Windows Service Migration Guide

Migrating from IIS Mode to Windows Service Mode

AgilePoint BPMS v5.0 R2 SP1

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Preface

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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

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

Migrating from IIS Mode to Windows Service Mode

If you are using AgilePoint BMPS in IIS mode, you must migrate to Windows Service mode. AgilePoint BPMS began supporting the Windows Service with AgilePoint BPMS v5.0, released in May 2010. Support for IIS mode will end with the AgilePoint v6.0 release.

All new AgilePoint components support the Windows Service mode only. AgilePoint will not release any new installer for IIS mode. Only upgrades for existing AgilePoint components is supported. However, no new functionality added in IIS mode because most of them depend on WCF and REST APIs. This is in line with Microsoft best practices where all Microsoft components like SharePoint and CRM BizTalk have taken a similar approach, and new development functionality is available on its WCF/REST interface only.

For more information on upgrading the AgilePoint components, see Upgrade Guide.

AgilePoint recommends migrating from IIS mode to Windows Service mode, and also you must have to upgrade the latest release service pack of AgilePoint BPMS.

If you use AgilePoint BPMS v5.0 installers to reinstall the AgilePoint components, reapply the latest service pack after installation. Otherwise a conflict will occur between the old and the new versions of the assemblies.

Evaluating Your Process Templates

Before you migrate AgilePoint BPMS to Windows Service mode, you must evaluate your process templates to determine whether they use Web Service or WSE AgileShapes that consume the AgilePoint APIs. If they do, these processes will not work in Windows Service mode. You must save the configuration, so you can redesign them once the migration is complete.

To save your process configuration, do the following.

Prerequisites

- This change is required only if you use Web Service or WSE AgileShapes that consume the AgilePoint APIs.

Good to Know

- Migrating to WCF AgileShape does not affect custom web services used in the process, so do not replace Web Service AgileShapes with the WCF AgileShapes for custom web services.

- You can create a web service wrapper, which makes a call to Window Service API to avoid changing the process model.

- The WSE AgileShape will be deprecated in AgilePoint BPMS v6.0.

Navigation

1. In AgilePoint Envision, open a process template.

Instructions

1. If the process model has Web Service or WSE AgileShapes that consume the AgilePoint APIs save the configuration settings for the Web Service based AgileShapes. In particular, note the values or take screen captures of the following pages:

    - AgilePart - Common Setup

    - Properties for the Web Service AgileShape or WSE AgileShape.

    - Configuration settings on the Web Service Configuration Window, or for the WSE AgileShape.

2. When you have finished the migration, update your process templates with WCF AgileShapes, and configure them using the values you saved.

Configuring AgilePoint Envision for Windows Service Mode

To set up AgilePoint Envision for Windows Service mode, do the following.

Good to Know

- When installing AgilePoint Envision using v5.0 Installers, the installer provides an option to select the **Hosting Mechanism** key with the value of IIS or Windows Service.

Navigation

1. Click **Start > Run.**

2. In the **Open** field, type **regedit**.

3. Click **OK**.

4. In the **Registry Editor** window, do one of the following:

   - If you are using 32 bit Visio on a 32 bit machine or 64 bit Visio on a 64 bit machine, navigate to the following location: HKEY_LOCAL_MACHINE\SOFTWARE\Ascentn\Envision

   - If you are using 32 bit Visio on a 64 bit machine, navigate to the following location: HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Ascentn\Envision

Instructions

1. In the corresponding location, search for the **HostingMechanism** key, and change the value of the key to **WCF**.

   - If the HostingMechanism key is not present, add this key, and then set the value as WCF.

Configuring AgilePoint Developer for Windows Service Mode

To migrate AgilePoint Developer, do the following.

Navigation

1. Click **Start > Run.**

2. In the **Open** field, type **regedit**.

3. Click **OK**.

4. In the **Registry Editor** window, navigate to the following location: **HKEY_LOCAL_MACHINE\SOFTWARE \Wow6432Node\Ascentn\Developer**

Instructions

1. In the corresponding location, search for the **HostingMechanism** key, and change the value of the key to **WCF**.

   - If the HostingMechanism key is not present, add this key, and then set the value as WCF.

