



Installation Guide

OnPremises and Private Cloud

AgilePoint NX v9.0 SP1

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Legal Statements and Policies

This section provides legal statements and general policies for AgilePoint software and documentation.

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AgilePoint recognizes that viruses are a significant security consideration for our customers. AgilePoint takes the following measures to make sure 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 compiled and packaged software files are scanned by virus scanning software before they are released. An official disclosure document regarding the findings from our virus scanning activities is available upon request.

External Links in Documentation

AgilePoint, Inc. user resources, such as Product Documentation and community forums, sometimes include links or URLs that AgilePoint does not control. Third-party web sites are referenced for convenience only. AgilePoint has no control over these external web sites, so we cannot make any representations about their accuracy or guarantee their security, such as the potential presence of malware. You assume any and all risks associated with visiting non-AgilePoint URLs.

Install AgilePoint NX

This section provides instructions to install the software components for AgilePoint NX on premises.

Set Up Your Environment for AgilePoint NX (Pre-Installation)

This section explains how to prepare your environment to install [AgilePoint NX](#).

AgilePoint requires that you complete **all** of the instructions pre-installation instructions that apply to your environment before attempting to install any components of the AgilePoint BPMS Suite. If an procedure does not apply in some environments, these are noted in the **Prerequisites** section within the topic.

Determine the Installation Machines

The AgilePoint software components must be installed on specific machines in your environment designated by you.

These are the machines to install the AgilePoint software components:

- AgilePoint Server machines

In AgilePoint NX v9.0 and higher, the AgilePoint NX Portal, AgilePoint NX Analytics, and SAP Connector components are installed on the AgilePoint Server machine.

- Data Services

Data Services is usually installed on the primary AgilePoint Server machine, but it can be installed on a separate machine.

- AgilePoint NX Developer machines
- Primary SharePoint server

Verify System Requirements

Before installing any of the AgilePoint components, please make sure each computer meets the hardware and software requirements for your version of AgilePoint. For more information, refer to [System Requirements](#).

Obtain AgilePoint License Keys

Some AgilePoint components require a license key. When you sign up for an AgilePoint account or purchase AgilePoint software, AgilePoint will send you the license keys for the components you purchased.

Good to Know

- A license key is required when you install one of these components:
 - AgilePoint Server
 - The AgilePoint SAP Connector for AgilePoint Server
 - AgilePoint NX Developer
- For information about applying and activating the license keys, refer to [Obtain, Apply, and Activate AgilePoint License Keys](#).

Procedure

Acquiring AgilePoint license keys requires a purchase of the product or service, or an approval for a trial license key. This process is handled through AgilePoint Sales. You may need to work with a primary contact in your organization who has worked with AgilePoint Sales to acquire the license keys. For more information, contact AgilePoint Sales.

After an initial license purchase or the approval for a trial license, license keys can be acquired from AgilePoint Customer Support. For more information, [contact AgilePoint Support](#).

When you request a new license key, please provide the following information:

- Your name.
- The name of your company or organization.
- The version numbers and the names of the AgilePoint products that you plan to install.
- The type of license keys. Types may include valuation, Development, Production, or Clustered. If you are not sure, AgilePoint can help you determine the license type.
- The number of physical or virtual machines on which you plan to install each component.
- If you are requesting a license key as a replacement for a previously issued license key, provide the original license key.

AgilePoint will send an email with information about the license key, including any necessary instructions to apply the license key in your environment. The license key is usually provided as a secure download link, but other methods are available upon request.

If you submit a request for a license key, please allow at least 1 full business day to receive the license key.

Set Up the AgilePoint Service Account

An AgilePoint solution is comprised of a number of software components that all must communicate with one another. This topic shows the systems and permissions that are required for various AgilePoint administrator accounts.

Good to Know

- During installation, you must use the same AgilePoint Service account credentials for all AgilePoint systems. However, for security purposes, AgilePoint recommends you change separate these account credentials after installation.

For more information, refer to:

- [Administrator Types](#)
- [How Do I Change the Credentials for AgilePoint Administrator Accounts?](#)

AgilePoint Service Account Permissions

System	Permissions	Notes
AgilePoint Server Machines	<ul style="list-style-type: none"> • Local administrator • ServiceLogon • Member of the following groups: <ul style="list-style-type: none"> ◦ Administrator ◦ Performance Monitor Users ◦ IIS_IUSRS 	<ul style="list-style-type: none"> • This user account will also be used to initially sign in to AgilePoint NX. • If you are installing AgilePoint Server on a Domain Controller, this cannot be a local administrator account.
Database	<ul style="list-style-type: none"> • db_owner privileges 	<p>During installation, AgilePoint requires db_owner privileges in SQL Server to create the tables required on the data-base. For security purposes, after finishing the AgilePoint Server configuration, you can remove the AgilePoint Server service account from the db_owner role in order to disallow the Create table priv-</p>

System	Permissions	Notes
		<p>ilege. Instead you can add this user to the db_datareader and db_datawriter role memberships. Please note that when updating the database schema in the future (e.g. for an upgrade), you will need to add this account back to the db_owner role in order for the database schema to be updated</p> <p>It is recommended to configure permissions for the SQL database account for AgilePoint, which grants INSERT, UPDATE, DELETE and SELECT, ... by schema (namespace), ONLY on AgilePoint tables at the database level, instead of using the generic dbo schema to restrict access.</p>
SharePoint	<ul style="list-style-type: none"> • Member of the following groups: <ul style="list-style-type: none"> ◦ SharePoint Farm Administrators (applies to SharePoint Farm only) ◦ Site Collection Administrators 	<ul style="list-style-type: none"> • When AgilePoint Server is installed, by default these privileges are associated with the AgilePoint Service Account. However, for security purposes, AgilePoint recommends separating this account from the AgilePoint Service Account to create a unique SharePoint account for the AgilePoint system. This account is sometimes referred to as the SharePoint impersonator. • AgilePoint recognizes that adding this user to the SharePoint Site Collection Administrators group does not follow the least-privileged account best practice. If you want to make sure you are following this best practice, make sure this account has at least has Contribute rights on each SharePoint site where Lists, Document Libraries or Form Libraries are associated to an AgilePoint process. <p>Usually, it's enough to add that this account to the [Site Collection Name]</p>

System	Permissions	Notes
		<p>Members SharePoint Group. However, you must:</p> <ul style="list-style-type: none"> ◦ Make sure that group has Contribute rights on SharePoint. ◦ Make sure inheritance is not broken on sub-sites as that might prevent that Impersonator account to access those sub-sites – it would have to be added to the Members role of each of those sub-sites that break inheritance with their parent site.
Data Services Machine	<ul style="list-style-type: none"> • Local administrator • ServiceLogon 	<ul style="list-style-type: none"> • This machine may be the same as the AgilePoint Server machine.

Add the Log on as a service Right to the AgilePoint Service Account

To add the **Log on as a service** right to the [AgilePoint Service Account](#), do the procedure in this topic.

How to Start

1. To open **Local Security Policy**, click **Start > Control Panel > Administrative Tools**.
2. Double-click **Local Security Policy**.

Procedure

1. In the console tree, double-click **Local Policies**.
2. Click **User Rights Assignment**.
3. In the details pane, double-click **Log on as a service**.
4. Click **Add User or Group**.
5. In the list of accounts that possess the **Log on as a service** right, add the AgilePoint Service Account.

Create Databases for AgilePoint NX

AgilePoint requires two or more [databases](#), depending upon the AgilePoint NX components you install. You must create these databases on your database server.

Prerequisites

- Configure the database administrator account.

For information about [authentication](#) for the database, see [Set Up the AgilePoint Service Account](#).

Good to Know

- AgilePoint recommends that you create the databases before installing your AgilePoint components. If you have not created the database before installation, you may be able to create the database during the installation process, but only under the following conditions:
 - You are installing the component on the same physical machine as your database server.
 - The user account that you are using during installation has db_owner privileges on the database server.
- Regardless of whether you create the AgilePoint database before or during AgilePoint Server installation, it is only necessary to create the database. The database tables are created automatically during installation.
- It is recommended to configure permissions for the SQL database account for AgilePoint, which grants INSERT, UPDATE, DELETE and SELECT, ... by schema (namespace), ONLY on AgilePoint tables at the database level, instead of using the generic dbo schema to restrict access.

How to Start

1. Make sure your SQL Server is up and running.
2. Open the SQL Server Management Studio:
 - a. On the [AgilePoint Server machine](#), click **Start**, and enter **SSMS**.
 - b. On the search results, click **SQL Server Management Studio**.

Procedure

Repeat the following instructions to create the databases listed in the AgilePoint Databases section, depending upon the AgilePoint components you want to install.

1. In SQL Server Management Studio, right-click **Databases > New Database**.
2. On the **New Database** screen, enter a database name.

AgilePoint Databases

Component	Database Name (Suggested but Optional)	Database Optional for Component?	Function
Workflow Database	AP_Workflow_DB	No	Stores application data in AgilePoint NX. This is the main AgilePoint NX database.
Data Entities	AP_Data_Entities_DB	No	Stores the data for the Data Entities component.
Data Services	AP_Data_Svcs_DB	Yes	<p>An AgilePoint server-side application that stores data you want to track and report in AgilePoint apps.</p> <p>After your installation is complete, if you want to use advanced mode, create a table that is named based on the app, and create the table columns based on the fields from the form. The Primary Key should be the process instance ID (type varchar 50).</p>
Analytics Center	AP_Analytics_DB	No	The database for Analytics Center .

Reserve Port Numbers for AgilePoint NX Components

AgilePoint NX requires certain port numbers to be available for various AgilePoint components and services.

Good to Know

- Once your installation is complete, you must set up firewall rules to accommodate all of these ports.
- All port numbers depend upon whether you are installing the associated AgilePoint NX component.

AgilePoint Port Numbers

Field Name	Definition
WSHttp Port	<p><u>Description:</u></p> <p>A free, unique port AgilePoint Server instance can use for WSHttp binding.</p> <p>This field is required.</p> <p><u>Allowed Values:</u></p> <p>A port number on your machine for WSHttp binding.</p> <p>The port number must be unique (not used for any other purpose) and higher than 10000.</p> <p><u>Default Value:</u></p> <p>13487</p>
TCP Port	<p><u>Description:</u></p> <p>A free, unique port AgilePoint Server instance can use for TCP binding.</p> <p>This field is required.</p> <p><u>Allowed Values:</u></p>

Field Name	Definition
	<p>A port number on your machine for TCP binding.</p> <p>The port number must be unique (not used for any other purpose) and higher than 10000.</p> <p><u>Default Value:</u></p> <p>13488</p>
BasicHttp Port	<p><u>Description:</u></p> <p>A free, unique port AgilePoint Server instance can use for BasicHttp binding.</p> <p>This field is required.</p> <p><u>Allowed Values:</u></p> <p>A port number on your machine for BasicHttp binding.</p> <p>The port number must be unique (not used for any other purpose) and higher than 10000.</p> <p><u>Default Value:</u></p> <p>13489</p>
REST Port	<p><u>Description:</u></p> <p>A free, unique port AgilePoint Server instance can use for REST API calls.</p> <p><u>Allowed Values:</u></p> <p>A port number on your machine for REST API calls.</p> <p><u>Default Value:</u></p> <p>13490</p> <p><u>Limitations:</u></p> <p>If you use AgilePoint NX OnPremises, the REST URL for your AgilePoint Server instance must be configured to use the default HTTPS port number 443 to associate AgilePoint workflows with SharePoint lists and libraries in the AgilePoint Intelligent Process Automation</p>

Field Name	Definition
	app for Microsoft 365. When AgilePoint NX OnPremises is installed, the default REST port is 13490. However, the endpoint for the Intelligent Process Automation app must be accessible through the default port number used for HTTPS communication by Microsoft 365.
AgilePoint NX Portal	<p><u>Description:</u></p> <p>A free, unique port AgilePoint Server instance can use for connection of client (end user) web browsers to the AgilePoint NX Portal.</p> <p><u>Allowed Values:</u></p> <p>A port number on your machine for AgilePoint NX Portal.</p> <p><u>Default Value:</u></p> <p>13491</p>
Analytics Center	<p><u>Description:</u></p> <p>A free, unique port AgilePoint Server instance can use for connection to the Analytics Center component.</p> <p><u>Allowed Values:</u></p> <p>A port number on your machine for Analytics Center.</p> <p>This port requires access for all of your users who use reports in AgilePoint NX.</p> <p><u>Default Value:</u></p> <p>13492</p>

Configure Node.js To Communicate Through the Firewall

To allow Node.js to communicate through the firewall, do the procedure in this topic. This procedure must be completed on all [AgilePoint Server machines](#):

Prerequisites

- Node.js is installed.

Procedure

1. On the AgilePoint Server machine, search **Allow an app through windows firewall**.
2. On the **Allow apps to communicate through Windows Defender Firewall** screen, click **Allow another app...**
3. Open the file **nodejs\node.exe**.
4. Click **Add**.
5. On the **Allow apps to communicate through Windows Defender Firewall** screen, select **Node.js JavaScript Runtime**.
6. For **Node.js JavaScript Runtime**, select **Private**.
7. Click **Ok**.

Turn Off User Account Control (UAC)

To turn off User Account Control (UAC), do the procedure in this topic.

Good to Know

- This procedure must be completed on these machines:
 - AgilePoint Server machines
 - AgilePoint NX Developer machines
 - Primary SharePoint server

Procedure

1. On each machine where an AgilePoint component is installed, turn off UAC.

The procedure for this varies based on your version of Windows. As an example, in Windows 7 do the following:

 - a. Click **Start > Control Panel > User Accounts > Change User Account Control Settings**.
 - b. On the slider, select **Never notify**, and click **OK**.
2. Restart the machine.

Verify Windows Process Activation Service (WAS) is Turned On

Before you install AgilePoint, make sure Windows Process Activation Service (WAS) is turned on.

How to Start

1. On the [AgilePoint Server machine](#), open **Server Manager**.

Procedure

1. On the **Server Manager** screen, click **Manage > Add Roles and Features**.
2. On the **Add Roles and Features Wizard** screen, on the **Before You Begin** tab, click **Next**.
3. On the **Installation Type** tab, select **Role-based or feature-based installation**.
4. Click **Next**.
5. On the **Server Selection** tab, select **Select a server from the server pool**.
6. On the **Server Pool** section, select your server.
The server name is the name of machine where the AgilePoint Server is installed.
7. Click **Next**.
8. On the **Server Roles** tab, click **Next**.
9. On the **Features** tab, in the **Features** section, make sure **Windows Process Activation Service > Process Model** is selected.
10. On the **Confirmation** tab, click **Next**.
11. Click **Install**.

Download Installation Files to the Local Machine

To install AgilePoint NX, download the installation package to your [AgilePoint Server machine](#).

Good to Know

- The default location for the installer is C:\AgilePoint. It is recommended that you decompress the installation package directly under you C:\ drive folder. The installation file path must be fewer than 50 characters.
- After you download an installation or upgrade package from AgilePoint, before you extract the package, make sure the file is not blocked by Windows:
 1. Right-click the installation package file, and click **Properties**.
 2. On the file properties screen, select **Unblock**.
- If you do attempt to install when the installation files are located on a network drive (or some other remote location), the setup application may fail to run with an error message similar to the following:

“An exception 'System.Security.Policy.PolicyException' has occurred in Setup.”

Obtain SMTP Server Information

During your [AgilePoint Server](#) installation, you will need the following information about your SMTP email server. If required, request this information from your system administrator, so you have it ready during installation.

Field Name	Definition
SMTP Server	<p><u>Description:</u> The URL for the SMTP email server for your organization.</p> <p><u>Allowed Values:</u> One line of text (a string) in URL format.</p> <p><u>Default Value:</u> None</p>
System User Email	<p><u>Description:</u> Specifies the email address for the AgilePoint System Account. This email address receives technical notifications from the AgilePoint NX system, such as important system errors.</p>

Field Name	Definition
	<p><u>Allowed Values:</u></p> <p>One line of text (a string) in email address format.</p> <p><u>Default Value:</u></p> <p>None</p>

Create Aliases for AgilePoint Server Machines

Before you install AgilePoint, make sure that your [AgilePoint Server machines](#) use aliases, rather than IP addresses. This is strictly required for environments that use multiple AgilePoint Servers in network load balancing (NLB) configurations, but for single server installations, it is highly recommended.

Good to Know

- Server aliases are a recommended best practice. If after you install AgilePoint Server on multiple machines, the machines cannot communicate using aliases, you can configure the servers to use IP addresses.

For more information, refer to [Configuring Ascentn.AgilePoint.WCFService.exe.config](#)

Procedure

1. Create aliases for your AgilePoint Server machines.

The physical hardware is normally abstracted using DNS or FQDN entries registered on the network.

2. To verify that the proper entries have been created and are available on the network, ping the DNS Name or FQDN and make sure that the correct IP address is returned.

Verify NLB Configuration and Functionality

AgilePoint can be installed in an NLB environment. If you are planning an NLB environment installation, verify that the NLB environment is configured properly.

Prerequisites

- These instructions do **not** apply to the following installation scenarios:
 - Single server (non-NLB) environment

Procedure

1. Make sure your NLB is configured properly.

If [AgilePoint Server](#) needs to be installed on a Web site other than the default Port 80 site, make sure all the Web sites are mirror images of each other including the Port numbers.

For more information, refer to:

- [Network Load Balancing Deployment Guide for Windows Server 2008, 2008 R2, or 2012](#)
2. On AgilePoint Servers in an NLB environment, double loopback check must be disabled for the AgilePoint Server machines.

For more information, refer to [401 Error when Connecting to SharePoint](#).

Set Up IIS

On the [AgilePoint Server machine](#), complete the following procedures to make sure IIS is set up to support AgilePoint.

Install Static Content in IIS

To install the Static Content feature in IIS, do the procedure in this topic.

Prerequisites

- IIS is installed in your environment.
- You are installing [Analytics Center](#).

This is required for web-based applications, but it needs to be completed only once per machine where the web-based applications are running.

Good to Know

- This topic describes the procedure in Windows Server 2019 and IIS 10.0. These procedures change slightly between Windows versions, but the concepts are the same.

How to Start

1. On the [AgilePoint Server machine](#), open **Server Manager**.

Procedure

1. On the **Server Manager** screen, click **Manage > Add Roles and Features**.
2. On the **Add Roles and Features Wizard** screen, on the **Before You Begin** tab, click **Next**.
3. On the **Installation Type** tab, select **Role-based or feature-based installation**.
4. Click **Next**.
5. On the **Server Selection** tab, select **Select a server from the server pool**.
6. On the **Server Pool** section, select your server.

The server name is the name of machine where the AgilePoint Server is installed.

7. Click **Next**.
8. On the **Server Roles** tab, in the **Roles** section, expand **Web server (IIS) > Web Server > Common HTTP Features**.
9. Select **Static Content**.
10. Click **Next**.
11. On the **Features** tab, click **Next**.
12. On the **Confirmation** tab, click **Next**.
13. Click **Install**.

Verify IIS World Wide Web Publishing Service (W3SVC) is Turned On

Before you install AgilePoint, make sure IIS World Wide Web Publishing Service (W3SVC) is turned on.

Prerequisites

- IIS is installed in your environment.

How to Start

1. On the [AgilePoint Server machine](#), open **Server Manager**.

Procedure

1. On the **Server Manager** screen, click **Tools > Services**.
2. On the **Services** screen, make sure **World Wide Web Publishing Service** is running.
If World Wide Web Publishing Service is not started, do the following:
 - a. Right-click **World Wide Web Publishing Service**.
 - b. Click **Restart**.

Verify IIS 6 Management Compatibility Role Service

To verify the IIS 6 Management Compatibility Role Service, do the procedure in this topic.

Prerequisites

- IIS is installed in your environment.
- You are installing [Analytics Center](#).

This is required for web-based applications, but it needs to be completed only once per machine where the web-based applications are running.

Good to Know

- This topic describes the procedure in Windows Server 2019 and IIS 10.0. These procedures change slightly between Windows versions, but the concepts are the same.

How to Start

1. On the [AgilePoint Server machine](#), open **Server Manager**.

Procedure

1. On the **Server Manager** screen, click **Manage > Add Roles and Features**.
2. On the **Add Roles and Features Wizard** screen, on the **Before You Begin** tab, click **Next**.
3. On the **Installation Type** tab, select **Role-based or feature-based installation**.
4. Click **Next**.
5. On the **Server Selection** tab, select **Select a server from the server pool**.

6. On the **Server Pool** section, select your server.
The server name is the name of machine where the AgilePoint Server is installed.
7. Click **Next**.
8. On the **Server Roles** tab, in the **Roles** section, expand **Web server (IIS) > Management Tools**.
9. Make sure **IIS 6 Management Compatibility** and its child options are selected.
10. Click **Next**.
11. On the **Features** tab, click **Next**.
12. On the **Confirmation** tab, click **Next**.
13. Click **Install**.

Verify the ASP.NET Server Role is Installed

Before you install AgilePoint, make sure the service ASP.NET 4.8 Server Role is installed.

Prerequisites

- IIS is installed in your environment.

How to Start

1. On the [AgilePoint Server machine](#), open **Server Manager**.

Procedure

1. On the **Server Manager** screen, click **Manage > Add Roles and Features**.
2. On the **Add Roles and Features Wizard** screen, on the **Before You Begin** tab, click **Next**.
3. On the **Installation Type** tab, select **Role-based or feature-based installation**.
4. Click **Next**.
5. On the **Server Selection** tab, select **Select a server from the server pool**.
6. On the **Server Pool** section, select your server.
The server name is the name of machine where the AgilePoint Server is installed.
7. Click **Next**.
8. On the **Server Roles** tab, in the **Roles** section, expand **Web server (IIS) > Web Server > Application Development**.

9. Make sure **ASP.NET 4.8** is selected.
10. Click **Next**.
11. On the **Features** tab, click **Next**.
12. On the **Confirmation** tab, click **Next**.
13. Click **Install**.

Reset IIS

To complete the IIS setup, do the procedure in this topic.

Procedure

1. On the [AgilePoint Server machine](#), reset IIS.

Set Up SharePoint

Please make sure the following items are installed and configured properly on the [SharePoint](#) machine.

Add the AgilePoint Service Account to the SharePoint Farm Administrators Group

To add the [AgilePoint Service Account](#) to the Farm Administrators group on the SharePoint server machine, do the procedure in this topic.

Prerequisites

- SharePoint in an on-premises environment.
- A SharePoint Farm environment.

How to Start

1. Navigate to SharePoint Central Administration on your [SharePoint](#) site.
2. In SharePoint Central Administration, click **Security > Manage the farm administrator group**.

Procedure

1. On the **People and Groups > Farm Administrators** screen, click **New > Add Users**.
2. On the **Share Central Administration** screen, enter the username for the [AgilePoint Service Account](#).
3. Click **Share**.

Create a SharePoint Web Application

Determine which [SharePoint](#) web application will be used for the AgilePoint [SharePoint Integration](#). If a SharePoint web application to be used for the AgilePoint SharePoint Integration is not already created, you will need to create one.

To create a new SharePoint web application, do the procedure in this topic.

Prerequisites


- These instructions apply only if you plan to install [SharePoint Integration](#), which is an optional component.

How to Start

1. From the **SharePoint Central Administration** page, click the **Application Management** tab.

Procedure

1. In the **SharePoint Web Application Management** section, click the **Create or extend Web application** link.
2. Click the **Create a new Web application** link. The **Create New Web Application** page appears.
3. In the **IIS Web Site** section, it is recommended to select the **Create a new IIS web site** option and use the default **Port** number and **Path**. If necessary, specify a **Host Header** name.

 If your [AgilePoint Server](#) instance uses HTTPS, to use [on-premises SharePoint](#), the web application for your SharePoint site must be configured to use HTTPS.

4. In the **Security Configuration** section, select either **NTLM** or **Kerberos** depending on your preferred network authentication mode.
5. In the **Load Balanced URL** section, accept the default values.
6. In the **Application Pool** section, it is recommended to create a new unique application pool for this Web site. When entering a security account, use a different local administrator account (not the AgilePoint System User account).

! You can choose not to use a local administrator account. However, this requires additional configuration. For more information, refer to [How Do I Connect On-Premises SharePoint Integration to the Windows Event Log?](#).

7. In the **Reset Internet Information Services** section, accept the default value.
8. In the **Database Name and Authentication** section, accept the default values.
9. Click **OK**. The **Application Created** page appears.
10. Click the **Create Site Collection** link.
11. Complete the fields as desired. For the Site Collection Administrator, it is recommended to not use the same name that was used as the Identity account for the application pool.
12. After the Top-Level site is created, click **OK**.

Disable Double Loopback Check

If user-friendly URLs are used on the [SharePoint](#) site, then double loopback check needs to be disabled for the SharePoint server machine.

Prerequisites

- These instructions apply only if you plan to install [SharePoint Integration](#), which is an optional component.
- User-friendly URLs are used on the SharePoint site.

More Information

Please refer to the following Microsoft Knowledge Base article for more information:

<https://mskb.pkisolutions.com/kb/896861>

Verify the SharePoint Configuration

To verify the [SharePoint](#) is installed and configured appropriately, do the procedure in this topic.

Prerequisites

- These instructions apply only if you plan to install [SharePoint Integration](#), which is an optional component.

Procedure

1. Browse a SharePoint page from the following locations:
 - The SharePoint machine.
 - The AgilePoint Server machine.
 - Client machines.

Install AgilePoint Server

To install [AgilePoint Server](#) for AgilePoint NX, do the procedure in this topic.

Prerequisites

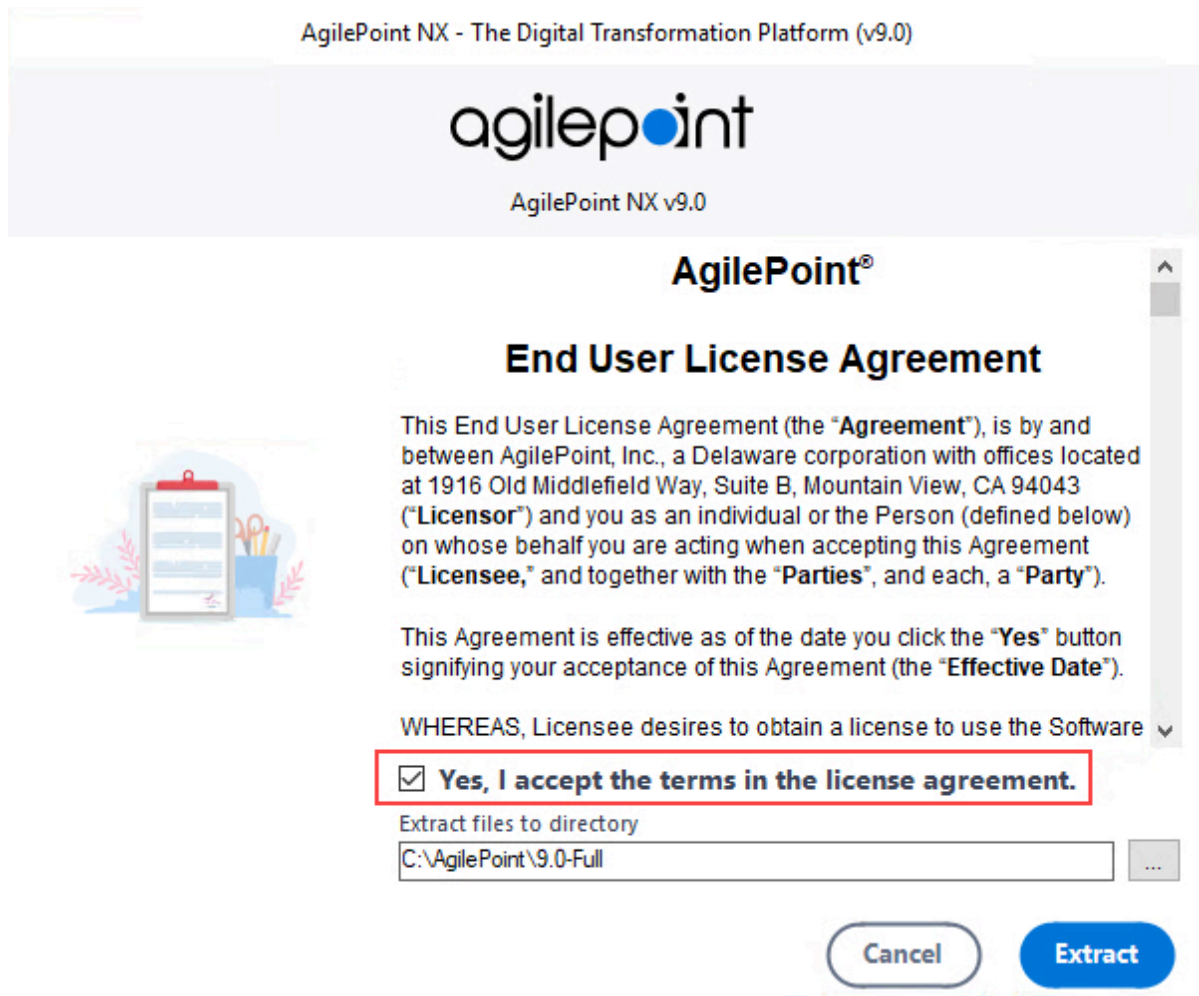
- Your system meets the minimum system requirements for this component.
For more information, refer to [System Requirements for AgilePoint Server](#).
- You have completed all of the pre-installation instructions for this component.
For more information, refer to [Set Up Your Environment for AgilePoint NX](#).
- Sign in to Windows using a user login that belongs to the local system's Administrators group.
- Download the AgilePoint NX Installation Package to your [AgilePoint Server machine](#).

Good to Know

- The AgilePoint NX installation includes [AgilePoint Server](#), [AgilePoint NX Portal](#), [Analytics Center](#), if it is licensed, [AgilePoint NX Developer](#), and [SharePoint Integration](#).
- The installer UI is optimized for system resolutions 1366x768 or 1920x1080 with 100% scaling. If you use other screen resolutions, the installer UI may not display correctly, which can cause installation errors.

How to Start


1. On the [AgilePoint Server machine](#), right-click the AgilePoint NX installer package, and click **Run as administrator**.
2. On the **End User License Agreement** screen, review the license agreement, and click **Yes. I accept the terms in the license agreement**.



3. On the **Extract files to directory** field, click the **Ellipses (...)** button to select the folder where you want to extract the installation files.

The default location for the installer is C:\AgilePoint. It is recommended that you decompress the installation package directly under you C:\ drive folder. The installation file path must be fewer than 50 characters.


AgilePoint NX - The Digital Transformation Platform (v9.0)



AgilePoint NX v9.0

AgilePoint®

End User License Agreement



This End User License Agreement (the "**Agreement**"), is by and between AgilePoint, Inc., a Delaware corporation with offices located at 1916 Old Middlefield Way, Suite B, Mountain View, CA 94043 ("**Licensor**") and you as an individual or the Person (defined below) on whose behalf you are acting when accepting this Agreement ("**Licensee**," and together with the "**Parties**", and each, a "**Party**").

This Agreement is effective as of the date you click the "**Yes**" button signifying your acceptance of this Agreement (the "**Effective Date**").

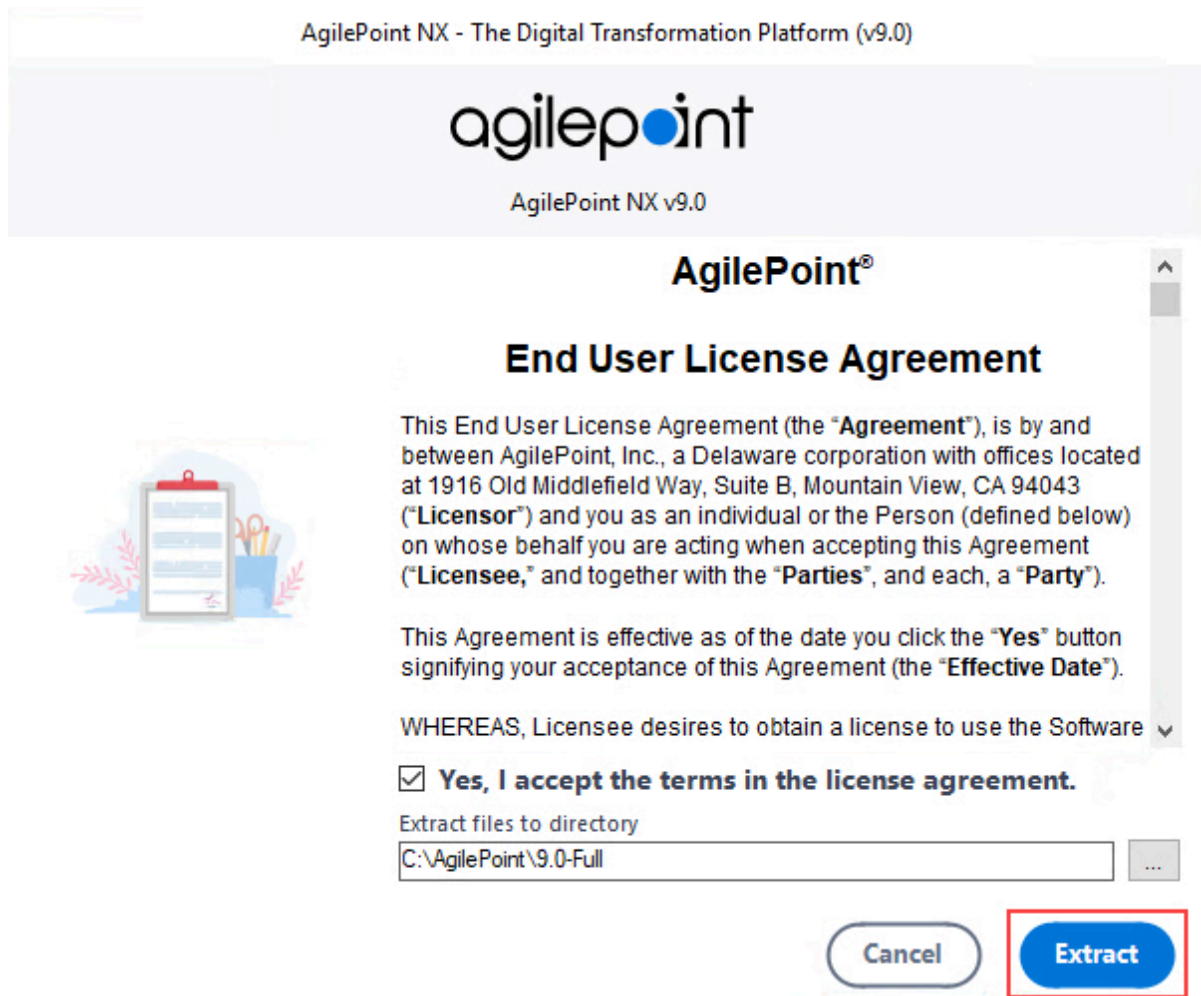
WHEREAS, Licensee desires to obtain a license to use the Software

Yes, I accept the terms in the license agreement.

Extract files to directory
C:\AgilePoint\9.0-Full

Cancel Extract

4. Click **Extract**.



5. On the **Information** screen, click **Open Extracted Folder**.

AgilePoint NX - The Digital Transformation Platform (v9.0)

agilepoint

AgilePoint NX v9.0



The installation files have been extracted to

C:\AgilePoint\9.0-Full

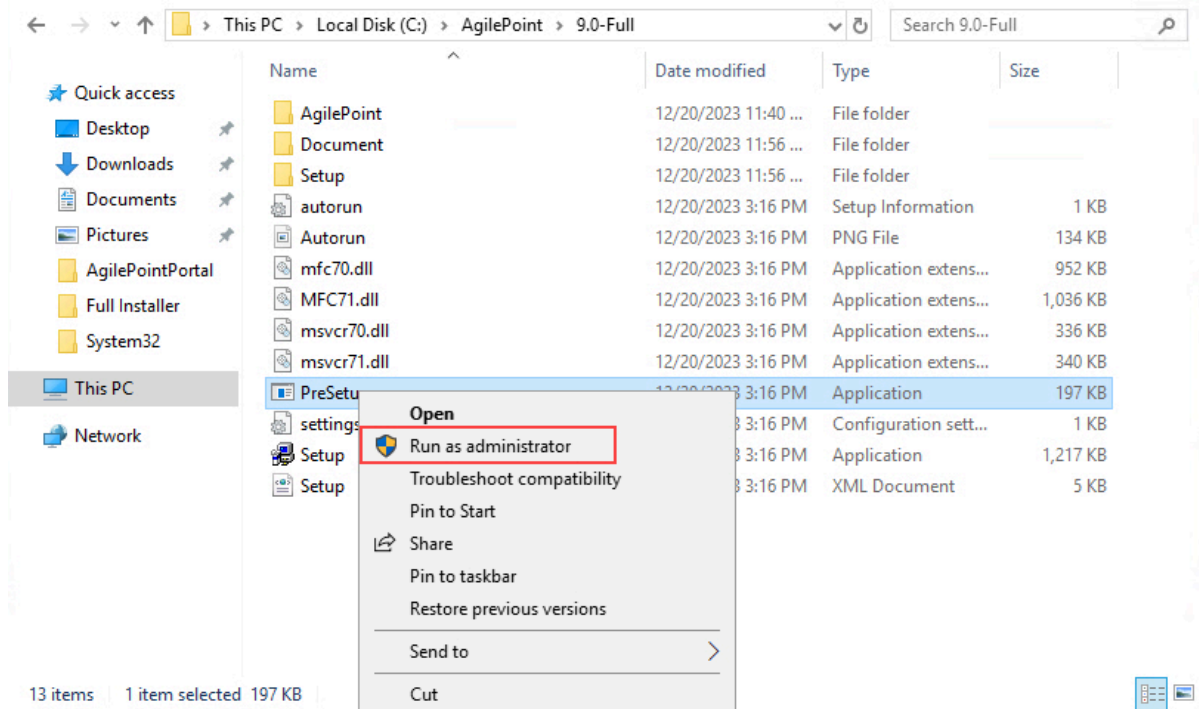
Please run PreSetup.exe with administrator right.

Note: This product requires administrator privilege to install.
It is recommended to use local administrator account.

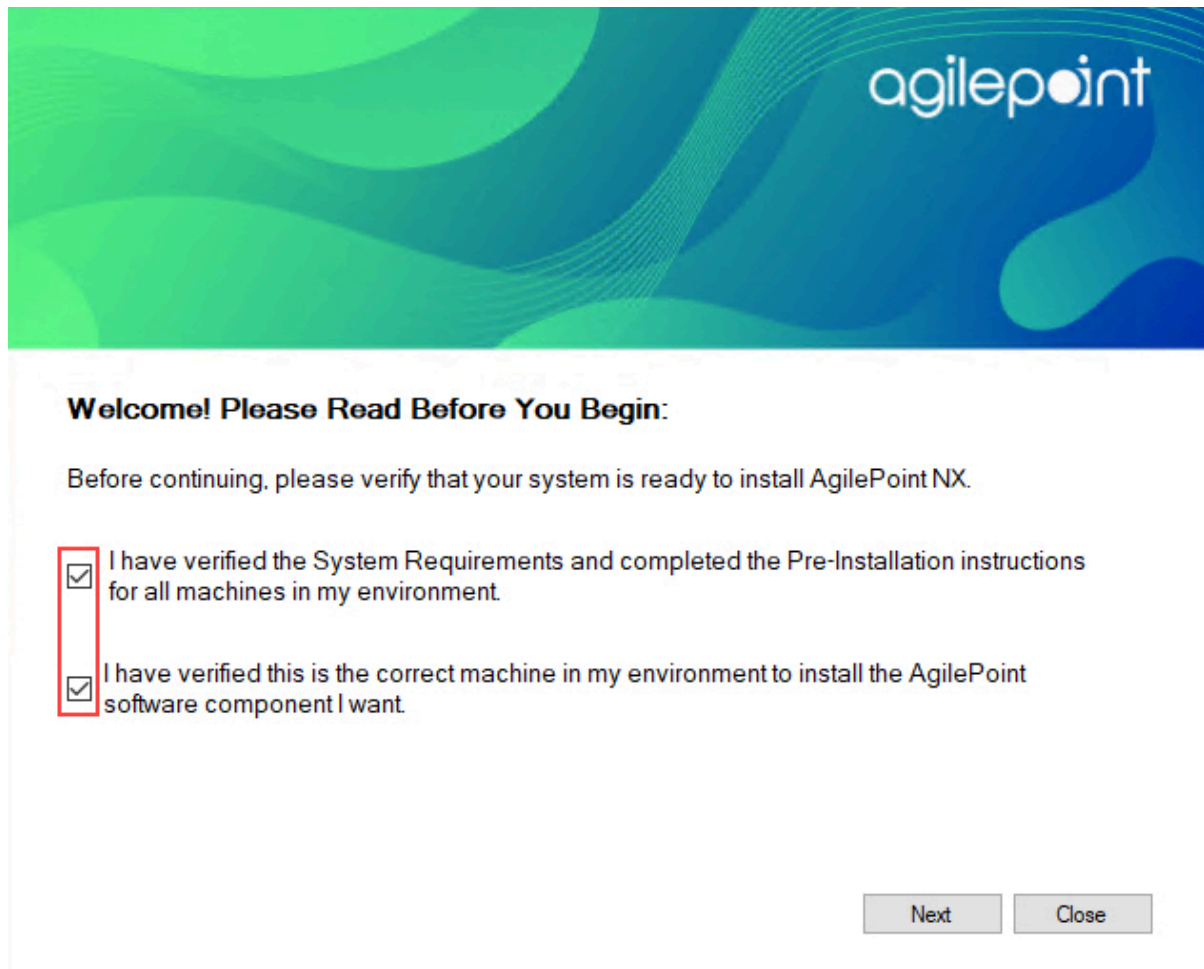
Cancel

Open Extracted Folder

6. In your specified folder, right-click the AgilePoint NX **PreSetup.exe** file, and click **Run as administrator**.



7. On the **Welcome Please Read Before You Begin** screen, make sure you have completed the tasks, and select all the items on this screen.



8. Click **Next**.
9. If a supported version of **.NET Runtime** is not installed, this screen shows.

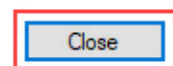
- a. Click **Close**.
- b. Install the supported version of .NET Runtime.
- c. Right-click the AgilePoint NX **PreSetup.exe** file, and click **Run as administrator**.



Welcome! Please Read Before You Begin:

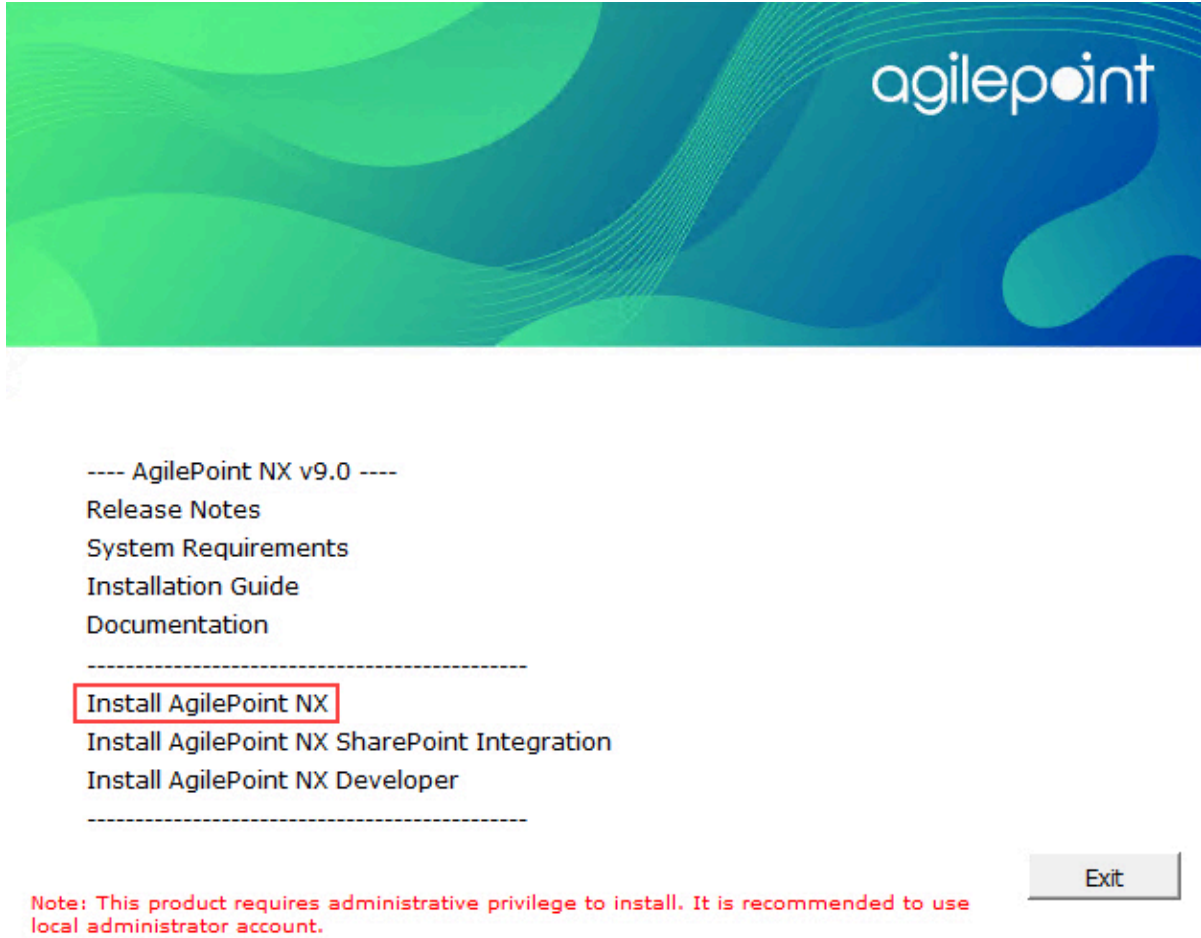
A supported version of .NET runtime is not installed. Please install a supported version of .NET Runtime. For more information, refer to the System Requirements Guide.

