# AGILEPOINT

# System Requirements

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

Document Revision r5.0.14

October 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, refer to 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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**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

# System Requirements for AgilePoint BPMS for Azure

This document describes the minimum system requirements for AgilePoint BPMS for Azure, including:

● The Windows Azure account

● On-premises software components

Before installing any AgilePoint products, please ensure that your system meets the following **minimum** hardware and software requirements.

# Components in AgilePoint Product Suites

AgilePoint offers a variety of product suites, serving a range of customer needs. The following table shows the AgilePoint components that are included in various AgilePoint product versions.

> **Note:** AgilePoint BPMS components are not cross-compatible with multiple versions of the .NET Framework. For the supported versions of .NET for a particular component, see the system requirements.

| AgilePoint Component | AgilePoint Genesis Edition | AgilePoint BPMS Universal Edition | AgilePoint BPMS for .NET 3.5 | AgilePoint BPMS for .NET 4.0 | AgilePoint BPMS for Azure |
|---|---|---|---|---|---|
| AgilePoint Server | Yes | Yes | Yes | Yes | In Cloud |
| Clustering Server Manager | | Yes | Yes | Yes | In Cloud |
| Enterprise Manager | Yes | Yes | Yes | Yes | In Cloud |
| Envision | Yes | Yes | Yes | Yes | On-Premises |
| Developer | | Yes | Yes | Yes | On-Premises |
| SharePoint Integration | Yes | Yes | Yes | Yes | On-Premises |
| AgileForms | | Yes | Yes | Yes | |
| AgileReports | Yes | Yes | Yes | Yes | |
| AgileXRM AgilePoint Server Component | | Yes | | | |
| AgileXRM Process Manager | | Yes | | | |
| AgileDialogs | | Yes | | | |
| Dynamics CRM 2011 Integration | | Yes | | | |

| AgilePoint Component | AgilePoint Genesis Edition | AgilePoint BPMS Universal Edition | AgilePoint BPMS for .NET 3.5 | AgilePoint BPMS for .NET 4.0 | AgilePoint BPMS for Azure |
|---|---|---|---|---|---|
| AgileXRM Envision Component | | Yes | | | |
| AgileXRM Form Server (ALF) | | Yes | | | |
| AgileMonitor | | Yes | | | |
| AgileXRM SharePoint Integration | | Yes | | | |
| AgileXRM Developer SDK | | Yes | | | |

# Windows Azure Account

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) | ● **Storage Size** - 25 GB <br> ● **Storage Transactions** - 1 million |
| 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.

# AgilePoint Service Bus

This section provides detailed information about the specific supported system requirements for the AgilePoint Service Bus.

| | |
|---|---|
| Processor (CPU) | Dual-processor server |
| Memory (RAM) | 4 GB |
| Available Hard Disk Space | ● 150 MB |
| Other Hardware or Devices | ● A network connection with read and write access to the AgilePoint SQL Azure database<br>● NIC 1 GB or higher |
| Operating System | One of the following:<br>● Microsoft Windows 2003 Server 64 bit<br>● Microsoft Windows 2008 Server 64 bit<br>● Microsoft Windows 2008 Server R2 64 bit |
| Locally Installed Software | All of the following:<br>● Microsoft .NET Framework 3.5 SP1 or 4.0<br>● Windows Identify Foundation (WIF).<br>For more information, refer to Windows Identity Foundation  on the Microsoft Download Center.<br>● Microsoft Windows PowerShell<br>This is used to restart on premises Windows services for AgilePoint — for example, AgilePoint Server running in Windows Service mode on premises, or the AgilePoint Service Bus for AgilePoint BPMS for Azure. It is possible to use the Windows command line, but PowerShell is recommended because it provides more sophisticated functionality. For example, it waits for one command to complete before executing the next command. |

# AgilePoint Envision Requirements

This section provides information about the minimum system requirements for AgilePoint Envision.