Migrating AgilePoint Server to Windows Service Mode

This section provides instructions for migrating an AgilePoint Server from IIS mode to Windows Service mode.

Backing Up AgilePoint Server Files

To back up AgilePoint Server files prior to migration, do the following.

Instructions

1. Create a backup copy of the following configuration files:
   - **[AgilePoint Server installation folder]\netflow.cfg**
   - **[AgilePoint Enterprise Manager installation folder]\web.config**
   - **[AgilePoint Server installation folder]\bin\[AgileConnector name]AgileConnector.dll.config**

Uninstalling AgilePoint Server

To uninstall AgilePoint Server, do the following.

Good to Know

- Uninstalling the AgilePoint Server component does not affect the workflow database.

Instructions

1. In Windows, use **Add or Remove Programs** to remove the following program:
   - **AgilePoint Server**

Uninstalling AgilePoint Enterprise Manager

To uninstall AgilePoint Enterprise Manager, do the following.

Prerequisites

1. Clear the cache in your web browser on any machine where you access Enterprise Manager.

2. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
   - Microsoft Internet Explorer
   - Microsoft IIS

Instructions

1. Delete the web application for Enterprise Manager.

2. In Windows, use **Add or Remove Programs** to remove the following program:

   - **AgilePoint Enterprise Manager**

Installing AgilePoint Server in Windows Service Mode

Install your version of AgilePoint Server in Windows Service mode. For more information, see Installation Guide.

If the installation instructions for your version of AgilePoint Server are not listed on this page, you can find older versions of the AgilePoint documentation on the AgilePoint Support Portal.

Upgrading AgilePoint BPMS to Your Current Version

Once the installation of AgilePoint WCF Server is complete, run the installer for your latest service pack.

To run the latest service pack to upgrade AgilePoint BPMS to your current version, see Upgrade Guide.

Reapplying Your Custom Configuration Files

To reapply your customized AgilePoint configuration files, do the following.

Instructions

1. Copy your **netflow.cfg** backup file, and paste it in [AgilePoint Server installation folder] to overwrite the new version.

2. Copy your **web.config** backup folder, and paste it in [AgilePoint Enterprise Manager installation folder] to overwrite the new version.

3. Copy your **AgileConnector.dll.config** backup file, and paste it in [AgilePoint Server installation folder]\bin to overwrite the new version.

Updating SharePoint Integration to Support Windows Service Mode

This section provides instructions for updating SharePoint Integration to support Windows Service mode.

Migrating from SharePoint Integration v1 to v2

If you are using SharePoint with AgilePoint BPMS in Windows Service mode, you must have AgilePoint SharePoint integration v2, which released with AgilePoint BPMS 4.7.

If you installed AgilePoint SharePoint Integration for the first time with an AgilePoint version prior to 4.7 release, you may be using AgilePoint SharePoint Integration v1. This is not a common scenario. Contact AgilePoint Professional Services to migrate from AgilePoint SharePoint Integration v1 to v2.

Updating the SharePoint Configuration List for Windows Service Mode

To update the AgilePoint SharePoint configuration list, do the following for all SharePoint web applications that are AgilePoint enabled.

Prerequisites

- Create a backup copy of SharePoint **web.config** file.

Navigation

1. Open an AgilePoint-enabled SharePoint site collection.

2. Navigate to the list of SharePoint lists within the site (for example, **Site Actions > View All Site Content**).

3. In the list of SharePoint lists, click **AgilePoint Configuration**.

Instructions

1. Change the value of the following key in the AgilePoint Configuration List. If the key is not present in the list, add the key in the AgilePoint Configuration List, and set the value of the key.