[System Requirements Guide](#)

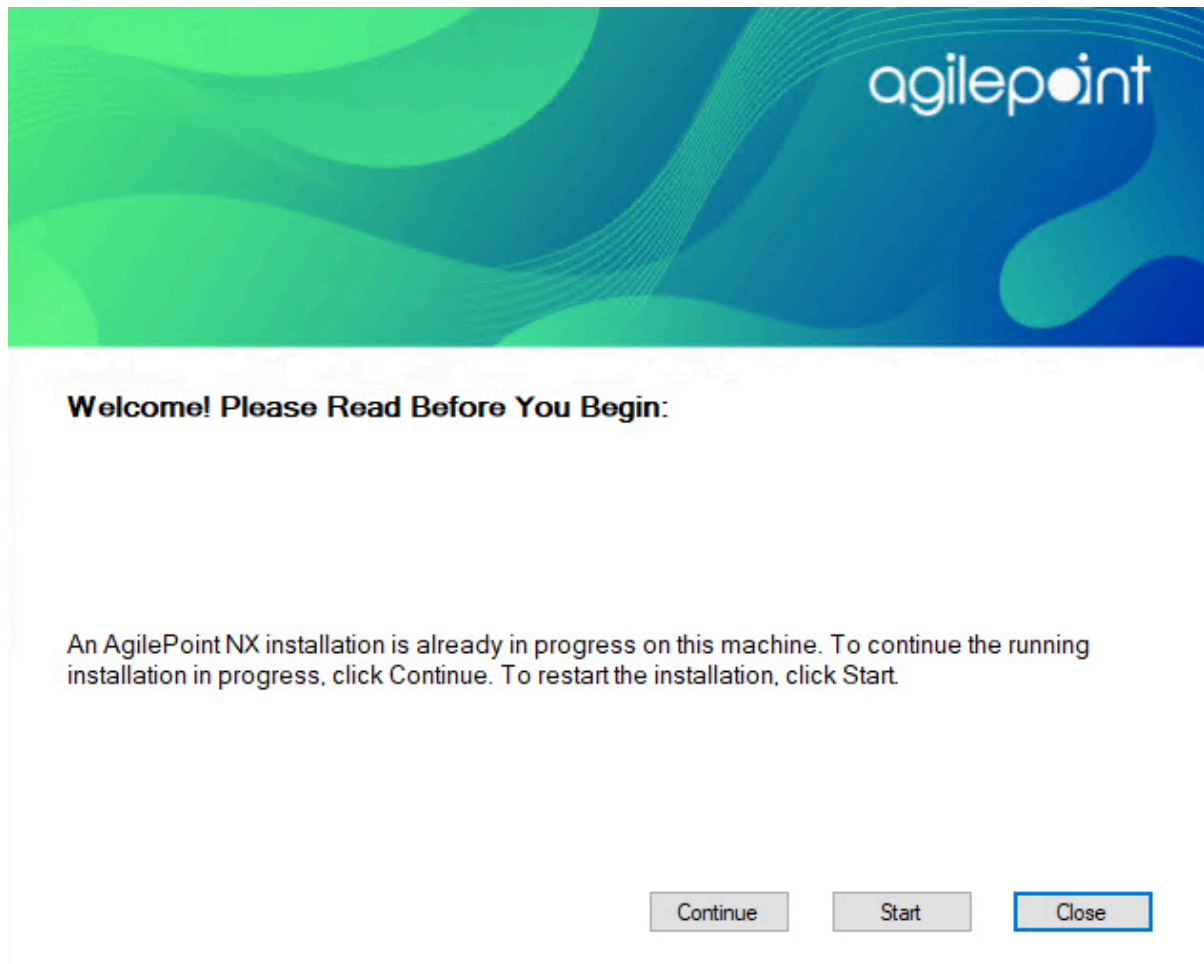


Procedure

1. On the **AgilePoint NX v9.0** screen, click **Install AgilePoint NX**.



2. This screen shows if an AgilePoint NX installation is running on this machine.
 - To resume the installation, click **Continue**.
 - To restart the installation, click **Start**.



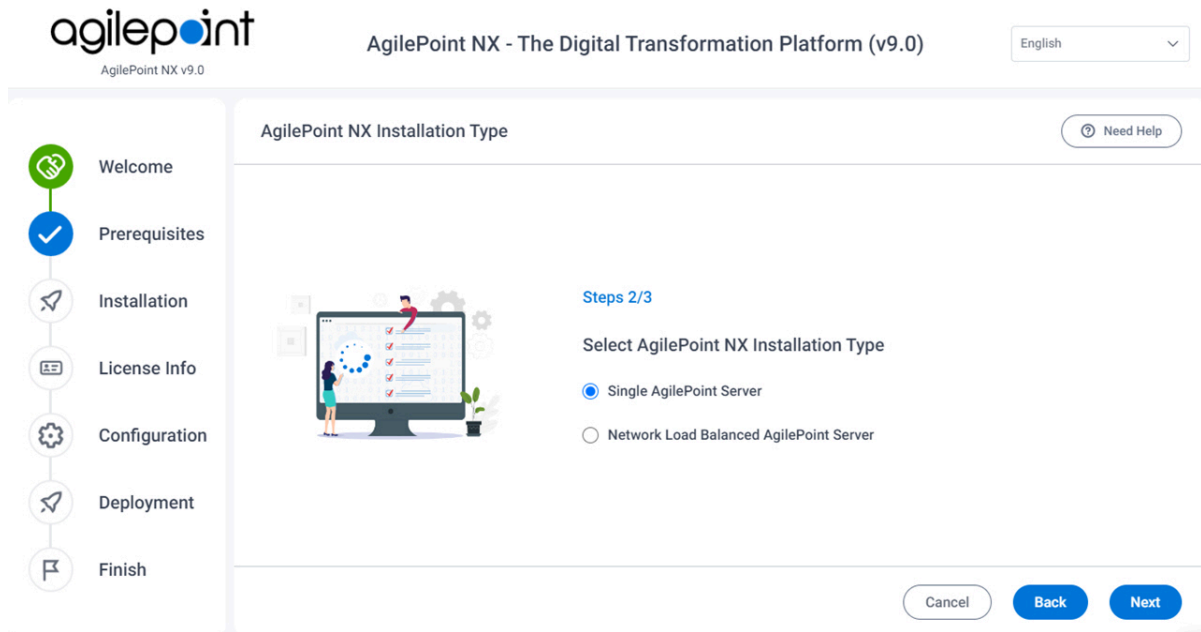
3. On the **Welcome to AgilePoint NX v9.0 Installation** screen, click **Next**.

The screenshot shows the 'Welcome' screen of the AgilePoint NX v9.0 Installation Wizard. The interface includes the AgilePoint logo and version 'AgilePoint NX v9.0' in the top left, the title 'AgilePoint NX - The Digital Transformation Platform (v9.0)' in the top center, and a language dropdown menu set to 'English' in the top right. A vertical navigation pane on the left lists the steps: Welcome, Prerequisites, Installation, License Info, Configuration, Deployment, and Finish. The main content area is titled 'AgilePoint NX v9.0 Installation' and features an illustration of three people. Below the illustration, the text reads: 'Welcome to AgilePoint NX v9.0 Installation' and 'This Wizard will guide you through the pre-installation, installation and configuration set-up for AgilePoint NX v9.0.' At the bottom right, there are three buttons: 'Cancel', 'Back', and 'Next', with the 'Next' button highlighted by a red box.

4. On the **Prerequisites** screen, select all the items on this screen.
You can click the help icon for each item for more information.

The screenshot shows the 'Prerequisites' screen of the AgilePoint NX v9.0 Installation Wizard. The interface is similar to the Welcome screen, with the title 'AgilePoint NX - The Digital Transformation Platform (v9.0)' and the language dropdown set to 'English'. The vertical navigation pane on the left shows 'Prerequisites' as the active step, indicated by a blue checkmark. The main content area is titled 'Prerequisites' and includes a 'Need Help' icon. Below the title, it says 'Steps 1/3' and 'Please make sure all prerequisites are installed and configured before proceeding for installation.' There are four prerequisite items, each with a blue checkmark and a help icon: 'AgilePoint NX requires a license key for installation and activation', 'AgilePoint NX requires Databases', 'Ensure AgilePoint Service account user is a member of these groups:' followed by a bulleted list: 'Administrators', 'Performance Monitor Users', and 'IIS_IUSRS', and 'Make sure you sign in with the AgilePoint Service Account before you install this software'. At the bottom right, there are three buttons: 'Cancel', 'Back', and 'Next'.

5. Click **Next**.
6. On the **Select AgilePoint NX Installation Type** screen, select your installation type.

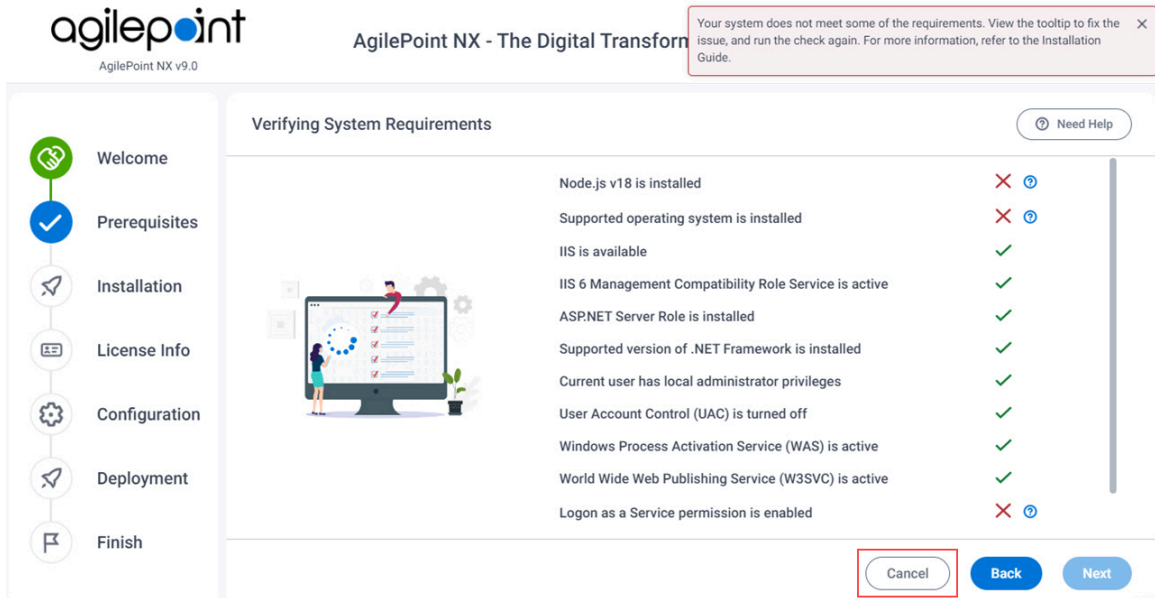


Field Name	Definition
Single AgilePoint Server	<p>This AgilePoint Server instance will not use Network Load Balancing (NLB).</p> <p>It is still possible to have multiple standalone instances of AgilePoint Server running as separate services in your environment. They simply cannot be load balanced in an NLB configuration.</p>
Network Load Balance AgilePoint Server	<p>This AgilePoint Server instance uses NLB.</p> <p>If you select this option, the following applies:</p> <ul style="list-style-type: none"> ◦ You must complete the Virtual Host Name/IP Address field. ◦ When you install AgilePoint Server, the AgilePoint Clustering Server Manager (CSM) component is installed in the background.
Virtual Host Name Or IP Address	<p>The virtual host name or IP address for your NLB server. This virtual host name must be declared in the hosts file for your NLB server machine.</p> <p>This is required for NLB environments only.</p>

7. Click **Next**.
8. On the **Verifying System Requirements** screen:

- If there are any errors, do this procedure:
 - a. Click **Cancel**.
 - b. Correct the errors.
 - c. Right-click the AgilePoint NX **Setup.exe** file, and click **Run as administrator**.

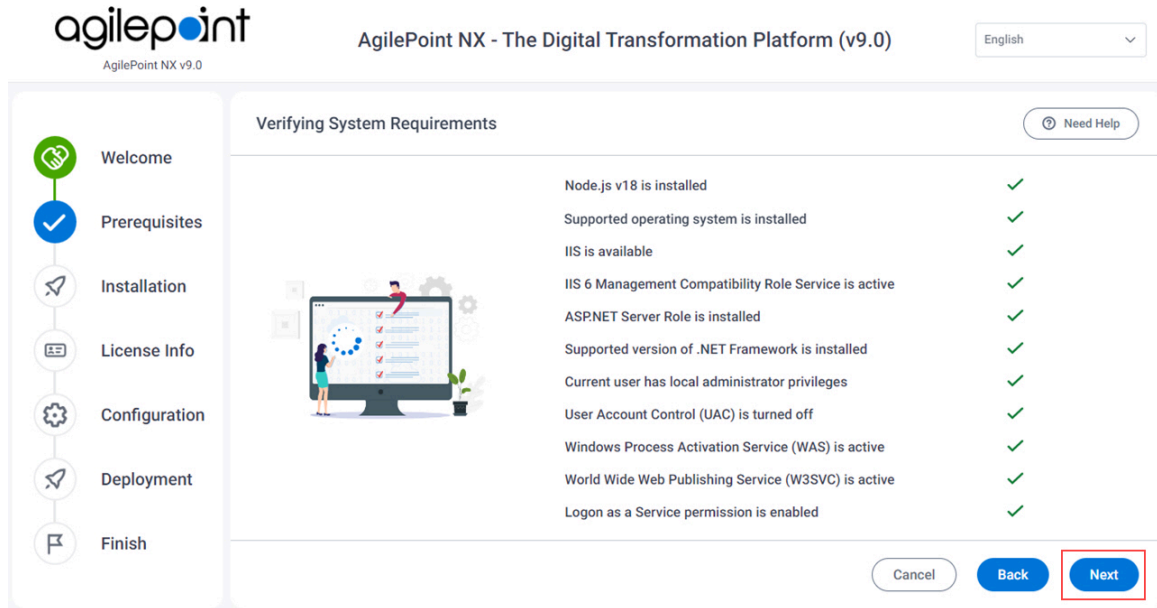
The AgilePoint NX installation starts.



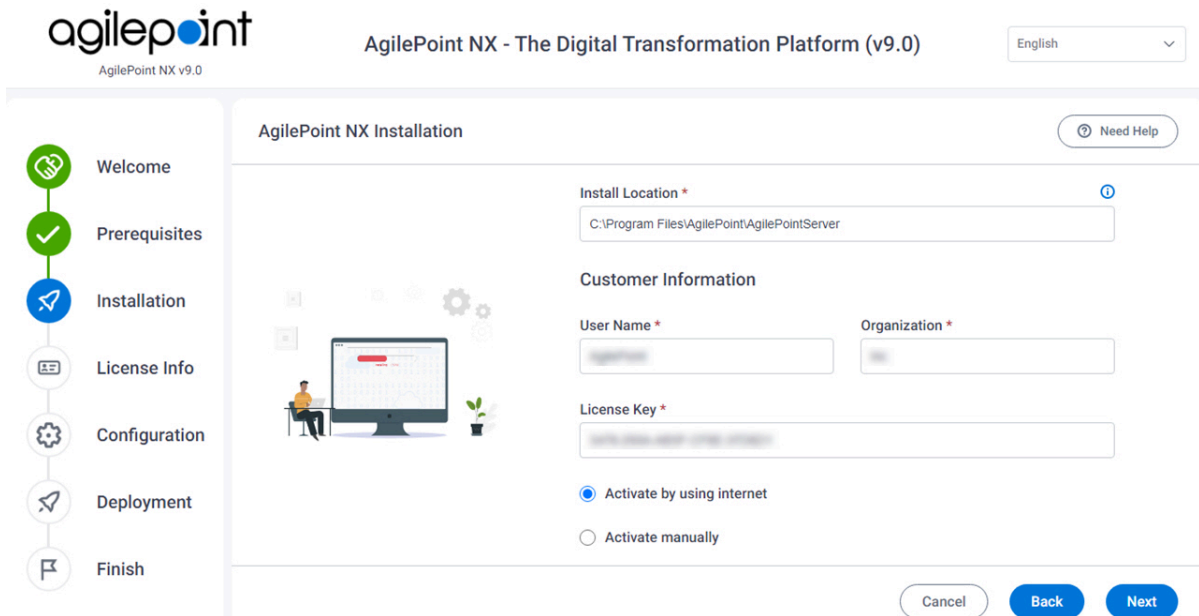
Issue	Resolution
Node.js v18 is installed	Install Node.js on the AgilePoint Server machine .
Supported operating system is installed	Install a supported operating system on this machine. For more information, refer to System Requirements for AgilePoint Server .
IIS is available	Install or start an IIS version that is supported by your operating system.
IIS 6 Management Compatibility Role Service is active	Activate Management Compatibility Role Service on IIS 6 or higher. For more information, refer to Verify the IIS 6 Management Compatibility Role Service .

Issue	Resolution
ASP.NET Server Role is installed	<p>Install ASP.NET Server Role on this machine. The correct version of the ASP.NET Server Role is different for different versions of Windows Server.</p> <p>For more information, refer to Verify the ASP.NET Server Role is Installed.</p>
Supported version of .NET Framework is installed	<p>Install a supported version of .NET Framework on this machine.</p> <p>For more information, refer to System Requirements for AgilePoint Server.</p>
Current user has local administrator privileges	<p>Sign in to this machine as a user with administrator privileges.</p>
User Account Control (UAC) is turned off	<p>Turn user access control (UAC) off.</p> <p>For more information, refer to Turn Off User Account Control (UAC).</p>
Windows Process Activation Service (WAS) is active	<p>Activate Windows Process Activation Service (WAS) on this machine.</p> <p>For more information, refer to Windows Process Activation Service (WAS) is Active.</p>
World Wide Web Publishing Service (W3SVC) is active	<p>Activate World Wide Web Publishing Service (W3SVC) on this machine.</p> <p>For more information, refer to IIS World Wide Web Publishing Service (W3SVC) is Active.</p>
Logon as a Service permission is enabled	<p>Add the Log on as a Service permission to the account.</p> <p>For more information, refer to Add the Log on as a service Right to the AgilePoint Service Account.</p>

- If there are no errors, click **Next**.



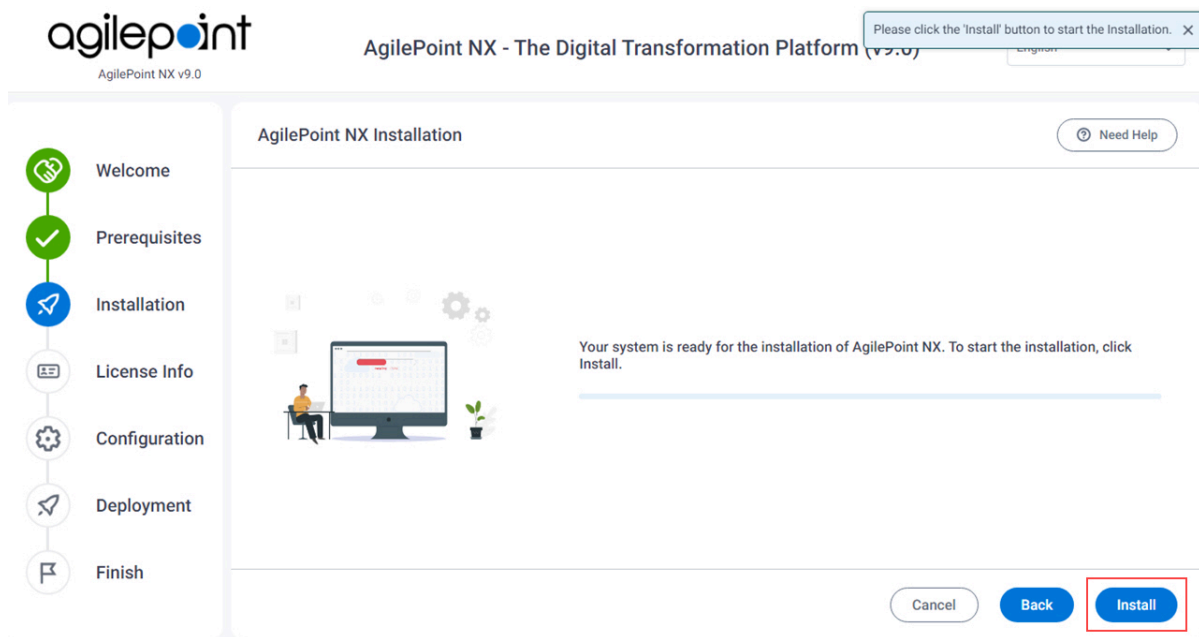
9. On the **AgilePoint NX Installation** screen, complete these fields:



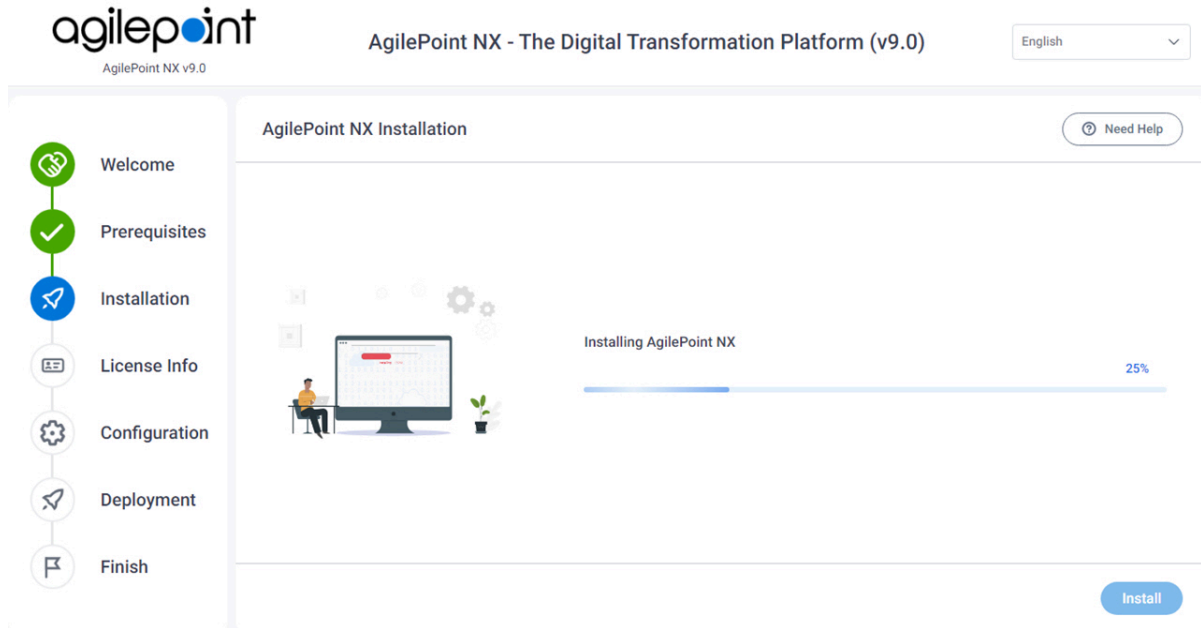
Field Name	Definition
Install location	The folder where you want to install AgilePoint NX.

Field Name	Definition
User Name	Usually the first and last name of the person responsible for the AgilePoint Server administration or software license.
Organization	The name of your organization, or company.
License Key	Your AgilePoint NX license key. For more information, refer to Obtain, Apply, and Activate AgilePoint License Keys .
Activate by using internet / Activate manually	Specifies how to activate the AgilePoint NX license key. For more information, refer to Obtain, Apply, and Activate AgilePoint License Keys .

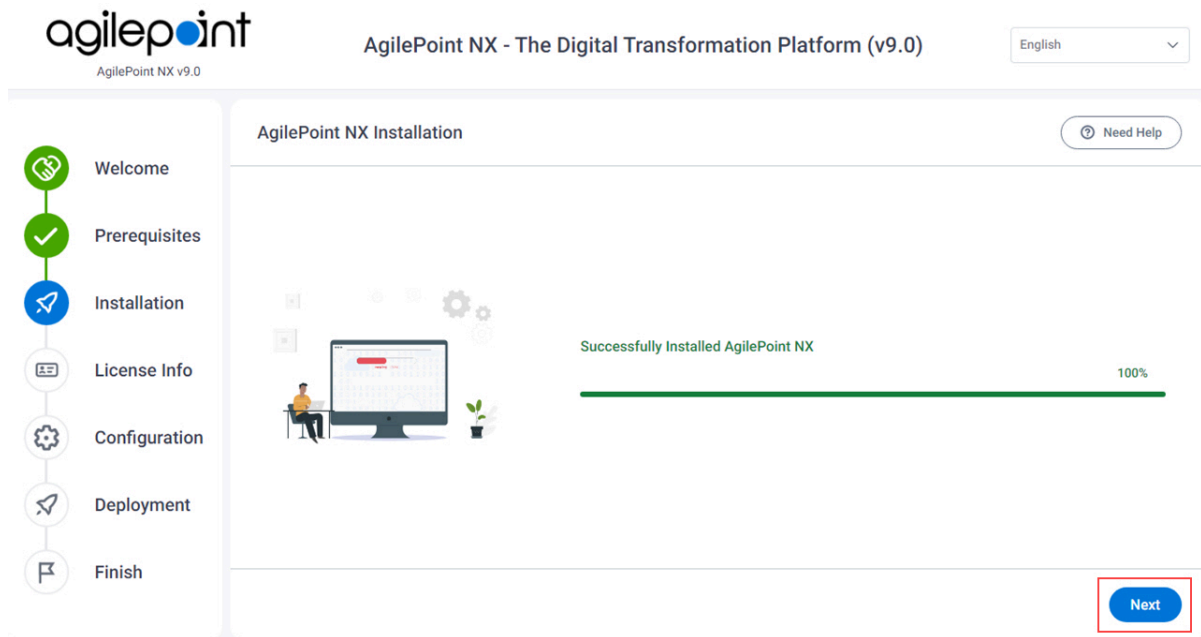
10. Click **Next**.
11. On the **AgilePoint NX Installation** screen, click **Install**.



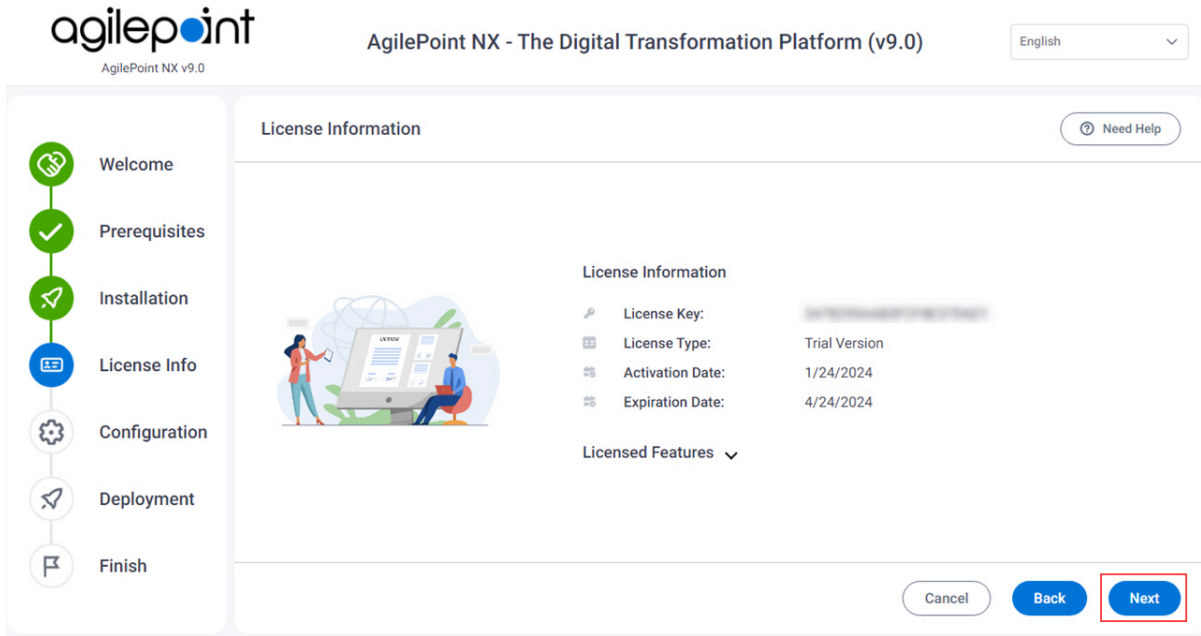
The AgilePoint NX installation starts.



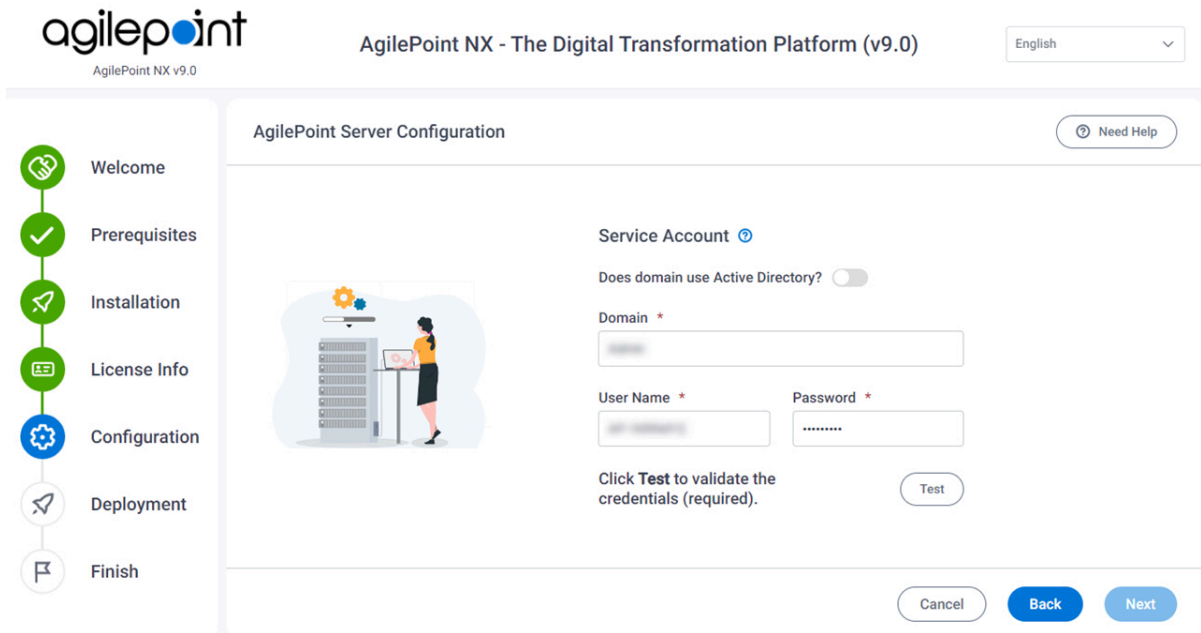
12. After the installation completes, click **Next**.



13. On the **License Information** screen, click **Next**.



- On the **AgilePoint Server Configuration** screen, enter the credentials for your **AgilePoint Service Account**.



Field Name	Definition
Does domain use Active Directory?	Description:

Field Name	Definition
	<p>Specifies whether the domain for your AgilePoint Service Account uses on premises Active Directory.</p> <p>If you want to integrate Active Directory with AgilePoint NX, this value must be Yes.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> ◦ On - AgilePoint NX is configured to integrate with an existing AgilePoint Directory user store in your environment, and AgilePoint NX will use this Active Directory as the primary source for AgilePoint users. Do not select Yes unless you are certain that you have a specific AgilePoint Directory user store you want to integrate, and you have the authentication credentials for the Active Directory service account. ◦ Off - AgilePoint NX is not configured to use Active Directory as its primary user store. AgilePoint NX will provide the primary source for AgilePoint users. <p><u>Default Value:</u></p> <p>Off</p>
Domain	<p><u>Description:</u></p> <p>The authentication domain for the AgilePoint Service Account.</p> <p><u>Allowed Values:</u></p> <p>One line of text (a string) with no spaces that represents an authentication domain in your environment.</p> <p><u>Default Value:</u></p> <p>None</p>
User Name	<p><u>Description:</u></p> <p>Specifies the user name for your AgilePoint Service Account. This account serves as your AgilePoint Service Account, your AgilePoint System Account, and the account that AgilePoint uses to communicate with SharePoint, called the SharePoint impersonator.</p>

Field Name	Definition
	<p>This account must be set up before entering the account information here. The AgilePoint installer cannot create this account for you.</p> <p><u>Allowed Values:</u></p> <p>One line of text (a string) that represents a user name for an account with the required privileges detailed in Set Up the AgilePoint Service Account.</p> <p><u>Default Value:</u></p> <p>None</p> <p><u>Limitations:</u></p> <p>During installation, you must use the same AgilePoint Service account credentials for all AgilePoint systems. However, for security purposes, AgilePoint recommends you change separate these account credentials after installation.</p> <p>For more information, refer to:</p> <ul style="list-style-type: none"> ◦ Administrator Types ◦ How Do I Change the Credentials for AgilePoint Administrator Accounts?
Password	<p><u>Description:</u></p> <p>The password for the AgilePoint Service Account.</p> <p><u>Allowed Values:</u></p> <p>An alphanumeric string that represents a password.</p> <p><u>Default Value:</u></p> <p>None</p>

15. To make sure the user credentials are valid, click **Test**.

The screenshot shows the AgilePoint Server Configuration interface. On the left is a vertical navigation menu with icons and labels for: Welcome, Prerequisites, Installation, License Info, Configuration (highlighted in blue), Deployment, and Finish. The main content area is titled "AgilePoint Server Configuration" and includes a "Need Help" button. It features a "Service Account" section with a toggle for "Does domain use Active Directory?". Below this are input fields for "Domain", "User Name", and "Password". A "Test" button is highlighted with a red box. A message below the fields says "Click Test to validate the credentials (required)". At the bottom right are "Cancel", "Back", and "Next" buttons.

If the user credentials are valid, the validation message shows.

This screenshot is identical to the previous one, but with a green notification box at the top right that reads "Authentication successful. [redacted] is a valid user." The "Test" button is no longer highlighted with a red box.

16. Click **Next**.
17. On the **Port Information** screen, you can change the port numbers AgilePoint Server uses to communicate using various protocols. The default port numbers are verified as available for your system.

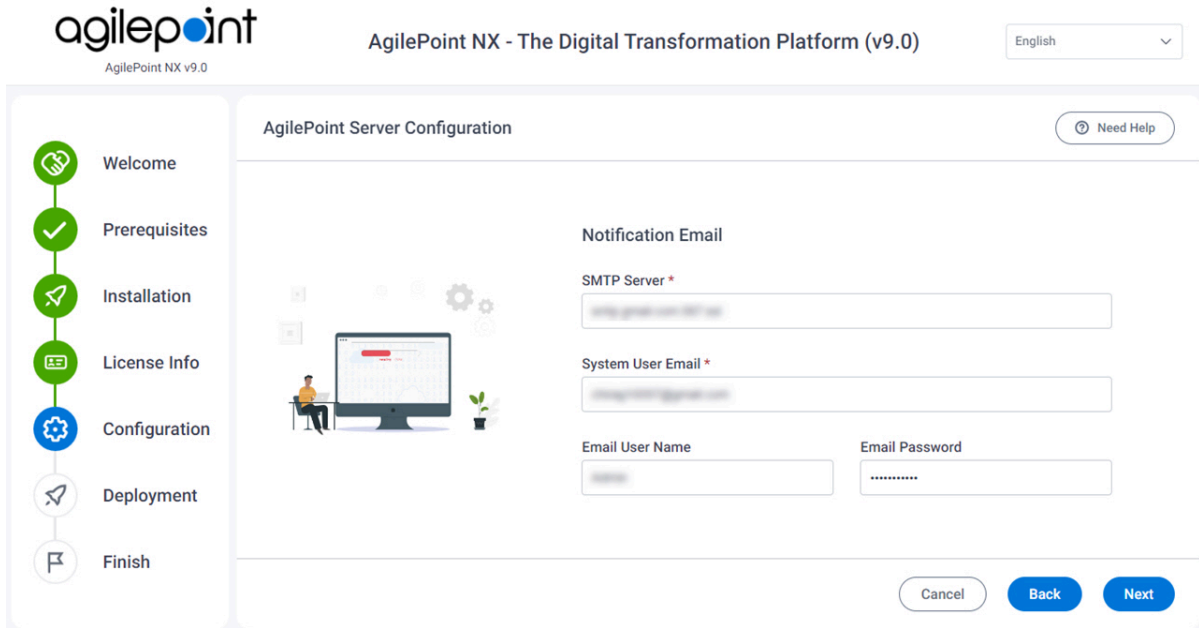
! You must create a firewall rule to allow AgilePoint Server to use these ports.

Field Name	Definition
WSHttP Port	<p><u>Description:</u></p> <p>A free, unique port AgilePoint Server instance can use for WSHttP binding.</p> <p>This field is required.</p> <p><u>Allowed Values:</u></p> <p>A port number on your machine for WSHttP binding.</p> <p>The port number must be unique (not used for any other purpose) and higher than 10000.</p> <p><u>Default Value:</u></p> <p>13487</p>
TCP Port	<p><u>Description:</u></p> <p>A free, unique port AgilePoint Server instance can use for TCP binding.</p> <p>This field is required.</p>

Field Name	Definition
	<p><u>Allowed Values:</u></p> <p>A port number on your machine for TCP binding.</p> <p>The port number must be unique (not used for any other purpose) and higher than 10000.</p> <p><u>Default Value:</u></p> <p>13488</p>
BasicHttp Port	<p><u>Description:</u></p> <p>A free, unique port AgilePoint Server instance can use for Basic-Http binding.</p> <p>This field is required.</p> <p><u>Allowed Values:</u></p> <p>A port number on your machine for BasicHttp binding.</p> <p>The port number must be unique (not used for any other purpose) and higher than 10000.</p> <p><u>Default Value:</u></p> <p>13489</p>
REST Port	<p><u>Description:</u></p> <p>A free, unique port AgilePoint Server instance can use for REST API calls.</p> <p><u>Allowed Values:</u></p> <p>A port number on your machine for REST API calls.</p> <p><u>Default Value:</u></p> <p>13490</p> <p><u>Limitations:</u></p>

Field Name	Definition
	<p>If you use AgilePoint NX OnPremises, the REST URL for your AgilePoint Server instance must be configured to use the default HTTPS port number 443 to associate AgilePoint workflows with SharePoint lists and libraries in the AgilePoint Intelligent Process Automation app for Microsoft 365. When AgilePoint NX OnPremises is installed, the default REST port is 13490. However, the endpoint for the Intelligent Process Automation app must be accessible through the default port number used for HTTPS communication by Microsoft 365.</p>
Portal Port	<p><u>Description:</u></p> <p>A free, unique port AgilePoint Server instance can use for AgilePoint NX Portal.</p> <p>This field is required.</p> <p><u>Allowed Values:</u></p> <p>A port number on your machine for AgilePoint NX Portal.</p> <p><u>Default Value:</u></p> <p>13491</p>
Analytics Port	<p><u>Description:</u></p> <p>A free, unique port AgilePoint Server instance can use for Analytics Center.</p> <p>This field is required.</p> <p><u>Allowed Values:</u></p> <p>A port number on your machine for Analytics Center.</p> <p><u>Default Value:</u></p> <p>13492</p>

18. Click **Next**.
19. On the **Notification Email** screen, enter this information for your SMTP email server.

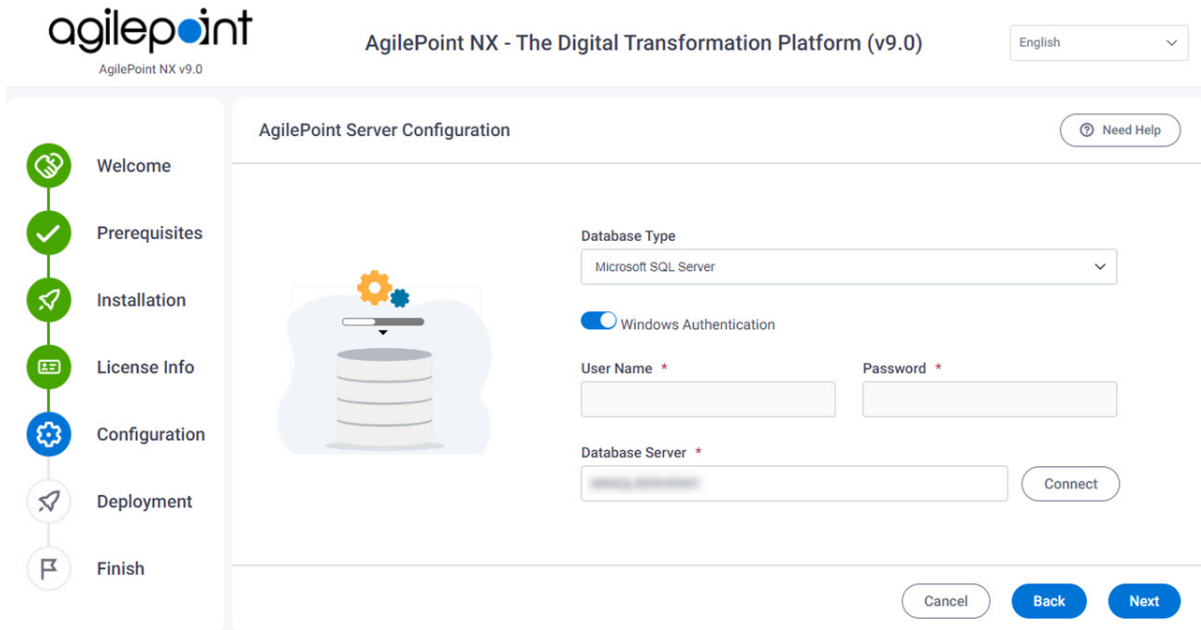


Field Name	Definition
SMTP Server	<p><u>Description:</u> The URL for the SMTP email server for your organization.</p> <p><u>Allowed Values:</u> One line of text (a string) in URL format.</p> <p><u>Default Value:</u> None</p>
System User Email	<p><u>Description:</u> Specifies the email address for the AgilePoint System Account. This email address receives technical notifications from the AgilePoint NX system, such as important system errors.</p> <p><u>Allowed Values:</u> One line of text (a string) in email address format.</p> <p><u>Default Value:</u> None</p>

Field Name	Definition
Email User Name	<p><u>Description:</u></p> <p>Specifies the user name for an email account on the SMTP server AgilePoint NX can use to send emails. These include, but are not limited to, emails from apps and server-side components, such as AgilePoint Server.</p> <p><u>Allowed Values:</u></p> <p>One line of text (a string) that represents a user name for an email account on the SMTP server.</p> <p><u>Default Value:</u></p> <p>None</p>
Email Password	<p><u>Description:</u></p> <p>Specifies the password for an email account on the SMTP server AgilePoint NX can use to send emails. These include, but are not limited to, emails from apps and server-side components, such as AgilePoint Server.</p> <p><u>Allowed Values:</u></p> <p>An alphanumeric string that represents a password.</p> <p><u>Default Value:</u></p> <p>None</p>

20. Click **Next**.
21. On the **AgilePoint Server Configuration** screen, enter the connection information for your AgilePoint Server [workflow database](#).

For more information, refer to [Create Databases for AgilePoint](#).



Field Name	Definition
<p>Database Type</p>	<p><u>Description:</u> Specifies the database technology to store your data.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> ◦ Microsoft SQL Server <p><u>Default Value:</u> Microsoft SQL Server</p>
<p>Windows Authentication</p>	<p><u>Description:</u> Specifies whether the database connection uses Windows authentication.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> ◦ On - The database connection uses Windows Authentication, and the machine's authenticated user connects to the database server. <p>If this option is selected, the User Name and Password fields are not required.</p>

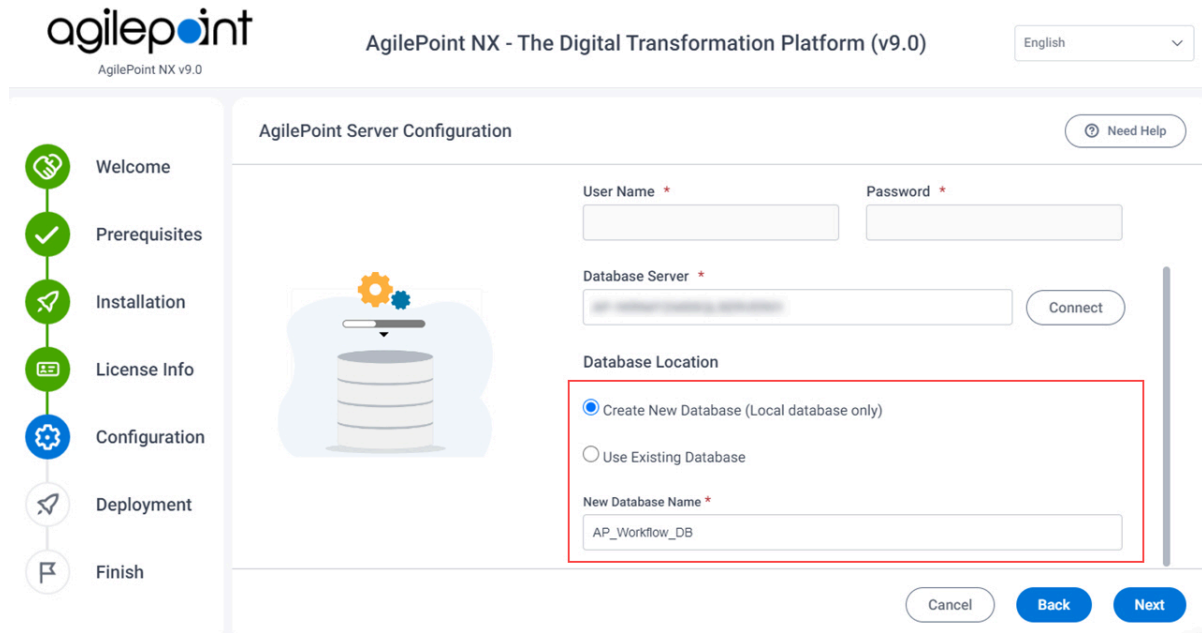
Field Name	Definition
	<ul style="list-style-type: none"> ◦ Off - The database connection does not use Windows authentication. <p>If this option is selected, you must specify the user name and password for the authentication account AgilePoint Server uses to connect to the database.</p> <p><u>Default Value:</u> On</p>
User Name	<p><u>Description:</u> The user name for the account AgilePoint Server uses to connect to the database.</p> <p><u>To Open this Field:</u></p> <ol style="list-style-type: none"> a. Turn off Windows Authentication. <p><u>Allowed Values:</u> An alphanumeric string that contains a user name for the database.</p> <p><u>Default Value:</u> None</p>
Password	<p><u>Description:</u> The password for the authentication account.</p> <p><u>To Open this Field:</u></p> <ol style="list-style-type: none"> a. Turn off Windows Authentication. <p><u>Allowed Values:</u> An alphanumeric string that represents a password.</p> <p><u>Default Value:</u> None</p>

Field Name	Definition
Database Server	<p><u>Description:</u></p> <p>Specifies the server name and domain for the AgilePoint database.</p> <p><u>Allowed Values:</u></p> <p>An alphanumeric string with no spaces that represents a database server name.</p> <p><u>Default Value:</u></p> <p>None</p> <p><u>Example:</u></p> <ul style="list-style-type: none"> ◦ mydatabase ◦ mydatabase/WorkflowFolder

22. Once you enter the database server name in **Database Server** field, click **Connect** to authenticate the database user account and populate the names of the databases on your database server.