| | |
|---|---|
| Processor (CPU) | Follow the requirements for your version of Microsoft Visio. |
| Memory (RAM) | ● 1 GB |
| Available Hard Disk Space | ● 50 MB<br>● This is in addition to the requirements (150+ MB) for Microsoft Visio |
| Other Hardware or Devices | ● A network connection |
| Operating System | One of the following:<br>● Microsoft Windows XP Professional SP3 or later<br>● Microsoft Windows Vista 32 bit<br>● Microsoft Windows Vista 64 bit<br>● Microsoft Windows 7 32 bit<br>● Microsoft Windows 7 64 bit<br>● Microsoft Windows 2003 Server 32 bit<br>● Microsoft Windows 2003 Server 64 bit<br>● Microsoft Windows 2008 Server R2 64 bit |
| Locally Installed Software | All of the following:<br>● Microsoft Visio 2010 (Standard, Professional, Architect, or Premium)<br><br>   ⓘ **Note:** When Visio is installed, the **.NET Programmability Support** option must be enabled.<br><br>● Microsoft Internet Explorer 6 - 10<br>● Microsoft .NET Framework 4.0 |

# AgilePoint Developer Requirements

This section provides detailed information about the specific supported system requirements for the AgilePoint Developer component of the AgilePoint BPMS Suite.

| | |
|---|---|
| Processor (CPU) | Follow the requirements for your version of Microsoft Visual Studio. |
| Memory (RAM) | ● 1 GB |
| Available Hard Disk Space | ● 100 MB<br>● This is in addition to the requirements (2-4 GB) for Microsoft Visual Studio |
| Other Hardware or Devices | ● A network connection |
| Operating System | One of the following:<br>● Microsoft Windows XP Professional SP3 or later<br>● Microsoft Windows Vista 32 bit<br>● Microsoft Windows Vista 64 bit<br>● Microsoft Windows 7 32 bit<br>● Microsoft Windows 7 64 bit<br>● Microsoft Windows 2003 Server 32 bit<br>● Microsoft Windows 2003 Server 64 bit<br>● Microsoft Windows 2008 Server R2 64 bit |
| Locally Installed Software | All of the following:<br>● Microsoft .NET Framework 4.0<br>● Microsoft Visual Studio 2010 |
| Other Software in the Environment | ● AgilePoint Envision<br>● One of the following:<br>    ● Microsoft Internet Explorer 6 - 10<br>    ● Mozilla Firefox 19.0 or earlier |

# AgilePoint SharePoint Integration Requirements

This section provides detailed information about the specific supported system requirements for the AgilePoint SharePoint Integration component of the AgilePoint BPMS Suite. The recommended requirements for this component vary greatly based on the intended usage of the product.

| | |
|---|---|
| Processor (CPU) | Dual-processor server |
| Memory (RAM) | 4 GB |
| Available Hard Disk Space | ● 50 MB<br>● This is in addition to the requirements for Microsoft SharePoint |
| Other Hardware or Devices | ● A network connection<br>● NIC 1 GB or higher |
| Operating System | One of the following:<br>● Microsoft Windows 2003 Server 32 bit<br>● Microsoft Windows 2003 Server 64 bit<br>● Microsoft Windows 2008 Server 32 bit<br>● Microsoft Windows 2008 Server 64 bit<br>● Microsoft Windows 2008 Server R2 64 bit |
| Locally Installed Software | All of the following:<br>● Microsoft .NET Framework 3.5 SP1<br>● Microsoft Office SharePoint Server 2010<br>  ● Foundation, Standard, or Enterprise<br><br>  ⓘ **Note:** Support for SharePoint MOSS 2007 is available with an additional support fee. |
| Other Software in the Environment | ● AgilePoint Server<br>● One of the following:<br>  ● Microsoft Internet Explorer 6 - 10<br>  ● Mozilla Firefox 19.0 or earlier<br>● AgilePoint Deployment Service (Optional) |