Application	Title	Value	Evaluation Versions
AgilePoint	HostingMechanism	Enter the type of AgilePoint installation you are using: • **WCF** – A Windows service installation.	For on-premises AgilePoint evaluation, this is not applicable

Application	Title	Value	Evaluation Versions
AgilePoint	WorkflowBindingUsed	Enter the type of binding that is used for Windows Service. This setting applies only if AgilePoint Server is running as a Windows Service. If AgilePoint Server is running in IIS mode, this setting is ignored. • WS HTTP - **WSHttpBinding_IWCFWorkflowService** • Basic HTTP (Windows Service Only) - **BasicHttpBinding_IWCFWorkflowService** • TCP (Windows Service Only) - **NetTcpBinding_IWCFWorkflowService**	For on-premises AgilePoint evaluation, this is not applicable.
AgilePoint	AdminBindingUsed	Enter the type of binding that is used for Windows Service. This setting applies only if AgilePoint Server is running as a Windows Service. If AgilePoint Server is running in IIS mode, this setting is ignored. • WS HTTP - **WSHttpBinding_IWCFAdminService** • Basic HTTP (Windows Service Only) - **BasicHttpBinding_IWCFAdminService** • TCP (Windows Service Only) - **NetTcpBinding_IWCFAdminService**	For on-premises AgilePoint evaluation, this is not applicable.

2. Run the Windows Service Client Utility Tool, against the SharePoint web.config file.

3. On the primary SharePoint machine, reset IIS.

AgileForms Configuration

AgileForms running with AgilePoint Server in IIS mode is not a common scenario because AgileForms was released after the Windows Service mode. However, if you have AgileForms in an IIS mode environment, do the following to migrate to a Windows Service environment.

Navigation

1. On the AgileForms Server machine, click **Start > All Programs > AgilePoint > AgileForms > AgileForms Configuration**.

2. Log on as required.

Instructions

1. On the **System** tab, modify the following field.

Field Name	Value
Hosting Mechanism	Windows Service

> **Note:** If the following message appears, run the Client Utility Tool from the AgilePoint installation program: "Failed to add Service model information in [path]\web.config. Please use SVCClient Utility tool to update it before using." For more information, see Run the Windows Service Client Utility Tool.

2. On the AgileForms Server machine, reset IIS.

Configuring Data Services for Windows Service Mode

To configure Data Services for Windows Service mode, do the following. Data Services installed in an IIS mode environment is not a common scenario.

Navigation

1. Click **Start > Run**, and enter **services.msc**.

2. In the **Services** window, right-click **AgilePointDataServices**, and click **Stop**.

3. Run the script **[AgilePoint Data Services installation folder]\DataServiceConfiguration.exe**.

Instructions

1. On the **AgilePoint Data Services Configuration** window, complete the following field.

Field Name	Value
Hosting Mechanism	Windows Service

> ⊘ **Note:** If the following message appears, run the Client Utility Tool from the AgilePoint installation program: "Failed to add Service model information in [path]\web.config. Please use SVCClient Utility tool to update it before using." For more information, see Run the Windows Service Client Utility Tool.

2. Start AgilePoint Data Service window service.

    For more information, see Start the Windows Service for Data Services.

AgilePoint Deployment Service

The AgilePoint Deployment Service is a Windows service that runs on the AgilePoint Server machine, and provides a WCF communication channel between the server and the client.

Installing AgilePoint Deployment Services is optional. For a fresh installation and upgrade, AgilePoint Deployment Services is installed as a separate component via the **AgilePoint Utilities and Other Support Files** section of the installer.

To migrate AgilePoint Deployment Services, do the following.

Instructions

1. Click **Start > Run**, and enter **services.msc**.

2. In the **Services** window, right-click **AgilePointDeploymentService**, and click **Stop**.

3. Run the Windows Service Client Utility Tool against **apds.exe.config** of AgilePoint Deployment Service.

4. Start AgilePoint Deployment Service.

Updating Your Process Templates

To update your process templates that consume APIs, do the following.