23. On the **Database Location** section, enter the following information for your AgilePoint Server Workflow database.

This database holds the **application data** for AgilePoint NX. It is the main AgilePoint NX database. For more information, refer to [Create Databases for AgilePoint](#).

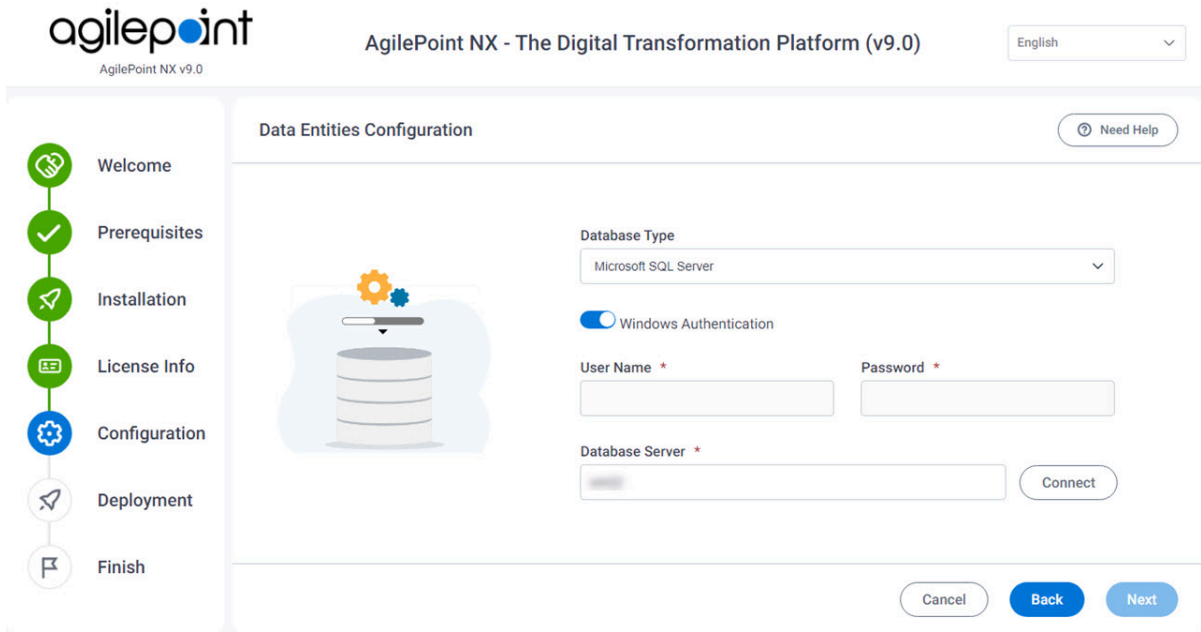


Field Name	Definition
Create New Database / Use Existing Database	<p><u>Description:</u> Specifies whether to create a database for AgilePoint Server.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> ◦ Create New Database - Specifies the name of a database to create for AgilePoint Server. ◦ Use Existing Database - Specifies the name of an existing database you want to use for AgilePoint Server. <p><u>Default Value:</u> Create New Database</p>
New Database Name	<p><u>Description:</u> Specifies the name of a new database you want to create as your AgilePoint workflow database.</p>

Field Name	Definition
	<p>This option is only available if your database is installed on the same machine where you are installing this component.</p> <p><u>To Open this Field:</u></p> <p>a. Select Create New Database.</p> <p><u>Allowed Values:</u></p> <p>One line of text (a string).</p> <p><u>Not Accepted:</u></p> <ul style="list-style-type: none"> ◦ Spaces <p><u>Default Value:</u></p> <p>AP_Workflow_DB</p>
Database	<p><u>Description:</u></p> <p>Specifies the name of an existing database you want to use for AgilePoint Server.</p> <p><u>To Open this Field:</u></p> <p>a. Select Use Existing Database.</p> <p>b. Click Connect to populate the list.</p> <p><u>Allowed Values:</u></p> <p>A database name from the list.</p> <p><u>Default Value:</u></p> <p>None</p>

24. Click **Next**.
25. On the **Data Entities Configuration** screen, enter the connection information for your AgilePoint NX [Data Entities](#) database.

For more information, refer to [Create Databases for AgilePoint](#).

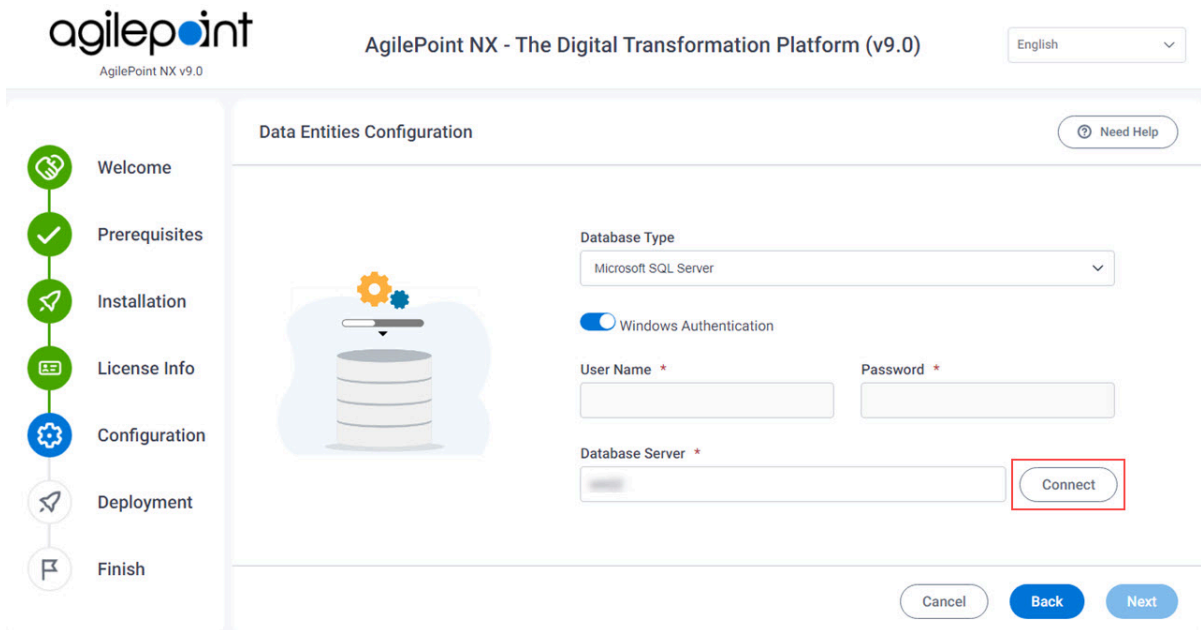


Field Name	Definition
Database Type	<p><u>Description:</u> Specifies the database technology to store your data.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> ◦ Microsoft SQL Server <p><u>Default Value:</u> Microsoft SQL Server</p>
Windows Authentication	<p><u>Description:</u> Specifies whether the database connection uses Windows authentication.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> ◦ On - The database connection uses Windows Authentication, and the machine's authenticated user connects to the database server. <p>If this option is selected, the User Name and Password fields are not required.</p>

Field Name	Definition
	<ul style="list-style-type: none"> ◦ Off - The database connection does not use Windows authentication. <p>If this option is selected, you must specify the user name and password for the authentication account AgilePoint Server uses to connect to the database.</p> <p><u>Default Value:</u> On</p>
User Name	<p><u>Description:</u> The user name for the account AgilePoint Server uses to connect to the database.</p> <p><u>To Open this Field:</u></p> <ol style="list-style-type: none"> a. Turn off Windows Authentication. <p><u>Allowed Values:</u> An alphanumeric string that contains a user name for the database.</p> <p><u>Default Value:</u> None</p>
Password	<p><u>Description:</u> The password for the authentication account.</p> <p><u>To Open this Field:</u></p> <ol style="list-style-type: none"> a. Turn off Windows Authentication. <p><u>Allowed Values:</u> An alphanumeric string that represents a password.</p> <p><u>Default Value:</u> None</p>

Field Name	Definition
<p>Database Server</p>	<p><u>Description:</u></p> <p>Specifies the server name and domain for the AgilePoint database.</p> <p><u>Allowed Values:</u></p> <p>An alphanumeric string with no spaces that represents a database server name.</p> <p><u>Default Value:</u></p> <p>None</p> <p><u>Example:</u></p> <ul style="list-style-type: none"> ◦ mydatabase ◦ mydatabase/WorkflowFolder

- Once you enter the database server name in **Database Server** field, click **Connect** to authenticate the database user account and populate the names of the databases on your database server.



- On the **Database Location** section, enter the following information for your AgilePoint NX Data Entities database.

This database holds the data for the Data Entities component.

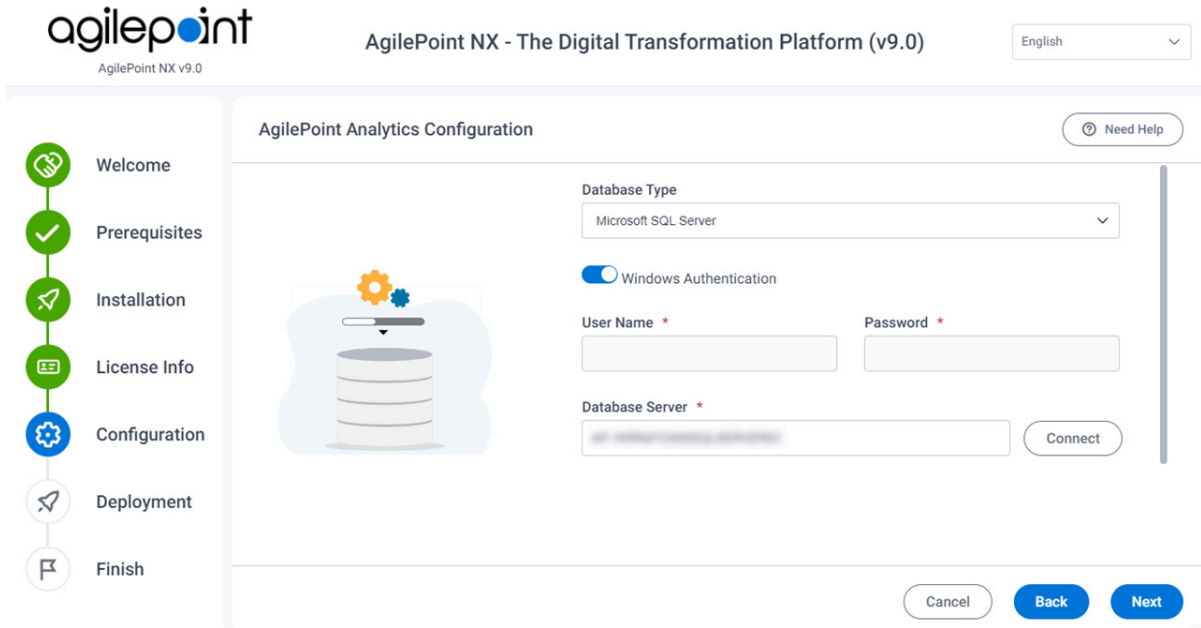
For more information, refer to [Create Databases for AgilePoint](#).

Field Name	Definition
Create New Database / Use Existing Database	<p><u>Description:</u></p> <p>Specifies whether to create a database for AgilePoint NX Data Entities.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> ◦ Create New Database - Specifies the name of a database to create for Data Entities. ◦ Use Existing Database - Specifies the name of an existing database you want to use for Data Entities. <p><u>Default Value:</u></p> <p>Create New Database</p>
New Database Name	<p><u>Description:</u></p> <p>Specifies the name of a new database you want to create as your AgilePoint NX Data Entities database.</p>

Field Name	Definition
	<p>This option is only available if your database is installed on the same machine where you are installing this component.</p> <p><u>To Open this Field:</u></p> <p>a. Select Create New Database.</p> <p><u>Allowed Values:</u></p> <p>One line of text (a string).</p> <p><u>Not Accepted:</u></p> <ul style="list-style-type: none"> ◦ Spaces <p><u>Default Value:</u></p> <p>AP_Data_Entities_DB</p>
Database	<p><u>Description:</u></p> <p>Specifies the name of an existing database you want to use for AgilePoint NX Data Entities.</p> <p><u>To Open this Field:</u></p> <p>a. Select Use Existing Database.</p> <p>b. Click Connect to populate the list.</p> <p><u>Allowed Values:</u></p> <p>A database name from the list.</p> <p><u>Default Value:</u></p> <p>None</p>

28. Click **Next**.

29. On the **AgilePoint Analytics Configuration** screen, enter the connection information for your [Analytics Center](#) database.

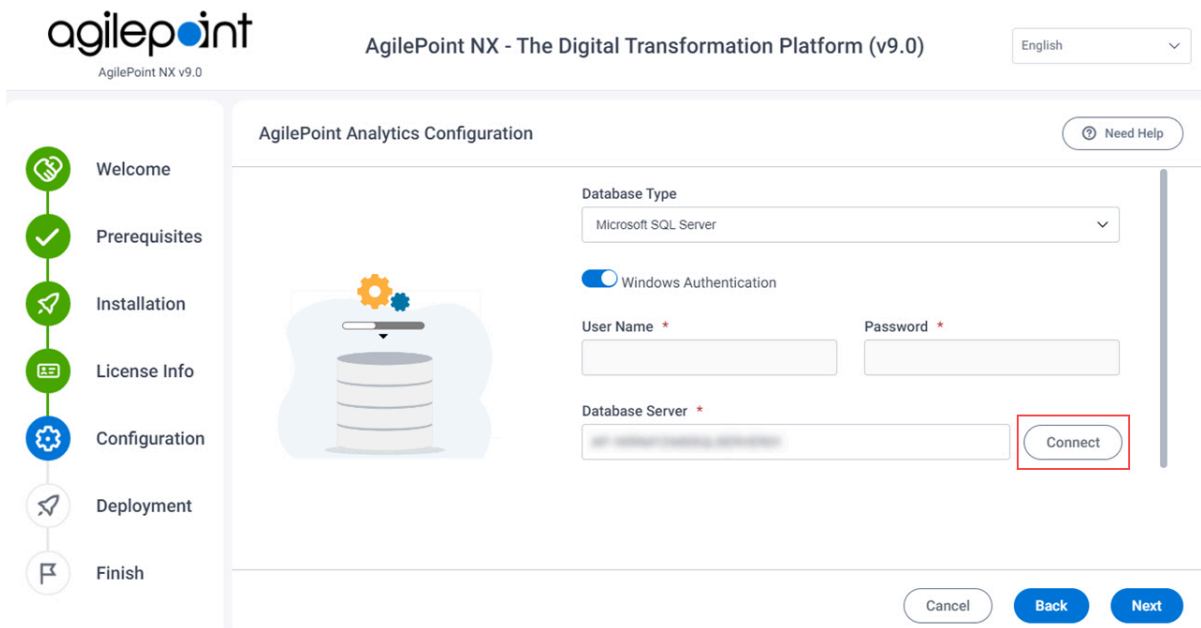


Field Name	Definition
Database Type	<p><u>Description:</u> Specifies the database technology to store your data.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> ◦ Microsoft SQL Server <p><u>Default Value:</u> Microsoft SQL Server</p>
Windows Authentication	<p><u>Description:</u> Specifies whether the database connection uses Windows authentication.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> ◦ On - The database connection uses Windows Authentication, and the machine's authenticated user connects to the database server. <p>If this option is selected, the User Name and Password fields are not required.</p>

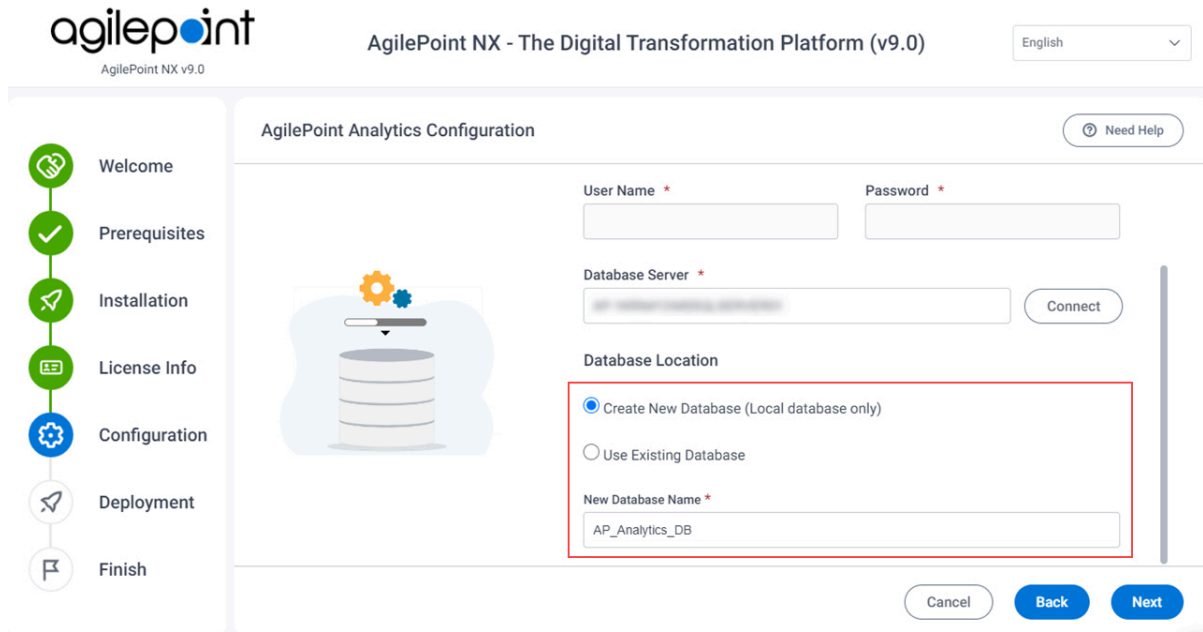
Field Name	Definition
	<ul style="list-style-type: none"> ◦ Off - The database connection does not use Windows authentication. <p>If this option is selected, you must specify the user name and password for the authentication account AgilePoint Server uses to connect to the database.</p> <p><u>Default Value:</u> On</p>
User Name	<p><u>Description:</u> The user name for the account AgilePoint Server uses to connect to the database.</p> <p><u>To Open this Field:</u></p> <ol style="list-style-type: none"> a. Turn off Windows Authentication. <p><u>Allowed Values:</u> An alphanumeric string that contains a user name for the database.</p> <p><u>Default Value:</u> None</p>
Password	<p><u>Description:</u> The password for the authentication account.</p> <p><u>To Open this Field:</u></p> <ol style="list-style-type: none"> a. Turn off Windows Authentication. <p><u>Allowed Values:</u> An alphanumeric string that represents a password.</p> <p><u>Default Value:</u> None</p>

Field Name	Definition
Database Server	<p><u>Description:</u></p> <p>Specifies the server name and domain for the AgilePoint database.</p> <p><u>Allowed Values:</u></p> <p>An alphanumeric string with no spaces that represents a database server name.</p> <p><u>Default Value:</u></p> <p>None</p> <p><u>Example:</u></p> <ul style="list-style-type: none"> ◦ mydatabase ◦ mydatabase/WorkflowFolder

- Once you enter the database server name in **Database Server** field, click **Connect** to authenticate the database user account and populate the names of the databases on your database server.



- On the **Database Location** section, enter this information for your **Analytics Center** database.

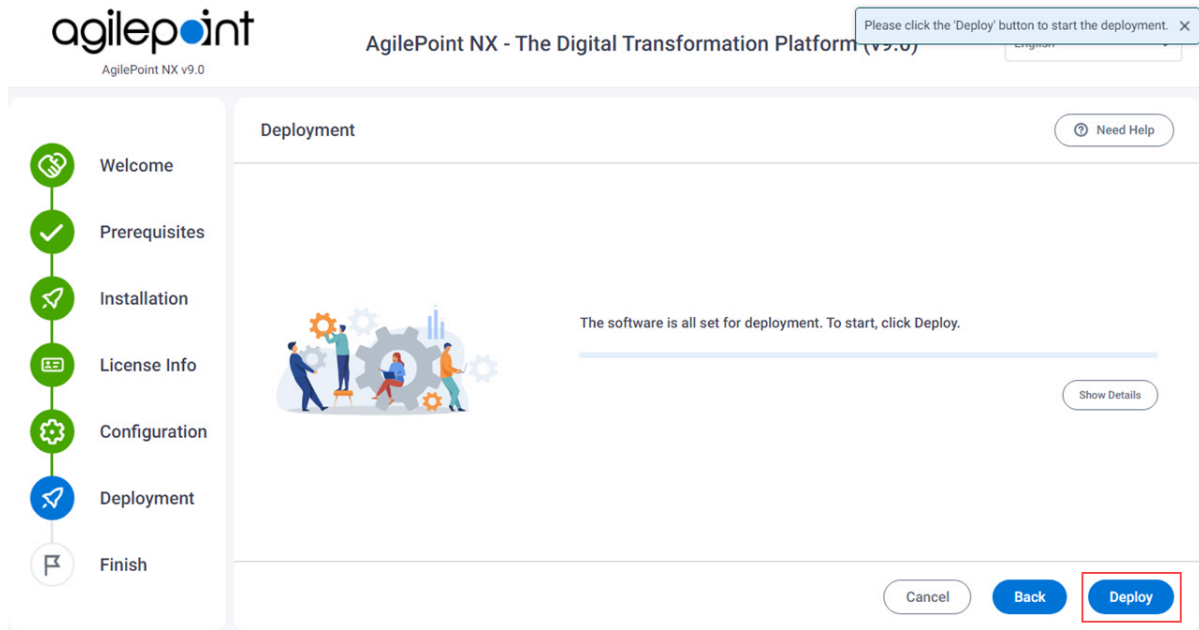


Field Name	Definition
Create New Database / Use Existing Database	<p><u>Description:</u> Specifies whether to create a database for Analytics Center.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> ◦ Create New Database - Specifies the name of a database to create for Analytics Center. ◦ Use Existing Database - Specifies the name of an existing database you want to use for Analytics Center. <p><u>Default Value:</u> Create New Database</p>
New Database Name	<p><u>Description:</u> Specifies the name of a new database you want to create as your Analytics Center database.</p> <p>This option is only available if your database is installed on the same machine where you are installing this component.</p> <p><u>To Open this Field:</u></p>

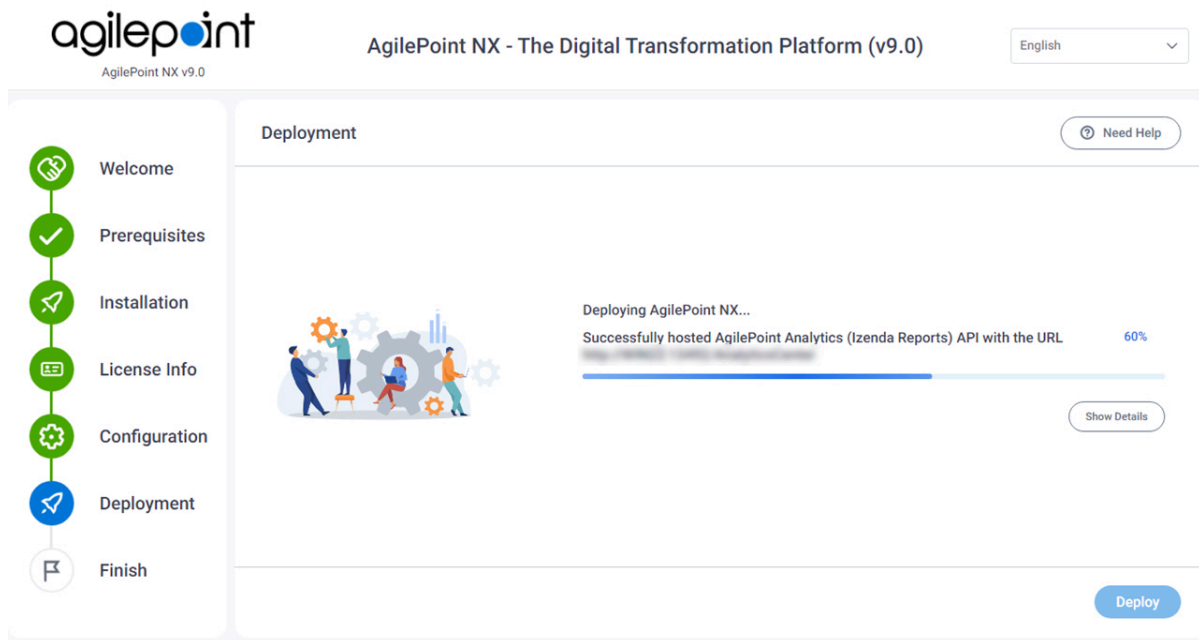
Field Name	Definition
	<p>a. Select Create New Database.</p> <p><u>Allowed Values:</u> One line of text (a string).</p> <p><u>Not Accepted:</u></p> <ul style="list-style-type: none"> ◦ Spaces <p><u>Default Value:</u> AP_Analytics_DB</p>
Database	<p><u>Description:</u> Specifies the name of an existing database you want to use for Analytics Center.</p> <p><u>To Open this Field:</u></p> <p>a. Select Use Existing Database.</p> <p>b. Click Connect to populate the list.</p> <p><u>Allowed Values:</u> A database name from the list.</p> <p><u>Default Value:</u> None</p>

32. Click **Next**.

33. On the **Deployment** screen, click **Deploy**.



The AgilePoint Server installation runs. If any error messages shows on the screen, you can use the log messages to troubleshoot the errors. If an error exists, [contact AgilePoint Customer Support](#).



34. After the AgilePoint Server installation is complete, click **Next**.

The screenshot shows the AgilePoint NX v9.0 Deployment screen. The top navigation bar includes the AgilePoint logo, the product name 'AgilePoint NX - The Digital Transformation Platform (v9.0)', and a language dropdown set to 'English'. On the left, a vertical sidebar contains icons and labels for 'Welcome', 'Prerequisites', 'Installation', 'License Info', 'Configuration', 'Deployment', and 'Finish'. The 'Deployment' step is currently active. The main content area displays a progress bar at 100% with the text 'Successfully deployed AgilePoint NX'. A 'Show Details' button is located below the progress bar. A 'Next' button is highlighted with a red box in the bottom right corner.

35. On the **Finish** screen, take note of the important information about your environment. You will need this information later.

The screenshot shows the AgilePoint NX v9.0 Finish screen. The top navigation bar is identical to the previous screen. The sidebar on the left shows the 'Finish' step as the current active step. The main content area displays the message 'Congratulations! You have installed and configured AgilePoint NX.' Below this, it states: 'The following information will be saved and displayed in a text file, after clicking the Finish button. Make sure to save a copy of the file for your record.' A red box highlights a section of the text file containing the following information:

This URL is required to access the AgilePoint NX Portal.
 [Redacted URL]

Port Information for Manual Configuration

You must ensure the following ports are open in your firewall settings.

o 13487	o 13488	o 13489
o 13490	o 13491	o 13492

Other Configuration Information

A 'Finish' button is located in the bottom right corner.

36. Click **Finish**.
37. A text file appears with the summary information for your installation. Save this file where you can find it. You will need this information later, especially when you install [SharePoint Integration](#).

- ❗ 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, refer to [Run the Windows Service Client Utility Tool](#).

Set Firewall Rules for AgilePoint Server Ports

Verify you have set firewall rules to open the required ports for WSHttp Port, TCP Port, BasicHttp Port, and the port for Analytics Center, if necessary.

For more information, refer to [Reserve Port Numbers for AgilePoint NX Components](#).

Verify the AgilePoint Installation

To verify your installation, log on to the [AgilePoint NX Portal](#) web site.

Good to Know

- The URL for your Portal web site shows in the text file with the summary information for your installation.

Check the AgilePoint NX Windows Service

To make sure the [AgilePoint NX](#) Windows Service is running properly, do the procedure in this topic.

Prerequisites

- The pre-installation instructions are complete.
- [AgilePoint Server](#) is installed and configured.

How to Start

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

Procedure

1. In the **Services** window, make sure the AgilePoint NX Windows Service is started.
The name is the name of the service you created in [AgilePoint Server Manager](#).
2. If the service is not started, right-click the AgilePoint NX service name, and click **Start**.

Install AgilePoint Data Services

To install AgilePoint [Data Services](#), do the procedure in this topic.

Prerequisites

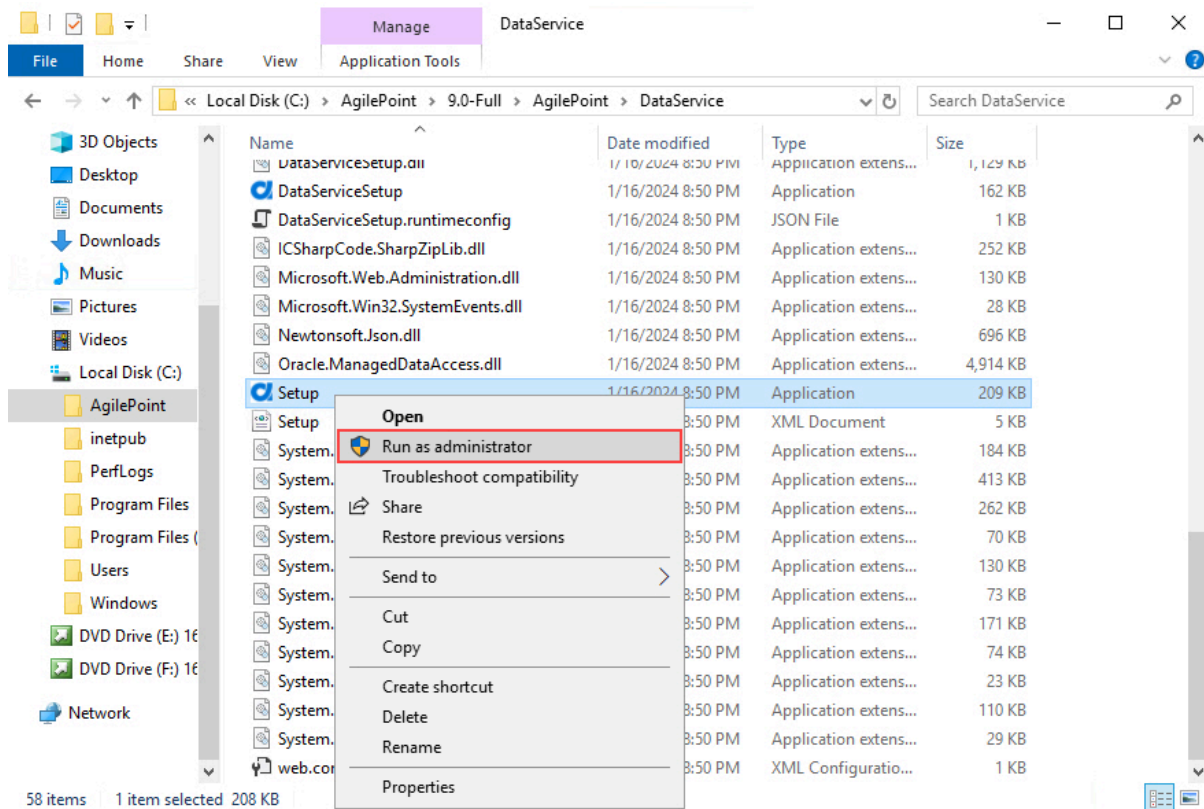
- Your system meets the minimum system requirements for this component.
For more information, refer to [AgilePoint Data Services Requirements](#).
- You have completed all of the pre-installation instructions for this component.
For more information, refer to [Set Up Your Environment for AgilePoint NX](#).
- [AgilePoint Server](#) installed on the AgilePoint Server machine.

Good to Know

- The installer UI is optimized for system resolutions 1366x768 or 1920x1080 with 100% scaling. If you use other screen resolutions, the installer UI may not display correctly, which can cause installation errors.

How to Start

1. On the [AgilePoint Server machine](#), open the folder **C:\AgilePoint\9.0-Full\AgilePoint\DataService**.
2. Right-click the **Setup.exe** file, and click **Run as administrator**.



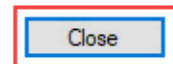
3. If a supported version of **.NET Runtime** is not installed, this screen shows.
 - a. Click **Close**.
 - b. Install the supported version of **.NET Runtime**.
 - c. Right-click the **Setup.exe** file, and click **Run as administrator**.



Welcome! Please Read Before You Begin:

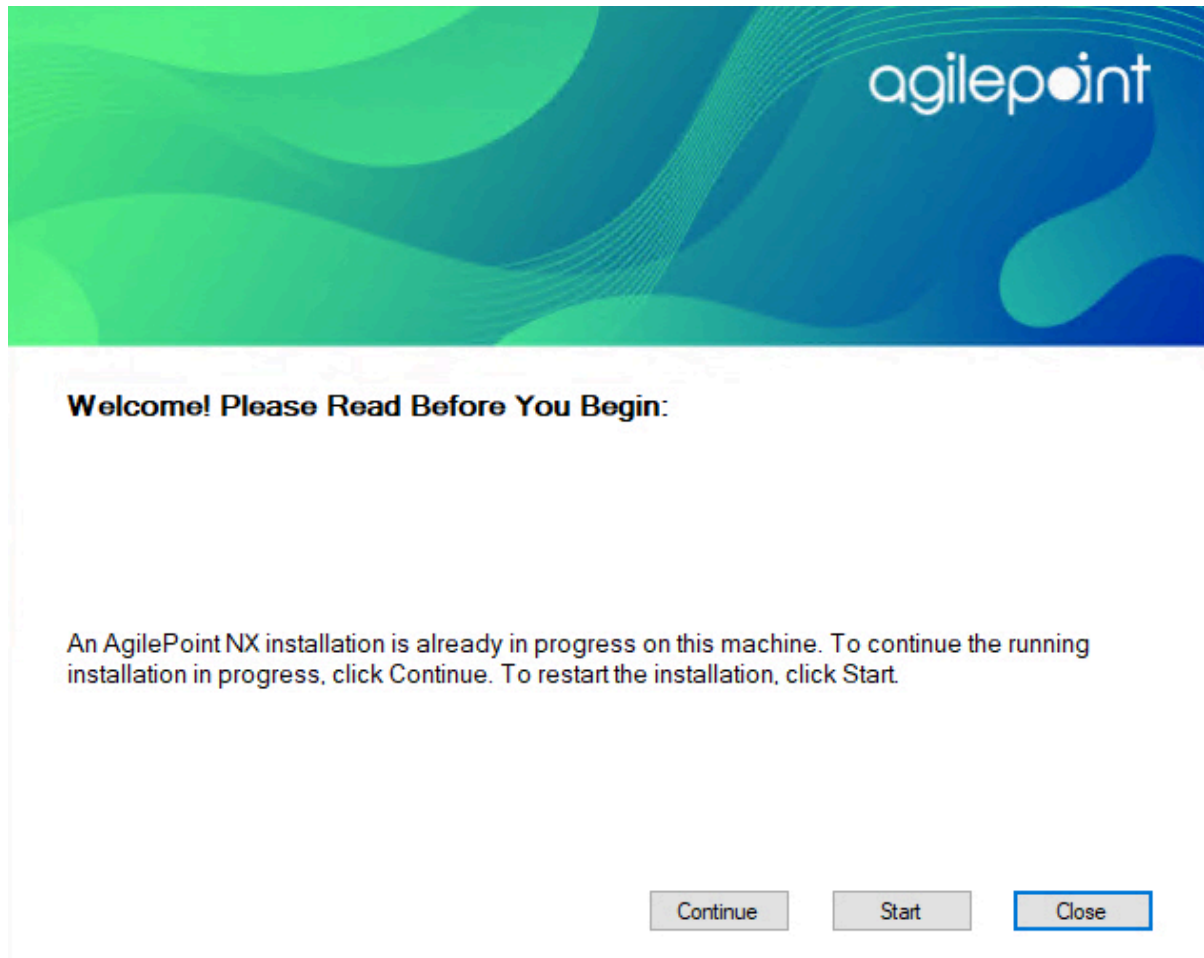
A supported version of .NET runtime is not installed. Please install a supported version of .NET Runtime. For more information, refer to the System Requirements Guide.

[System Requirements Guide](#)



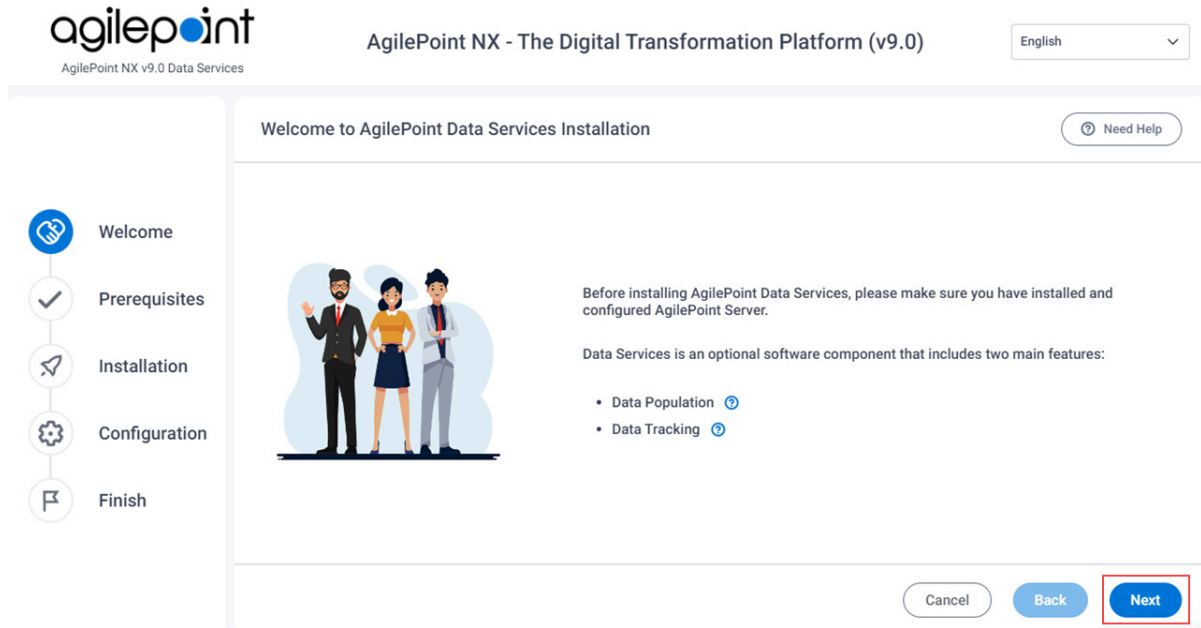
4. This screen shows if an AgilePoint NX installation is running on this machine.

- To resume the installation, click **Continue**.
- To restart the installation, click **Start**.

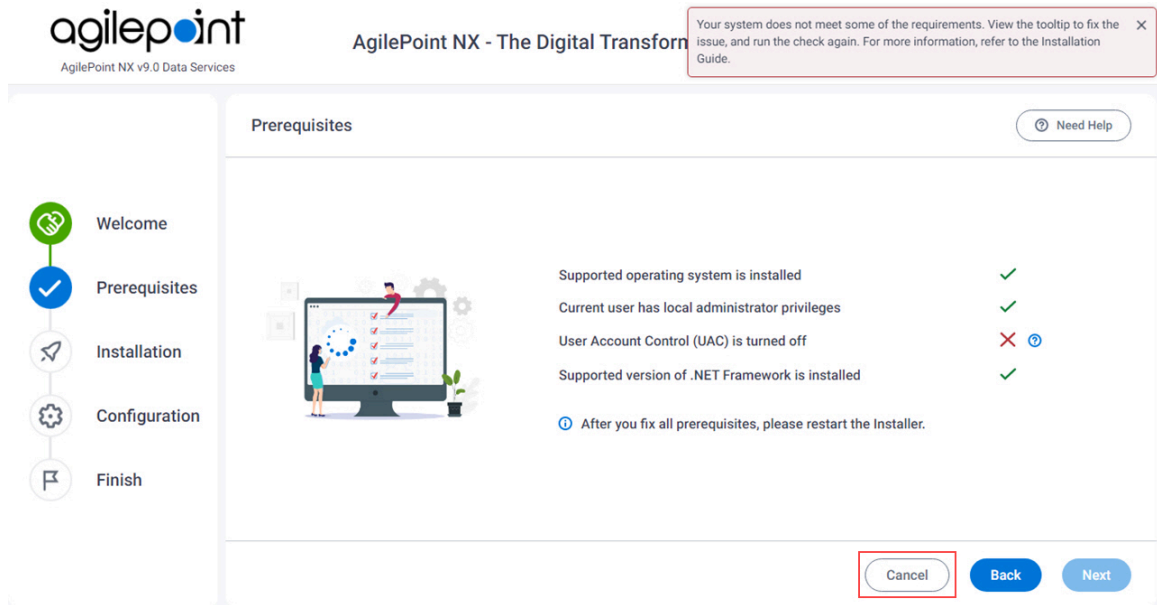


Procedure

1. On the **Welcome to AgilePoint Data Services Installation** screen, click **Next**.

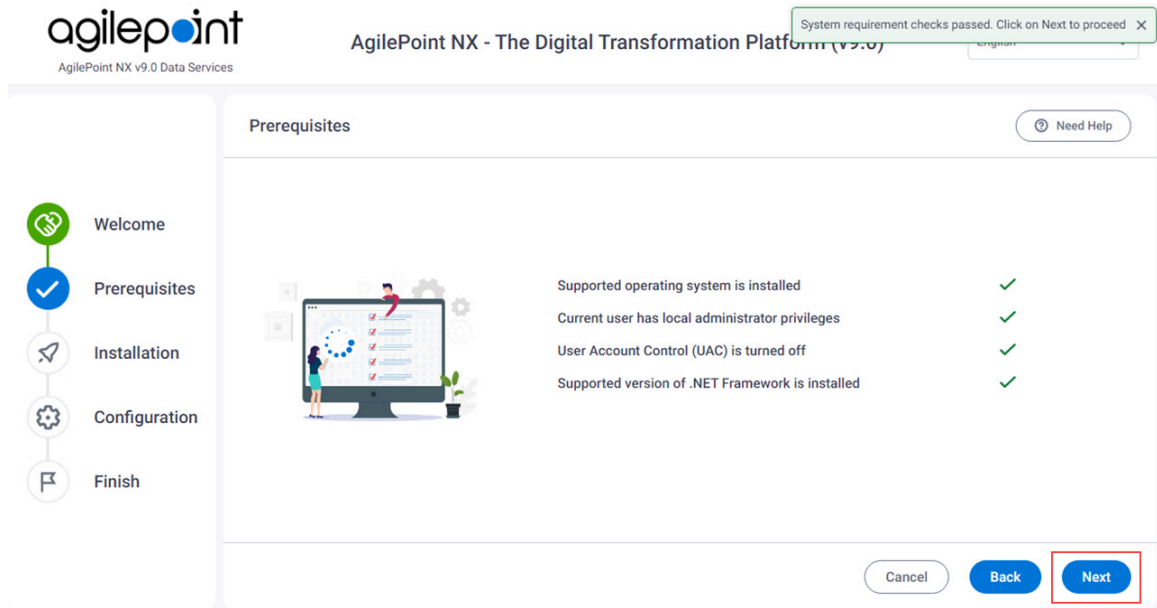


2. On the **Prerequisites** screen:
 - If there are any errors, do this procedure:
 - a. Click **Cancel**.
 - b. Correct the errors.
 - c. Right-click the AgilePoint NX **Setup.exe** file, and click **Run as administrator**.The AgilePoint Data Services installation starts.

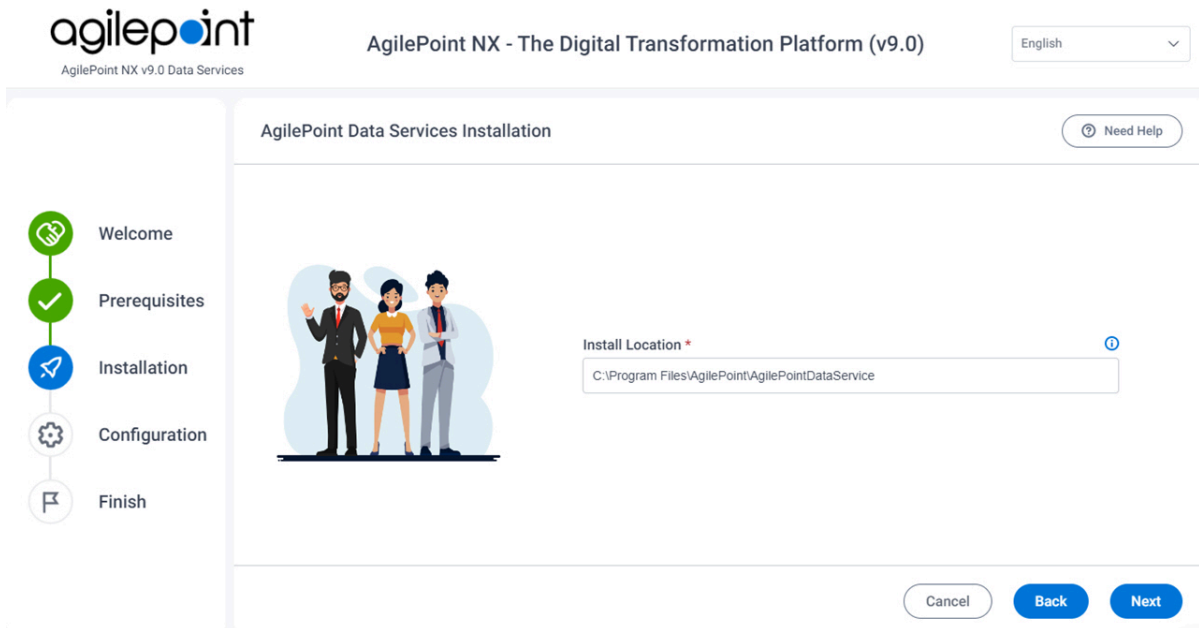


Issue	Resolution
Supported operating system is installed	Install a supported operating system on this machine. For more information, refer to System Requirements for AgilePoint Server .
Current user has local administrator privileges	Sign in to this machine as a user with administrator privileges.
User Account Control (UAC) is turned off	Turn user access control (UAC) off. For more information, refer to Turn Off User Account Control (UAC) .
Supported version of .NET Framework is installed	Install a supported version of .NET Framework on this machine. For more information, refer to System Requirements for AgilePoint Server .

