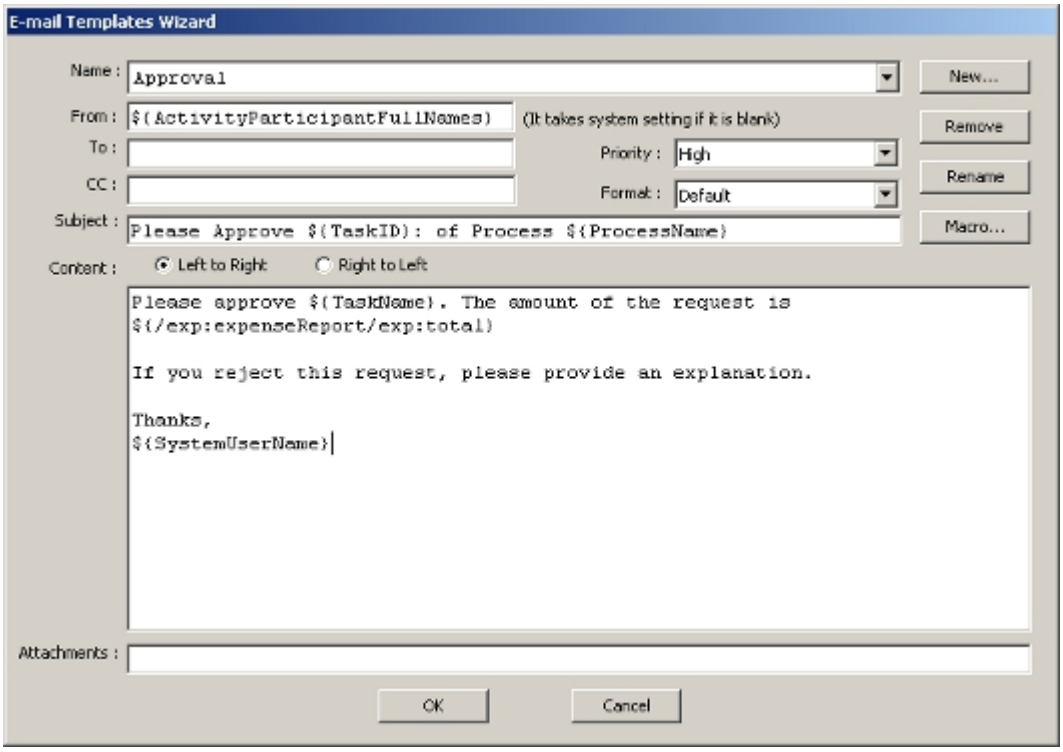
In SPDoc based process templates, you can access the values of a SharePoint Document Library's metadata columns. This data can then be used in your process (e.g. to determine the workflow in your process, or to display information in an email notification). To access the metadata column(s) within an email template, type ${ and select <XML Schema>. If outside an email template, such as in a Multiple Condition Activity, you can simply define the columns within the Data Binding field. The Show All check box allows you to see a complete list of metadata columns to choose from.



For SPDoc, the Select SharePoint Document Library Column window appears.



1. Select the data column for which you would like to associate.
2. Click **OK**. The association is shown below.



Process Attributes

This section provides detailed information on the features, functionality, purpose, and intended usage of the process attributes included in the AgilePoint BPMS Suite. AgilePoint Process Models typically contain many process related attributes which can be very useful when working with AgileShapes. Instead of creating your own mechanism to manage or access these attributes, AgilePoint has built-in functionality giving you direct access to this information without having to use code. In AgilePoint, you can access process attributes within the AgileShapes. Process Modelers can simply specify the process attributes to be used in the properties of the AgileShapes making the values associated to these attributes available automatically.

Below is a list of pre-defined process attributes that can be used when building AgilePoint process models. When writing code, a different approach is necessary for accessing process attributes. For the case of writing code, most of the Predefined Process Attributes mentioned below are actually the properties of classes. For example, you may get the process instance information such as process instance name, due date, etc from the properties of the WFProcessInstance class. The available classes and properties are listed in our Web Service API and AgilePoint SDK (APSDK) documentation.