Prerequisites

- AgilePoint Server installed in Windows Service mode.

- Redesign of the process with WCF AgileShape is required only, when you have used the Web Service AgileShape in the process, which consumes AgilePoint APIs directly.

- Make sure you have noted down the configuration or taken the screen capture of the configuration window before migrating to WCF AgileShape.

Good to Know

- Migrating to WCF AgileShape does not affect any custom Web Services used in the process, so avoid replacing the Web Service AgileShape with the WCF AgileShape for custom Web Services.

- You can create a web service wrapper, which makes a call to window service API to avoid changing the process model.

Navigation

1. In AgilePoint Envision, open a process template that has Web Service or WSE AgileShapes that consume the AgilePoint APIs.

Instructions

1. Replace the Web Service AgileShape with the WCF AgileShapes.

2. Set up each WCF AgileShape you replace with you values you saved in the procedure Evaluating Your Process Templates.

Custom Coded Applications and ASP.NET Applications

If you have custom applications that consume the AgilePoint APIs, the code used to connect to the AgilePoint API will not work after migrating from IIS mode to Windows Service mode. These include custom applications such as web services, console application, windows services, or ASP.Net applications.

Consuming windows services requires adding few extra lines of code to make the application work with AgilePoint Server running in Windows Service mode.

Prerequisites

- These instructions do not apply for applications connecting through SharePoint.

Good to Know

- Custom AgileParts, AgileWorks, AgileConnectors and AgileExtenders not require any changes when migrating from IIS mode to Windows Service mode.

- AgilePoint recommends you contact Professional Services for help analyzing the custom coded application.

- If you followed the AgilePoint coding best practice to consume AgilePoint APIs, then few changes are required to support Windows Service mode.

- Follow the same procedures for all of your custom applications.

Analyzing Your Custom Application Code

To analyze the custom Application code, see how the WorkflowService and AdminService objects are created.

Usually, WorkFlow Service and Admin Service are created at a common place inside a common method and called to all other places in the application.

The methods that create the WorkFlow Service and Admin Service must be implemented using IWFWorkflowService and IWFAdminService interfaces.

Code Examples: Creating AgilePoint API objects using Interfaces

The code examples in this topic show how to create AgilePoint API objects using Interfaces.

Example 1: GetAdminService

```
public IWFAdminService GetAdm()
{
    System.Net.ICredentials credentials = credentials = new
    System.Net.NetworkCredential(username, password, domainname);
    if (credentials == null) return m_adm;
    string locale = "en-US";// Set locale us value
    string hostingMechanism = null;
```

```
      if
 (String.IsNullOrEmpty(ConfigurationSettings.AppSettings["HostingMechanism"]))
                 hostingMechanism = "IIS";
     else
         hostingMechanism =
 (String)ConfigurationSettings.AppSettings["HostingMechanism"];
     if (hostingMechanism.ToLower() != "wcf")
     {
         string agilePointServerURL =
 (String)ConfigurationSettings.AppSettings["ServerUrl"];
         if (!agilePointServerURL.EndsWith("/")) agilePointServerURL += "/";
         System.Net.CookieContainer cookieContainer = new
 System.Net.CookieContainer();
         AdminService m_adm_temp = new AdminService();
         m_adm_temp.Url = agilePointServerURL + "Admin.asmx";
         m_adm_temp.Credentials = credentials;
         m_adm_temp.CookieContainer = cookieContainer;
         m_adm_temp.Timeout = 1000 * 60 * 60;
         m_adm_temp.SetClientAppName("SampleClient");
         m_adm_temp.SetClientLocale(locale);
         m_adm = m_adm_temp;
     }
     else
     {
         string user = domainname + @"\" + username;
         string adminBinding =
 (String)ConfigurationSettings.AppSettings["AdminBindingUsed"];
         m_adm = new WCFAdminProxy("SampleApplication", "CSC-NINE", locale, user,
 credentials, adminBinding);
         String username = m_adm.CheckAuthenticated();
     }
         return m_adm;
}
```