- If there are no errors, click **Next**.

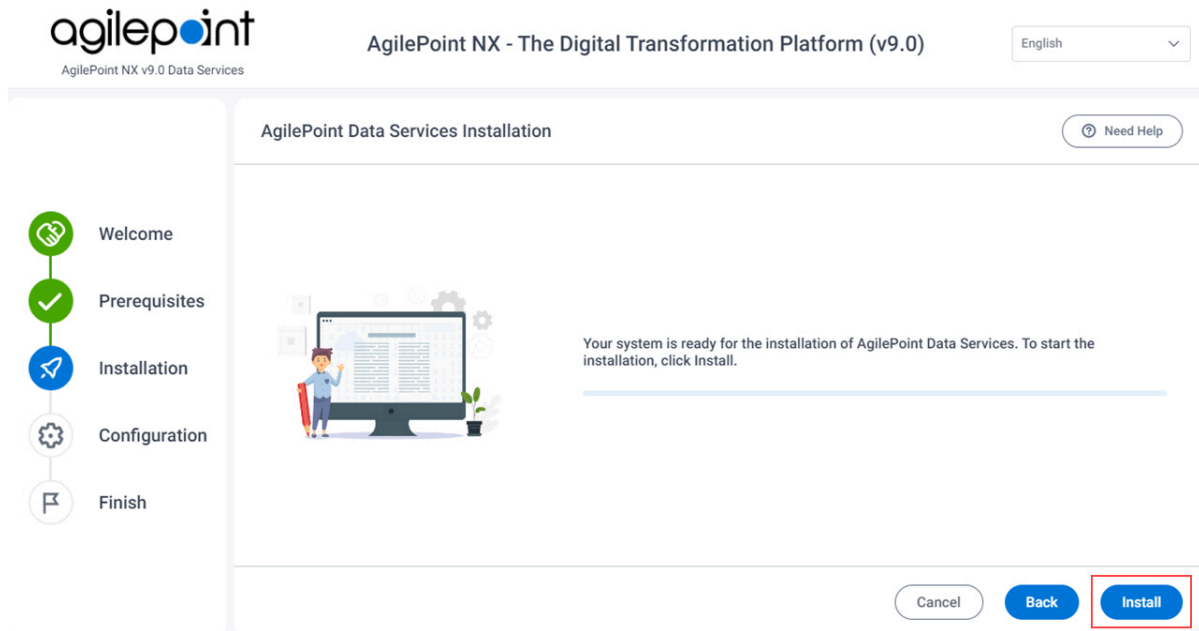


3. On the **AgilePoint Data Services Installation** screen, in the **Install Location** field, complete this field.

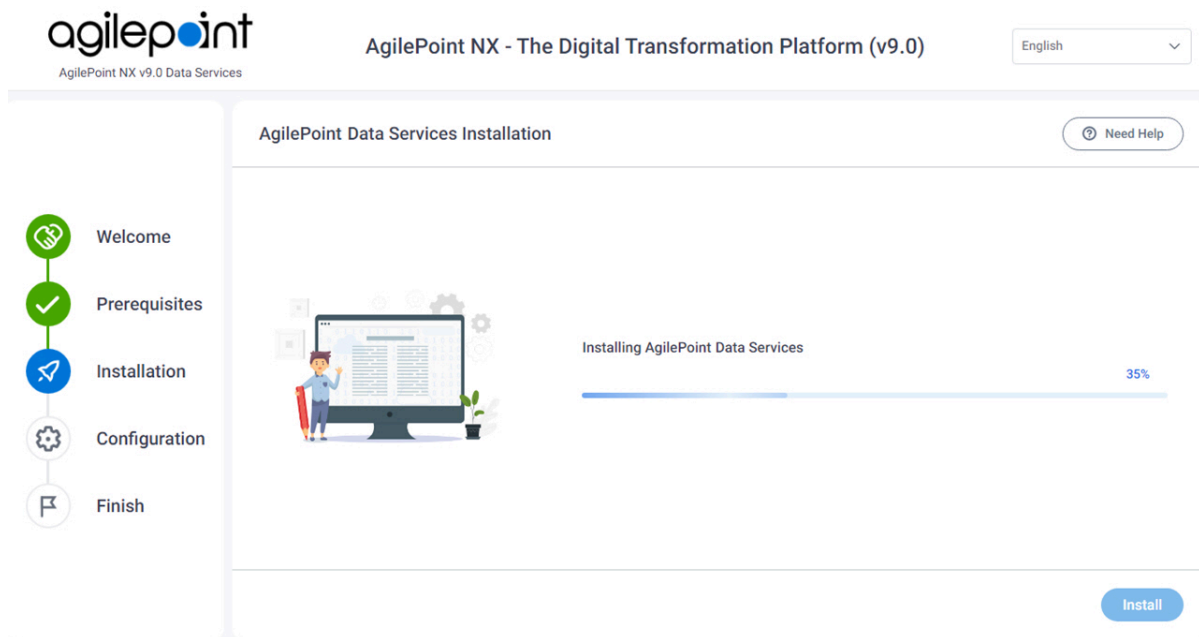


Field Name	Definition
Install Location	<p><u>Description:</u></p> <p>The folder where you want to install the AgilePoint component.</p>

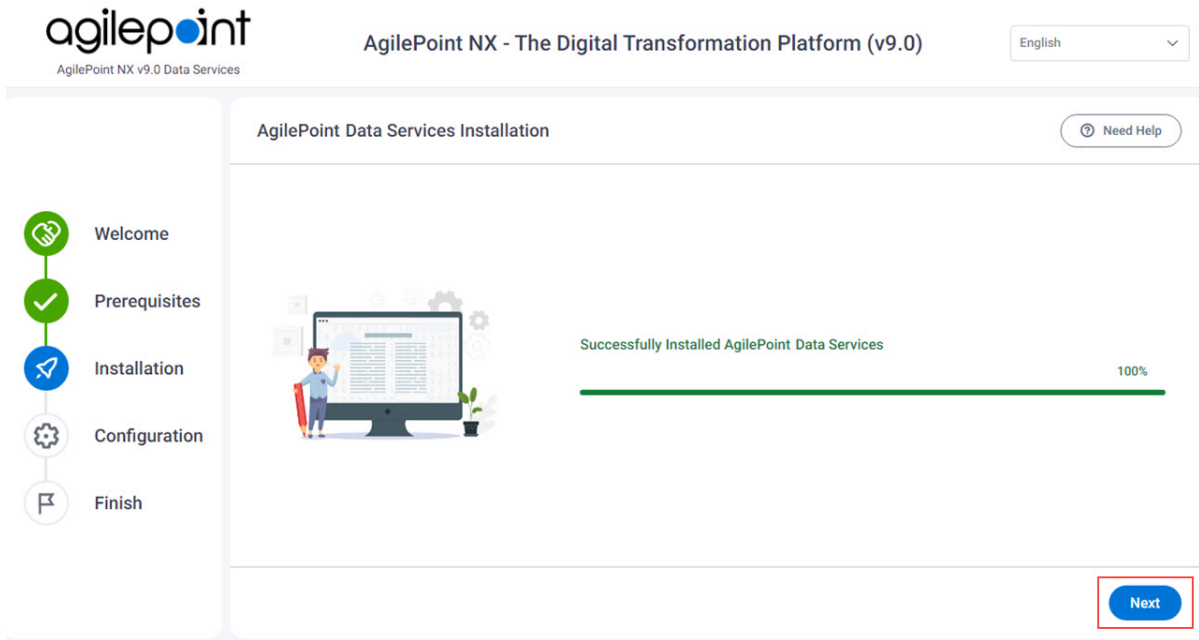
- Click **Next**.
- On the **AgilePoint Data Services Installation** screen, click **Install**.



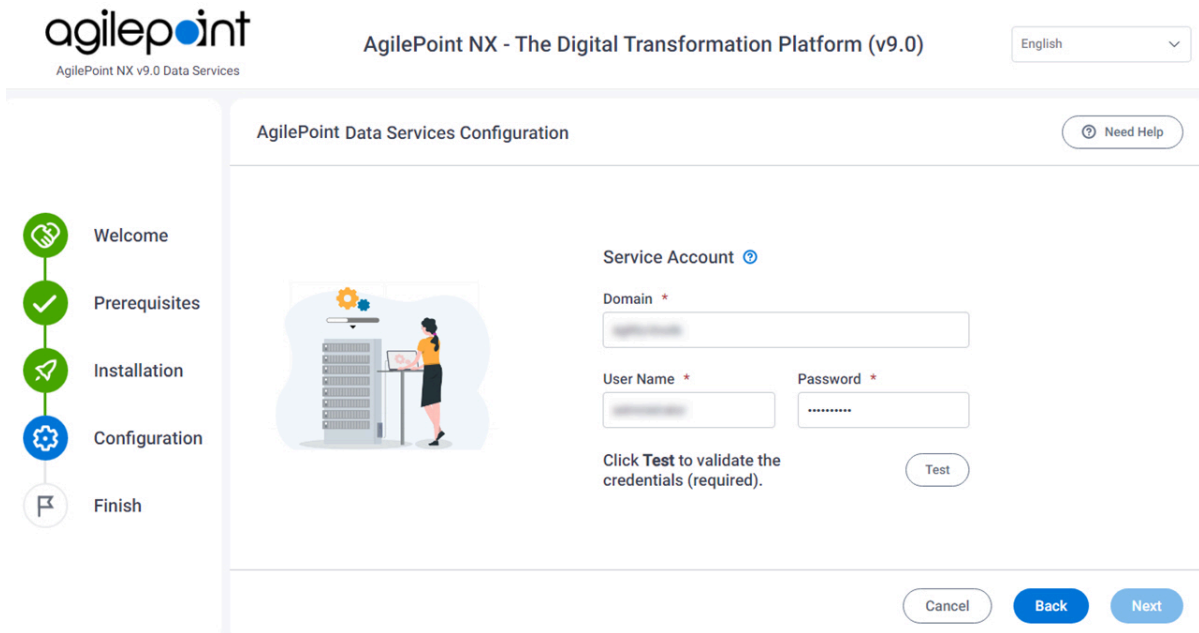
The AgilePoint Data Services installation starts.



- After the installation completes, click **Next**.



7. On the **AgilePoint Data Services Configuration** screen, enter the following information:

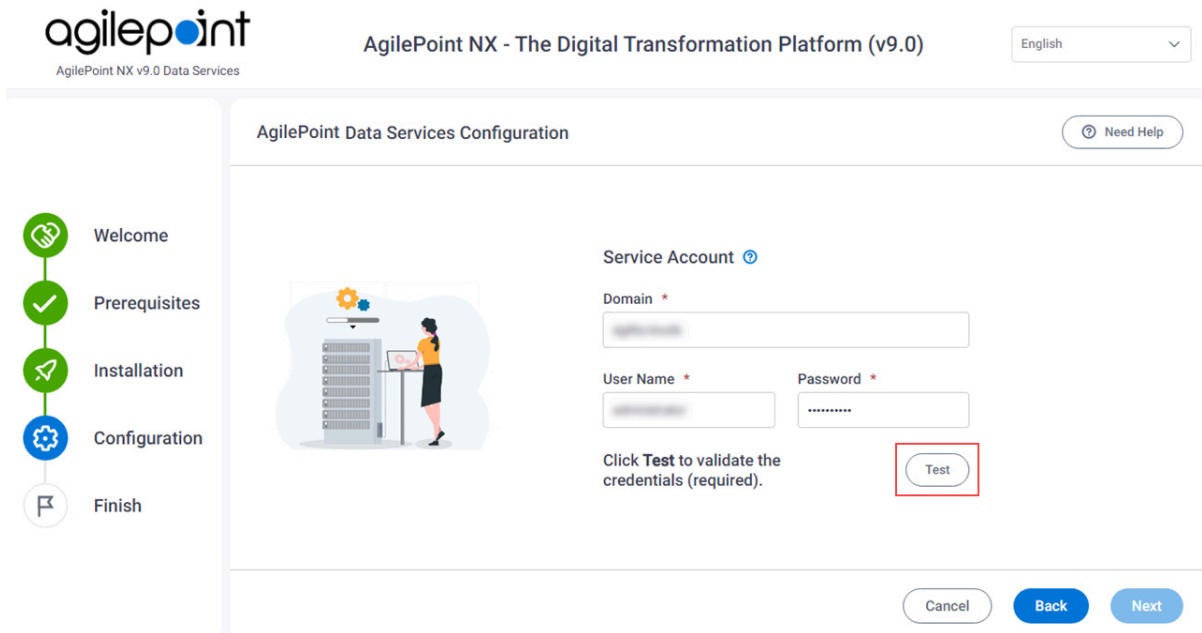


Field Name	Definition
Domain	<p><u>Description:</u></p> <p>The authentication domain for the AgilePoint Service Account.</p>

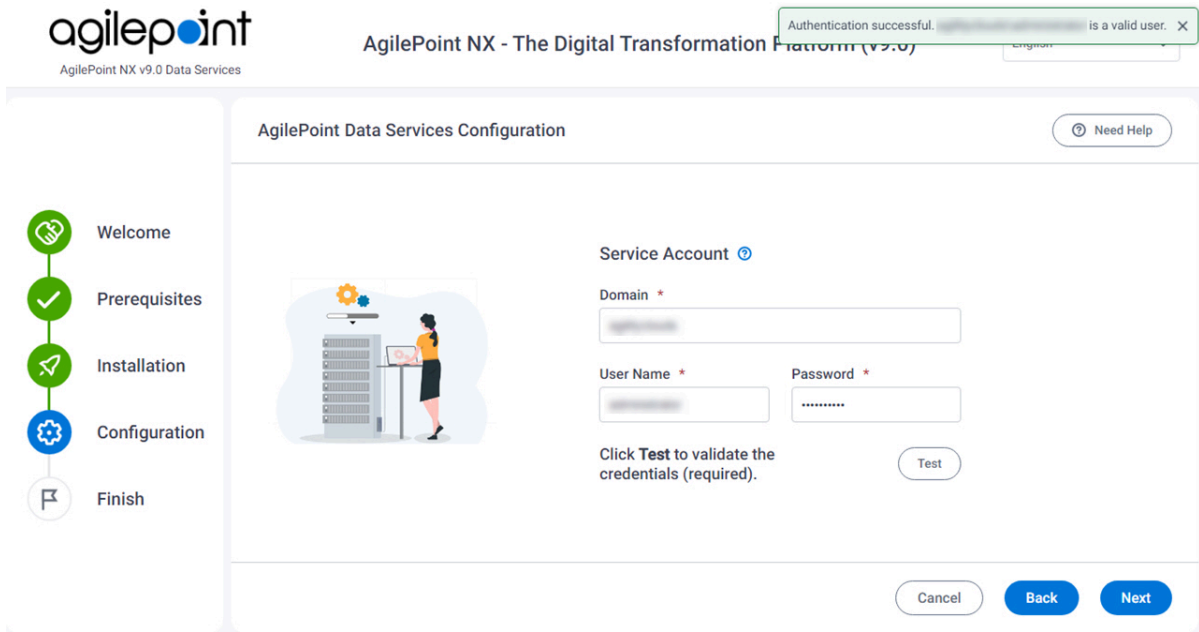
Field Name	Definition
	<p><u>Allowed Values:</u></p> <p>One line of text (a string) with no spaces that represents an authentication domain in your environment.</p> <p><u>Default Value:</u></p> <p>None</p>
User Name	<p><u>Description:</u></p> <p>Specifies the user name for your AgilePoint Service Account. This account serves as your AgilePoint Service Account, your AgilePoint System Account, and the account that AgilePoint uses to communicate with SharePoint, called the SharePoint impersonator.</p> <p>This account must be set up before entering the account information here. The AgilePoint installer cannot create this account for you.</p> <p><u>Allowed Values:</u></p> <p>One line of text (a string) that represents a user name for an account with the required privileges detailed in Set Up the AgilePoint Service Account.</p> <p><u>Default Value:</u></p> <p>None</p> <p><u>Limitations:</u></p> <p>During installation, you must use the same AgilePoint Service account credentials for all AgilePoint systems. However, for security purposes, AgilePoint recommends you change separate these account credentials after installation.</p> <p>For more information, refer to:</p> <ul style="list-style-type: none"> ◦ Administrator Types ◦ How Do I Change the Credentials for AgilePoint Administrator Accounts?

Field Name	Definition
Password	<p><u>Description:</u></p> <p>The password for the AgilePoint Service Account.</p> <p><u>Allowed Values:</u></p> <p>An alphanumeric string that represents a password.</p> <p><u>Default Value:</u></p> <p>None</p>

8. To make sure the user credentials are valid, click **Test**.

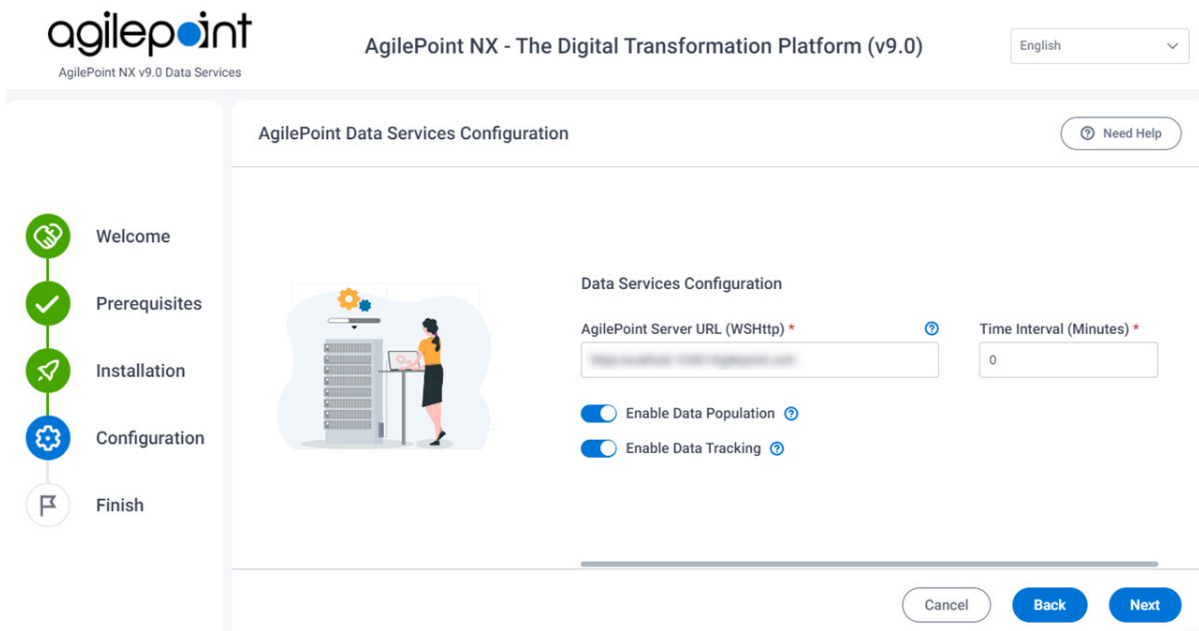


If the user credentials are valid, this validation message shows.



9. Click **Next**.

10. On the **Data Services Configuration** screen, complete these fields:

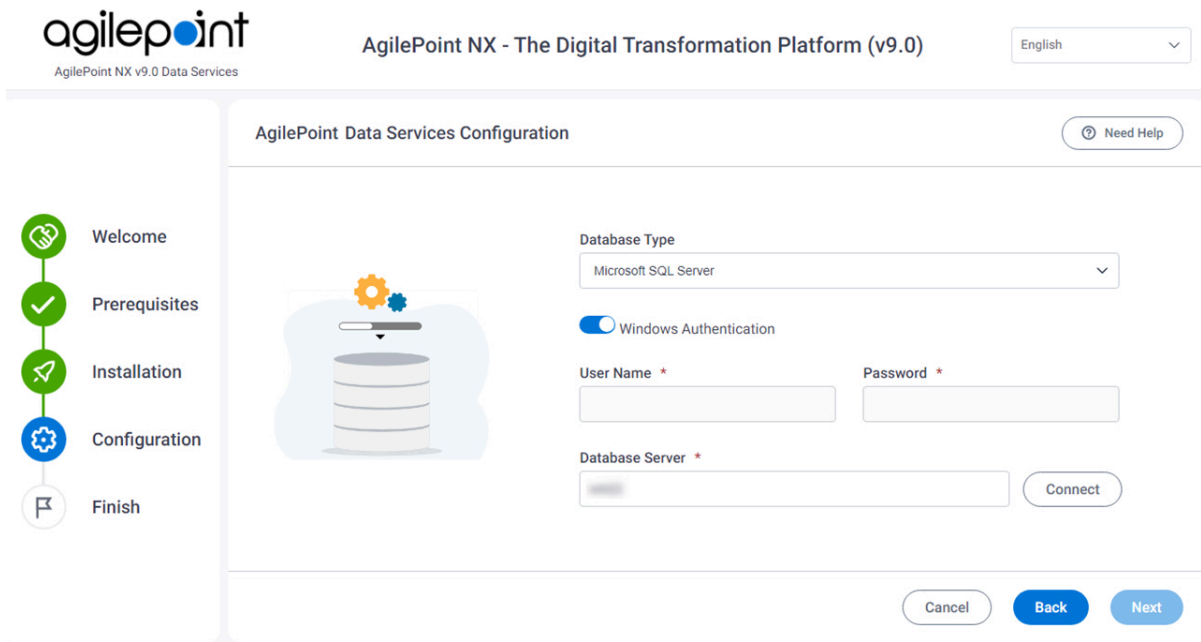


Field Name	Definition
AgilePoint Service URL	Specifies the AgilePoint Service URL for your AgilePoint BPMS environment.

Field Name	Definition
	For more information, refer to Find Your AgilePoint Service URL in AgilePoint NX .
Time Interval	<p><u>Description:</u></p> <p>Specifies the timer interval, in minutes, used by Data Services to check for new entries in the database.</p> <p><u>Allowed Values:</u></p> <p>An integer.</p> <p>Represents:</p> <ul style="list-style-type: none"> ◦ A number of minutes <p><u>Default Value:</u></p> <p>0</p>
Enable Data Population	<p><u>Description:</u></p> <p>Turns on the data population feature, which lets application data to be written to the database.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> ◦ On - Turns on the Data Population feature. ◦ Off - Turns off the Data Population feature. <p><u>Default Value:</u></p> <p>On</p>
Enable Data Tracking	<p><u>Description:</u></p> <p>Turns on the data tracking feature, which lets application data to be tracked across processes and components.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> ◦ On - Turns on the Data Tracking feature. ◦ Off - Turns off the Data Tracking feature.

Field Name	Definition
	<p><u>Default Value:</u></p> <p>On</p>

- Click **Next**.
- On the **AgilePoint Data Services Configuration** screen, enter the following information for your Data Services database.

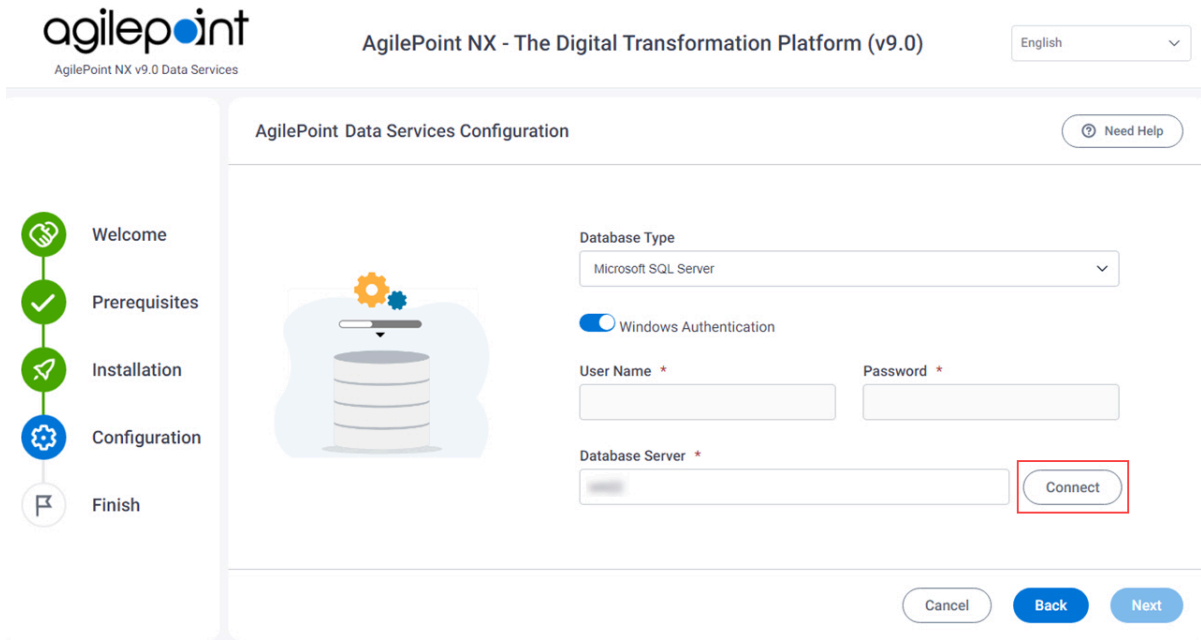


Field Name	Definition
Database Type	<p><u>Description:</u></p> <p>Specifies the database technology to store your data.</p> <p><u>Allowed Values:</u></p> <p>Microsoft SQL Server.</p> <p><u>Default Value:</u></p> <p>Microsoft SQL Server</p>
Windows Authentica-tion	<p><u>Description:</u></p>

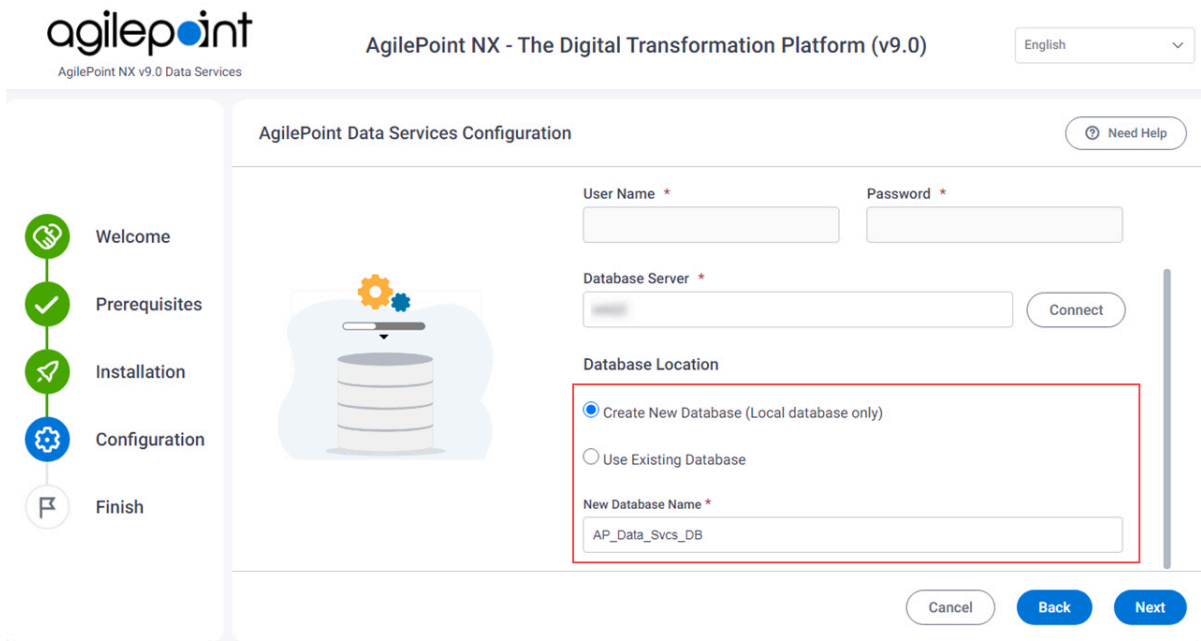
Field Name	Definition
	<p>Specifies whether the database connection uses Windows authentication.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> ◦ On - The database connection uses Windows Authentication, and the machine's authenticated user connects to the database server. <p>If this option is selected, the User Name and Password fields are not required.</p> <ul style="list-style-type: none"> ◦ Off - The database connection does not use Windows authentication. <p>If this option is selected, you must specify the user name and password for the authentication account AgilePoint Server uses to connect to the database.</p> <p><u>Default Value:</u></p> <p>On</p>
User Name	<p><u>Description:</u></p> <p>The user name for the account AgilePoint Server uses to connect to the database.</p> <p><u>To Open this Field:</u></p> <ol style="list-style-type: none"> a. Turn off Windows Authentication. <p><u>Allowed Values:</u></p> <p>An alphanumeric string that contains a user name for the database.</p> <p><u>Default Value:</u></p> <p>None</p>
Password	<p><u>Description:</u></p> <p>The password for the authentication account.</p>

Field Name	Definition
	<p><u>To Open this Field:</u></p> <p>a. Turn off Windows Authentication.</p> <p><u>Allowed Values:</u></p> <p>An alphanumeric string that represents a password.</p> <p><u>Default Value:</u></p> <p>None</p>
Database Server	<p><u>Description:</u></p> <p>The database used for data tracking.</p> <p><u>Allowed Values:</u></p> <p>An alphanumeric string with no spaces that represents a database server name.</p> <p><u>Default Value:</u></p> <p>None</p> <p><u>Example:</u></p> <ul style="list-style-type: none"> ◦ mydatabase ◦ mydatabase/sharepoint

13. Once you enter the Database Server, click **Connect** to authenticate the database user account and populate the names of the databases on your database server.



14. In the **Database Location** section, enter the following information for your AgilePoint database.

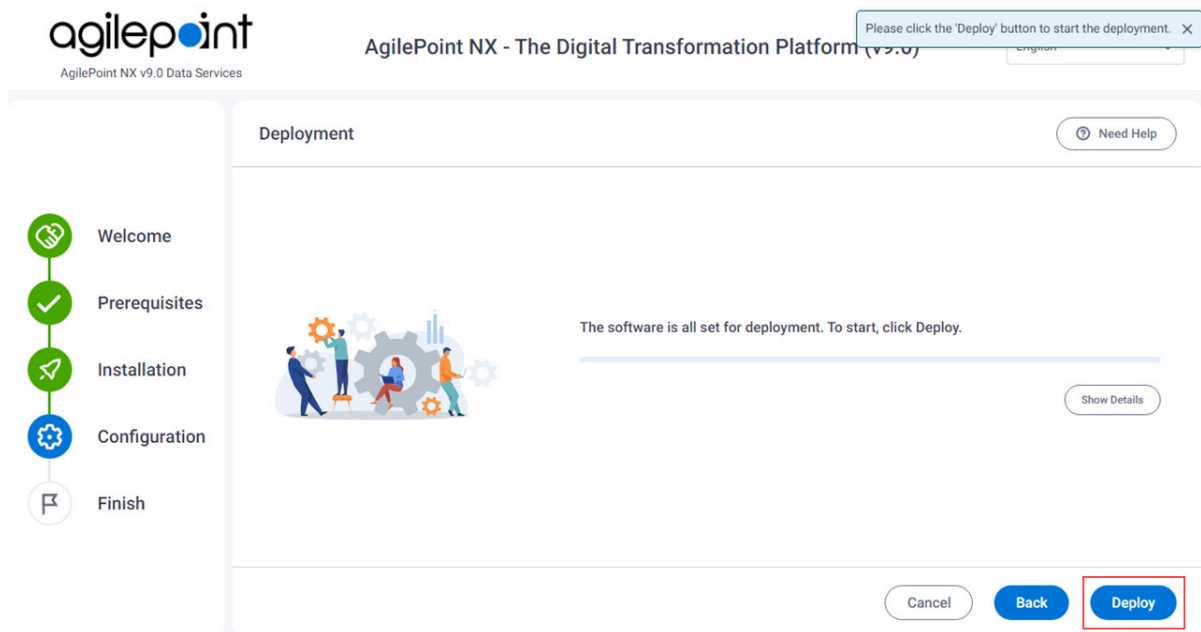


Field Name	Definition
Create New Database / Use Existing Database	<p><u>Description:</u></p> <p>Specifies whether to create a database for AgilePoint Data Services.</p>

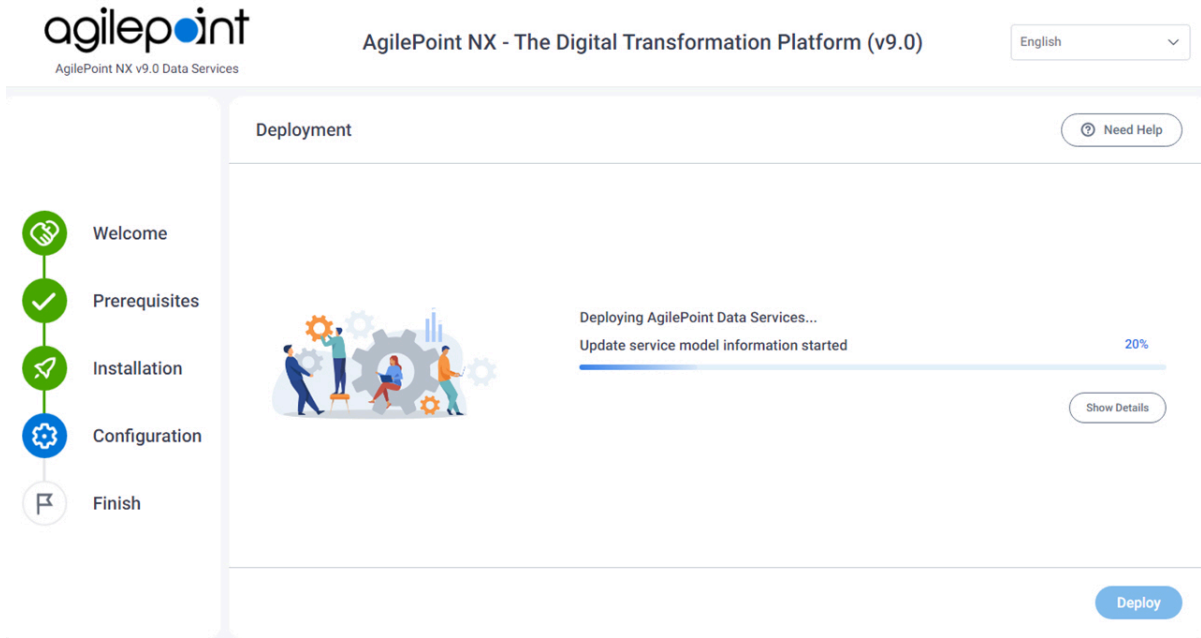
Field Name	Definition
	<p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> ◦ Create New Database - Specifies the name of a database to create for AgilePoint Data Services. ◦ Use Existing Database - Specifies the name of an existing database you want to use for AgilePoint Data Services. <p><u>Default Value:</u></p> <p>Create New Database</p>
New Database Name	<p><u>Description:</u></p> <p>Specifies the name of a new database you want to create as your AgilePoint Data Services database.</p> <p>This option is only available if your database is installed on the same machine where you are installing this component.</p> <p><u>To Open this Field:</u></p> <p>a. Select Create New Database.</p> <p><u>Allowed Values:</u></p> <p>One line of text (a string).</p> <p><u>Not Accepted:</u></p> <ul style="list-style-type: none"> ◦ Spaces <p><u>Default Value:</u></p> <p>AP_Data_Svcs_DB</p>
Database	<p><u>Description:</u></p> <p>Specifies the name of an existing database you want to use for AgilePoint Data Services.</p> <p><u>To Open this Field:</u></p>

Field Name	Definition
	<p>a. Select Use Existing Database.</p> <p>b. Click Connect to populate the list.</p> <p><u>Allowed Values:</u></p> <p>A database name from the list.</p> <p><u>Default Value:</u></p> <p>None</p>

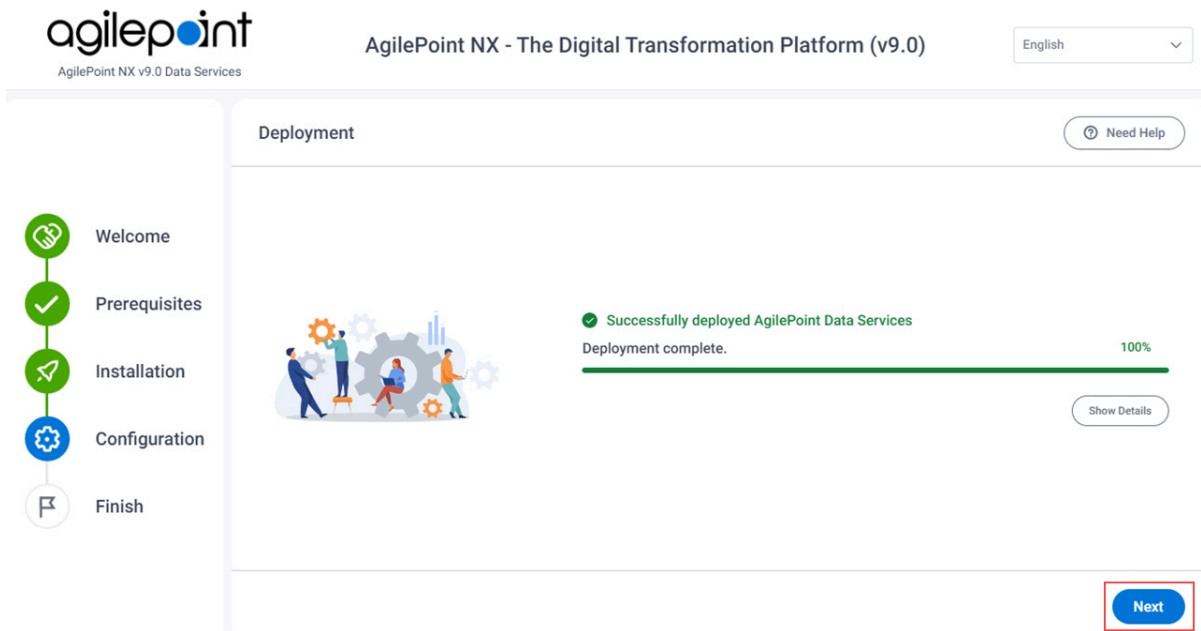
15. Click **Next**.
16. On the **Deployment** screen, click **Deploy**.



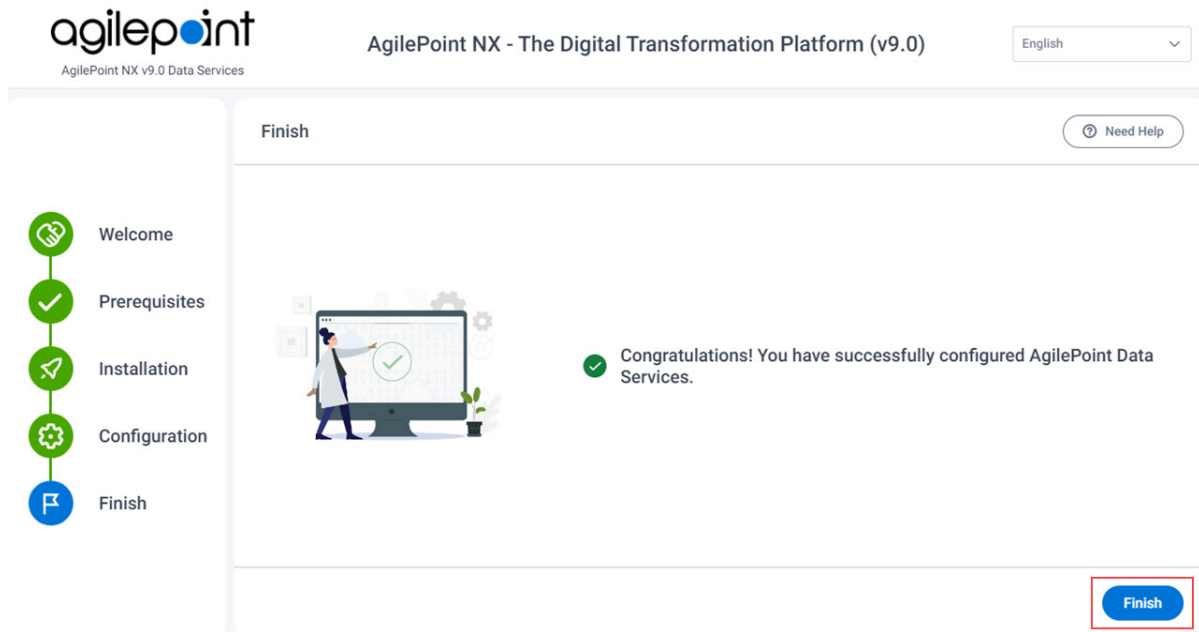
The AgilePoint Data Services installation runs. If any error messages show on the screen, you can use the log to troubleshoot the errors. If an error exists, [contact AgilePoint Customer Support](#).



17. After the installation completes, click **Next**.



18. On the **Finish** screen, click **Finish**.



19. Restart the machine.

This is optional, but recommended. Rarely AgilePoint users have reported an issue with shortcuts not displaying if the machine is not restarted. There are no other known issues if you do not restart the machine. Windows sometimes prompts to restart, and sometimes not. This is determined by the operating system.

- ❗ 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, refer to [Run the Windows Service Client Utility Tool](#).

Install the AgilePoint SAP Connector

To install the AgilePoint [SAP Connector](#), do the procedure in this topic.

Prerequisites

- A license key that includes the AgilePoint [SAP Connector](#).
- Your system meets the minimum system requirements for this component.
For more information, refer to [System Requirements for the AgilePoint SAP Connector](#).
- You have completed all of the pre-installation instructions for this component.
For more information, refer to [Set Up Your Environment for AgilePoint NX](#).
- If you have installed the SAP Connector component for an earlier version of AgilePoint NX, you will need to uninstall this component before installing the AgilePoint SAP Connector v7.0. Before you uninstall the old version, do this procedure:
 1. Open the AgilePoint SAP Connector configuration.
For more information, refer to [SAP Integration AgileConnector](#).
 2. Make a note of the information in these fields. When you configure AgilePoint SAP Connector v7.0, the values for these fields must be the same because these values are used in the SAP access token.
 - These fields are critical because they are used in the SAP access tokens:
 - **Pool Number** - This is provided in the **Connection Pool** list. When you configured the pool number in Connection Pool list, the same pool number shows in the **Pool ID** list in the SAP access token.
 - **Client**
 - **User**
 - **Password**

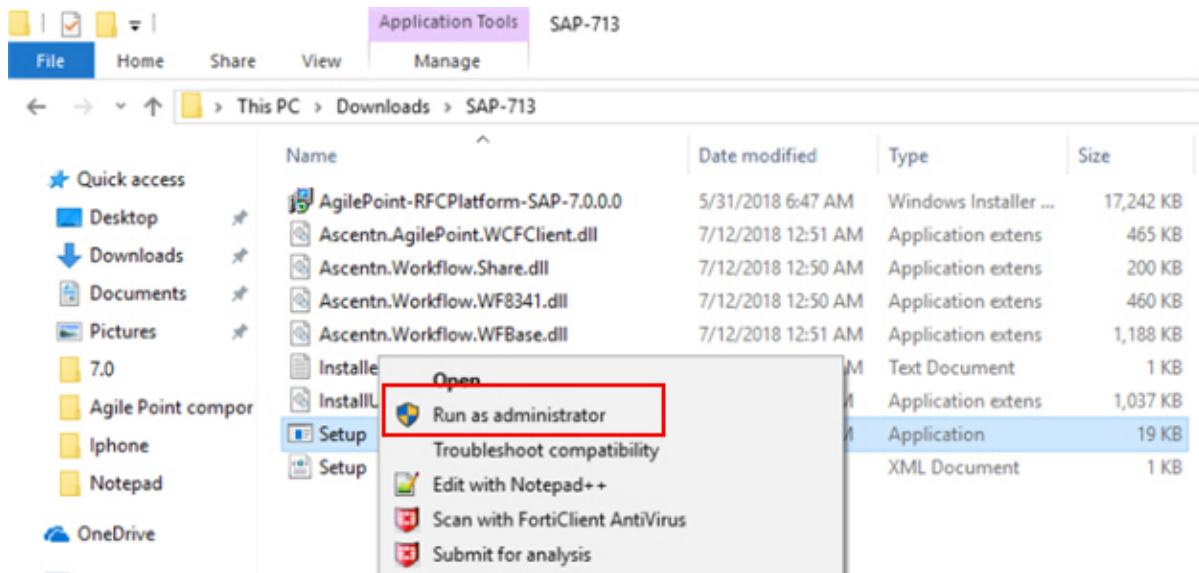
- You may also want to note these fields, so that you can enter them again when you install the latest version of the SAP Connector. However, if these values change, it will not have an effect on your SAP access tokens:
 - **Description**
 - **Destination String**
 - **Connection Mode**
 - **Language**
 - **Min Pool Size**
 - **Max Pool Size**

Good to Know

- The installer UI is optimized for system resolutions 1366x768 or 1920x1080 with 100% scaling. If you use other screen resolutions, the installer UI may not display correctly, which can cause installation errors.