When using process attributes, different syntax may need to be used. For example, outside of an email template, you may use $AttributeName, whereas inside an email template, you may use ${AttributeName}.

Common Process Attributes

This topic provides a list of common process attributes for AgilePoint.

Name	Description
ActivityName	Name of the activity. Specific to manual activities. **Common Usage:** Can be used in an email template to specify the name of the activity that has been assigned to a participant.
ActivityParticipantFullNames	The full names of the activity's participants. Specific to manual activities. **Common Usage:** Can be used in the body of an email template to display the full names of the activity's participants.
ActivityParticipantUserNames	The user names of the activity's participants. Specific to manual activities. **Common Usage:** Can be used in the body of an email template to display the system names of the activity's participants. The **ActivityParticipantUserNames** attribute uses a comma as the string's delimiter. Since the **To** and **CC** fields of an email template only recognize semicolon as the delimiter for specifying multiple recipients, the **ActivityParticipantUserNames** macro cannot

Name	Description
	currently be used in the **To** or **CC** field of an email template when there are multiple participants for the activity.
CurrentDate	The current date. **Common Usage:** Can be used to update date fields in an InfoPath form or to set date fields in a database. It can also be used anywhere that you want the date to be shown.
HomeDirectory	The path for which AgilePoint Server is installed. **Common Usage:** Can be used in the **Attachments** field of an email template to construct a path to files on the AgilePoint Server.
ParentProcessID	The unique ID of the parent process. **Common Usage:** Can be used in an email template to notify the Admin user that there is an error in the parent process.
ProcessID	The unique ID of a process. **Common Usage:** Can be used in the body of an email template to provide the Administrator user with the identification code assigned to the process instance.
ProcessInitiator	The user who initiated the process. **Common Usage:** Can be used in the **To** field of an email template to send an Activity Exit Email notification to the person who initiated the process, letting them know that the process is complete. It can also be used in the Participant property of a Manual Activity.
ProcessInitiatorLocation	The location (IP address) of the user who initiated the process. **Common Usage:** Can be used in the body of an email template to specify the IP address of the Process Initiator.
ProcessInstanceID	The unique ID of a process instance. **Common Usage:** Can be used in the body of an email template to provide the Administrator user with the identification code assigned to the process instance.
ProcessInstanceName	The name of the process instance.

Name	Description
	Common Usage: Can be used in an email template to notify the Administrator user that there is an error in a specific instance of a process.
ProcessName	Name of the activity. **Common Usage:** Can be used in an email template to notify the Administrator user that there is an error in a specific instance of a process.
ProcessParticipantFullNames	The full names of the process's participants. Specific to manual activities. **Common Usage:** Can be used in the body of an email template to display the full names of the process participants.
ProcessParticipantUserNames	The user names of the process's participants. Specific to manual activities. **Common Usage:** Can be used in the **To** field of an email template to send an email notification to the process's participants letting them know there has been a change in the process.
ProcessStartedDate	The start date of the process. **Common Usage:** Can be used in the body of an email template to display the date for which the process started.
ProcessTemplateID	The unique ID of the process template. **Common Usage:** Can be used in the body of an email template to specify the unique identification code of the process template.
ProcessTemplateName	The name of the process template. **Common Usage:** Can be used in the body of an email template when referring to the name of the process template.
ProcessTemplateReportFile	The name of the report associated with a process template. **Common Usage:** Can be used to attach the process template report file in an email template.
ProcessTemplateVersion	The version of the process template. **Common Usage:** Can be used in the body of an email template to specify the version of the process template.
Session	The task session ID.