Example 2: GetWorkflowService

```
public IWFWorkflowService GetApi()
{
    System.Net.ICredentials credentials = credentials = new
    System.Net.NetworkCredential(username, password, domainname);
    string locale = "en-US"; // Set locale value
    string hostingMechanism = null;
    if
 (String.IsNullOrEmpty(ConfigurationSettings.AppSettings["HostingMechanism"]))
        hostingMechanism = "IIS";
    else
        hostingMechanism =
 (String)ConfigurationSettings.AppSettings["HostingMechanism"];
    if (hostingMechanism.ToLower() != "wcf")
    {
    string agilePointServerURL =
 (String)ConfigurationSettings.AppSettings["ServerUrl"];
    if (!agilePointServerURL.EndsWith("/")) agilePointServerURL += "/";
        System.Net.CookieContainer cookieContainer = new
 System.Net.CookieContainer();
        WorkflowService m_api_temp = new WorkflowService();
        m_api_temp.Url = agilePointServerURL + "Workflow.asmx";
        m_api_temp.Credentials = credentials;
        m_api_temp.CookieContainer = cookieContainer;
        m_api_temp.Timeout = 1000 * 60 * 60;
        m_api_temp.SetClientAppName("MyApplication");
```

```
        m_api_temp.SetClientLocale(locale);
        m_api = m_api_temp;
    }
    else
    {
        string user = domainname + @"\" + username;
        string workflowBinding =
 (String)ConfigurationSettings.AppSettings["WorkFlowBindingUsed"]; // WCF Binding
 used
        m_api = new WCFWorkflowProxy("MyApplication", "CSC-NINE", locale, user,
 credentials, workflowBinding);
        m_api.CheckAuthenticated();
    }
        return m_api;
}
```

Code Examples: Consuming the AgilePoint API Running in Window Service Mode

The code examples in this topic show how to consume an AgilePoint API running in Window Service mode.

Example 1: GetAdminService

```
public IWFAdminService GetAdm()
{
…
…..
…….
string hostingMechanism = null;
    if
 (String.IsNullOrEmpty(ConfigurationSettings.AppSettings["HostingMechanism"]))
            hostingMechanism = "IIS";
    else
        hostingMechanism =
 (String)ConfigurationSettings.AppSettings["HostingMechanism"];

    if (hostingMechanism.ToLower() != "wcf")
    {
        //CODE Snippet for creating WorkFlowService object in AgilePoint WebService
 (IISVersion)
        ………
        …….
    }
    else
    {
        string user = domainname + @"\" + username;
        string adminBinding =
 (String)ConfigurationSettings.AppSettings["AdminBindingUsed"];
        m_adm = new WCFAdminProxy("SampleApplication", "CSC-NINE", locale, user,
 credentials, adminBinding);
        String username = m_adm.CheckAuthenticated();
    }
…
…
…
}
```

Example 2: GetWorkflowService

```
public IWFWorkflowService GetApi()
{
 ……
 ……
 ….
string hostingMechanism = null;
    if String.IsNullOrEmpty(ConfigurationSettings.AppSettings["HostingMechanism"]))
         hostingMechanism = "IIS";
    else
      hostingMechanism =
 (String)ConfigurationSettings.AppSettings["HostingMechanism"];
    if (hostingMechanism.ToLower() != "wcf")
    {
      //CODE Snippet for creating WorkFlowService object in AgilePoint WebService
 (IISVersion)
 ………
 …….
    }
    else
    {
      // CODE snippet for creating WorkFlowService object in AgilePoint WCF
 version.
   string user = domainname + @"\" + username;
   string workflowBinding =
 (String)ConfigurationSettings.AppSettings["WorkFlowBindingUsed"]; // WCF Binding
 used
   m_api = new WCFWorkflowProxy("MyApplication", "CSC-NINE", locale, user,
 credentials, workflowBinding);
   m_api.CheckAuthenticated();
    }
….
….
}
```