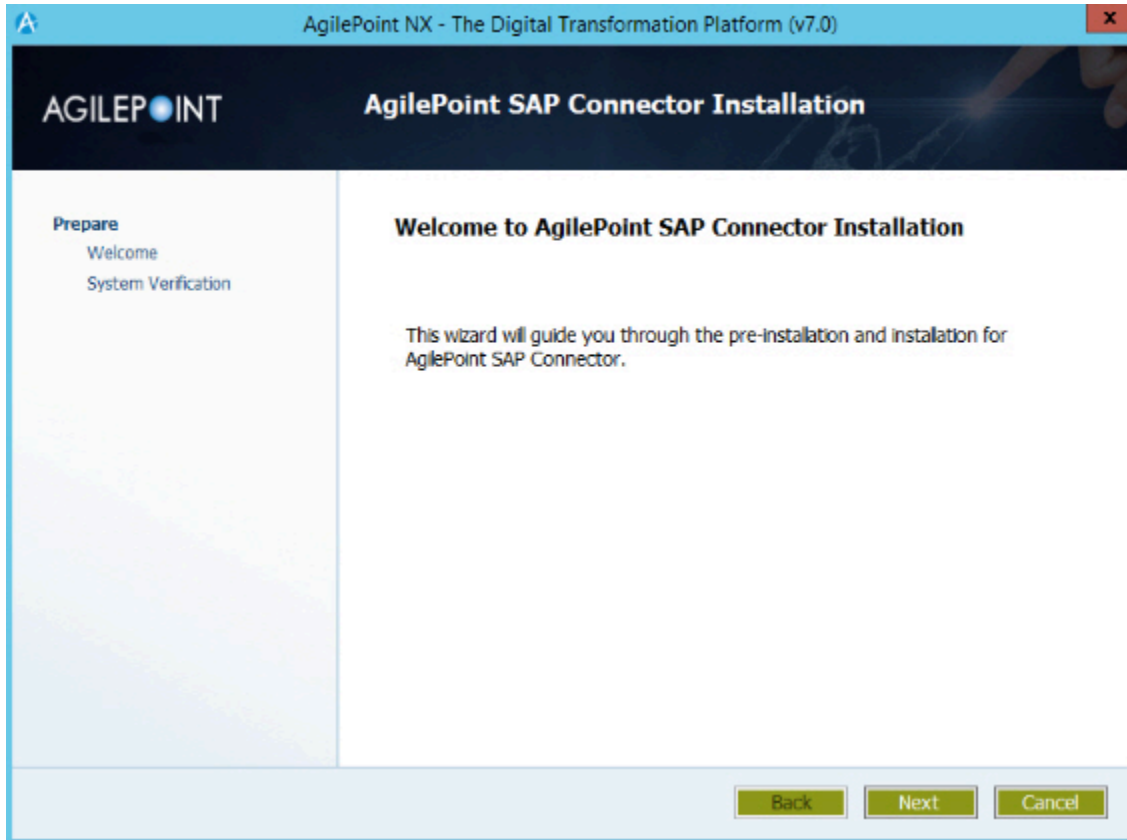
How to Start

1. Open the AgilePoint SAP Connector installation package.
2. Right-click the **Setup.exe** file, and click **Run as administrator**.



Procedure

1. On the **Welcome to AgilePoint SAP Connector Installation** screen, click **Next**.

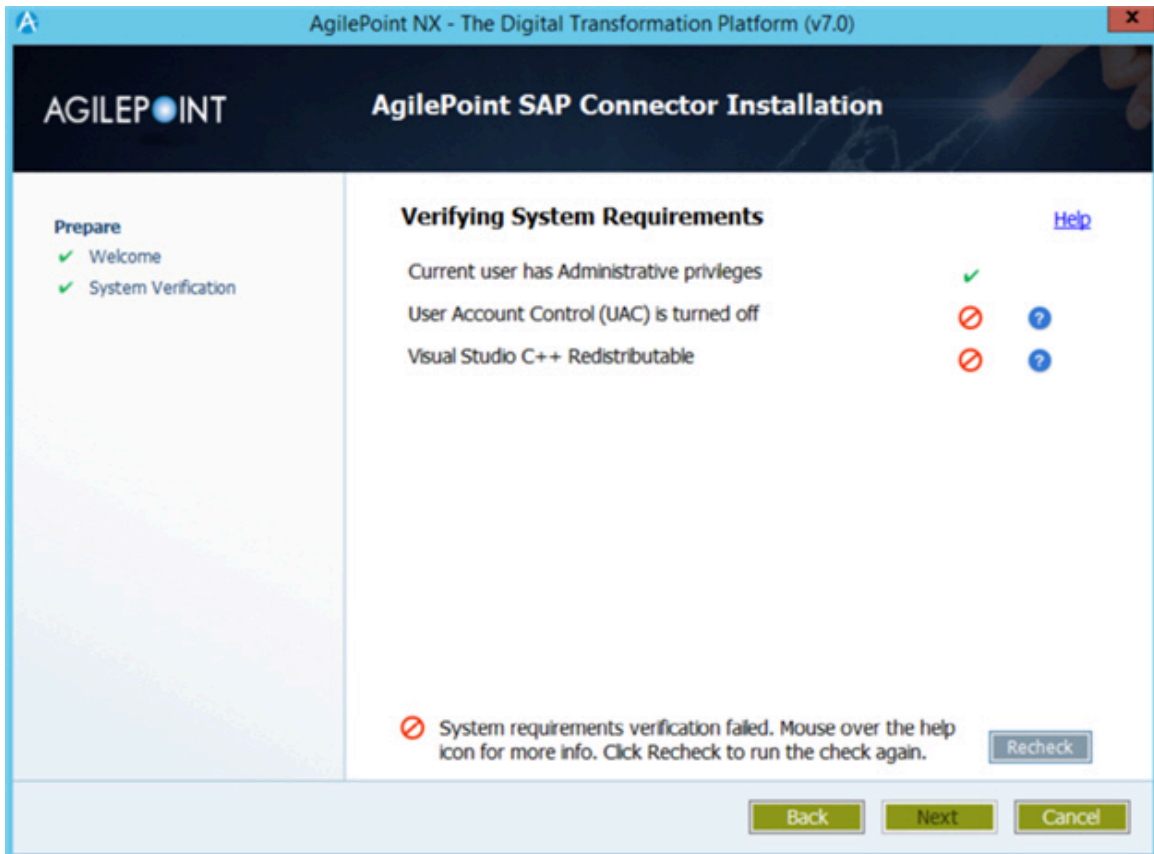


2. On the **AgilePoint SAP Connector Installation** screen, complete these fields.

Field Name	Definition
Name	Your first and last name.
Organization	The name of your organization, or company.
AgilePoint Server License Key	An AgilePoint Server license key that includes the SAP Connector . For more information, refer to Obtain, Apply, and Activate AgilePoint License Keys .

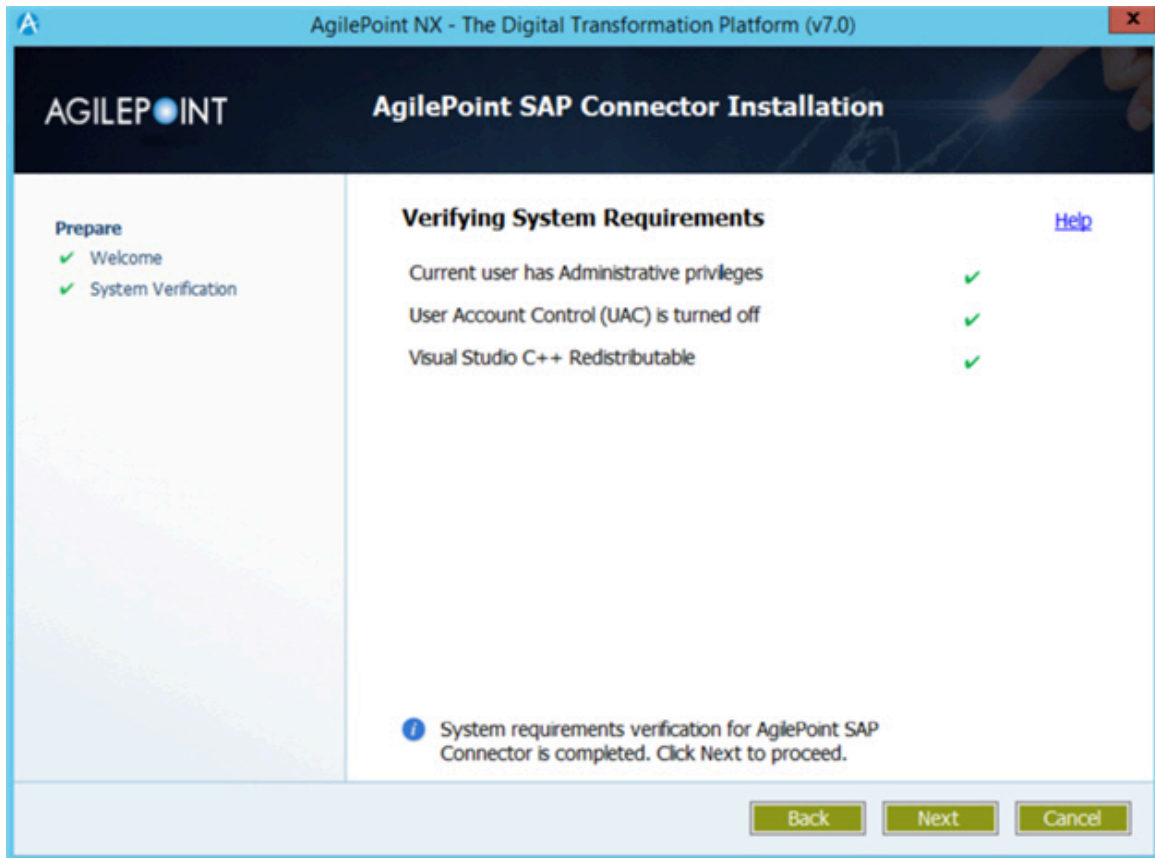
3. On the **Verifying System Requirements** screen:

- If there are any errors, correct them. Once you have resolved the issue, click **Recheck**.



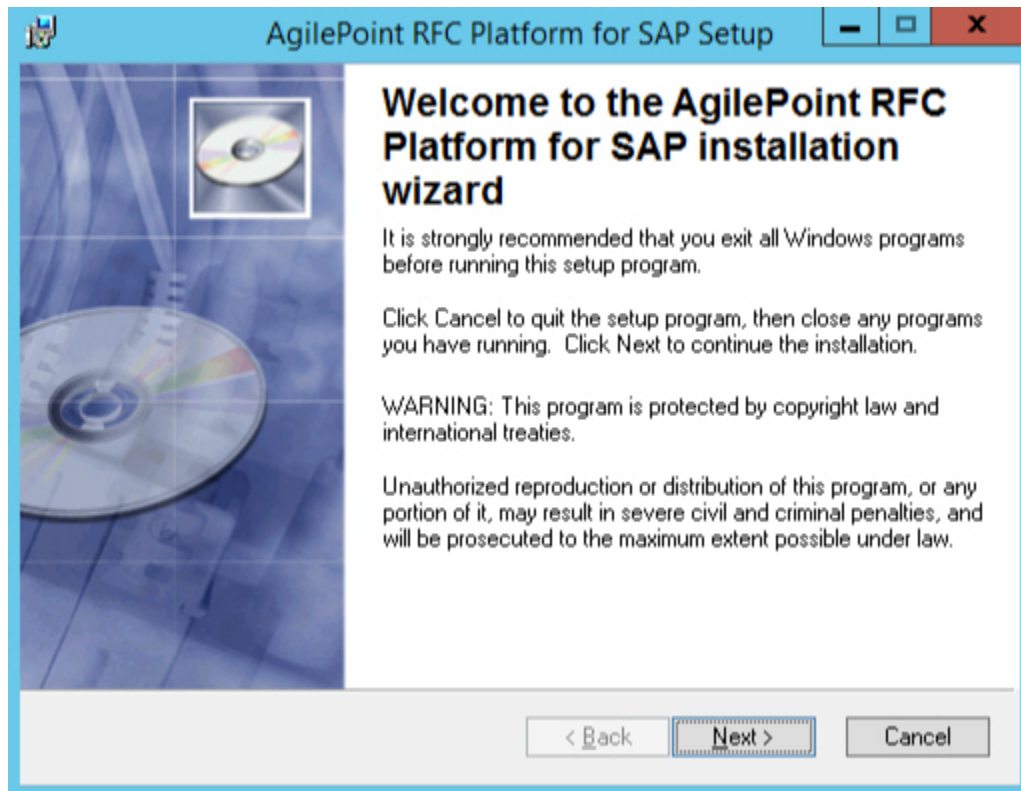
Issue	Resolution
Current user has local administrator privileges	Sign in to this machine as a user with administrator privileges.
User Account Control (UAC) is turned off	Turn user access control (UAC) off. For more information, refer to Turn Off User Account Control (UAC) .
Visual Studio C++ Redistributable	Install C++ Redistribution for Visual Studio on this machine. For more information, refer to System Requirements for the AgilePoint SAP Connector .

- If there are no errors, click **Next**.

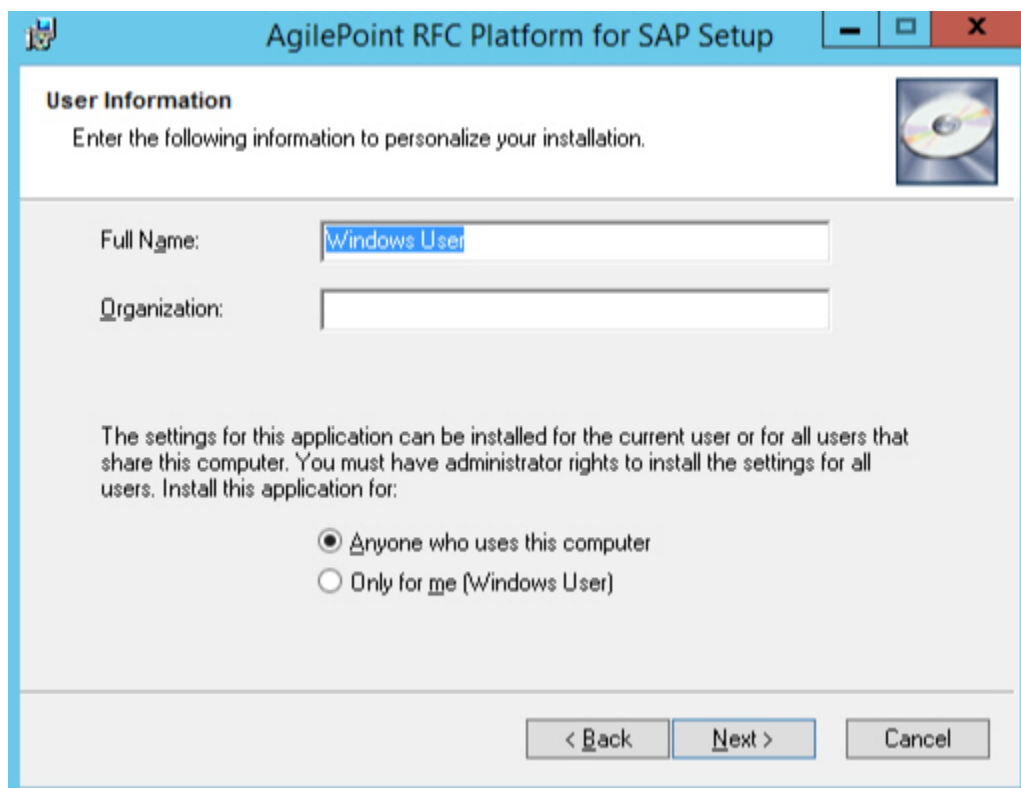


4. On the **Welcome to the AgilePoint RFC Platform for SAP Installation Wizard** screen, click **Next**.

! On this installer, the AgilePoint SAP Connector is referred to as the RFC Platform for SAP. Both names refer to the same component.

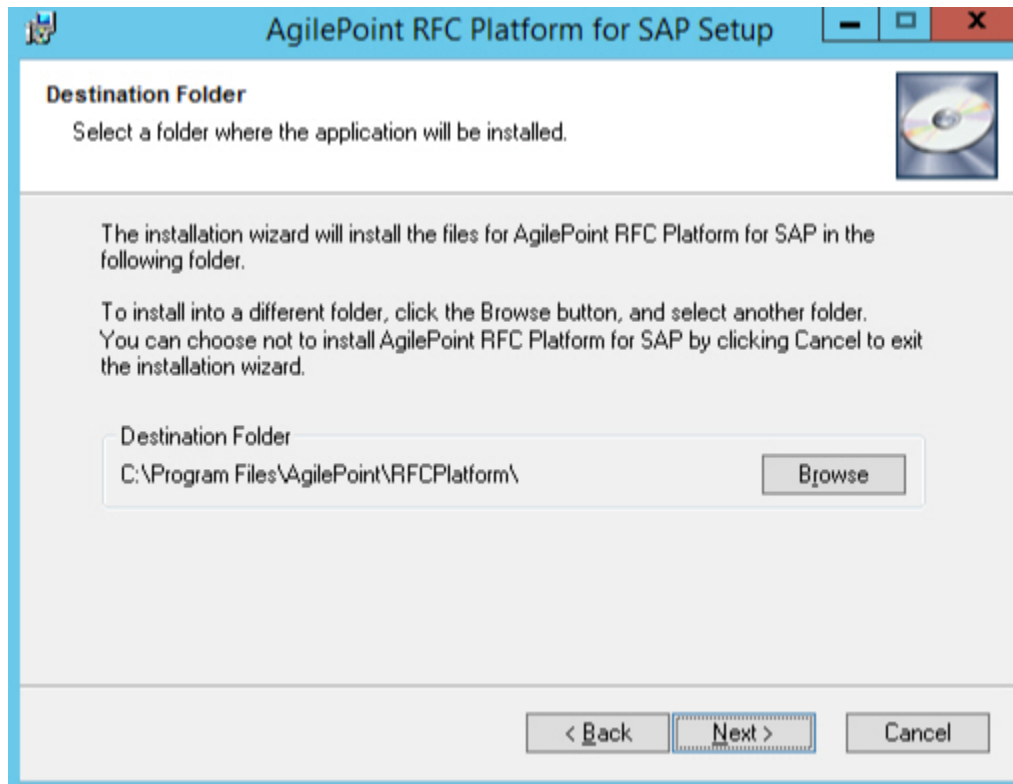


5. (Optional) On the **User Information** screen, enter your full name and organization name.



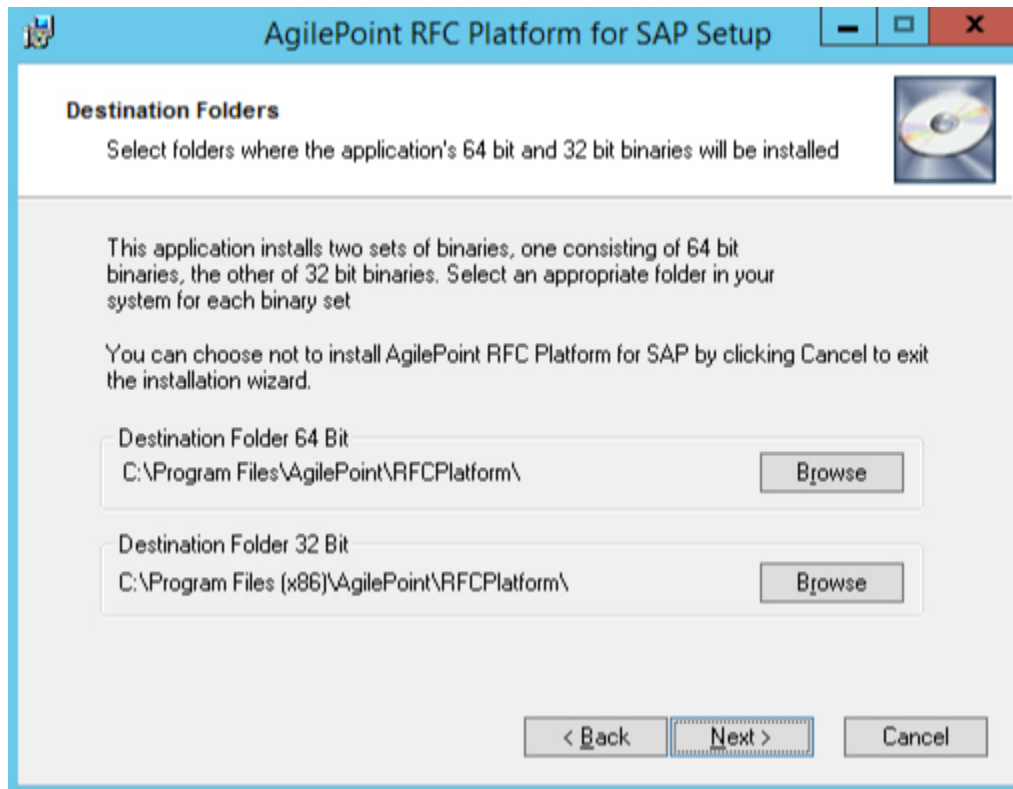
6. Click **Next**.
7. In the **Destination Folder** section, click **Next**.

The system enters the default folder path. If you want to change the path, click **Browse** and select the folder where you want to install AgilePoint SAP Connector.



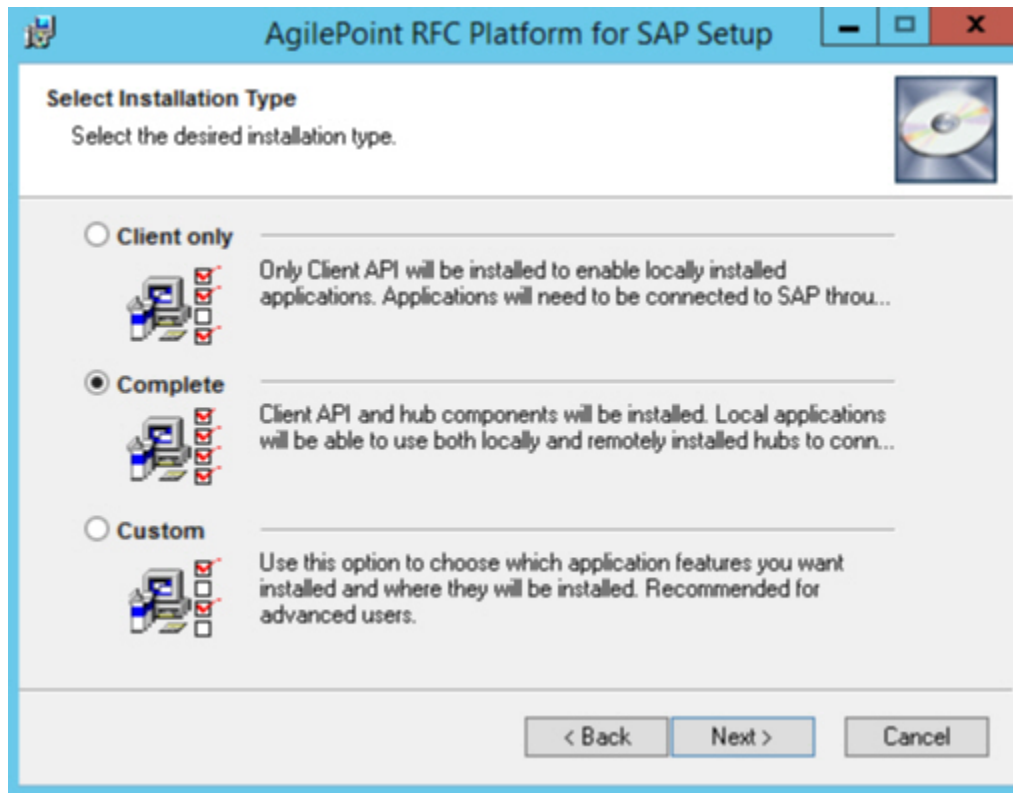
8. In the **Destination Folders** screen, click **Next**.

The system enters the default folders path to install 32 bit and 64 bit application binaries. If you want to change the folders path to install the application binaries, click **Browse** and select the folder.



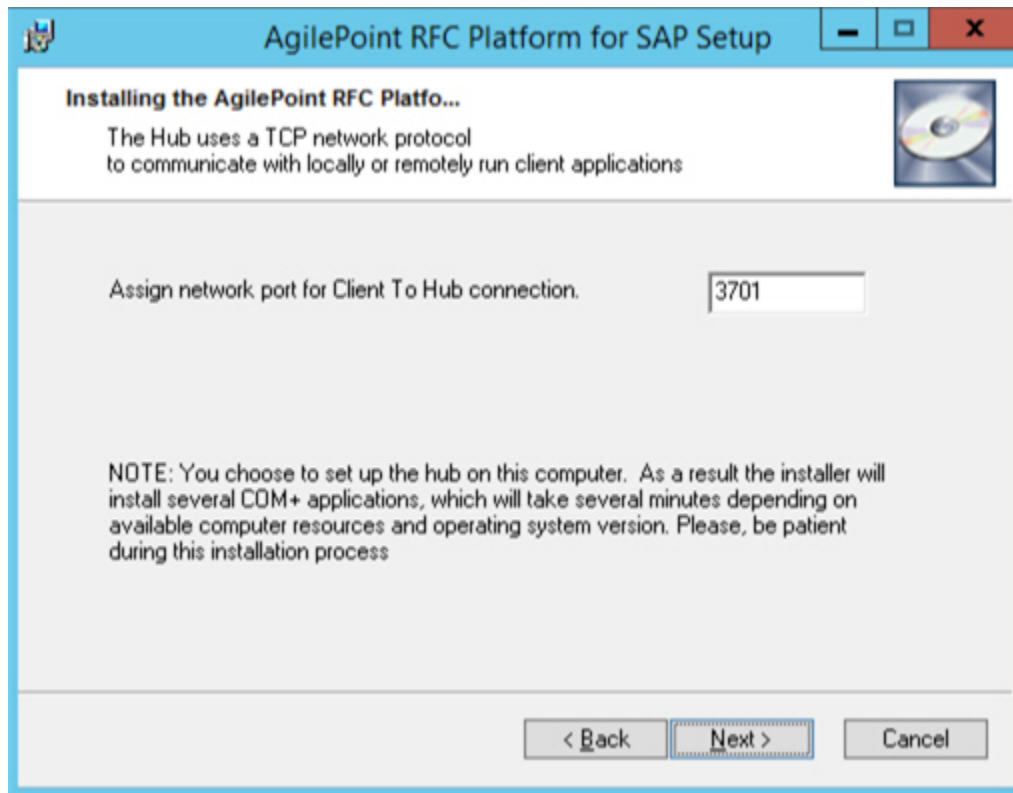
9. On the **Select Installation Type** screen, select **Complete**.

 You must select **Complete**. This is not the default option.

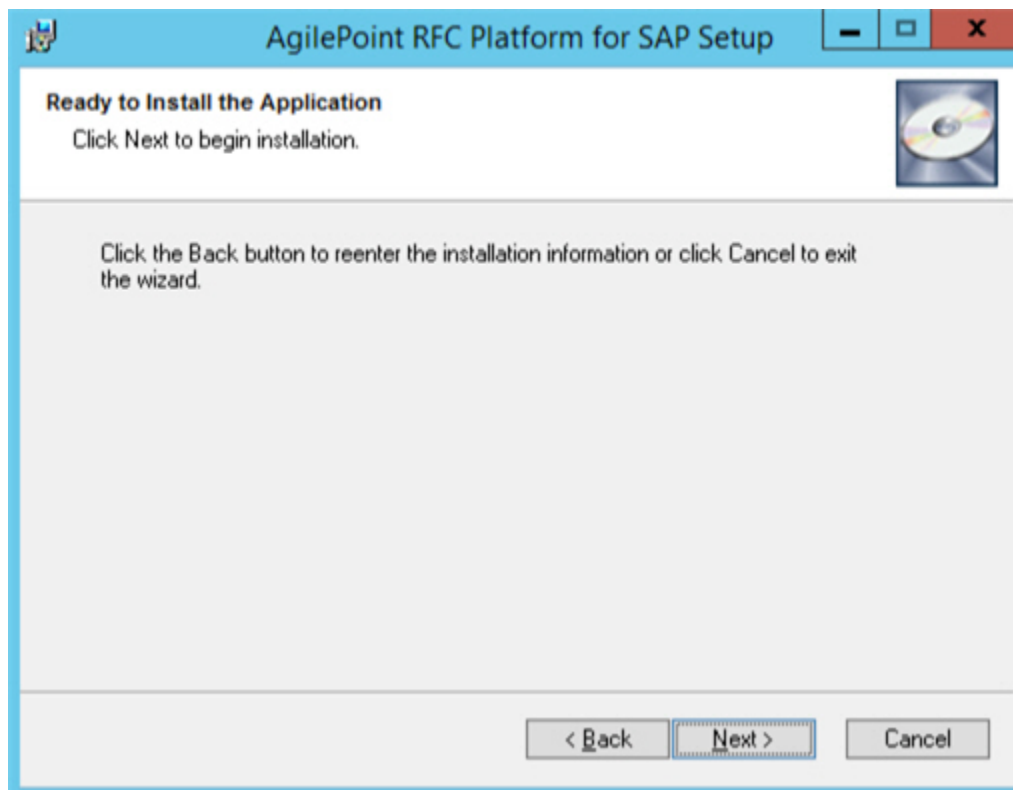


10. Click **Next**.
11. On the **Installing the AgilePoint RFC Platform** screen, click **Next**.

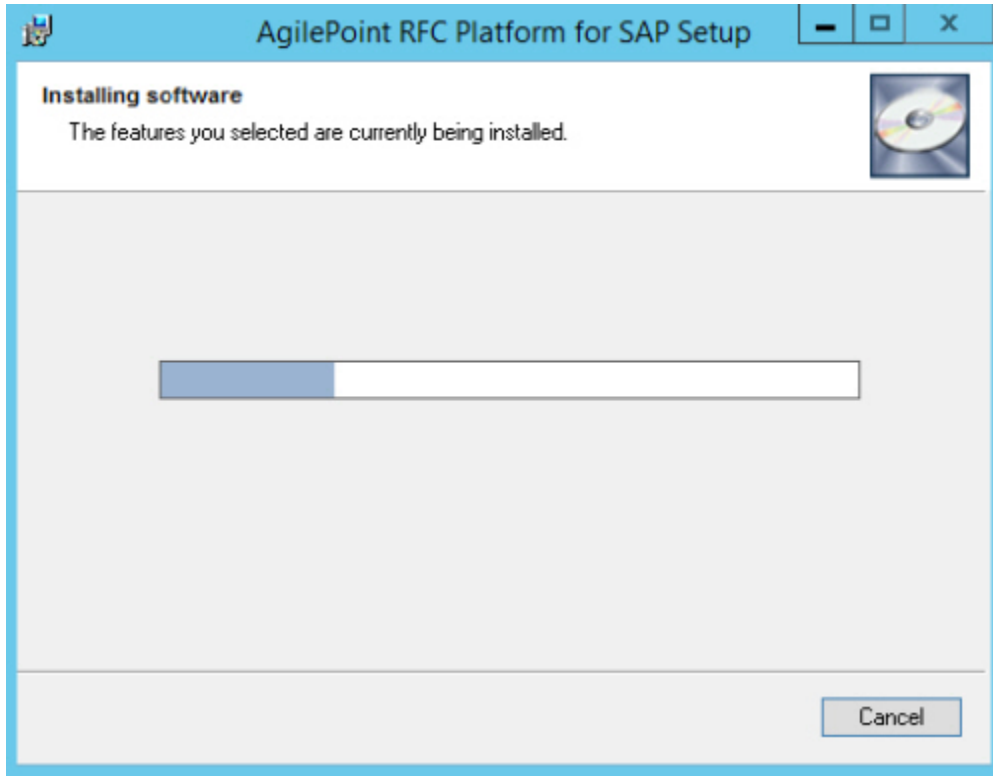
This is the port number the AgilePoint Server machine uses to connect with SAP. The default value of the port is **3701**. You can change the port value as necessary.



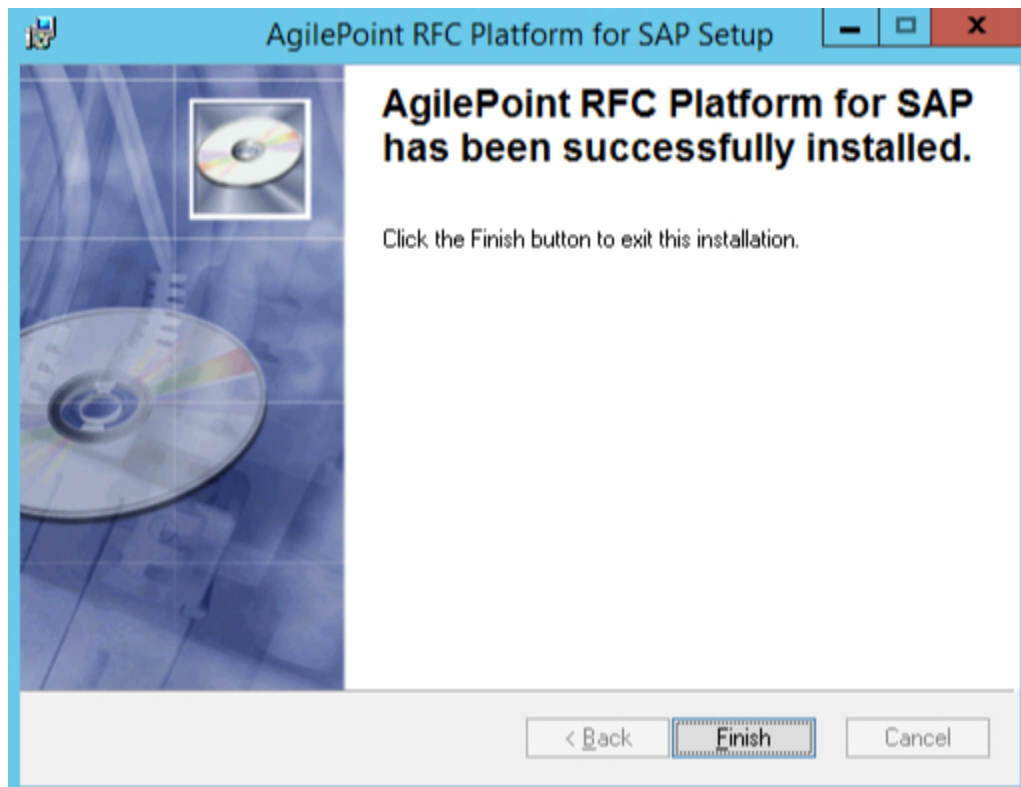
12. On the **Ready to Install the Application** screen, click **Next**.



The AgilePoint SAP AgileConnector installation starts.



13. After the installation completes, click **Finish**.



Install AgilePoint SharePoint Integration (On-Premises)

This section provides procedures to install the [SharePoint Integration](#) for AgilePoint NX in an on-premises SharePoint environment.

! If problems occur during the installation of the AgilePoint SharePoint Integration, log files are generated and can be found at ([AgilePoint Integration for SharePoint installation folder](#)) C:\Program Files\AgilePoint\AgilePoint Integration for SharePoint\Installer.log.

! If your [AgilePoint Server instance](#) uses HTTPS, to use [on-premises SharePoint](#), the web application for your SharePoint site must be configured to use HTTPS.

More Information

- This section shows how to install and configure [SharePoint Integration](#) on-premises SharePoint, for information about how to install SharePoint Integration for Microsoft 365, refer to [Installation \(Microsoft 365\)](#).

Install SharePoint Integration (On-Premises) with the Installer

To install [SharePoint Integration](#) for AgilePoint NX, do the procedure in this topic.

Prerequisites

- [AgilePoint NX OnPremises](#) or [AgilePoint NX PrivateCloud](#) is installed.
- Your system meets the minimum system requirements for this component.
For more information, refer to [System Requirements](#).
- You have completed all of the pre-installation instructions for this component.
For more information, refer to [Set Up Your Environment for AgilePoint NX](#).

- If you are installing AgilePoint SharePoint Integration in a SharePoint farm, you must select a [SharePoint](#) server you want to designate as the primary AgilePoint integration server. **Document your decision.** You will need to use the same machine for all AgilePoint SharePoint Integration installations and upgrades.

You need only apply installation and upgrade procedures on this one primary server. The SharePoint software will propagate the changes to the other servers in your SharePoint farm.

- Sign in to Windows using a user login that belongs to the local system's Administrators group.
- Download the AgilePoint Installation Package for your solution to your primary SharePoint front-end web server.
- If your [AgilePoint Server instance](#) uses HTTPS, to use [on-premises SharePoint](#), the web application for your SharePoint site must be configured to use HTTPS.


Good to Know

- The installer UI is optimized for system resolutions 1366x768 or 1920x1080 with 100% scaling. If you use other screen resolutions, the installer UI may not display correctly, which can cause installation errors.
- The AgilePoint NX Dashboard for SharePoint can be added to a SharePoint Web Part page or wiki page in any supported version of SharePoint. The AgilePoint NX Dashboard can be added to modern pages in [SharePoint for Microsoft 365](#), but not in [on-premises SharePoint](#). Modern pages were added in on-premises SharePoint 2019.

How to Start

1. On the [AgilePoint Server machine](#), right-click the AgilePoint NX installer package, and click **Run as administrator**.
2. On the **End User License Agreement** screen, review the license agreement, and click **Yes. I accept the terms in the license agreement**.


AgilePoint NX - The Digital Transformation Platform (v9.0)



AgilePoint NX v9.0

AgilePoint®

End User License Agreement



This End User License Agreement (the "**Agreement**"), is by and between AgilePoint, Inc., a Delaware corporation with offices located at 1916 Old Middlefield Way, Suite B, Mountain View, CA 94043 ("**Licensor**") and you as an individual or the Person (defined below) on whose behalf you are acting when accepting this Agreement ("**Licensee**," and together with the "**Parties**", and each, a "**Party**").

This Agreement is effective as of the date you click the "**Yes**" button signifying your acceptance of this Agreement (the "**Effective Date**").

WHEREAS, Licensee desires to obtain a license to use the Software

Yes, I accept the terms in the license agreement.

Extract files to directory


C:\AgilePoint\9.0-Full

Cancel Extract

3. On the **Extract files to directory** field, click the **Ellipses (...)** button to select the folder where you want to extract the installation files.

The default location for the installer is C:\AgilePoint. It is recommended that you decompress the installation package directly under you C:\ drive folder. The installation file path must be fewer than 50 characters.


AgilePoint NX - The Digital Transformation Platform (v9.0)



AgilePoint NX v9.0

AgilePoint®

End User License Agreement



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This Agreement is effective as of the date you click the "**Yes**" button signifying your acceptance of this Agreement (the "**Effective Date**").

WHEREAS, Licensee desires to obtain a license to use the Software


Yes, I accept the terms in the license agreement.

Extract files to directory
C:\AgilePoint\9.0-Full

Cancel Extract

4. Click **Extract**.


AgilePoint NX - The Digital Transformation Platform (v9.0)



AgilePoint NX v9.0

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WHEREAS, Licensee desires to obtain a license to use the Software

Yes, I accept the terms in the license agreement.

Extract files to directory

C:\AgilePoint\9.0-Full

Cancel Extract

5. On the **Information** screen, click **Open Extracted Folder**.

AgilePoint NX - The Digital Transformation Platform (v9.0)

agilepoint

AgilePoint NX v9.0



The installation files have been extracted to

C:\AgilePoint\9.0-Full

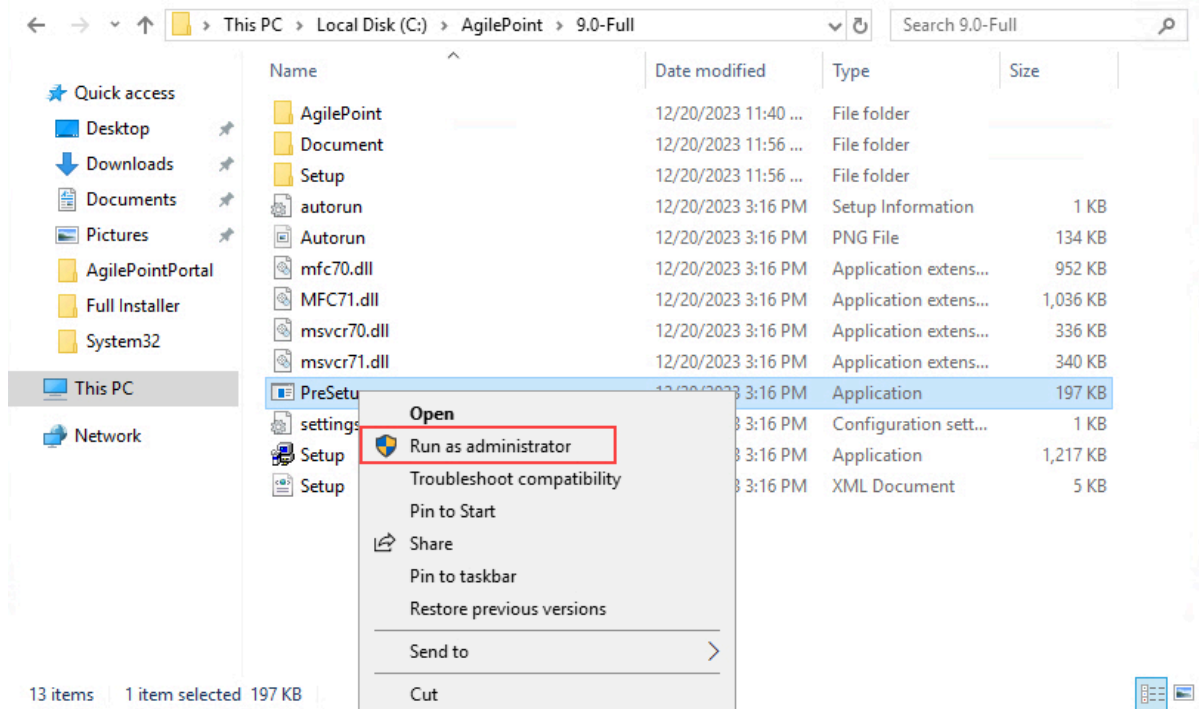
Please run PreSetup.exe with administrator right.

Note: This product requires administrator privilege to install.
It is recommended to use local administrator account.

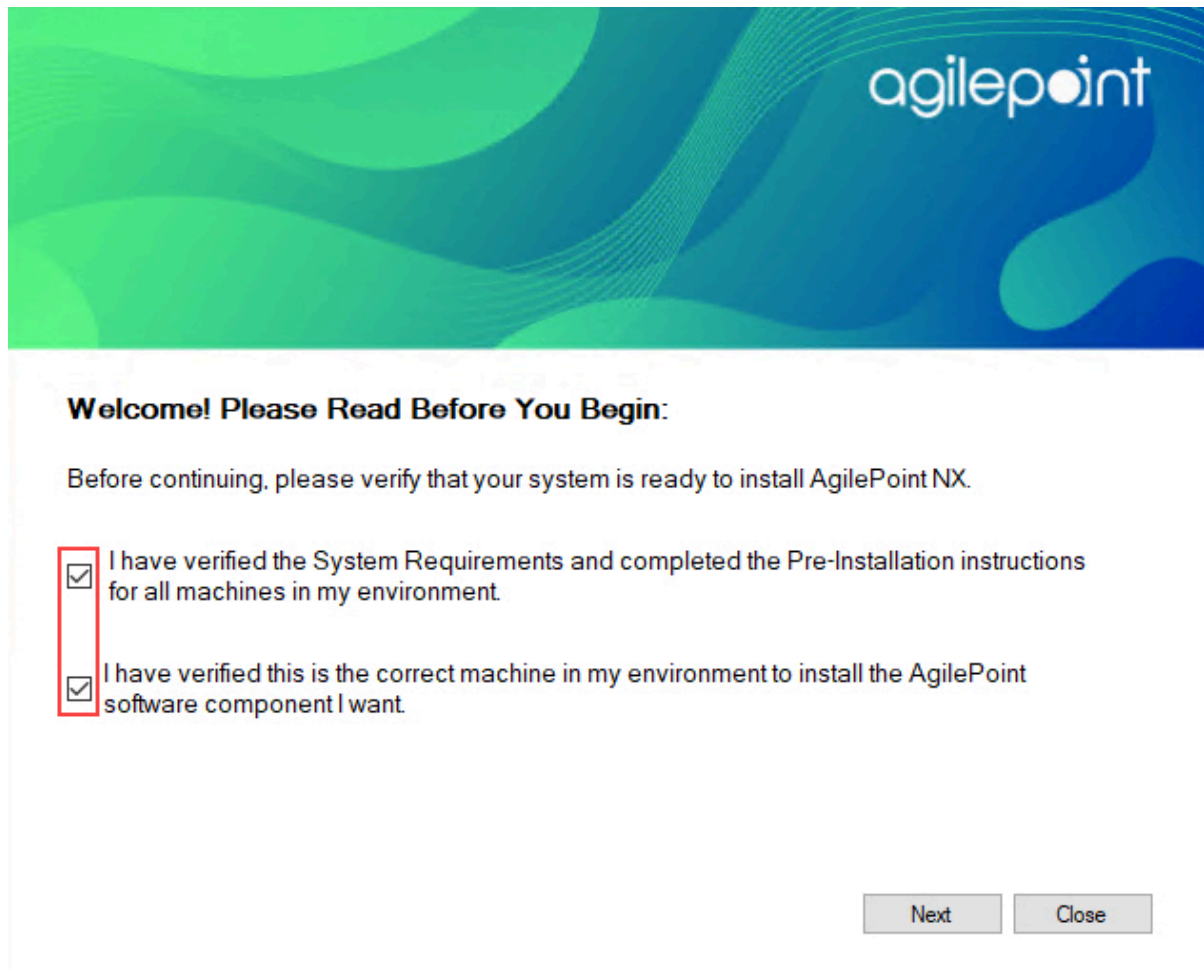
Cancel

Open Extracted Folder

6. In your specified folder, right-click the AgilePoint NX **PreSetup.exe** file, and click **Run as administrator**.



7. On the **Welcome Please Read Before You Begin** screen, make sure you have completed the tasks, and select all the items on this screen.



8. Click **Next**.
9. If a supported version of **.NET Runtime** is not installed, this screen shows.

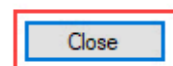
- a. Click **Close**.
- b. Install the supported version of .NET Runtime.
- c. Right-click the AgilePoint NX **PreSetup.exe** file, and click **Run as administrator**.