Name	Description
	Can only be used in email templates associated with Activity Entry Email. **Common Usage:** Can be used to refer to a specific session or occurrence of a task when a process is in a loop. The Session ID is updated each time the process loops. See TaskID.
SourceTaskParticipantFullName	The full name of the task's participant associated with the original task (i.e. reassigned). Specific to manual activities. **Common Usage:** Can be used in the body of an email template to display the full name(s) of the task's participants.
SourceTaskParticipantUserName	The user name of the task's participant for the original task (i.e. reassigned). Specific to manual activities. **Common Usage:** Can be used in the **To** field of an email template to send an email notification to the activity's participants letting them know an activity has been assigned to them.
SystemUserEmailAddress	The email address of the system user. **Common Usage:** Can be used in the **From**, **To**, and **CC** fields of an email template.
SystemUserName	The name of the system user. **Common Usage:** Can be used in the body of an email template to display the name of the system user.
TaskAssignedDate	The date the task was assigned. **Common Usage:** Can be used in an incoming or Activity Exit Email template notifying a participant of the date for which a task has been assigned.
TaskCode	The unique code of the task. **Common Usage:** Can be used in Lync, SMS, and Yammer template associated with the Task Assigned Message to specify the unique code of the task that has been assigned.
TaskDueDate	The due date of the task. **Common Usage:** Can be used in an incoming or Activity Exit Email template notifying a participant of the date for which a task is due.
TaskID	The unique ID of the task.

Name	Description
	Can only be used in email templates associated with Activity Entry Email. **Common Usage:** Can be used in an email template associated with an Activity Entry Email to specify the unique ID of the task that has been assigned. See Session.
TaskName	The name of the task. Can only be used in email templates associated with Activity Entry Email. **Common Usage:** Can be used in an email template associated with an Activity Entry Email to specify the name of the task that has been assigned.
TaskParticipantFullName	The full name of the task's participant. **Common Usage:** Can be used in the body of an email template to display the full name(s) of the task's participants.
TaskParticipantUserName	The user name of the task's participant. **Common Usage:** Can be used in the **To** field of an email template to send a re-assigning email to the task's participants letting them know a task has been re-assigned. If you use the **${TaskParticipantUserName}** process attribute in the **To** field instead of specifying the entire list of participants in the **To** field, then for each participant, a separate email will be sent, and none of the participants will receive duplicate copies of the email.
TaskLink	The link of the task. **Common Usage:** Can be used in the **Message** field of the Lync and SMS template to send the message with a link to open the task.
Version	The version of the process template. **Common Usage:** Can be used in the body of an email template to display the version of the process template.
WorkItemID	The unique ID of the work item. **Common Usage:** Can be used in the body of an email template to display the unique ID of a work item.

Process Attributes for SharePoint

The following is a list of process attributes that are specific to the SharePoint and InfoPath integrations.

The following process attributes are used for MS SPDoc and MS InfoPath based process templates.

Name	Description
AllParticipantCommentsHtml	The entire history of the information entered by the Participant in the "Comment" field of the SharePoint task page. **Common Usage:** Can be used in an email template to display the entire history of comments entered by the participant in the **Comment** field.
DocLibPath	The relative path of the document library (e.g. Testemail). **Common Usage:** Can be used in an email template when specifying the path to a document library in your SharePoint Portal Server.
DocName	The name of the document (e.g. Testemail-2005-0036.xml). **Common Usage:** Can be used in an email template when specifying the name of an InfoPath form.
DocUrl	The full document path (e.g. http://pearl:8084/sites/AgilePointFinancialSite/Testemail/Testemail-2005-0036.xml). **Common Usage:** Can be used in an email template when specifying the path to a document on your SharePoint Portal Server.
LastParticipantCommentHtml	The most recent comment entered by the participant in the **Comment** field of the SharePoint task page. **Common Usage:** Can be used in an email template to display the most recent comment entered by the participant in the **Comment** field.
SitePath	The relative path of the site (e.g. /sites/AgilePointFinancialSite). **Common Usage:** Can be used in an email template when specifying the path to a document library in SharePoint.
SPServer	The SharePoint URL (e.g. http://pearl:8084). **Common Usage:** Can be used in body of an email template to build a link to an item on your SharePoint Portal Server.

Process Attributes for AgileXRM

The following is a list of process attributes that are specific to AgileXRM processes.

Name	Description
CrmBeId	The ID of the record of the main entity.
CrmBeType	The relative path of the document library (for example, Testemail).
organizationname	The name of the CRM organization that the process record belongs to.

Built-In Macros

The following is a list of macros you can use as process attributes.

