Microsoft Office Client Integration

AgilePoint BPMS v5.0 R2 SP1

Document Revision r5.2.14

August 2014

Contents

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 *rX.Y.Z*. The letters and numbers in this revision number can be interpreted as follows:

- **r** - Indicates "revision." This helps to differentiate the document *version* numbers, which start with **v**.

- **X** - The major version number for AgilePoint BPMS to which this document refers. For example, AgilePoint releases 5.0, 5.0 SP1, and 5.5 would all have an **X** value of **5**.

- **Y** - The major document revision number. This number typically changes only when either there is a new AgilePoint release, or there are major changes to the document.

- **Z** - The minor document revision number. This number is incremented each time the document is republished.

AgilePoint Documentation in PDF and HTML

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

Advantages of HTML Documentation

- HTML is the **primary delivery format** for AgilePoint documentation.

- Unified, global **search** across all documentation. PDF documents allow you to search only within the context of a given PDF file.

- **All hyperlinks supported**. Links in PDFs are only supported in certain contexts.

- "One-stop shopping" for all information related to AgilePoint BPMS.

- The HTML documentation is updated more frequently than the PDF documentation. Web-based documentation is updated periodically between AgilePoint releases to address errors and omissions, but the PDF documentation is updated only at the time of a software release.

Advantages of PDF Documentation

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

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

Opening the Documentation Library

To open the AgilePoint Documentation Library, do the following.

Prerequisites

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

Instructions

1. Log on to the AgilePoint Support Portal.

2. Click **Documentation**.

3. On the **Documentation** page, click the documentation library for your AgilePoint release.

   - For AgilePoint BPMS v5.0 SP1 and higher, the web-based documentation library opens in a new tab or window in your web browser.

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

Finding Information in the Documentation Library

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

Using the Table of Contents

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

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

Searching

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

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

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

Tel: (650) 968 - 6789

Fax: (650) 968 - 6785

Email: info@agilepoint.com

Web site: www.agilepoint.com

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

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

Microsoft Office Client Integration

This document is a user's guide and reference to the features, functionality, usage, configuration, and administration of the AgilePoint Office Client Integration component of the AgilePoint BPMS Suite.

The AgilePoint Office Client Integration provides a ribbon of AgilePoint related action items directly embedded within the Office Client application itself. This functionality is provided for the following Microsoft Office Client Applications:

- Microsoft Office Word

- Microsoft Office Excel

- Microsoft Office PowerPoint

To access the AgilePoint ribbon, click the **AgilePoint** tab within the menu items of the Office Client application.

Submit for Approval/Review

The Submit for Approval/Review action item behaves in two ways depending on whether the document is a new document or if it is an existing document that has been opened for review and approval.

If the document is a new document, when clicking the **Submit for Approval/Review** button, the **Submit Document to SharePoint** window appears. From this window, you can submit the document directly to a SharePoint Document Library by specifying the URL and the document name.

If the document is one that has been opened for review and approval, when clicking the **Submit for Approval/ Review** button, the **Workflow Task** page appears. From this window, you can approve or reject the document.

Design Workflow

The Design Workflow action item allows you to access AgilePoint Envision to design a workflow.

My Tasks

The My Tasks action item allows you to access your SharePoint task list.

Available Workflows

The Available Workflows action item allows you to view a list of all workflows that have been deployed to AgilePoint Server.

Check Process

The Check Process action item allows you to view the AgilePoint Process Viewer and monitor a process in real-time.

View History

The View History action item allows you to view a history of the AgilePoint tasks relating to the process for which the document is associated.

Modify Setting

The Modify Setting action item allows you to change the AgilePoint Server URL and the SharePoint Document Library URL for extended flexibility when working with SharePoint.

Outlook Offline Integration

This document describes the Outlook Offline Integration component of the AgilePoint BPMS Suite. The Outlook Offline Integration is an add-in to Microsoft Outlook that allows users to integrate with AgilePoint Server though Microsoft Outlook.

AgilePoint Menu

A new AgilePoint menu is created in Outlook and consists of the following components.

Server Setting

Use the **AgilePoint > Server Setting** option to set up the AgilePoint Server connection.

The **Modify Setting** dialog box includes the following options:

- **AgilePoint Server Url** – The complete URL of the AgilePoint Server to which you want to connect.

- **SharePoint Document Library Url** – The complete URL of the SharePoint Document Library to which you want to connect.

- **Enterprise Manager Url** – The complete URL of your AgilePoint Enterprise Manager installation.

- **Document Cache** – The location on your local machine where you want to keep local copies of your AgilePoint files.

- **Hosting Mechanism** – The type of AgilePoint Server installation you are using – IIS or Windows Service.

Add New Personal Website

The **AgilePoint > Add New Personal Website** option creates a new AgilePoint source for Outlook synchronization. The source can be a SharePoint site or ASP.NET web application.

Note that you can synchronize documents off line for your primary SharePoint site only. You cannot use offline synchronization with additional personal web sites, or any ASP.NET applications.

- **Folder Name** – The name of the folder that appears in your Outlook folder list.

- **Website URL** – The URL of the web site you want to view in Outlook. This can be a SharePoint site or ASP.NET application.

- **Create** – The folder you specify is created in Outlook and points to the ASP .NET application URL or SharePoint URL.

Synchronize Tasks

The AgilePoint > Synchronize Tasks option synchronizes data between your local machine and the AgilePoint Server. Local documents are uploaded from your machine, and task lists, documents, and other data are

updated on your local machine for Outlook access. The items that are updated in Outlook are limited to those assigned to the Outlook user.

This data is located in the Outlook Workspace called AgilePoint Workspace. It creates a .pst file (AgilePointWorkSpace.pst) in the following location C:\Users\[user name]\AppData\Local\Microsoft\Outlook.

Updating Tasks

Once you click **AgilePoint > Synchronize Tasks**, the tasks in your My Tasks folder are updated. Click a task to open it, similar to an email message.

- **Modify File** – Opens a file related to a Task. To modify a file, click the **Modify File** link, make any required changes to the file, and then save it.

  Because Outlook integration works offline, the AgilePoint Submit button does not appear for InfoPath forms. You can only save the form.

- **View Process** – Opens a the process model for a task. After making changes to the file, change the **Status** to **Completed**, and then click **Save & Close**.