Welcome! Please Read Before You Begin:

A supported version of .NET runtime is not installed. Please install a supported version of .NET Runtime. For more information, refer to the System Requirements Guide.

[System Requirements Guide](#)



Procedure

1. On the **AgilePoint NX v9.0** screen, click **Install AgilePoint NX SharePoint Integration**.



---- AgilePoint NX v9.0 ----

Release Notes

System Requirements

Installation Guide

Documentation

Install AgilePoint NX

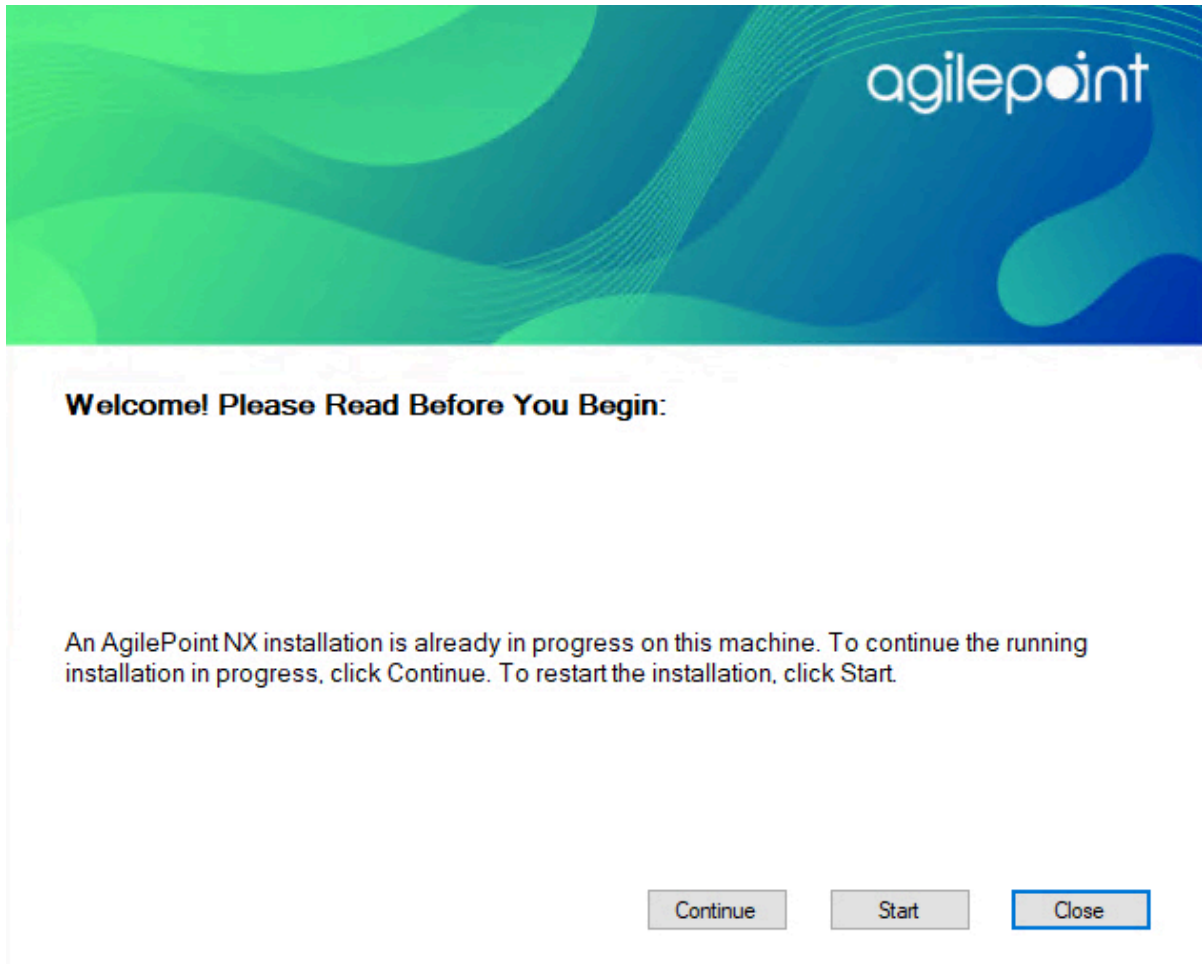
Install AgilePoint NX SharePoint Integration

Install AgilePoint NX Developer

Note: This product requires administrative privilege to install. It is recommended to use local administrator account.

Exit

2. This screen shows if an AgilePoint NX installation is running on this machine.
 - To resume the installation, click **Continue**.
 - To restart the installation, click **Start**.



3. On the **AgilePoint Integration for SharePoint Installation** screen, make sure [AgilePoint Server](#) is installed and configured, and select **Yes, I have installed and configured AgilePoint Server**.

agilepoint
AgilePoint NX v9.0 SharePoint

AgilePoint NX - The Digital Transformation Platform (v9.0)

English

AgilePoint Integration for SharePoint Installation

Need Help

Welcome

Prerequisites

Installation

Deployment

Finish

This Wizard will guide you through the pre-installation, installation and configuration set-up of AgilePoint Integration for SharePoint..

Before installing SharePoint Integration, please make sure that you have installed and configured AgilePoint Server.

Yes, I have installed and configured AgilePoint Server.

Cancel Back Next

4. Click **Next**.

5. On the **Verifying System Requirements** screen:

- If there are any errors, do this procedure:
 - a. Click **Cancel**.
 - b. Correct the errors.
 - c. Right-click the AgilePoint NX **Setup.exe** file, and click **Run as administrator**.

The AgilePoint NX installation starts.

agilepoint
AgilePoint NX v9.0 SharePoint

AgilePoint NX - The Digital Transform

Your system does not meet some of the requirements. View the tooltip to fix the issue, and run the check again. For more information, refer to the Installation Guide.

Verifying System Requirements Need Help

- Supported version of Microsoft SharePoint Server is installed ✓
- SharePoint Administration Windows Service is running ✓
- SharePoint Timer Windows Service is running ✓
- SharePoint Management Shell is available ✓
- SharePoint Web Application is available ✓
- SharePoint Farm Administrator Permissions are available ✓
- User Account Control (UAC) is turned off ✗ ⓘ
- Supported version of .NET Framework is installed ✓

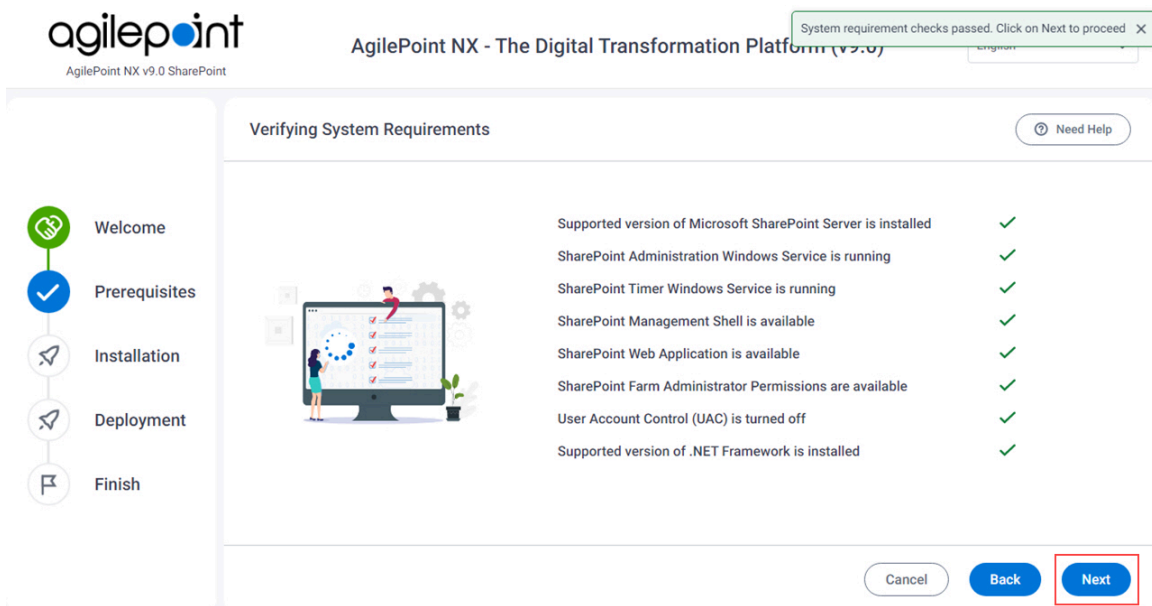
ⓘ After you fix all prerequisites, please restart the installer.

Cancel Back Next

Issue	Resolution
Supported version of Microsoft SharePoint Server is installed	Install and activate a supported version of Microsoft SharePoint Server. For more information, refer to System Requirements for AgilePoint SharePoint Integration .
SharePoint Administration Windows Service is running	Start the Windows service SharePoint Administration .
SharePoint Timer Windows Service is running	Start the Windows Service SharePoint Timer .
SharePoint Management Shell is available	This tool is installed with SharePoint. Reinstall SharePoint.
SharePoint Web Application is available	<ul style="list-style-type: none"> Make sure at least one SharePoint web application is created. Make sure the SharePoint web application is up and running. Make sure the SharePoint web site can be browsed in Microsoft Edge or Google Chrome with no errors Make sure the AgilePoint Service account is a member of the Site Collection Administrators group.


Issue	Resolution
<p>SharePoint Farm Administrator Permissions are available</p>	<p>Make sure the AgilePoint Service account is a member of the SharePoint Farm Administrators group, and the SharePoint Farm Administrator account has access to the SharePoint database.</p> <p>To verify access, run the following PowerShell command on the primary SharePoint machine:</p> <pre data-bbox="581 527 1414 688">Get-SPDatabase Add-SPShellAdmin [domain]\[AgilePoint Service Account user name]</pre>
<p>User Account Control (UAC) is turned off</p>	<p>Turn user access control (UAC) off.</p> <p>For more information, refer to Turn Off User Account Control (UAC).</p>
<p>Supported version of .NET Framework is installed</p>	<p>Install a supported version of the .NET Framework on all SharePoint Server machines in your environment.</p> <p>For more information, refer to System Requirements for AgilePoint SharePoint Integration.</p>

- If there are no errors, click **Next**.



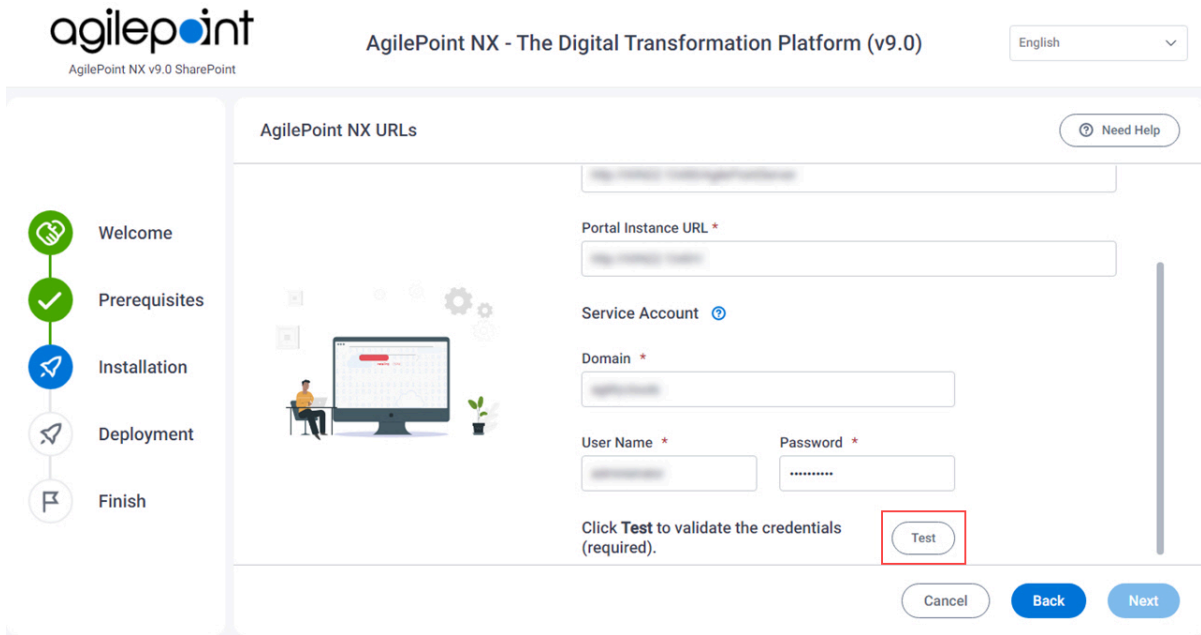
6. On the **AgilePoint NX URLs** screen, enter the following information:

Field Name	Definition
AgilePoint Server URL (WSHttp)	<p>Specifies the wsHttp AgilePoint Server URL for your AgilePoint environment.</p> <p>For more information, refer to Find Your AgilePoint Service URL in AgilePoint NX. Make sure you get the wsHttp URL.</p> <p>! If your AgilePoint Server instance uses HTTPS, to use on-premises SharePoint, the web application for your SharePoint site must be configured to use HTTPS.</p>
AgilePoint Service URL (REST)	<p>Specifies the REST AgilePoint Service URL for your AgilePoint environment.</p> <p>For more information, refer to Find Your AgilePoint Service URL in AgilePoint NX. Make sure you get the REST URL.</p> <p>! If your AgilePoint Server instance uses HTTPS, to use on-premises SharePoint, the web application for your SharePoint site must be configured to use HTTPS.</p>
Portal Instance URL	<p>Specifies the Portal Instance URL for your AgilePoint NX environment.</p> <p>For more information, refer to Find your Portal Instance URL. Make sure you get the Portal URL.</p>

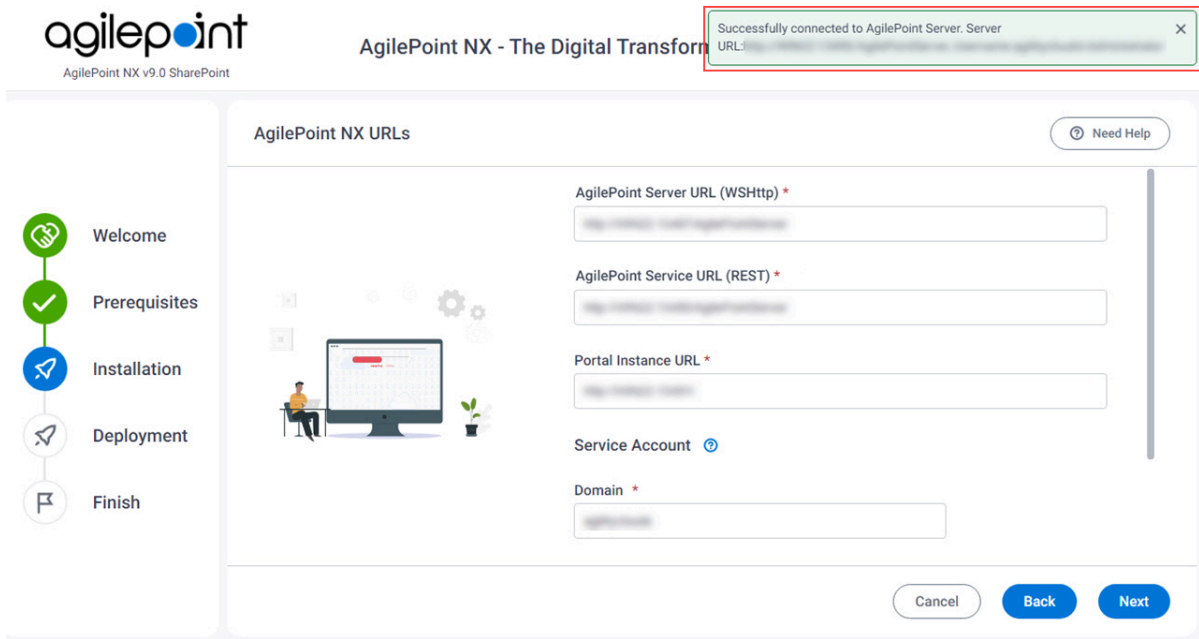
Field Name	Definition
	<p> If your AgilePoint Server instance uses HTTPS, to use on-premises SharePoint, the web application for your SharePoint site must be configured to use HTTPS.</p>
<p>Domain</p>	<p><u>Description:</u></p> <p>The authentication domain for the AgilePoint Service Account.</p> <p><u>Allowed Values:</u></p> <p>One line of text (a string) with no spaces that represents an authentication domain in your environment.</p> <p><u>Default Value:</u></p> <p>None</p>
<p>User Name</p>	<p><u>Description:</u></p> <p>Specifies the user name for your AgilePoint Service Account. This account serves as your AgilePoint Service Account, your AgilePoint System Account, and the account that AgilePoint uses to communicate with SharePoint, called the SharePoint impersonator.</p> <p>This account must be set up before entering the account information here. The AgilePoint installer cannot create this account for you.</p> <p><u>Allowed Values:</u></p> <p>One line of text (a string) that represents a user name for an account with the required privileges detailed in Set Up the AgilePoint Service Account.</p> <p><u>Default Value:</u></p> <p>None</p> <p><u>Limitations:</u></p> <p>During installation, you must use the same AgilePoint Service account credentials for all AgilePoint systems. However, for security</p>

Field Name	Definition
	<p>purposes, AgilePoint recommends you change separate these account credentials after installation.</p> <p>For more information, refer to:</p> <ul style="list-style-type: none"> ◦ Administrator Types ◦ How Do I Change the Credentials for AgilePoint Administrator Accounts?
<p>Password</p>	<p><u>Description:</u></p> <p>The password for the AgilePoint Service Account.</p> <p><u>Allowed Values:</u></p> <p>An alphanumeric string that represents a password.</p> <p><u>Default Value:</u></p> <p>None</p>

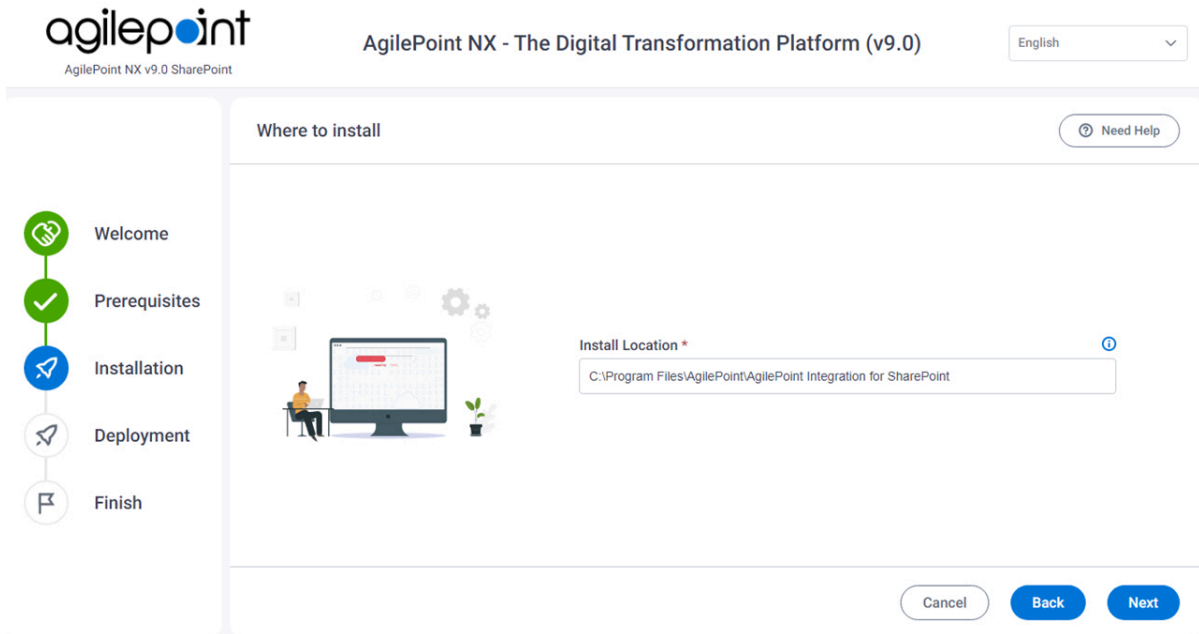
7. To make sure the user credentials are valid, click **Test**.



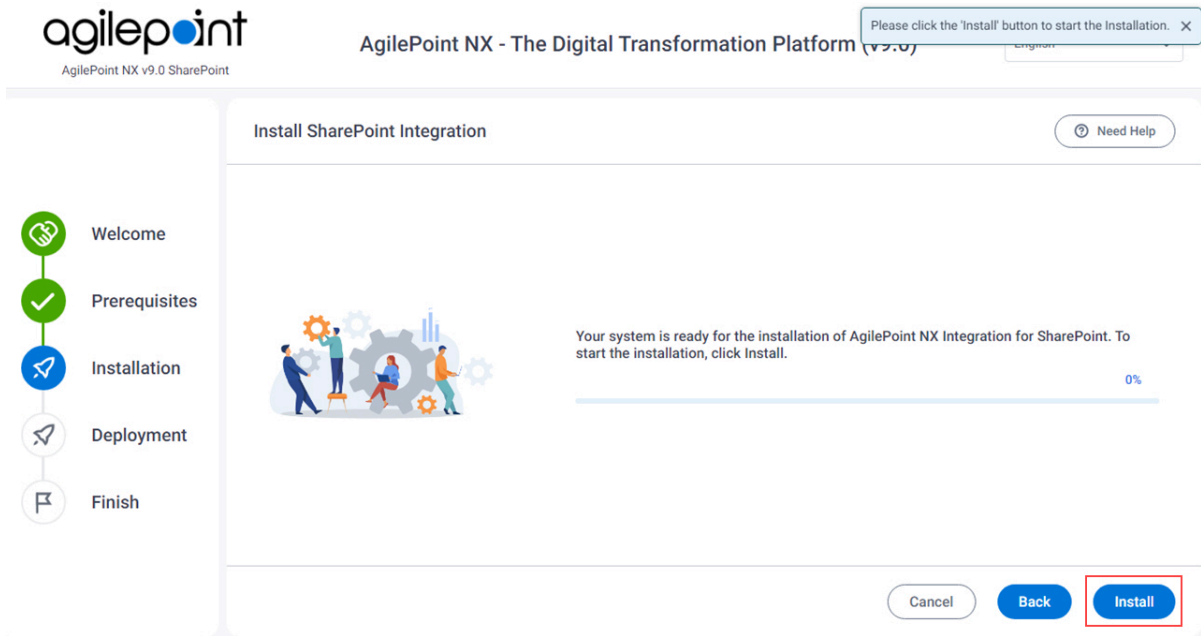
If the user credentials are valid, the validation message shows.



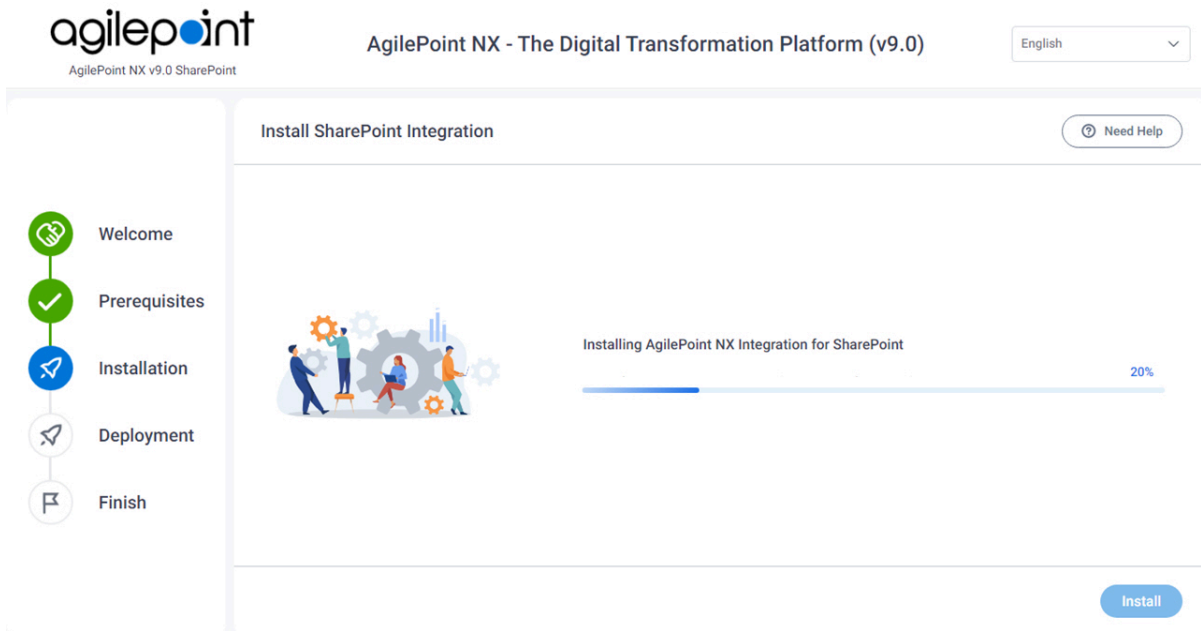
8. Click **Next**.
9. On the **Where to install** screen, browse to the location where you want to install SharePoint Integration.



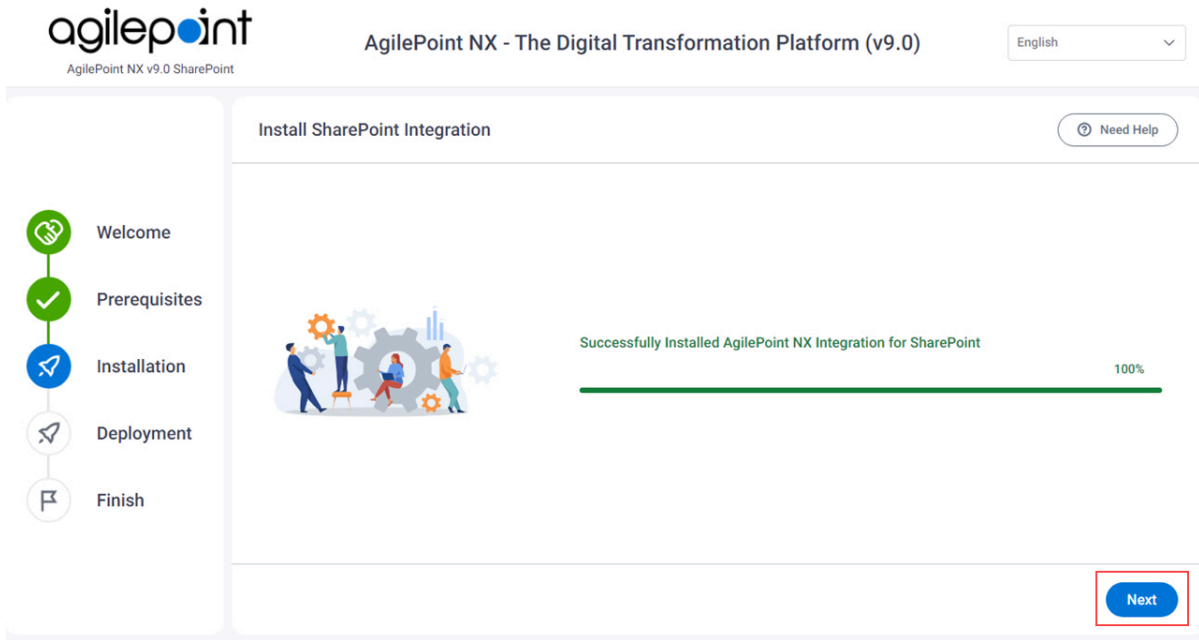
10. Click **Next**.
11. On the **Install SharePoint Integration** screen, click **Install**.



The AgilePoint Integration for SharePoint installation starts.



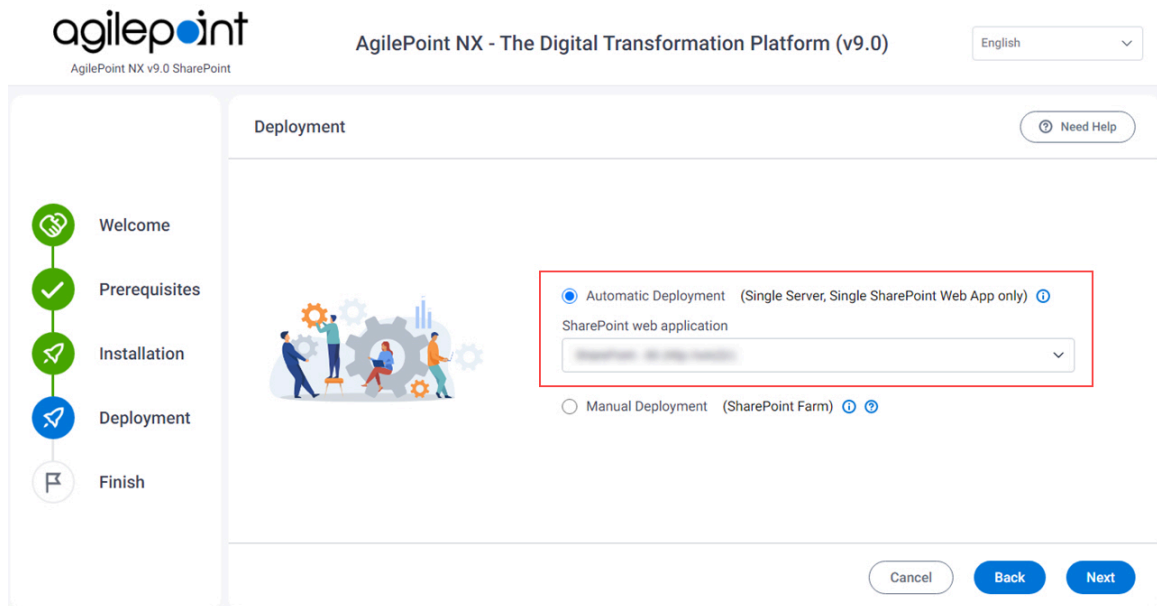
12. After the installation completes, click **Next**.



13. Select your SharePoint deployment type.

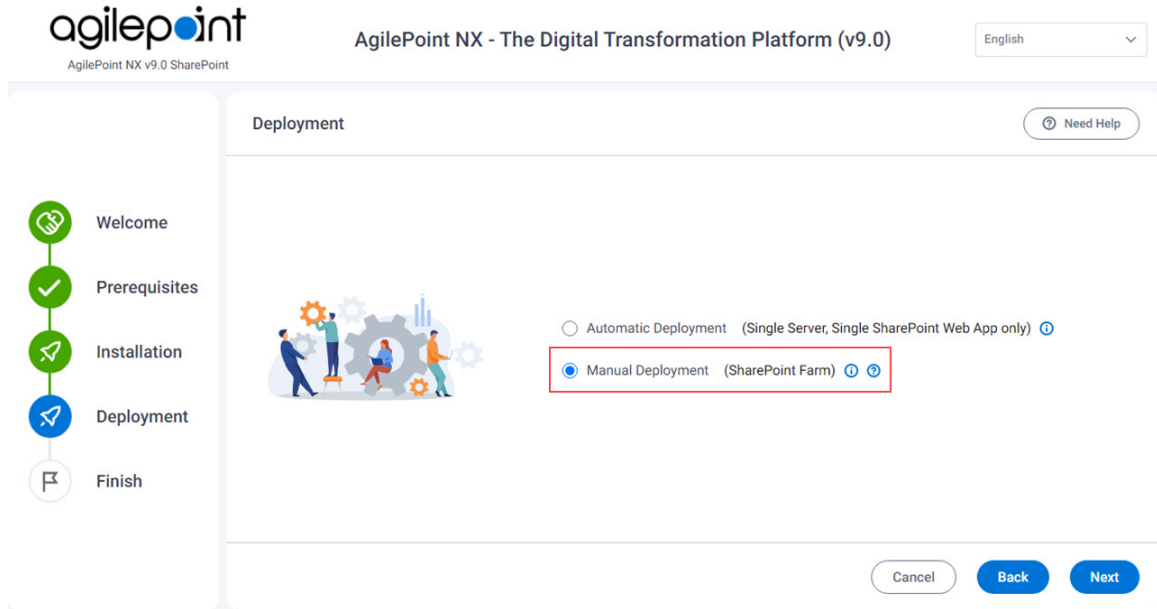
- **Automatic Deployment** - Installs AgilePoint SharePoint Integration with no intervention required from you. This option only applies when SharePoint is installed on a single server with a single web application.

If you select this option, a list shows with all the SharePoint web applications on your machine. Select the SharePoint web application where you want to install AgilePoint components.



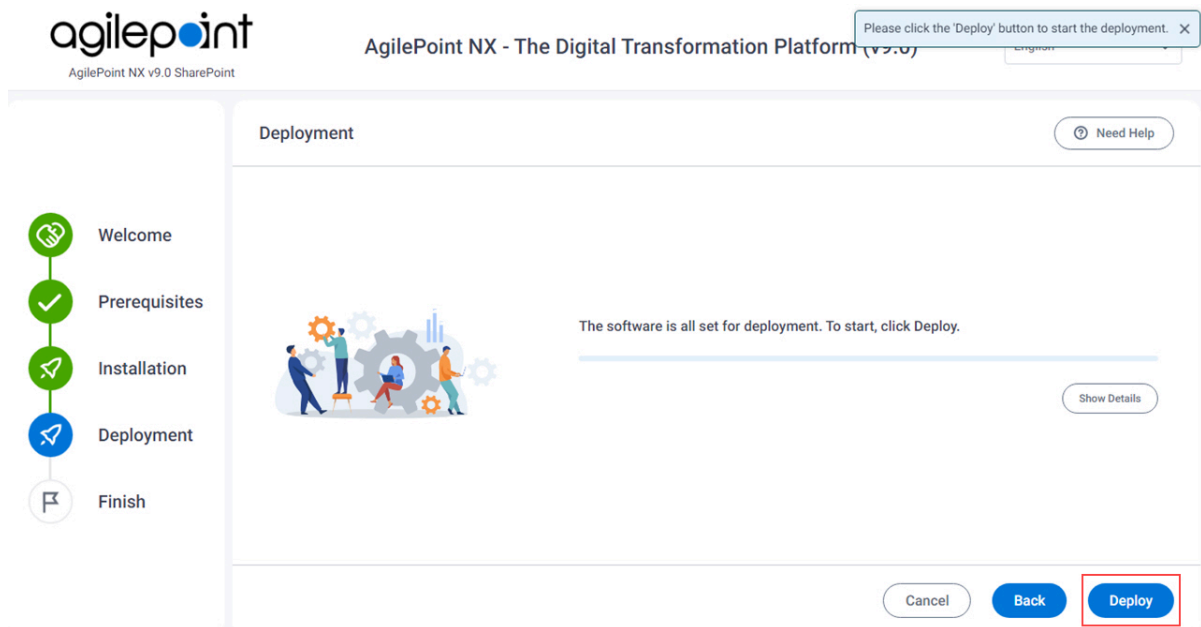
- **Manual Deployment** - Does not install SharePoint Integration. If you have more than one SharePoint web application and/or server, you will need to install SharePoint manually later.

For more information, refer to [Manual SharePoint Installation Using PowerShell](#).

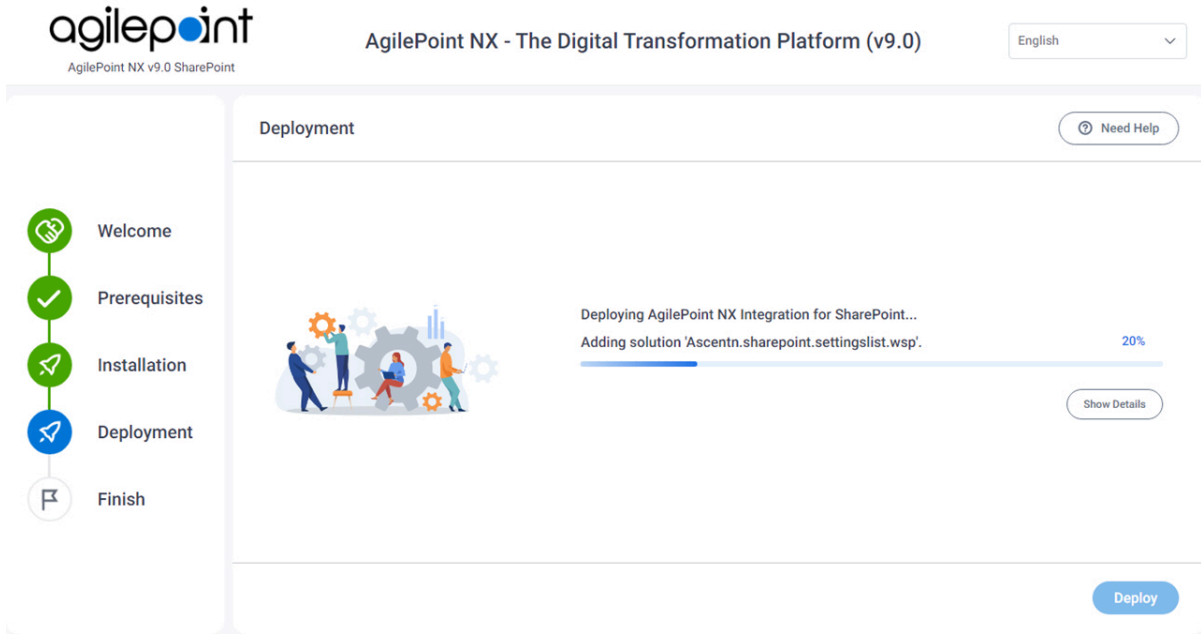


14. Click **Next**.

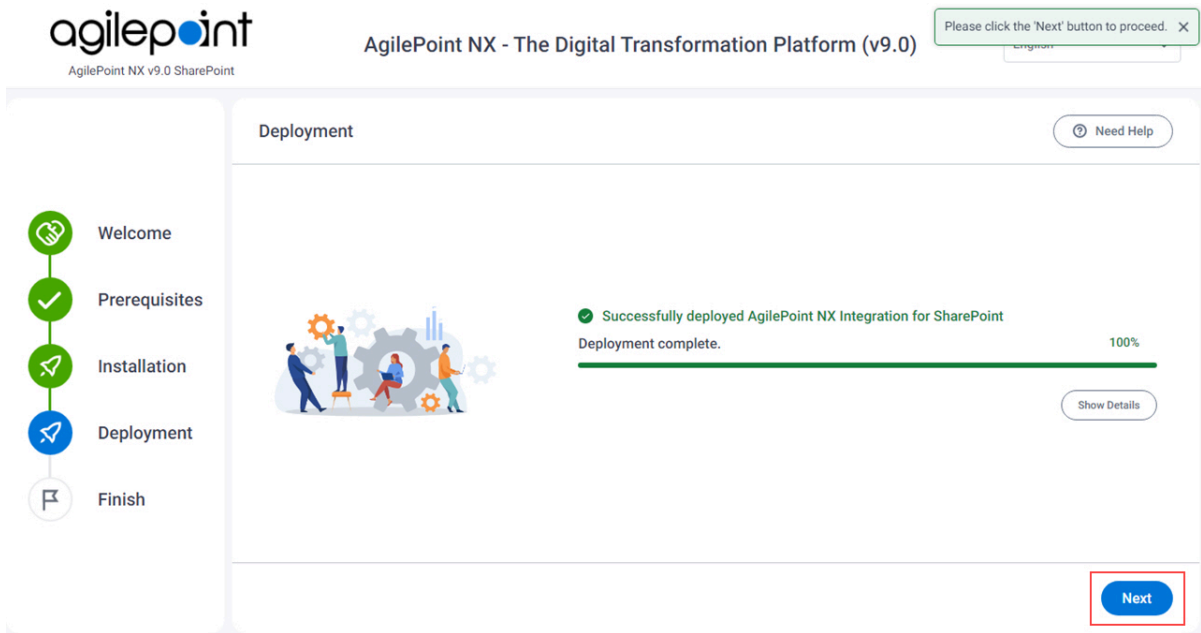
15. On the **Deployment** screen, click **Deploy**.



The AgilePoint SharePoint Integration deployment starts.



16. After the AgilePoint Integration for SharePoint deployment is complete, click **Next**.



17. On the **Important Information** screen, read the information, and click **Finish**.

The screenshot displays the AgilePoint NX interface. At the top, the logo 'agilepoint' and the text 'AgilePoint NX v9.0 SharePoint' are visible. The main header reads 'AgilePoint NX - The Digital Transformation Platform (v9.0)' with a language dropdown set to 'English'. A navigation sidebar on the left shows five steps: Welcome, Prerequisites, Installation, Deployment, and Finish. The 'Important Information' section is active, featuring a 'Need Help' button. The content includes a congratulatory message, a 'Manual Deployment' section with a 'Configure SharePoint Integration' button, and 'Other Configuration Information' with links for 'Enable SSL on AgilePoint Server' and 'Change your REST URL'. A 'Finish' button is highlighted with a red box at the bottom right.

Find Your Service URLs for AgilePoint NX

To find your AgilePoint service URL on NX, do the procedure in this topic.



How to Start

1. In AgilePoint NX, click **Settings**.
2. Click **Tenant**.

Procedure

1. On the Tenant Settings screen, find your **tenant** information in one of these fields:

Field Name	Definition
Tenant Name	<u>Description:</u> Specifies the name of the tenant in AgilePoint NX .
Server Instance URL (REST)	<u>Description:</u> Shows the REST URL for your AgilePoint Server instance.

Field Name	Definition
	<p data-bbox="561 279 1279 394">  If your AgilePoint Server instance uses HTTPS, to use on-premises SharePoint, the web application for your SharePoint site must be configured to use HTTPS. </p> <p data-bbox="545 468 737 499"><u>Allowed Values:</u></p> <p data-bbox="545 527 670 558">Read only.</p>
<p data-bbox="248 611 493 680">Server Instance URL (wsHttp)</p>	<p data-bbox="545 611 691 642"><u>Description:</u></p> <p data-bbox="545 674 1182 705">Shows the web service URL for your AgilePoint Server.</p> <p data-bbox="545 758 737 789"><u>Allowed Values:</u></p> <p data-bbox="545 821 670 852">Read only.</p>
<p data-bbox="248 900 488 932">Portal Instance URL</p>	<p data-bbox="545 900 691 932"><u>Description:</u></p> <p data-bbox="545 963 1062 995">Shows the URL for the AgilePoint NX Portal.</p> <p data-bbox="561 1037 1279 1152">  If your AgilePoint Server instance uses HTTPS, to use on-premises SharePoint, the web application for your SharePoint site must be configured to use HTTPS. </p> <p data-bbox="545 1226 737 1257"><u>Allowed Values:</u></p> <p data-bbox="545 1289 670 1320">Read only.</p>

Manual SharePoint Installation using PowerShell

Use the instructions in this section to install [SharePoint Integration](#) using the PowerShell command line tool.

Prerequisites

- This topic is required for **manual SharePoint Integration** installation only. If you installed SharePoint Integration automatically, you can skip this topic.
- PowerShell is installed on the appropriate SharePoint machines.
- [AgilePoint NX OnPremises](#) or [AgilePoint NX PrivateCloud](#) is installed.
- Log on to the SharePoint machine with a user account that belongs to the local Administrators group.
- If your [AgilePoint Server instance](#) uses HTTPS, to use [on-premises SharePoint](#), the web application for your SharePoint site must be configured to use HTTPS.

Good to Know

- The AgilePoint NX Dashboard for SharePoint can be added to a SharePoint Web Part page or wiki page in any supported version of SharePoint. The AgilePoint NX Dashboard can be added to modern pages in [SharePoint for Microsoft 365](#), but not in [on-premises SharePoint](#). Modern pages were added in on-premises SharePoint 2019.

Add, Deploy, and Activate the SharePoint Solution Files with PowerShell

To install the [SharePoint](#) solution files for AgilePoint using the PowerShell command line tool, do the procedure in this topic.

Prerequisites

- This topic is required for **manual SharePoint Integration** installation only. If you installed SharePoint Integration automatically, you can skip this topic.
- PowerShell is installed on the appropriate SharePoint machines.
- [AgilePoint NX OnPremises](#) or [AgilePoint NX PrivateCloud](#) is installed.
- [SharePoint Integration](#) in an on-premises environment.
- Log on to the SharePoint machine with a user account that belongs to the local Administrators group.

How to Start

1. On the primary SharePoint front-end web server, open the **PowerShell** command line tool.
 - For SharePoint 2016, the default location is **Start > Microsoft SharePoint 2016 Products > SharePoint 2016 Management Shell**.
 - For SharePoint 2019, the default location is **Start > Microsoft SharePoint 2019 Products > SharePoint 2019 Management Shell**.

Procedure

1. On the primary SharePoint front-end web server, in the **PowerShell** command line tool, add the solution files to SharePoint.

```
Add-SPSolution "[AgilePoint SharePoint Integration installation
folder]\Ascentn.SharePoint.SettingsList.wsp"
Add-SPSolution "[AgilePoint SharePoint Integration installation
folder]\AgilePoint.SharePoint.Dashboard.wsp"
Add-SPSolution "[AgilePoint SharePoint Integration installation
folder]\Ascentn.SharePoint.WFIntegration.wsp"
Add-SPSolution "[AgilePoint SharePoint Integration installation
folder]\Ascentn.SharePoint.ListForm.wsp"
```

Example Path: C:\Program Files\AgilePoint\AgilePoint Integration for SharePoint

This copies the wsp files from the installation folder (The default location is [AgilePoint installation folder]\AgilePoint Integration for SharePoint.), and adds them to SharePoint's Central Administration repository. You can specify a different path in the command.