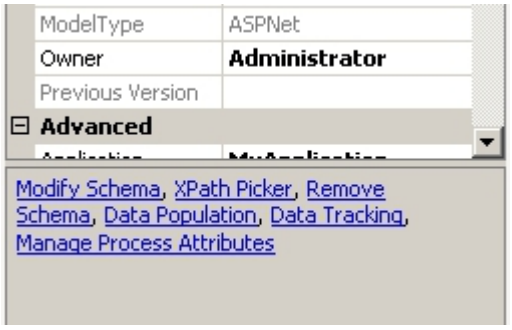
Name	Description
$GROUP()	$GROUP(ValidGroupNameInAgilePoint) Where you can obtain the ValidGroupNameInAgilePoint from InfoPath binding like $GROUP(${/my:myFields/my:groupname}), or you can supply the group name directly like $GROUP(Group ABC).
$ROLE()	$ROLE(ValidRoleNameInAgilePoint) Where you can obtain the ValidRoleNameinAgilePoint from InfoPath binding like $ROLE(${/my:myFields / my:rolename}), or you can supply the role name directly like $ROLE(Role XYZ).
$MANAGER()	$MANAGER(UserName) Returns the manager of the specified UserName, i.e. UserName is the subordinate. You can obtain the subordinate UserName from InfoPath binding like $MANAGER(${/my:myFields/my:username}), or you can supply the username directly like $MANAGER(DOMAIN\john).
$XMLREPEATING2HTML()	This macro accepts as a parameter an XPath expression indicating the location of a **repeating data** section of an InfoPath form. To refer to a literal XML string from an Xpath, add a tilde (~) at the end of the path. When used in an email template, this macro will include an HTML table (containing the repeating

Name	Description
	data from the InfoPath form) in the generated email notification. The following example shows an Xpath with the tilde: $XMLREPEATING2HTML(${/exp:expenseReport/exp:items~}) Common Usage: Can be used in the body of an email template to display data from an InfoPath form.

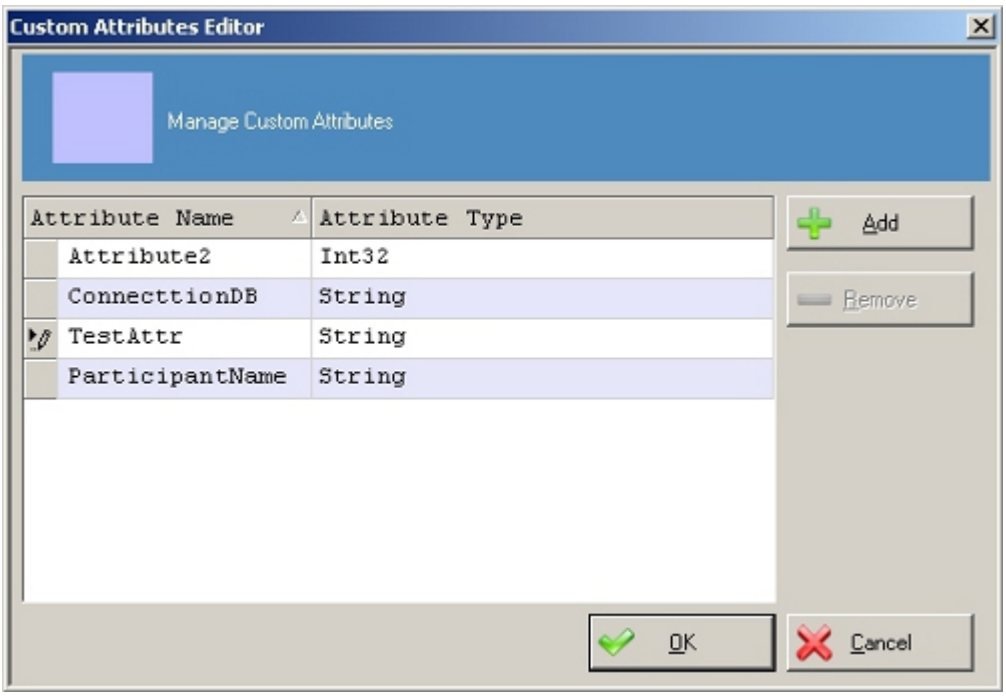
Manage Process Attributes

You can define custom attributes in your process by selecting them from a common reference point in a dialog box, rather than typing the exact name in the data binding field. This additional setup step declares your attributes in a common location in the process template, but it can save you time and effort if you want to use many custom attributes in your process.

