



## **Introduction**

### **AgilePoint BPMS for Azure**

#### **AgilePoint BPMS for Azure v5.0 SP3**

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# Preface

## Disclaimer of Warranty

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

## Copyright

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## Trademarks

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## Government Rights Legend

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

## Virus-free software policy

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

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

## Document Revision Numbers

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

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

## AgilePoint Documentation in PDF and HTML

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

### Advantages of HTML Documentation

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

### Advantages of PDF Documentation

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

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

## Opening the Documentation Library

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To open the AgilePoint Documentation Library, do the following.

### Prerequisites

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

### Instructions

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

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

## Finding Information in the Documentation Library

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

### Using the Table of Contents

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

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

### Searching

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

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

The search results display in alphabetical order by topic title.

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

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

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

### Printing

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

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

## Downloading Files and Sharing Links from the Documentation Library

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

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

## Share a Link to an HTML Topic

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

## Share a Link to a PDF Document

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

## Save a Copy of a PDF Document

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

## Contacting AgilePoint Sales

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

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**Web site:** [www.agilepoint.com](http://www.agilepoint.com)

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

## Contacting Customer Support

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

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

# AgilePoint BPMS for Azure

AgilePoint BPMS for Azure is a powerful solution that enables you to run the full AgilePoint suite in the cloud. AgilePoint BPMS is a fully functional, fully deployed AgilePoint solution running as a cloud-based service on the [Windows Azure](#) platform.

AgilePoint BPMS for Cloud offers:

- **Complete functionality** - Running the complete AgilePoint BPMS solution in Windows Azure gives your organization to the full range of AgilePoint functionality, rather than a slimmed down, light-featured version.
- **No hardware to purchase** - Your solution resides on Microsoft servers in the cloud, so you do not need to purchase and maintain your own hardware for AgilePoint.
- **Infinite scalability, on-demand** - Modify the size of your solution to fit your needs at any time.
- **Dedicated environment** - AgilePoint runs in your own Windows Azure virtual environment. Your AgilePoint implementation is not shared with any other organization or user.
- **Complete control** - Because this is a complete, dedicated AgilePoint solution, and not just a front-end UI, you can completely control your environment and configuration.
- **The right level of security for you** - Total control over your AgilePoint solution coupled with the instant, worldwide access of the cloud enables you to modify your security to meet your unique needs. Have a system that is open to anyone, or harden your solution to keep your processes private and secure.
- **Total extensibility** - You can extend AgilePoint BPMS for Cloud just as you would for an on-premises installation. Deploy your own AgileParts, AgileWorks, or AgileExtenders, connect through AgilePoint APIs, and integrate with external systems. This is an enormous advantage over a cloud-based solution that has a front-end UI only.

# Frequently Asked Questions

Find out more about AgilePoint BPMS for Azure, and get the answers to frequently asked questions.

## What is Windows Azure?

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[Windows Azure](#) is a cloud-based virtual environment built on the Windows platform. Windows Azure offers many options for deploying and running applications in the cloud, but AgilePoint uses an account that closely mimics a Microsoft Windows virtual machine with a dedicated SQL Server.

Running AgilePoint BPMS in Windows Azure is quite similar to running AgilePoint on your own dedicated servers, with the following important added benefits:

- Windows Azure greatly simplifies deployment of your AgilePoint solution.
- Windows Azure enables instant access worldwide (if desired).
- You can manage resources such as processing power and storage space through a simple, web-based management interface. There is no need to manage physical servers or an on-premises environment.

## When Should I Use AgilePoint BPMS for Azure?

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Use AgilePoint BPMS for Azure if your the following are among the highest priorities for your BPM solution:

- Scalability
- Change capacity based on peak loads
- Low hardware and infrastructure costs
- Reduced time for deployment
- Less time and money for maintenance
- Can have multiple service bus instances globally
- Reliability and very high availability

## When Should I Use On-Premises AgilePoint BPMS?

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While AgilePoint BPMS for Azure has many benefits, it may not be right for all customers. If the following conditions apply, you may want to consider using on premises AgilePoint BPMS:

- Precise timing is critical.

With AgilePoint BPMS for Azure, calls between process participants, AgilePoint Server, and third-party software are routed securely over the Internet. Performance over the Internet tends to be slower than on internal company networks.

- You require AgileForms for your form technology.

AgileForms is not currently supported for use with AgilePoint BPMS for Azure.

## How Do I Get Started Using AgilePoint BPMS for Azure?

To get started using AgilePoint BPMS for Azure, do the following:

1. Set up your Windows Azure account.
2. Request license and activation keys from AgilePoint.
3. Deploy AgilePoint BPMS for Azure.
4. Install the required software in your local environment.
5. Design your process in AgilePoint Envision.
6. Deploy the process to AgilePoint BPMS for Azure.