2. On the primary SharePoint front-end web server in the **PowerShell** command line tool, deploy the solution files to SharePoint.

```
Install-SPSolution -WebApplication "[Web Application URL]" -GACDeployment
-FullTrustBinDeployment -Identity Ascentn.SharePoint.SettingsList.wsp
-CompatibilityLevel All
Install-SPSolution -WebApplication "[Web Application URL]" -GACDeployment
-FullTrustBinDeployment -Identity AgilePoint.SharePoint.Dashboard.wsp
-CompatibilityLevel All
Install-SPSolution -WebApplication "[Web Application URL]" -GACDeployment
-FullTrustBinDeployment -Identity Ascentn.SharePoint.WFIntegration.wsp
-CompatibilityLevel All
Install-SPSolution -WebApplication "[Web Application URL]" -GACDeployment
-FullTrustBinDeployment -Identity Ascentn.SharePoint.ListForm.wsp
-CompatibilityLevel All
```

Site Collection URL Example: http://mysharepoint:8080/sites/mysite

3. On each SharePoint machine that is a front-end web server, in the **PowerShell** command line tool, execute the following command:

```
Install-SPApplicationContent
```

4. On the primary SharePoint front-end web server, , in the **PowerShell** command line tool, activate the features.,

! AgilePoint recommends you enable features with PowerShell, and not the SharePoint UI. For more information, refer to [Why Do I Get an Access Denied Error when I Activate the Configuration List in SharePoint?](#).

```
Enable-SPFeature -Url "[Site Collection URL]" -Identity  
AgilePointSettingsListFeature  
Enable-SPFeature -Url "[Site Collection URL]" -Identity AgilePointDashboard  
Enable-SPFeature -Url "[Site Collection URL]" -Identity AgilePointWFIntegration  
Enable-SPFeature -Url "[Site Collection URL]" -Identity AgilePointListForm
```

Site Collection URL Example: http://mysharepoint:8080/sites/mysite

Configure SharePoint Integration

After you install the software, do the procedures in this topic to configure your [SharePoint Integration](#).

Verify the Installation was Successful

Prerequisites

- AgilePoint [SharePoint Integration](#) is installed.

How to Start

1. Navigate to SharePoint Central Administration on your [SharePoint](#) site.
2. In SharePoint Central Administration, click **System Settings > Farm Management > Manage farm solutions**.

Procedure

1. Verify that the following AgilePoint solutions are deployed:
 - **ascentn.sharepoint.settingslist.wsp**
 - **agilepoint.sharepoint.dashboard.wsp**
 - **ascentn.sharepoint.wfintegration.wsp**
 - **ascentn.sharepoint.listform.wsp**

Run the Windows Service Client Utility Tool

After you install [SharePoint Integration](#) in an on-premises environment, you must run the Windows Service Client Utility Tool to configure the binding with the [AgilePoint Server](#).

Prerequisites

- [SharePoint Integration](#) in an on-premises environment.
- Create a backup copy of the configuration file for the SharePoint web application you are configuring before using this utility.
- If you are using SharePoint on a machine that is not the AgilePoint Server machine (typically the case), make a backup copy of the **web.config** file by copying it from the SharePoint machine to the AgilePoint Server machine. The following is the default target location for the web.config file on the SharePoint server machine:
 - c:\inetpub\wwwroot\wss\VirtualDirectories\[port number]


How to Start

1. On the AgilePoint Server machine, go to **(AgilePoint Server installation folder) C:\Program Files\AgilePoint\AgilePoint Server\SVCUtilityTool\AgilePointWindowsServiceClientUtilityTool.exe**

Procedure

1. In the AgilePoint Windows Service Client Utility Tool screen, complete these fields:

Field Name	Definition
Service address	Specifies the wsHttp AgilePoint Service URL for your AgilePoint environment.

Field Name	Definition
	<p>For more information, refer to Find Your AgilePoint Service URL in AgilePoint NX. Make sure you get the wsHttp URL.</p> <p> If your AgilePoint Server instance uses HTTPS, to use on-premises SharePoint, the web application for your SharePoint site must be configured to use HTTPS.</p>
Target Config	<p>Specifies the file name and location of the web.config for your SharePoint site.</p> <p>The default location is c:\inetpub\wwwroot\wss\VirtualDirectories\[port number]</p>

2. (Optional) Click **Settings** to configure the following fields:

- **Max Buffer Size**
- **Max Buffer Pool Size**
- **Max Received Message Size**
- **Max String Content Length**
- **Max Array Length**

Guidance for modifying these values can be found at the following articles on MSDN:

- [http://msdn.microsoft.com/en-us/library/ms731361\(v=VS.100\).aspx](http://msdn.microsoft.com/en-us/library/ms731361(v=VS.100).aspx)
- [http://msdn.microsoft.com/en-us/library/ms731325\(v=VS.100\).aspx](http://msdn.microsoft.com/en-us/library/ms731325(v=VS.100).aspx)

3. Click **Generate**.

This process overwrites the settings in your web.config file with the information you entered.

4. If you are using SharePoint on a machine that is not the AgilePoint Server machine, copy the modified web.config file back to its original location on the SharePoint machine.

Set the AgilePoint Configuration List for SharePoint Integration

After you install SharePoint Integration, you must configure the [AgilePoint Configuration List](#) for on-premises SharePoint:

- [AgilePoint Configuration List for SharePoint \(SharePoint On-Premises\)](#)

Set Up a Common AgilePoint Configuration List for Multiple Site Collections

! This configuration step is optional. If you do not complete this step, the current system behavior will remain the same, and the functionality of your AgilePoint system will be unaffected.

By default, each [SharePoint](#) site collection has its own [AgilePoint Configuration List](#). This is recommended because it allows you the capability of connecting to different [AgilePoint Servers](#) for different SharePoint Site Collections in future. Also, things like different log folders for different SharePoint Site Collections for better tracking would be available.

In a case where you have many SharePoint Site Collections within the same SharePoint Web application and you do not want to maintain the configuration list separately, and all site collections are going to connect to same AgilePoint Server, you can define one common AgilePoint Configuration List in the SharePoint Web Application web.config file.

Prerequisites

- SharePoint in an on-premises environment.
- AgilePoint [SharePoint Integration](#) is installed.

How to Start

1. Navigate to SharePoint Central Administration on your SharePoint site.
2. In a text editor, open the SharePoint Web Application **web.config** file.

Procedure

1. In the SharePoint web.config, add the following key/value nodes:

```
<appSettings>
  <add key="APSettingsListName" value="AgilePoint Configuration" />
  <add key="APSettingsSiteUrl" value="[ShrePoint Site URL]" />
  <add key="APSettingsWebName" value="" />
</appSettings>
```

Use the following values:

- **APSettingsListName** - The name of the AgilePoint Settings List.
- **APSettingsSiteURL** - The SharePoint Site URL that contains the common AgilePoint Configuration List. The rest of the site collections will refer to this location and list as long as the individual AgilePoint Configuration list (which is auto-created in the site collection when this feature is activated) is deactivated or removed.
- **APSettingsWebName** - If this field is left blank, this means that the AgilePoint Configuration List is located at the top-level site. A value would indicate the Sub site name.

Add the AgilePoint Web Part to Your SharePoint Site

To add the AgilePoint [SharePoint Integration](#) Web Part to your [on-premises SharePoint](#) site, do the procedure in this topic.

Prerequisites

- SharePoint in an on-premises environment.

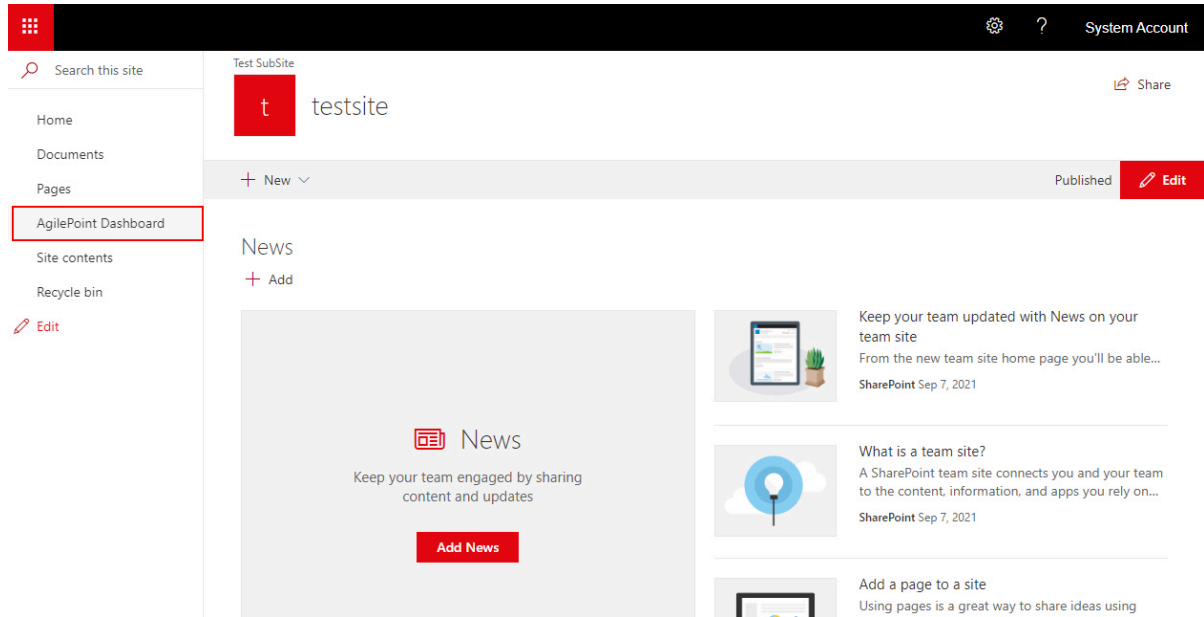
For [SharePoint for Microsoft 365](#), refer to [AgilePoint Intelligent Process Automation for Microsoft 365](#).

Good to Know

- The AgilePoint NX Dashboard for SharePoint can be added to a SharePoint Web Part page or wiki page in any supported version of SharePoint. The AgilePoint NX Dashboard can be added to modern pages in [SharePoint for Microsoft 365](#), but not in [on-premises SharePoint](#). Modern pages were added in on-premises SharePoint 2019.

How to Start

1. In SharePoint on-premises, on the SharePoint site, click **AgilePoint Dashboard**.



Procedure

1. Click **Page > Edit Page**.
2. Click the **Insert** tab.
3. Click **Web Part**.
4. In the **Categories** list, click **AgilePoint**.
5. In the **Parts** list, click **AgilePoint Dashboard**.
6. Click **Save**.

Install AgilePoint NX Developer

To install [AgilePoint NX Developer](#), do the procedure in this topic.

Prerequisites

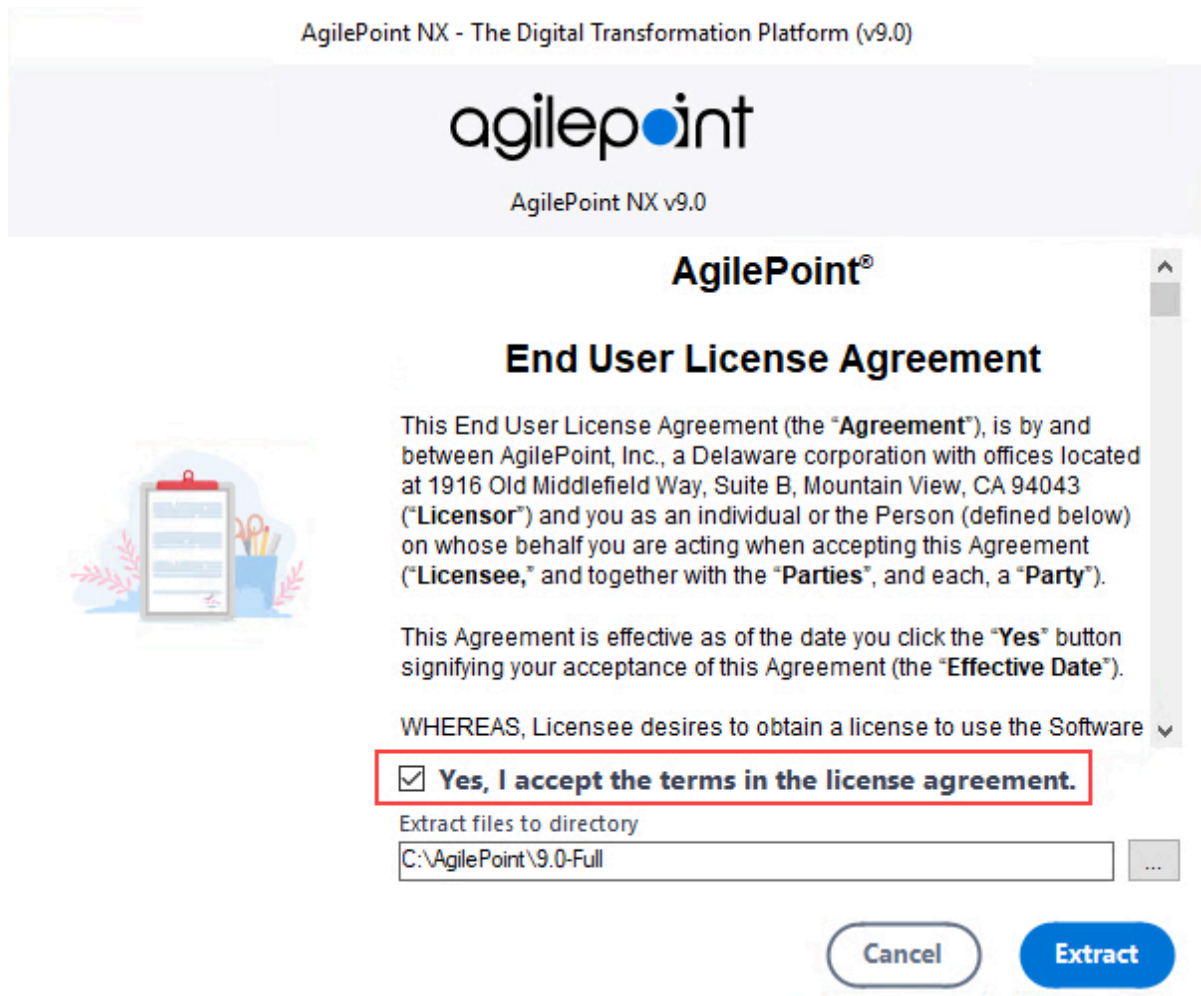
- Your system meets the minimum system requirements for this component.
For more information, refer to [System Requirements for AgilePoint NX Developer](#).
- You have completed all of the pre-installation instructions for this component.
For more information, refer to [Set Up Your Environment for AgilePoint NX](#).
- Sign in to Windows using a user login that belongs to the local system's Administrators group.
- If [AgilePoint Server](#) is not installed on the same computer that you will be installing on, it should be installed and running on a server that you can access via the internet from the computer where you are installing.

Good to Know

- The installer UI is optimized for system resolutions 1366x768 or 1920x1080 with 100% scaling. If you use other screen resolutions, the installer UI may not display correctly, which can cause installation errors.

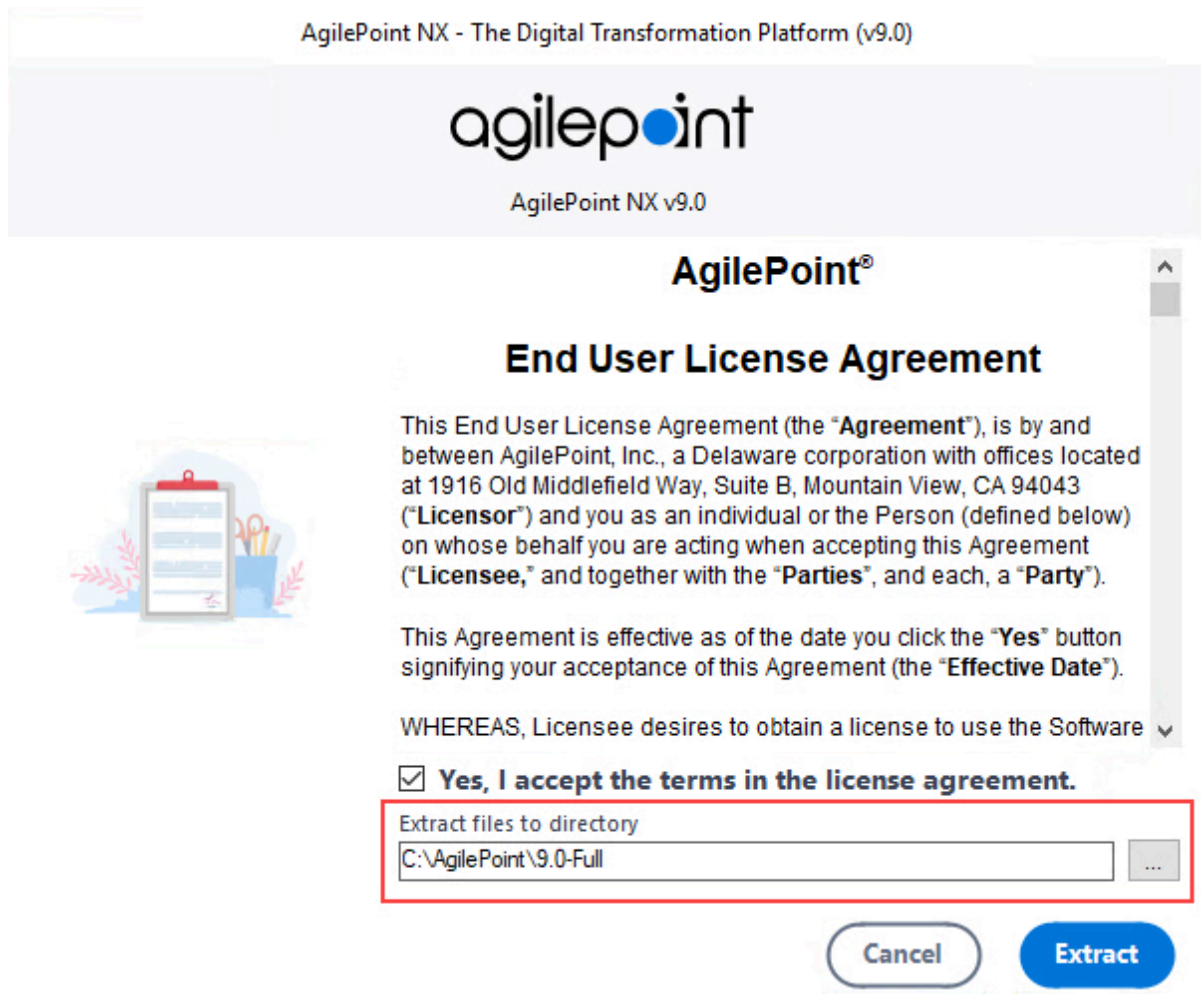
How to Start

1. On the [AgilePoint Server machine](#), right-click the AgilePoint NX installer package, and click **Run as administrator**.
2. On the **End User License Agreement** screen, review the license agreement, and click **Yes. I accept the terms in the license agreement**.

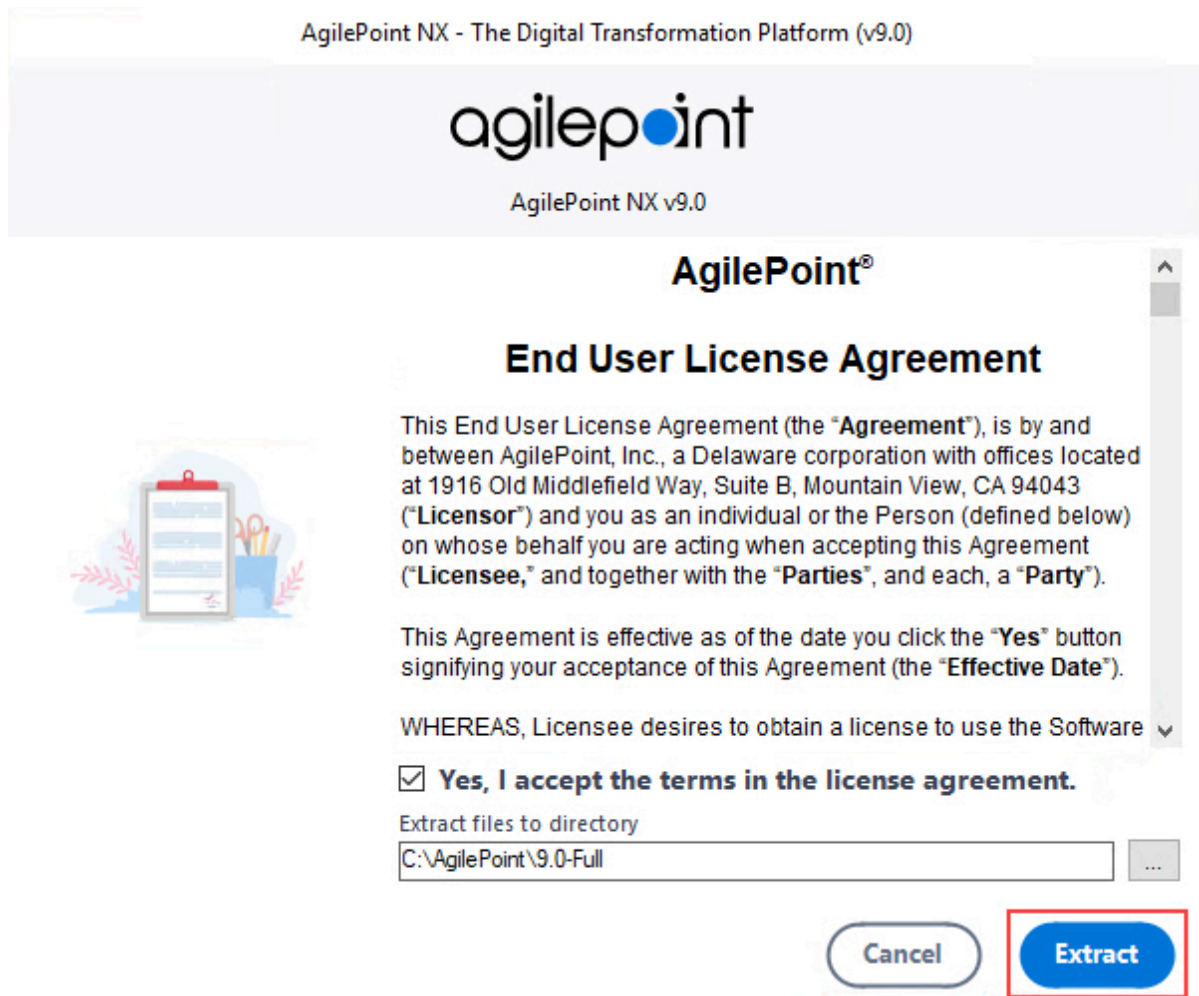


3. On the **Extract files to directory** field, click the **Ellipses (...)** button to select the folder where you want to extract the installation files.

The default location for the installer is C:\AgilePoint. It is recommended that you decompress the installation package directly under you C:\ drive folder. The installation file path must be fewer than 50 characters.



4. Click **Extract**.



5. On the **Information** screen, click **Open Extracted Folder**.

AgilePoint NX - The Digital Transformation Platform (v9.0)

The AgilePoint logo, featuring the word "agilepoint" in a lowercase, sans-serif font. The letter "o" in "point" is a solid blue circle.

AgilePoint NX v9.0

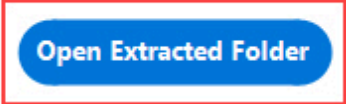


The installation files have been extracted to

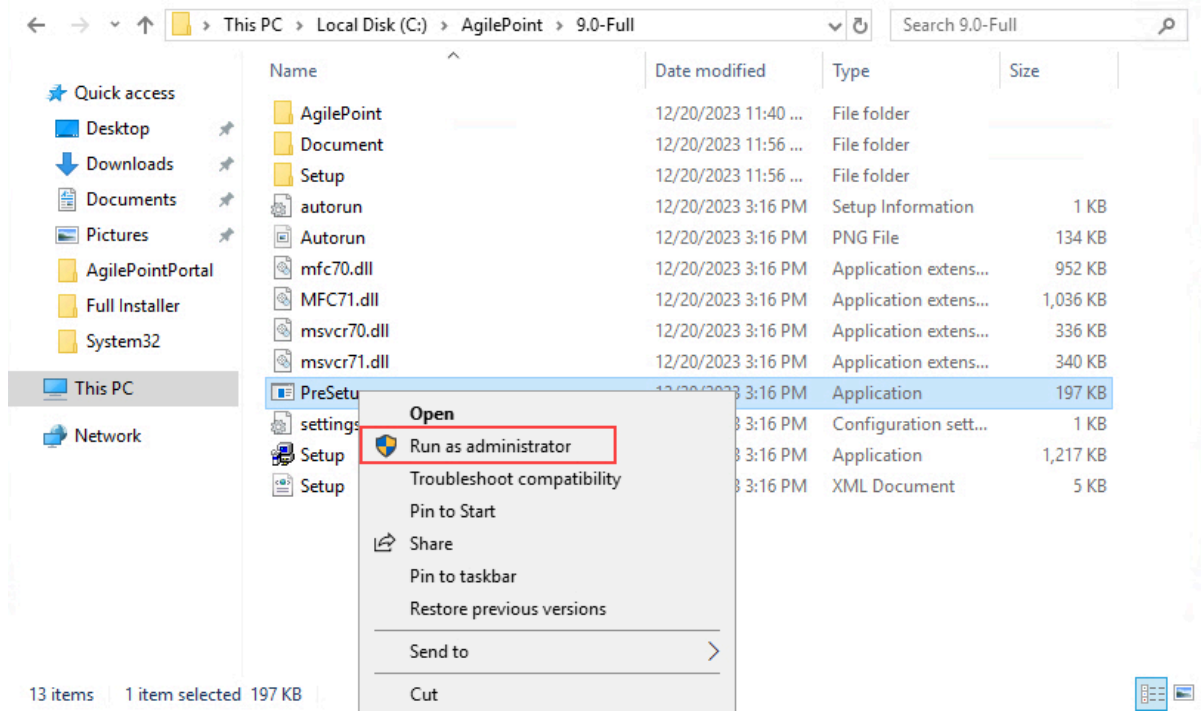
C:\AgilePoint\9.0-Full

Please run PreSetup.exe with administrator right.

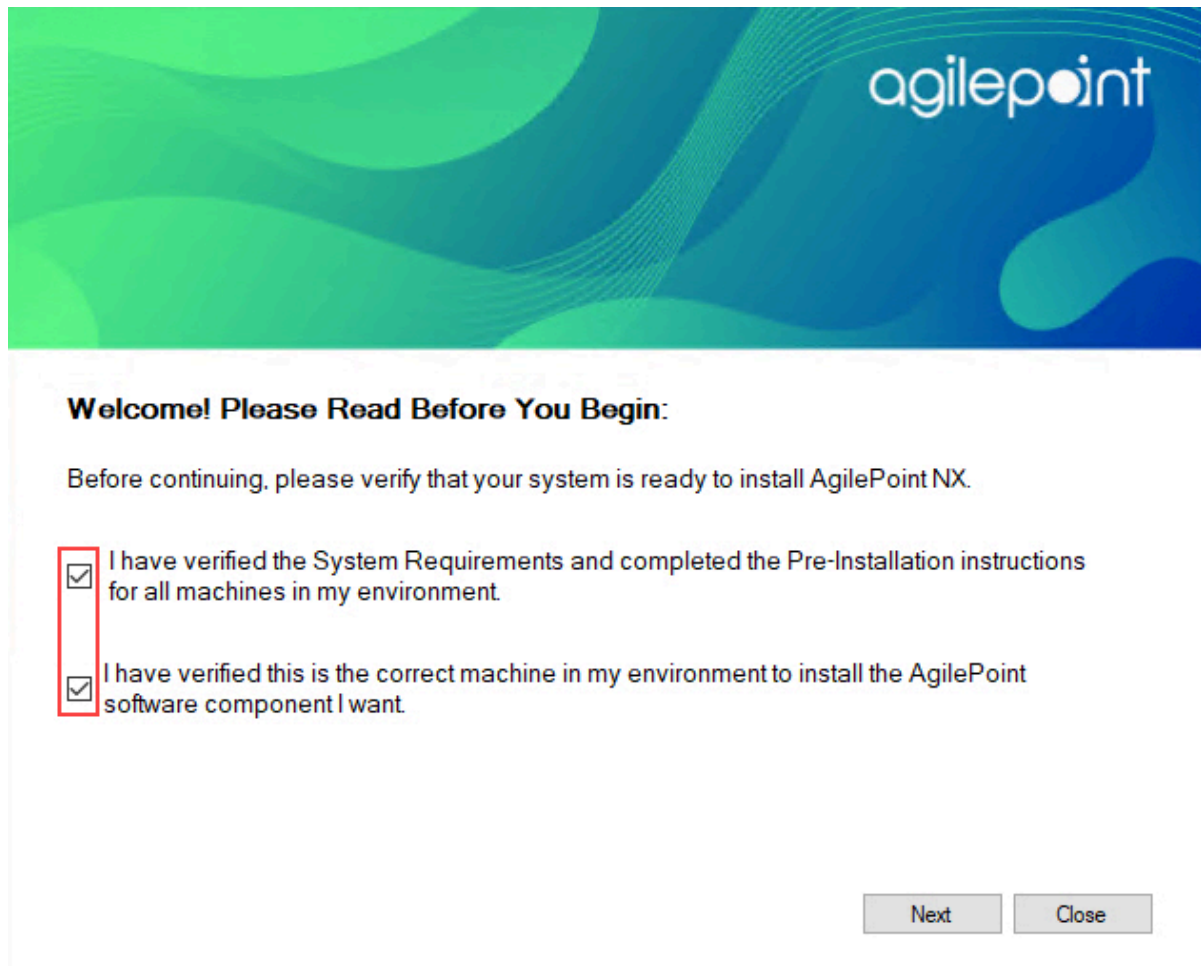
Note: This product requires administrator privilege to install.
It is recommended to use local administrator account.

A light blue button with rounded corners and a thin grey border, containing the word "Cancel" in a dark blue, sans-serif font.A blue button with rounded corners and a red border, containing the text "Open Extracted Folder" in a white, sans-serif font.

6. In your specified folder, right-click the AgilePoint NX **PreSetup.exe** file, and click **Run as administrator**.



7. On the **Welcome Please Read Before You Begin** screen, make sure you have completed the tasks, and select all the items on this screen.



8. Click **Next**.
9. If a supported version of **.NET Runtime** is not installed, this screen shows.

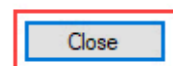
- a. Click **Close**.
- b. Install the supported version of .NET Runtime.
- c. Right-click the AgilePoint NX **PreSetup.exe** file, and click **Run as administrator**.



Welcome! Please Read Before You Begin:

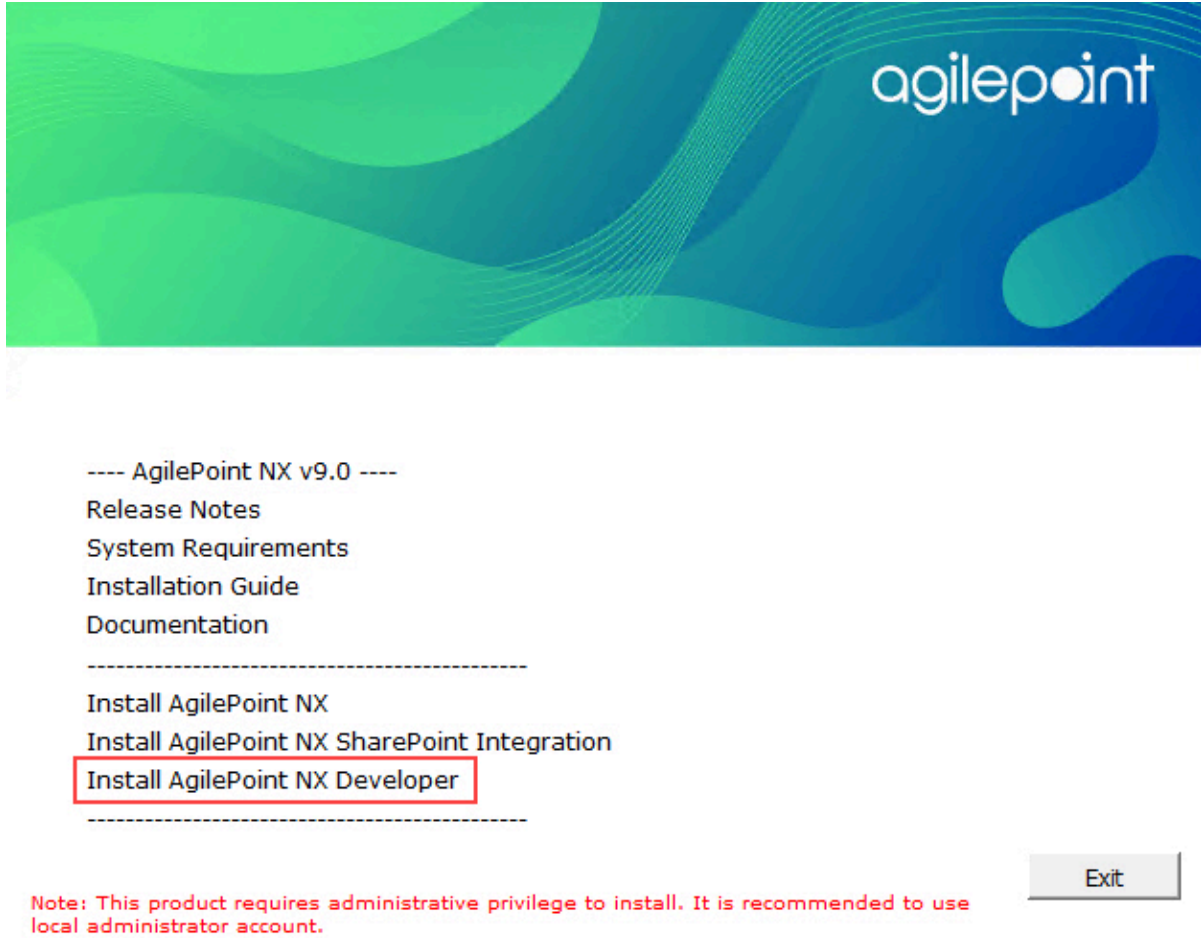
A supported version of .NET runtime is not installed. Please install a supported version of .NET Runtime. For more information, refer to the System Requirements Guide.

[System Requirements Guide](#)



Procedure

1. On the **AgilePoint NX v9.0** screen, click **Install AgilePoint NX Developer**.



2. On the **AgilePoint NX Developer** screen:
 - If Microsoft Visual Studio 2019 is installed on your machine, click **AgilePoint NX Developer (x86)**.
 - If Microsoft Visual Studio 2022 is installed on your machine, click **AgilePoint NX Developer (x64)**.

The installation procedures are the same for both AgilePoint NX Developer (x64) and AgilePoint NX Developer (x86).

The screens used in this procedure are for AgilePoint NX Developer (x86).



----- AgilePoint NX Developer -----

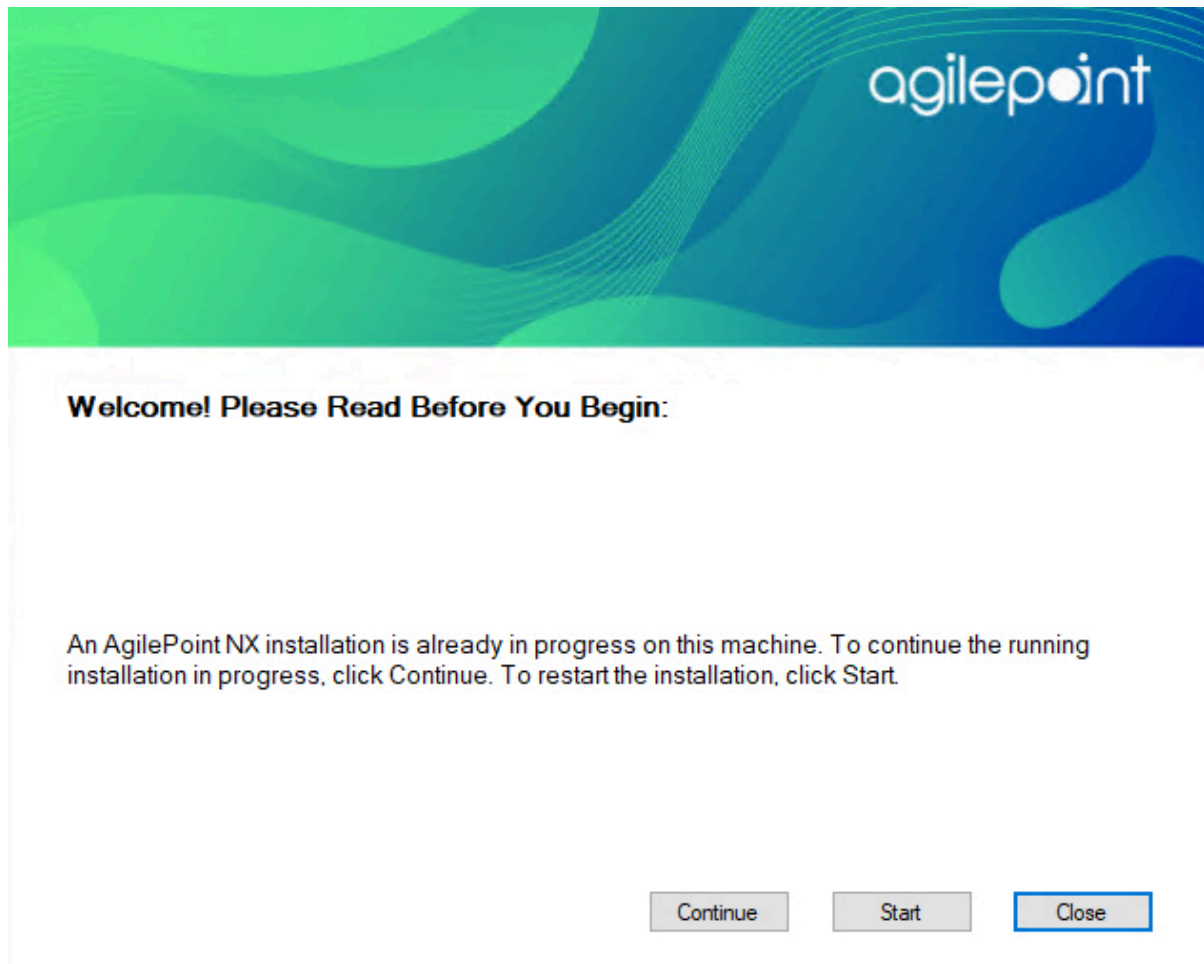
Install AgilePoint NX Developer (x86)

Install AgilePoint NX Developer (x64)

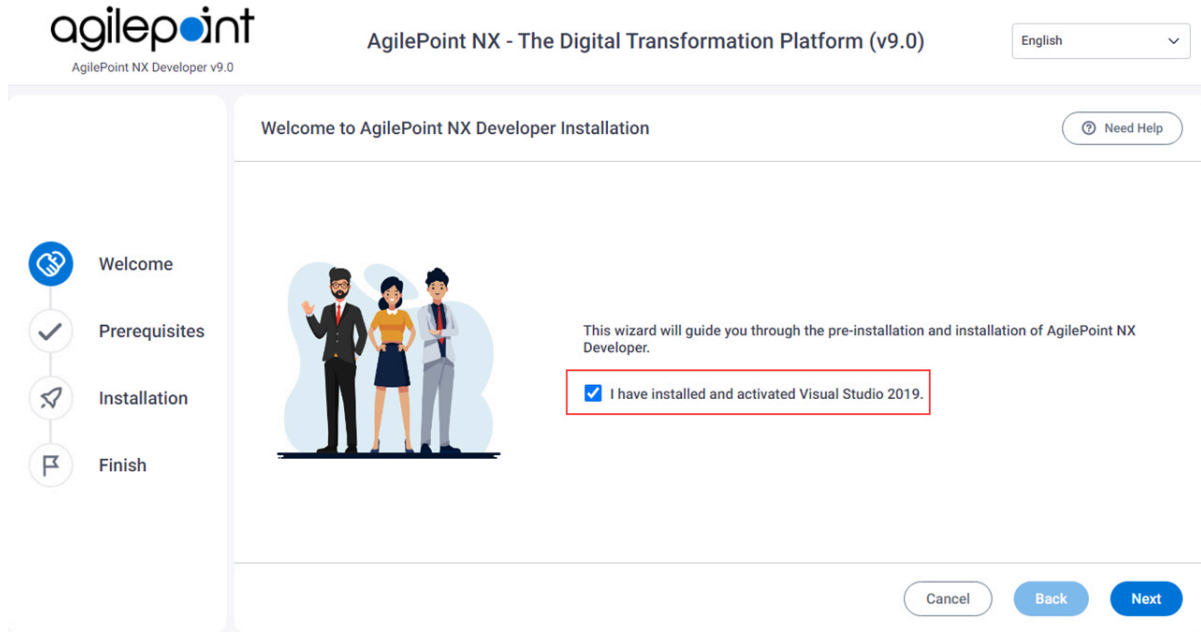
Note: This product requires administrative privilege to install. It is recommended to use local administrator account.

Exit

3. This screen shows if an AgilePoint NX installation is running on this machine.
 - To resume the installation, click **Continue**.
 - To restart the installation, click **Start**.



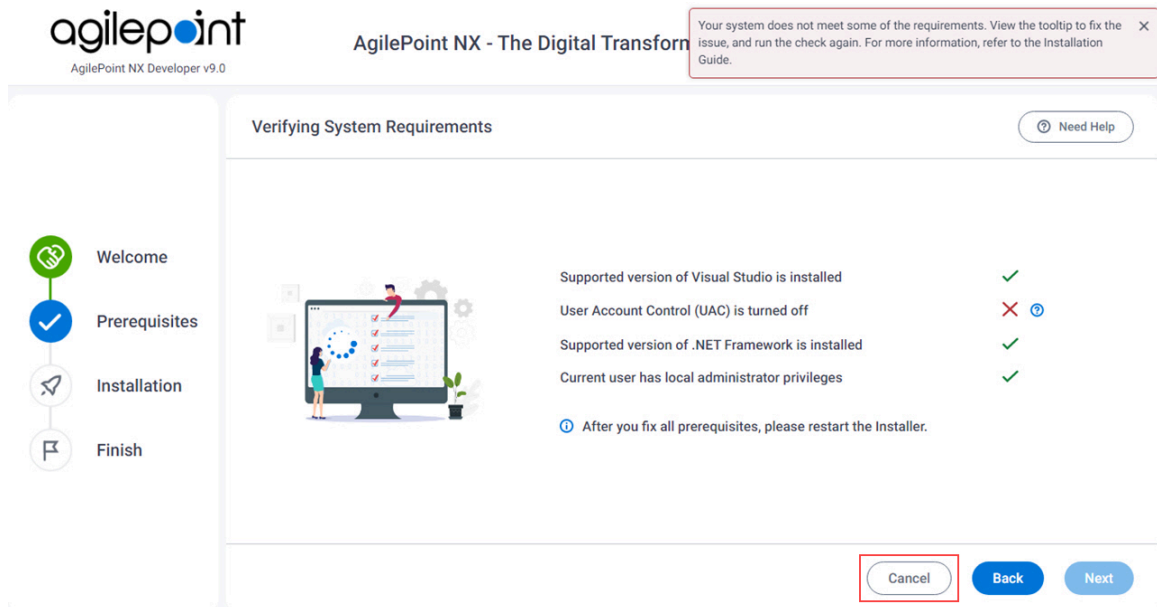
4. On the **Welcome to AgilePoint NX Developer Installation** screen, select **I have installed and activated Visual Studio 2019**.



5. On the **Verifying System Requirements** screen:

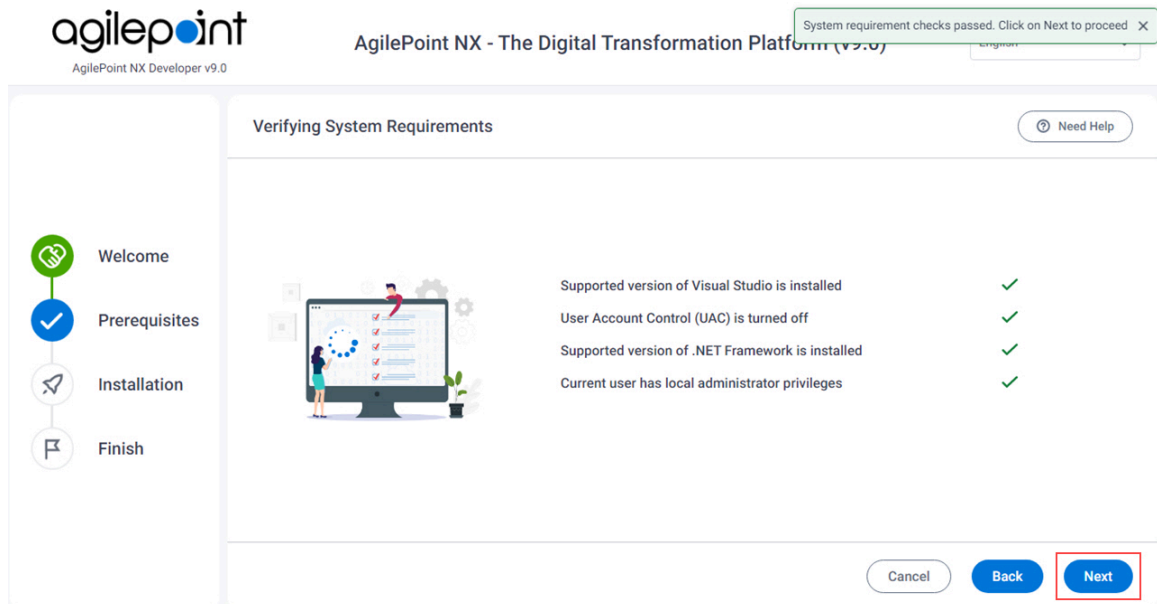
- If there are any errors, do this procedure:
 - a. Click **Cancel**.
 - b. Correct the errors.
 - c. Right-click the AgilePoint NX **Setup.exe** file, and click **Run as administrator**.

The AgilePoint NX installation starts.



Issue	Resolution
Supported version of Visual Studio is installed	Install a supported version of Visual Studio on this machine. For more information, refer to System Requirements for AgilePoint NX Developer .
User Account Control (UAC) is turned off	Turn user access control (UAC) off. For more information, refer to Turn Off User Account Control (UAC) .
Supported version of .NET Framework is installed	Install a supported version of .NET Framework on this machine. For more information, refer to System Requirements for AgilePoint NX Developer .
Current user has local administrator privileges	Sign in to this machine as a user with administrator privileges.

- If there are no errors, click **Next**.