1. Declare your custom attributes for use throughout the process template:
   a. In AgilePoint Envision, open a process template, and select the process template to display its properties in the right pane.
   b. Below the properties box, click the **Manage Process Attributes** link.



   c. In the **Manage Custom Attributes** window, click **Add**.



d. In the **Attribute Name** column, enter the name of the attribute you want to create.

e. In the **Attribute Type** column, select the data type for the attribute.

f. When you have finished adding all attributes you want to create, click **OK**.

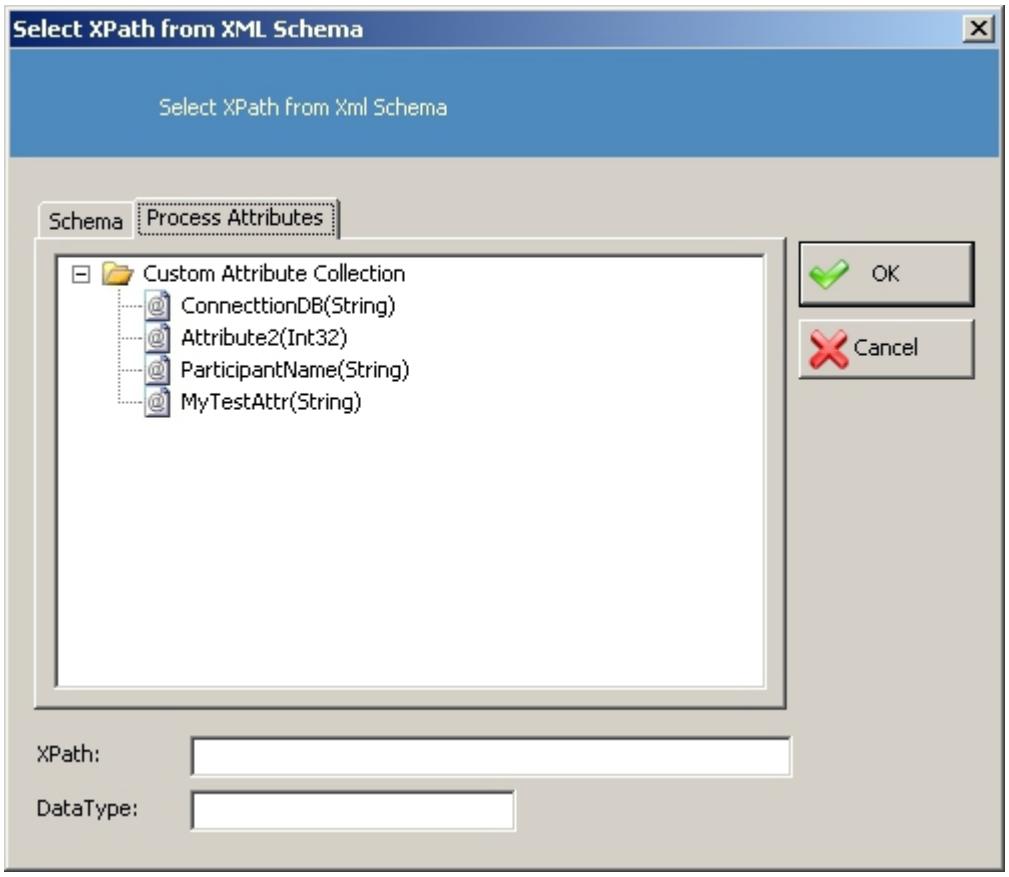
2. Select the custom attributes you want to use:

   a. Drag any AgileShape that uses data binding onto your process template – for example, the **Participants** property in a **Manual** activity.

   b. Select the shape you added. In the property where you want to use the custom attribute, click the appropriate field to open the schema binding dialog box. (From the previous example, for a **Manual** activity, in the **Participants** list, click **Add Participant**.)

   c. In the **Data Binding** field, click the **Ellipses** (…) button.

   d. On the **Select XPath from XML Schema** dialog box, click the **Process Attributes** tab.



e. In the **Custom Attribute Collection** list, select the attribute you want to use, and click **OK**.