## What Are the Windows Azure Account Requirements?

The following are the minimum requirements for a Windows Azure account to support AgilePoint BPMS for Azure.

Account Option	Minimum Number Required
Web and Worker Role Instances	3, Small
Storage (Locally Redundant)	<ul style="list-style-type: none"> <li>● <b>Storage Size</b> - 25 GB</li> <li>● <b>Storage Transactions</b> - 1 million</li> </ul>
SQL Database	1 GB
Bandwidth	20 GB



**Note:** Windows Azure offers a free trial account, but the free trial account does not meet the minimum requirements for AgilePoint BPMS for Azure. The configuration options offered by Microsoft for Windows Azure for new accounts may change without notice.

## Is AgilePoint BPMS for Azure a Dedicated Service?

Each AgilePoint BPMS for Cloud implementation is dedicated to a single customer using the customer's own Windows Azure account. No other parties have access to or share resources with your system.

## How Does a Service Account Work?

AgilePoint BPMS for Azure requires 2 separate but related accounts:

- **Windows Azure** - You must create, maintain, and pay for your own Windows Azure account. This is analogous to prerequisite infrastructure, such as purchasing and maintaining hardware, operating systems, and third-party software for an on-premises installation.

Microsoft is responsible for Windows Azure pricing, but it is usually based on the size of your solution, and the services it includes.

- **AgilePoint BPMS for Azure** - AgilePoint BPMS for Azure is priced based on unique users, and their actual system usage, such as tasks or work items completed. AgilePoint will bill you for your AgilePoint BPMS for Azure usage separately from your Windows Azure account.

For the precise details of how AgilePoint BPMS for Azure usage is calculated, [contact AgilePoint Sales](#).

## How Can I Scale My Solution?

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Windows Azure enables nearly unlimited scalability on-demand. Scaling is simply a matter of increasing your processing capacity in Windows Azure through a simple web interface.

## What Database Can I Use?

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AgilePoint BPMS for Azure uses SQL Azure for its database. This is a cloud-based version of Microsoft SQL Server.

## How Can I Integrate My Custom Application?

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There are a number of flexible ways to integrate with AgilePoint BPMS, whether your AgilePoint Server is on-premise, or in the cloud. You can use APIs that connect to a web service, or you can write code that directly interfaces with AgilePoint Server using the WCF standard and AgilePoint's AgileConnector framework.

## What Third-Party Software Can AgilePoint BPMS for Azure Integrate With?

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AgilePoint BPMS for Azure can integrate with external systems at the UI layer, or the data layer.

### User Interface Integrations

AgilePoint BPMS for Azure can integrate with the following technologies and systems for the user interface:

In Cloud	On Premises
<ul style="list-style-type: none"> <li>• Office 365</li> <li>• ASP.NET</li> </ul>	<ul style="list-style-type: none"> <li>• SharePoint</li> <li>• ASP.NET</li> <li>• Dynamics CRM</li> </ul>

## Data Source Integrations

AgilePoint BPMS for Azure can integrate with the following technologies and systems as data sources:

In Cloud	On Premises
<ul style="list-style-type: none"> <li>• Office 365</li> <li>• Cloud Storage</li> </ul>	<ul style="list-style-type: none"> <li>• SharePoint</li> <li>• SAP</li> <li>• Active Directory</li> <li>• Database</li> </ul>

## How are Notifications Handled?

AgilePoint Server uses an SMTP server to send notifications. AgilePoint provides a public SMTP service, but you can use your own server configured to allow access to AgilePoint Server, or another public SMTP service of your choice.

## Can AgilePoint BPMS for Azure Integrate with AgilePoint On-Premises Installations?

AgilePoint BPMS for Azure engineering team is working quickly to introduce integration between AgilePoint BPMS for Azure and AgilePoint on-premises installations. Within the next few weeks, this support is expected to include the following functionality:

- On-premises SharePoint installation initiates a process that runs in AgilePoint Azure.
- Components similar to AgileParts that have built-in capabilities for communicating between AgilePoint BPMS for Azure and AgilePoint on-premises installations.

## What Windows Azure Services Are Required to Build a Process-Driven Application?

AgilePoint BPMS for Azure uses standard Azure services, such as hosted services, SQL Azure, and Storage. In the future AgilePoint BPMS for Azure will use the caching service.

Use of the AppFabric Access Control Service is optional, as you can choose the authentication mechanism that is right for your application.