How Do I Modify the Value of a Shared Custom Process Attribute?

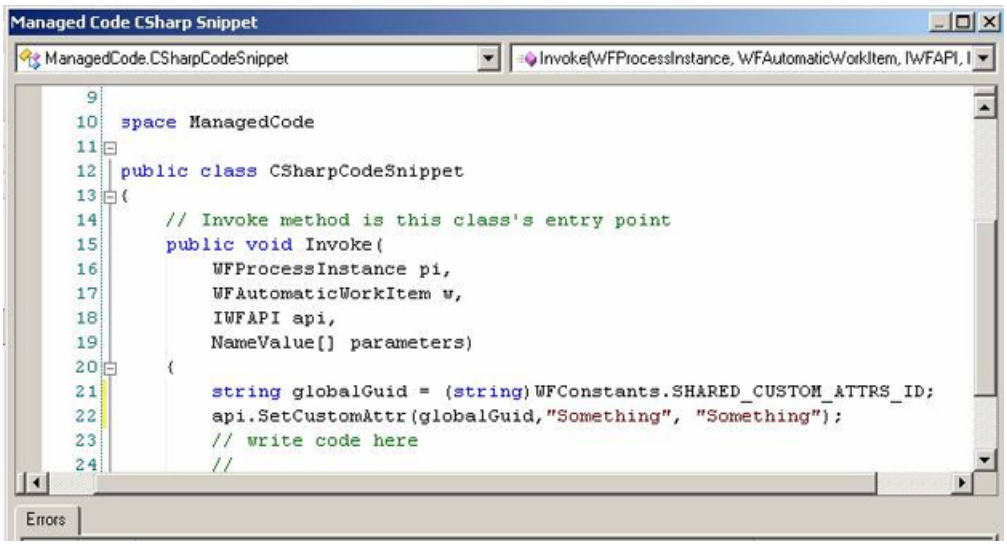
Applies To

- AgilePoint Envision v4.0 or later

Summary

I have defined a shared custom process attribute called "Something" in Enterprise Manager. I've set the value of the shared custom process attribute in Enterprise Manager. I now want to use a Managed Code C# Snippet to dynamically change the value of the shared custom process attribute "Something". What is the syntax to update the value of the shared custom process attribute "Something"?

To dynamically update the shared custom process attribute "Something" at run time, the following syntax can be used within the Managed Code C# Snippet AgilePart.



Using XPath to Retrieve Inner XML String from Custom Attributes

Description

The user has a need to refer to an XML string within AgilePoint custom attributes. However, when using Xpath as a reference, the XML structure is ignored and is returned as plain text.

Applies To

AgilePoint users with processes that refer to strings of XML code in the custom attributes.

Resolution

To refer to a literal XML string from an Xpath, add a tilde (~) at the end of the path. Adding the tilde returns the inner XML for the element the Xpath refers to. The following example shows an Xpath with the tilde:

```
$XMLREPEATING2HTML(${/exp:expenseReport/exp:items~})
```

Applying Process Attributes

Process attributes can be initialized, updated, and/or retrieved directly from within the process model. For example, the Single Condition and Multiple Condition AgileShapes allow you to route the process flow based on whether the current value(s) of specified process attributes match criteria defined by the process modeler from within AgilePoint Envision.

Furthermore, several built-in AgileShapes allow the process modeler to initialize and/or modify the value(s) of one or more process attributes. For example, the C# Snippet AgileShape allows the process modeler to initialize and/or modify the value(s) of one or more process attributes to a value derived by executing a specified fragment of C# code at run time. This allows even non-developers to update the values of process attributes to values as simple as a literal value (e.g. a number, date, or string). With very minimal training, it also allows for more complex and dynamic functionality such as increasing a numeric attribute's value by 1, setting a date attribute to the current time, etc.

As another example, the SubProcess AgileShape allows the modeler to specify values for "initial attributes" that will be pre-initialized for the sub process instance that will be created at run time. Other AgileShapes also

provide ways for non-developers to configure process attributes, and custom AgileShapes allow you to add virtually any type of additional "data field" configuration capabilities you may require directly into the process modeling environment.