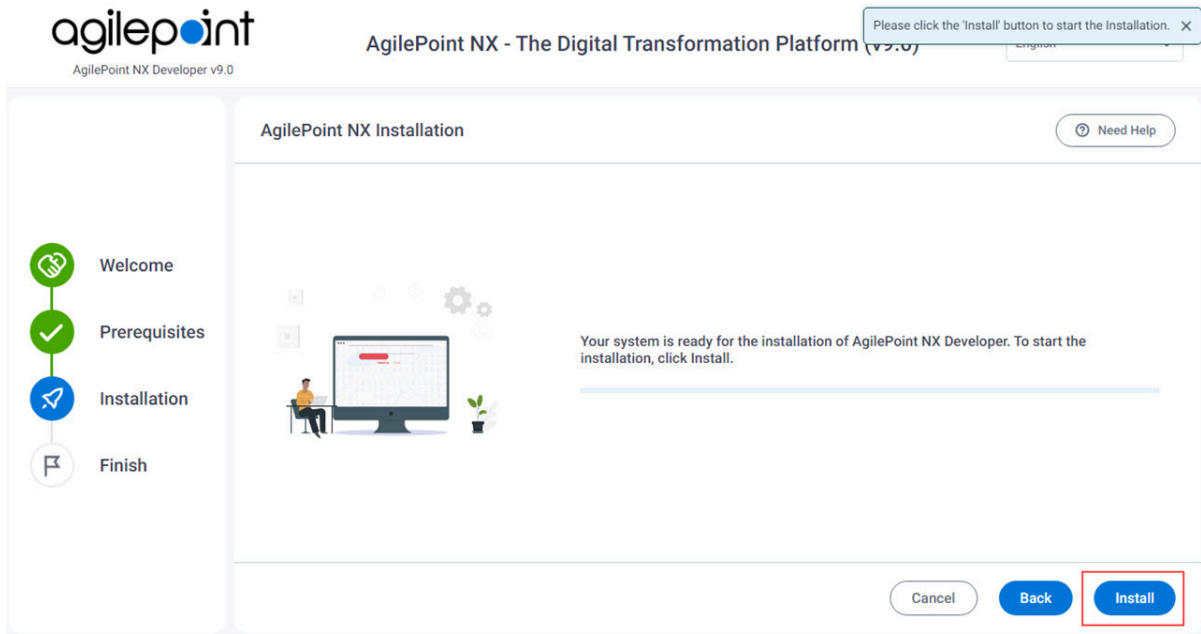


6. On the **AgilePoint NX Developer v9.0 Installation** screen, complete these fields.

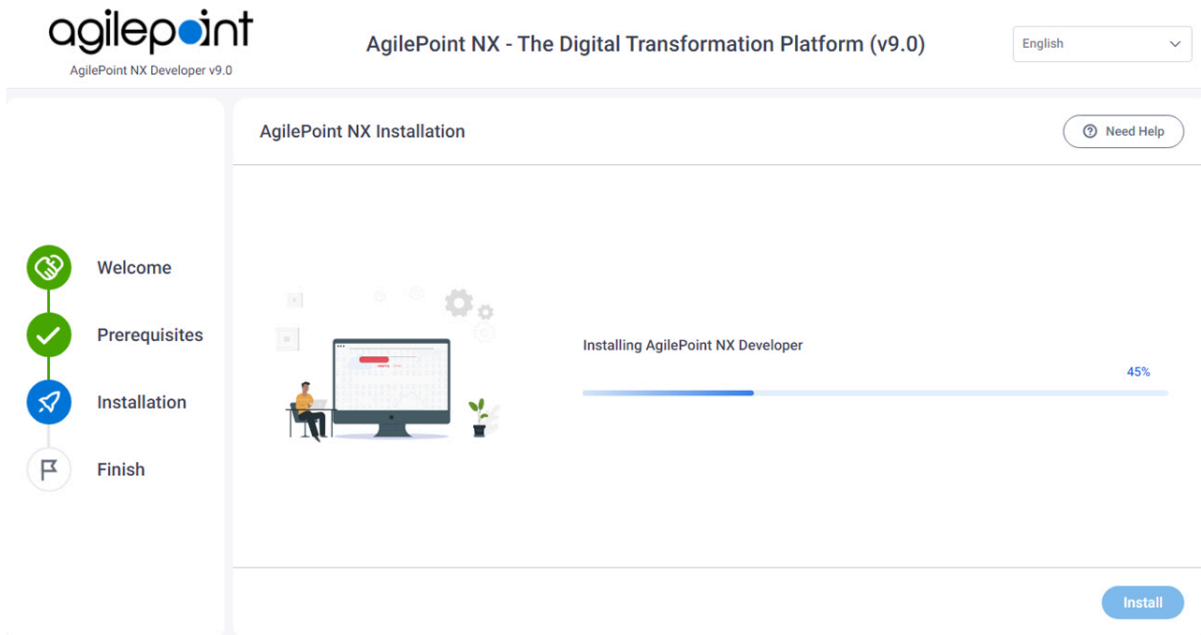
The screenshot shows the AgilePoint NX Installation wizard. The left sidebar indicates the current step is 'Installation'. The main content area is titled 'AgilePoint NX Installation' and includes a 'Need Help' button. The 'Install Location *' field is populated with 'C:\Program Files (x86)\AgilePoint\AgilePoint Developer'. The 'Customer Information' section has 'User Name *' and 'Organization *' fields. The 'License Key *' field is empty. At the bottom right, there are 'Cancel', 'Back', and 'Next' buttons.

Field Name	Definition
Install location	The folder where you want to install AgilePoint NX Developer.
User Name	Usually the first and last name of the person responsible for the AgilePoint NX Developer component or software license.
Organization	The name of your organization, or company.
License Key	Your AgilePoint NX Developer license key.

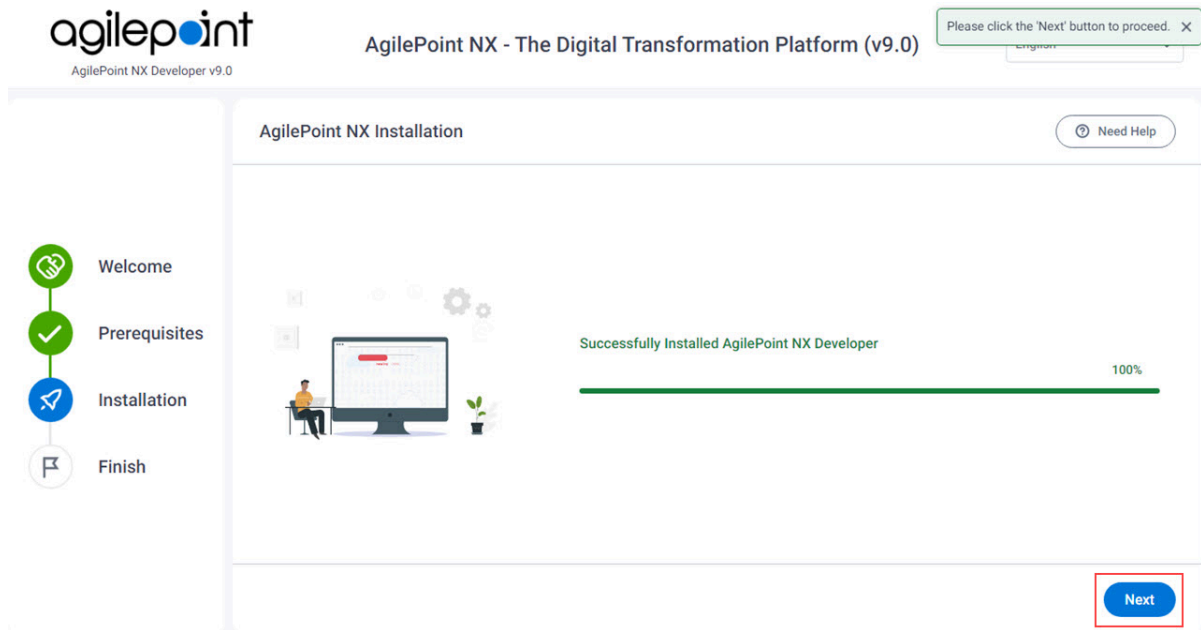
- Click **Next**.
- On the **AgilePoint NX Installation** screen, click **Install**.



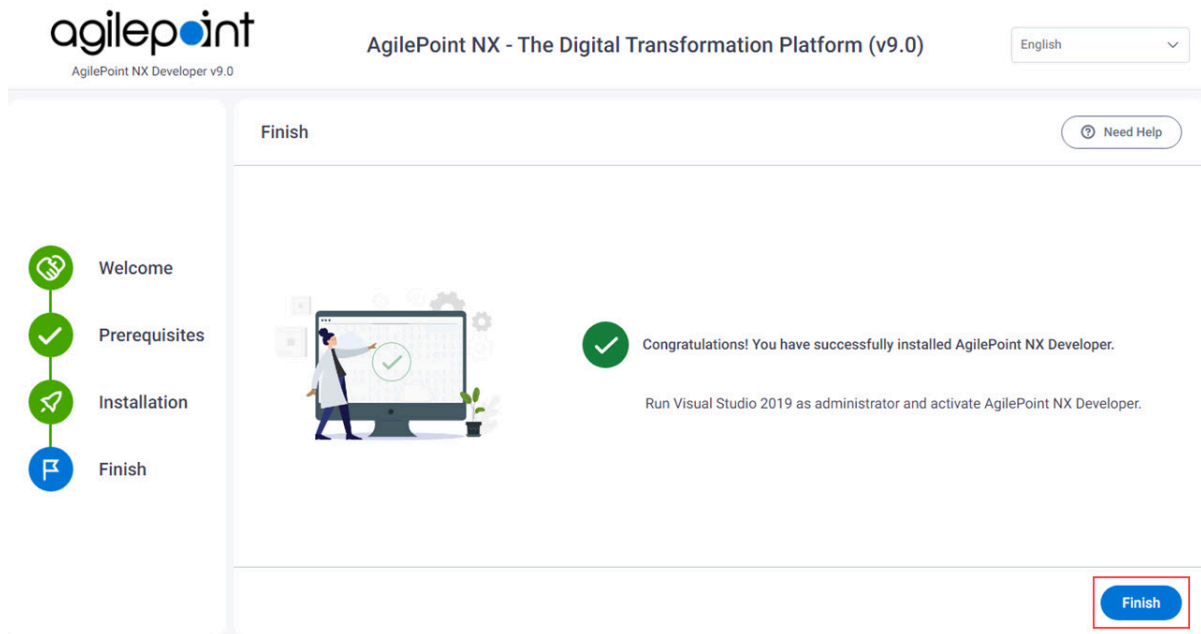
The AgilePoint NX Developer installation starts.



9. After the installation completes, click **Next**.



10. On the **Finish** screen, click **Finish**.




11. Restart the machine.

This is optional, but recommended. Rarely AgilePoint users have reported an issue with shortcuts not displaying if the machine is not restarted. There are no other known issues if you do not restart

the machine. Windows sometimes prompts to restart, and sometimes not. This is determined by the operating system.

12. Open **Microsoft Visual Studio** as an administrator.

 The first time you run the application after installing it, you will be prompted to activate it. This step is required. For more information, refer to [Obtain, Apply, and Activate AgilePoint License Keys](#).

(Optional) Configure SSL or TLS for AgilePoint Server and AgilePoint NX Portal

To configure [AgilePoint Server](#) and AgilePoint NX Portal to use [SSL](#) or [TLS](#), do the procedure in this topic.

Background and Setup

Prerequisites

- [AgilePoint NX OnPremises](#) or [AgilePoint NX PrivateCloud](#).
- To use secure communication, AgilePoint NX requires an [SSL](#) or [TLS](#) certificate to be installed for each communication port used for [AgilePoint Server](#) on the [AgilePoint Server machine](#).
- A full chain SSL or TLS certificate in PFX or PEM format.
 - **PFX** - The file must be in .pfx format and requires a password.
 - **PEM** - In most cases, a PEM certificate consists of two files: a private key file (.pem or .key) and a certificate file (.crt or .pem).

 Make sure the SSL certificate chain is complete.

Good to Know

- For security, AgilePoint recommends you use a standard SSL or TLS certificate, and not a self-signed certificate.
- SSL or TLS is required for AgilePoint Server if you use [on-premises SharePoint](#) over SSL or TLS.
- AgilePoint NX supports any version of SSL or TLS, but limitations to the versions of SSL or TLS you can use in your environment may apply based on software or systems outside of AgilePoint NX. The following are examples of restrictions that may apply to the SSL or TLS versions that could apply in your environment. However, the specific rules depend on your specific configuration:

- AgilePoint Server relies on the version of SSL or TLS that is configured for .NET on your AgilePoint Server machine. For example, by default, .NET 4.7.1 supports TLS 1.2 or higher.

This configuration can be changed, but any downgrade in the supported version of SSL or TLS can result in security risks. For more information, see the documentation from Microsoft.

- Outside services, such as Salesforce, may require certificates with higher levels (or specific levels) of SSL or TLS.

You can test your certificate with several third-party, web-based services—for example, <https://www.digicert.com/help/>

- If you want to connect to mobile apps that use iOS 9 or higher, your certificate must use Apple's App Transport Security standard.

For more information, refer to [NSAppTransportSecurity](#) from Apple.

- The security protocols supported by third-party technologies are subject to change and the responsibility for the associated vendors. These are subject to change without notice from AgilePoint.
- After you configure AgilePoint Server and AgilePoint NX Portal for SSL or TLS, you also must configure several other components if they are used in your environments.

For more information, refer to:

- [Configure SSL or TLS for Analytics Center](#)
- [Change the URL for Mobile Devices to use HTTPS](#)
- [Configure AgilePoint NX to Connect With On-Premises SharePoint with HTTPS](#)

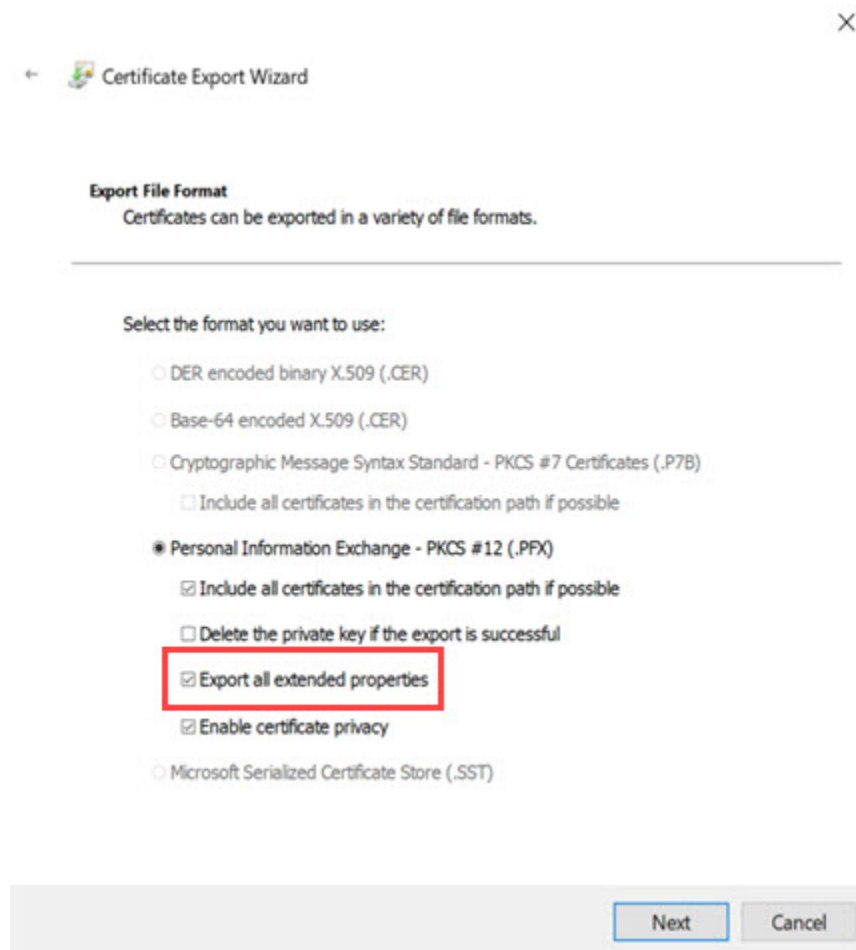
Add the SSL or TLS Certificate to the AgilePoint NX Installation Path

To add an [SSL](#) or [TLS](#) certificate to the AgilePoint NX file path, do the procedure in this topic.

Prerequisites

- **Important:** If your certificate is stored in the Microsoft certificate store, when you export the certificate, select **Export all extended properties**.

If this option is not selected, the certificate will cause errors.



Procedure

1. On the [AgilePoint Server machine](#), add the SSL or TLS certificate (.pfx or .pem) files to this folder:

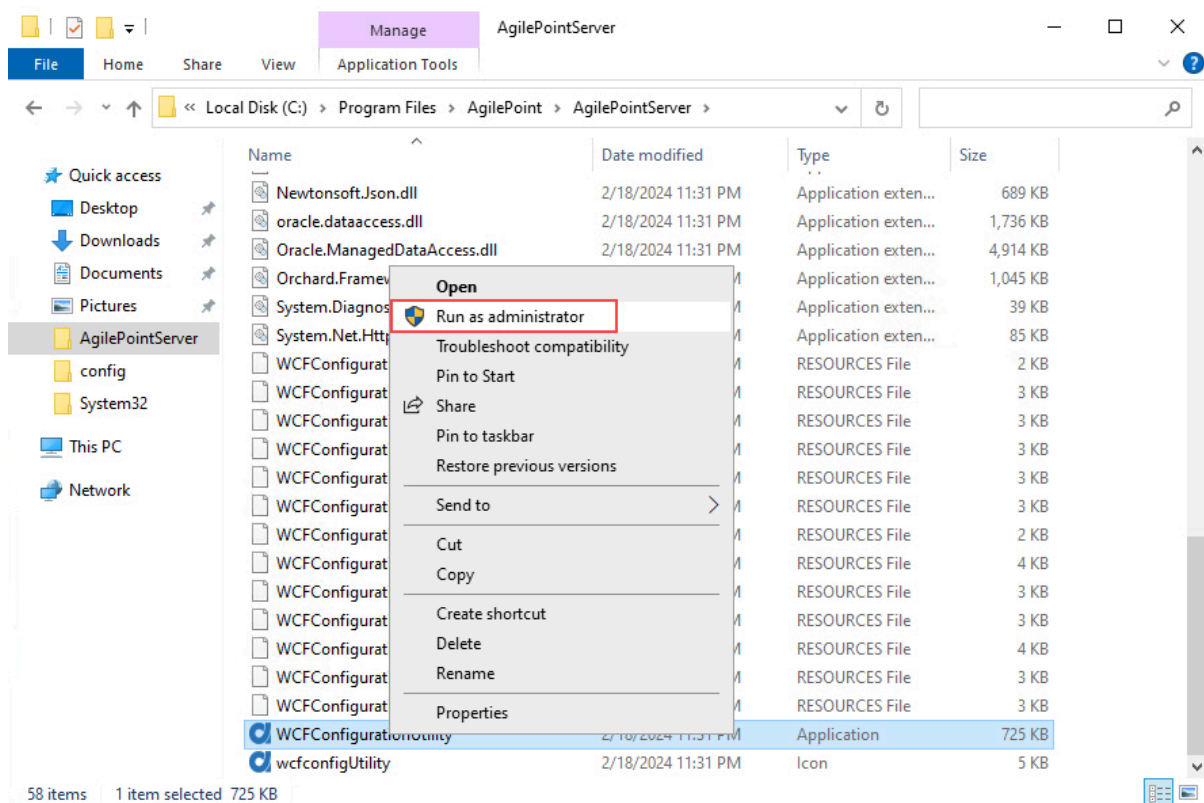
**(NX Portal installation folder - v9.0 and higher) C:\Program Files\AgilePoint
\AgilePointPortallInstance\Certificates**

Enable SSL or TLS in AgilePoint Server Manager

To enable the SSL Settings in [AgilePoint Server Manager](#), do the procedure in this topic.

How to Start

1. On the [AgilePoint Server](#) machine, in Windows Explorer, right-click the file (**AgilePoint Server installation folder**) `C:\Program Files\AgilePoint\AgilePoint Server\WCFCConfigurationUtility.exe`, and click **Run as Administrator**.



Procedure

1. On the [AgilePoint Server Manager](#), select your AgilePoint Windows Service instance.
2. On the **Networking** tab, in the **SSL Settings** section, turn on **Use Secure Connection (SSL)**.
3. In the **Domain** field, enter the common name or domain name for your SSL certificate.

- Restart the AgilePoint Server instance.

For more information, refer to [Restarting AgilePoint Server and AgilePoint Portal](#).

Bind an SSL or TLS Certificate to an AgilePoint Server Port

To bind an [SSL](#) or [TLS](#) certificate to an [AgilePoint Server](#) port, do the procedure in this topic.

Prerequisites

- The numbers for the ports you use for binding in AgilePoint Server. You can find these in [AgilePoint Server Manager](#).

Procedure

- In a command prompt, enter **mmc**.
- On the **Console Root** screen, click **File > Add/Remove Snap-in**.
- On the **Add or Remove Snap-ins** screen, select **Certificates**, and click **Add**.
- On the **Certificates snap-in** screen, click **Computer account**.
- On the **Select Computer** screen, click **Local computer**.
- Click **Finish**.
- On the **Selected snap-ins** section, click **Certificates (Local Computer)**.
- Click **Ok**.
- Click **Certificates (Local Computer) > Personal**.
- Right-click on the **Certificates** and select **All Task > Import**.
- On the **Certificates Import wizard**, click the **Next** button.
- In the **File name** field, browse your SSL certificate.
- Click **Next**.
- On the **Private key protection** screen, in the **Password** field, enter the password for the private key.
This screen shows only when the private key is secured with password.
- On the **Certificate Store** screen, select **Place all certificates in the following store**.
- In the **Certificate Store** field, click the **Browse** button, and select **Personal**.

17. Click **Next**.
18. Click **Finish**.
19. On the **Console Root** screen, double-click on the imported SSL certificate.
20. On the **Certificate** screen, click the **Details** tab.
21. In the **Show** field, select **ALL**.
22. Select **Thumbprint**.
23. Copy the value of the thumbprint.
24. In a command prompt, enter the following command:

```
netsh http add sslcert ipport=0.0.0.0:portnumber certhash=SSL-Certificate-thumbprint-value-without-spacesappid={c929c857-e10a-48c4-b123-5713faba528e}
```
25. Restart the AgilePoint Server instance.

For more information, refer to [Restarting AgilePoint Server and AgilePoint Portal](#).

Configure SSL or TLS for AgilePoint NX Portal

To configure an [SSL](#) or [TLS](#) certificate for an AgilePoint NX Portal port, do the procedure in this topic.

Procedure

1. On the [AgilePoint Server machine](#), in a text editor, open the AgilePoint NX Portal configuration file:
(NX Portal configuration folder - v9.0 and higher) C:\Program Files\AgilePoint\AgilePointPortallInstance\config\web.yaml
2. Do one of these, depending upon your SSL or TLS certificate format:
 - **PFX certificate:**
 - a. Encrypt the password:
 - i. On the AgilePoint Server machine, open this folder:
(NX Portal installation folder - v9.0 and higher) C:\Program Files\AgilePoint\AgilePointPortallInstance\tools\windows
 - ii. Right-click the file **encrypt.bat**, and click **Run as administrator**.
 - iii. In the command prompt, enter the password for the .pfx file.

- iv. Click **Enter**.

The encrypted password opens in the default text editor, usually Notepad.

- b. In the key **pfxf**, enter the path and file name for your PFX certificate.

Example:

```
"pfxf": "Certificates/mycertificate.pfx",
```

- c. In the the key **pfxfpassword**, enter the encrypted password.

Example:

```
"pfxfpassword": "658df8cbceb7499d245df32158dcf3aa83ce3558589sw2547f36d5",
```

- **PEM certificate:**

- a. In the key **sslkey**, enter the path and file name of the private key file. The file name has the extension **.pem** or **.key**.

Example:

```
"sslkey": "Certificates/key.pem",
```

- b. In the key **sslcert**, enter the path and file name of the the certificate file. The file name has the extension **.crt** or **.pem**.

Example:

```
"sslcert": "Certificates/cert.pem",
```

3. Change the value of the key **httpsenabled** to **true**:

```
"httpsenabled": true,
```

4. To change the REST URL, find the **agilepointserverurl** key and change the value so it starts with **https://**

The [REST URL](#) is the URL for your [AgilePoint Server instance](#).

For more information, refer to [Find your AgilePoint Server Instance REST URL](#).

Format:

```
"agilepointserverurl": "[Your AgilePoint NX Portal URL]/AgilePointServer",
```

Example:

```
"agilepointserverurl": "https://myagilepointnxdomain.com:13490/AgilePointServer",
```

5. To change the Portal URL, find the **portalurl** key, change the value so it starts with **https://**

The Portal URL represents the [AgilePoint Portal Instance URL](#).

For more information, refer to [Find your Portal Instance URL](#).

Example:

```
"portalurl": "https://myagilepointnxdomain.com:13490",
```

6. To change the IdP URL, find the **idpurl** key and change the value so it starts with **https://**

The value of the IdP URL is the same as the Portal URL, followed by **/idp**.

Format:

```
[Your AgilePoint NX Portal URL]/idp
```

Example:

```
"idpurl": "https://myagilepointnxdomain.com:13490/idp",
```

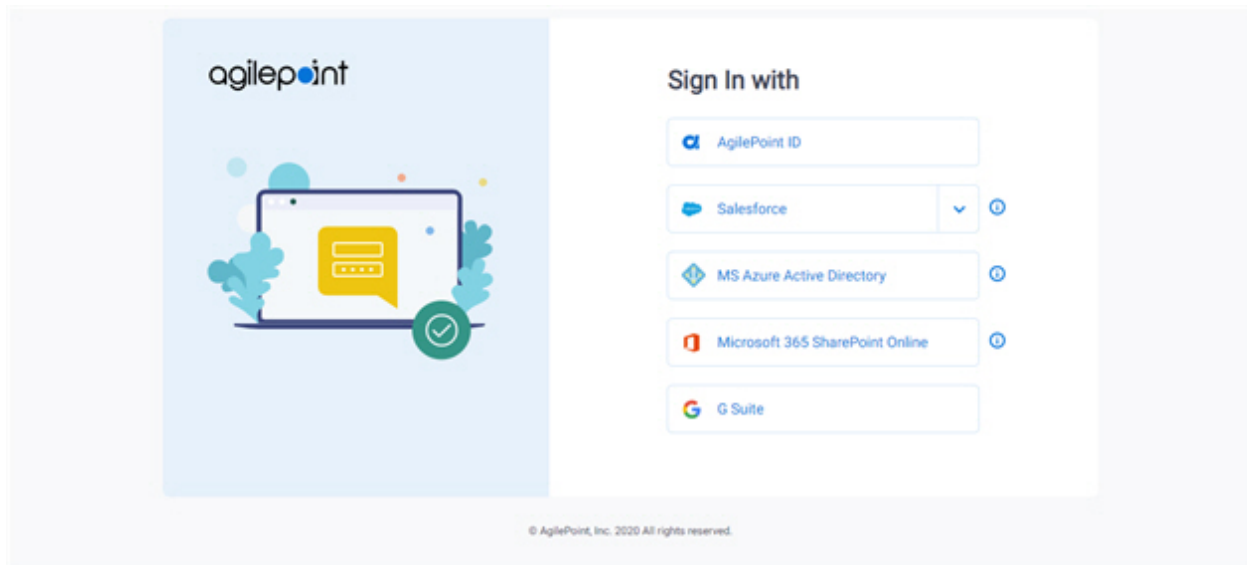
7. Save and close the file **web.yaml**.
8. Restart your AgilePoint Portal instance.

For more information, refer to [Restarting AgilePoint Server and AgilePoint Portal](#)

Test the HTTPS AgilePoint NX Portal REST URL

To test the HTTPS AgilePoint NX Portal REST URL, do the procedure in this topic.

Sign In With screen



Procedure

1. Open HTTPS REST URL for the AgilePoint NX Portal.

Format:

https://[fully qualified domain name]

Example:

https://myagilepointnxdomain.com

Troubleshoot Issues for AgilePoint NX Portal

After an [SSL](#) or [TLS](#) certificate is configured, the portal logs one of these errors.

Error Message 1

If the SSL certificate in use was generated with a legacy encryption mechanism, this error shows:

“unsupported”

AgilePoint strongly recommends to obtain a new SSL certificate. However, if you still want to support legacy encryption, do these:

1. On the [AgilePoint Server machine](#), in a text editor, open this file:
(NX Portal installation folder - v9.0 and higher) C:\Program Files\AgilePoint\AgilePointPortalInstance\windows-service\AgilePointPortalService.exe.config
2. Change the value of the **arguments** key to **--openssl-legacy-provider build/index.js**.
<add key="arguments" value="--openssl-legacy-provider build/index.js" />
3. Restart your AgilePoint Portal instance.

For more information, refer to [Restarting AgilePoint Server and AgilePoint Portal](#)

Error Message 2

If the password specified for the .pfx file is not encrypted, this error shows:

“The encrypted data is in an invalid format”

To resolve this issue, specify the encrypted password.

For more information, refer to [Configure an SSL or TLS Certificate for AgilePoint NX Portal](#).

Error Message 3

If the password specified for the .pfx file is not correct, this error shows:

“Looks like the password provided for the pfx certificate type is not matching. Please check your password and try again”

To resolve this issue, specify the correct password.

For more information, refer to [Configure an SSL or TLS Certificate for AgilePoint NX Portal](#).

(Optional) Configure AgilePoint NX to Connect With On-Premises SharePoint with HTTPS

To configure AgilePoint NX to connect to [on-premises SharePoint](#) with HTTPS, do the procedure in this topic.

Good to Know

- SSL or TLS is required for AgilePoint Server if you use [on-premises SharePoint](#) over SSL or TLS.
- If your [AgilePoint Server instance](#) is configured to use HTTP or HTTPS, the ImpersonatorPass setting must be encrypted.

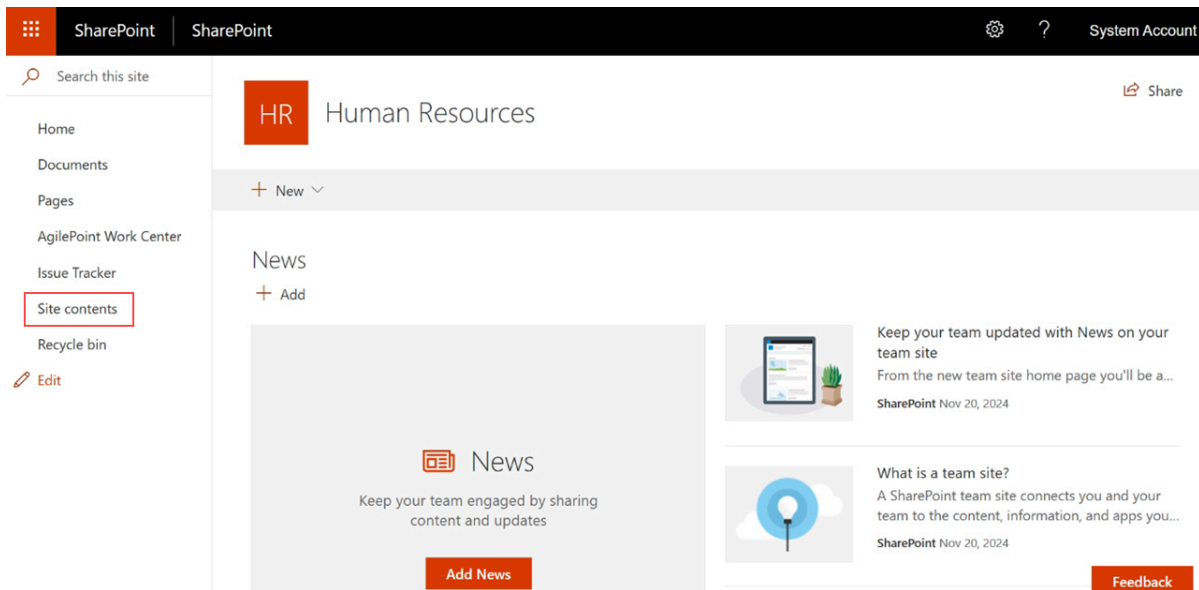
For more information, refer to [AgilePoint Configuration List for SharePoint \(SharePoint On-Premises\)](#).

- This topic shows only configuration settings for HTTPS and on-premises SharePoint. This is not the minimum configuration for on-premises SharePoint in general.

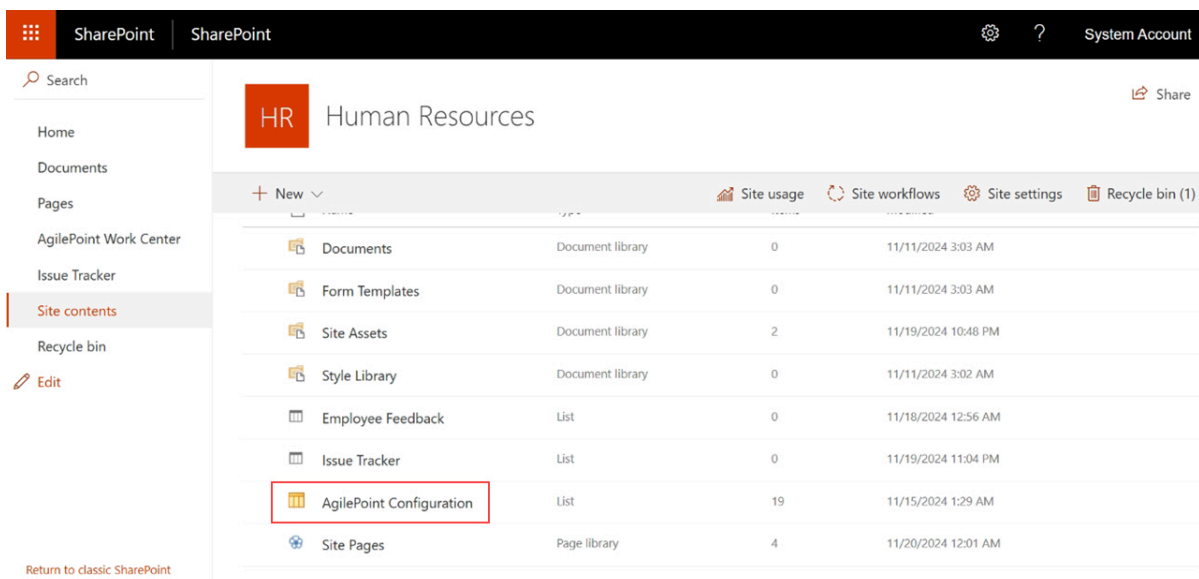
For more information, refer to [AgilePoint Configuration List for SharePoint \(SharePoint On-Premises\)](#).

How to Start

1. In SharePoint on-premises, on the SharePoint site, click **Site contents**.





2. On the **Site contents** screen, click **AgilePoint Configuration**.



Procedure

1. Configure the values for the these list items for URLs that use HTTPS:

Title	AP Setting Value
ServerInstanceUrl	<p><u>Description:</u></p> <p>Specifies the REST URL for your virtual AgilePoint server.</p> <p>For more information, refer to Find your AgilePoint Server Instance REST URL.</p> <p><u>Allowed Values:</u></p> <p>A valid REST URL in the following format:</p> <p>https://[virtual AgilePoint Server instance host name]:[REST port]/AgilePointServer</p> <div data-bbox="548 947 1333 1104" style="background-color: #f0f0f0; padding: 5px;"><p> If your AgilePoint Server instance uses HTTPS, to use on-premises SharePoint, the web application for your SharePoint site must be configured to use HTTPS.</p></div> <p><u>Default Value:</u></p> <p>The REST URL for your AgilePoint Server instance.</p> <p><u>Example:</u></p> <p>https://sunres.com:1451/AgilePointServer</p>
PortalInstanceUrl	<p><u>Description:</u></p> <p>Specifies the URL for the AgilePoint NX service in the following format:</p> <p>https://[AgilePoint NX portal host name]</p> <p>For more information, refer to Find your AgilePoint Server Instance REST URL.</p> <p><u>Allowed Values:</u></p> <p>A valid AgilePoint NX service URL.</p>

Title	AP Setting Value
	<p data-bbox="560 279 1333 415"> If your AgilePoint Server instance uses HTTPS, to use on-premises SharePoint, the web application for your SharePoint site must be configured to use HTTPS.</p> <p data-bbox="548 468 716 499"><u>Default Value:</u></p> <p data-bbox="548 531 1105 562">The URL for your AgilePoint NX Portal instance.</p> <p data-bbox="548 615 656 646"><u>Example:</u></p> <p data-bbox="548 678 841 709">https://sunresportal.com</p>

Obtain, Apply, and Activate AgilePoint License Keys

To obtain, apply, and activate AgilePoint product license keys, do the procedure in this topic.

Background and Setup

Prerequisites

- This procedure covers only licenses for new installations.
- To apply and activate a product license, you must have Administrator permissions on the installation machine.

Obtain AgilePoint License Keys

Some AgilePoint components require a license key. When you sign up for an AgilePoint account or purchase AgilePoint software, AgilePoint will send you the license keys for the components you purchased.

Good to Know

- A license key is required when you install one of these components:
 - AgilePoint Server
 - The AgilePoint SAP Connector for AgilePoint Server
 - AgilePoint NX Developer

Procedure

Acquiring AgilePoint license keys requires a purchase of the product or service, or an approval for a trial license key. This process is handled through AgilePoint Sales. You may need to work with a primary

contact in your organization who has worked with AgilePoint Sales to acquire the license keys. For more information, contact [AgilePoint Sales](#).

After an initial license purchase or the approval for a trial license, license keys can be acquired from AgilePoint Customer Support. For more information, [contact AgilePoint Support](#).

When you request a new license key, please provide the following information:


- Your name.
- The name of your company or organization.
- The version numbers and the names of the AgilePoint products that you plan to install.
- The type of license keys. Types may include valuation, Development, Production, or Clustered. If you are not sure, AgilePoint can help you determine the license type.
- The number of physical or virtual machines on which you plan to install each component.
- If you are requesting a license key as a replacement for a previously issued license key, provide the original license key.

AgilePoint will send an email with information about the license key, including any necessary instructions to apply the license key in your environment. The license key is usually provided as a secure download link, but other methods are available upon request.

If you submit a request for a license key, please allow at least 1 full business day to receive the license key.

Activate a Product License Over the Internet During Installation

To activate an AgilePoint product license using an Internet connection during product installation, do the procedure in this topic.

 Internet activation is recommended for all machines with Internet connections.

Prerequisites

- You are activating the license key in one of these situations during initial installation:
 - During the installation of AgilePoint Server.
 - After installing the AgilePoint NX Developer, when you run the application for the first time.

- An Internet connection on the installation machine.

If the machine does not have an Internet connection, refer to [Activate a Product License Manually without an Internet Connection](#).

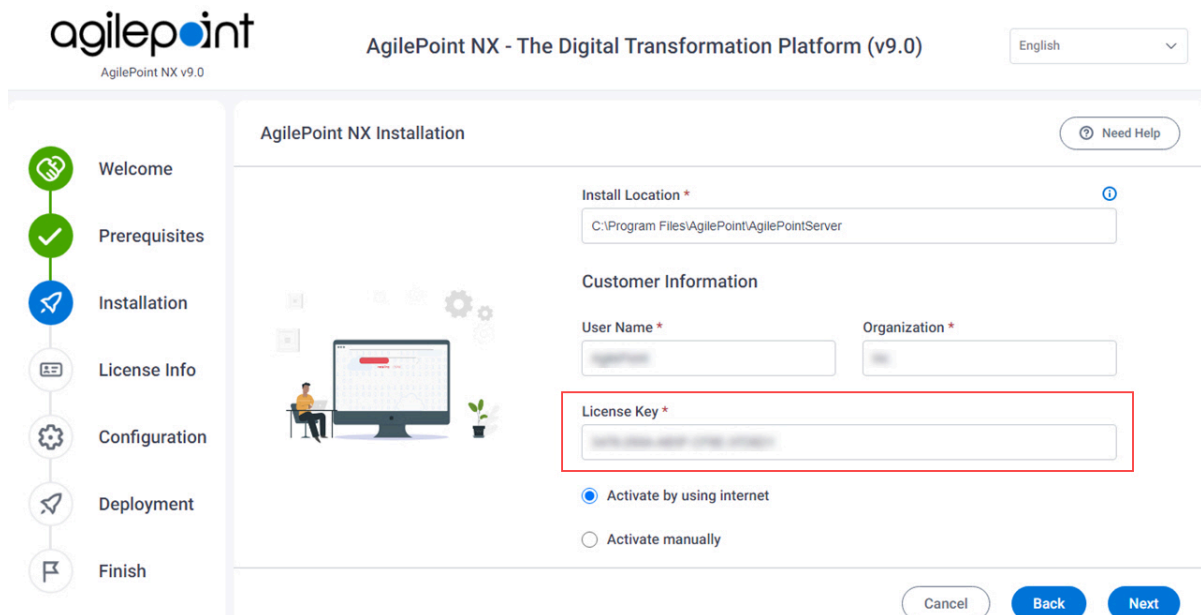
Activate the AgilePoint Server License Key with an Internet connection

1. Start installing AgilePoint Server.

For more information, refer to [Install AgilePoint Server](#).

2. On the **AgilePoint NX Installation** screen, in the **License Key** field, enter the AgilePoint NX license key provided by AgilePoint.

For more information, refer to [Obtain AgilePoint License Keys](#).



The screenshot shows the AgilePoint NX Installation wizard interface. The title bar reads "AgilePoint NX - The Digital Transformation Platform (v9.0)". The main window is titled "AgilePoint NX Installation" and includes a "Need Help" button. On the left, a navigation pane lists steps: Welcome, Prerequisites, Installation, License Info, Configuration, Deployment, and Finish. The "License Info" step is currently active. The main content area contains the following fields and options:

- Install Location ***: A text box containing "C:\Program Files\AgilePoint\AgilePointServer".
- Customer Information**:
 - User Name ***: A text box.
 - Organization ***: A text box.
 - License Key ***: A text box, highlighted with a red border.
- Activation Options**:
 - Activate by using internet**
 - Activate manually**

At the bottom right, there are three buttons: "Cancel", "Back", and "Next".

3. Select **Activate by using internet**.

agilepoint
AgilePoint NX v9.0

AgilePoint NX - The Digital Transformation Platform (v9.0) English

AgilePoint NX Installation Need Help

Install Location *
C:\Program Files\AgilePoint\AgilePointServer

Customer Information

User Name * Organization *

License Key *

Activate by using internet
 Activate manually

Cancel Back Next

4. Click **Next**.

The license key activates automatically within a few seconds.

After the license key is activated, the **License Information** screen shows details about the license activation.

agilepoint
AgilePoint NX v9.0

AgilePoint NX - The Digital Transformation Platform (v9.0) English

License Information Need Help

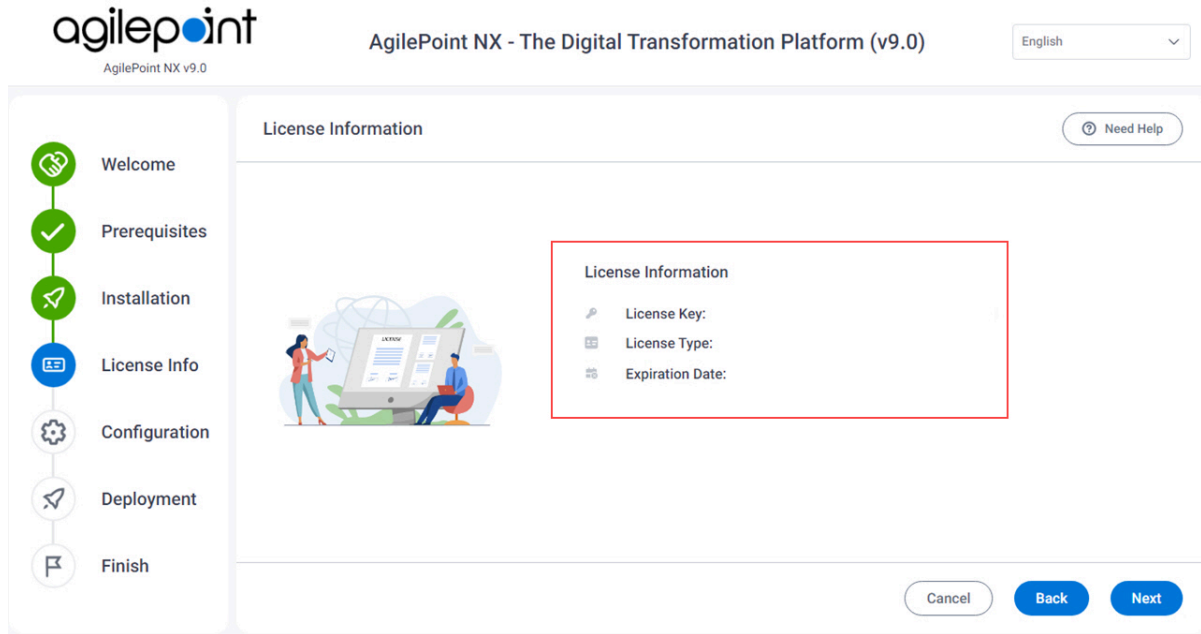
License Information

License Key:	
License Type:	Trial Version
Activation Date:	1/24/2024
Expiration Date:	4/24/2024

Licensed Features ▾

Cancel Back Next

If an error occurs, such as an incorrect license key or a license key not activated, the **License Information** screen shows no data.



To fix the issue, do the following:

- Click **Back** and enter the license key again.
- Check the Internet connection. If the machine does not have an Internet connection, click **Back**, and activate the license manually.

For more information, refer to [Activate a Product License Manually without an Internet Connection](#).

- If these procedures do not fix the issue, [contact AgilePoint Customer Support](#).

Activate the AgilePoint NX Developer License Key with an Internet connection

1. Start installing AgilePoint NX Developer.

For more information, refer to [Install AgilePoint NX Developer](#).

2. On the **AgilePoint NX Installation** screen, in the **License Key** field, enter the AgilePoint NX Developer license key you received from AgilePoint.

For more information, refer to [Obtain AgilePoint License Keys](#).

agilepoint
AgilePoint NX Developer v9.0

AgilePoint NX - The Digital Transformation Platform (v9.0)

English

AgilePoint NX Installation

Need Help

Welcome

Prerequisites

Installation

Finish

Install Location *

C:\Program Files (x86)\AgilePoint\AgilePoint Developer

Customer Information

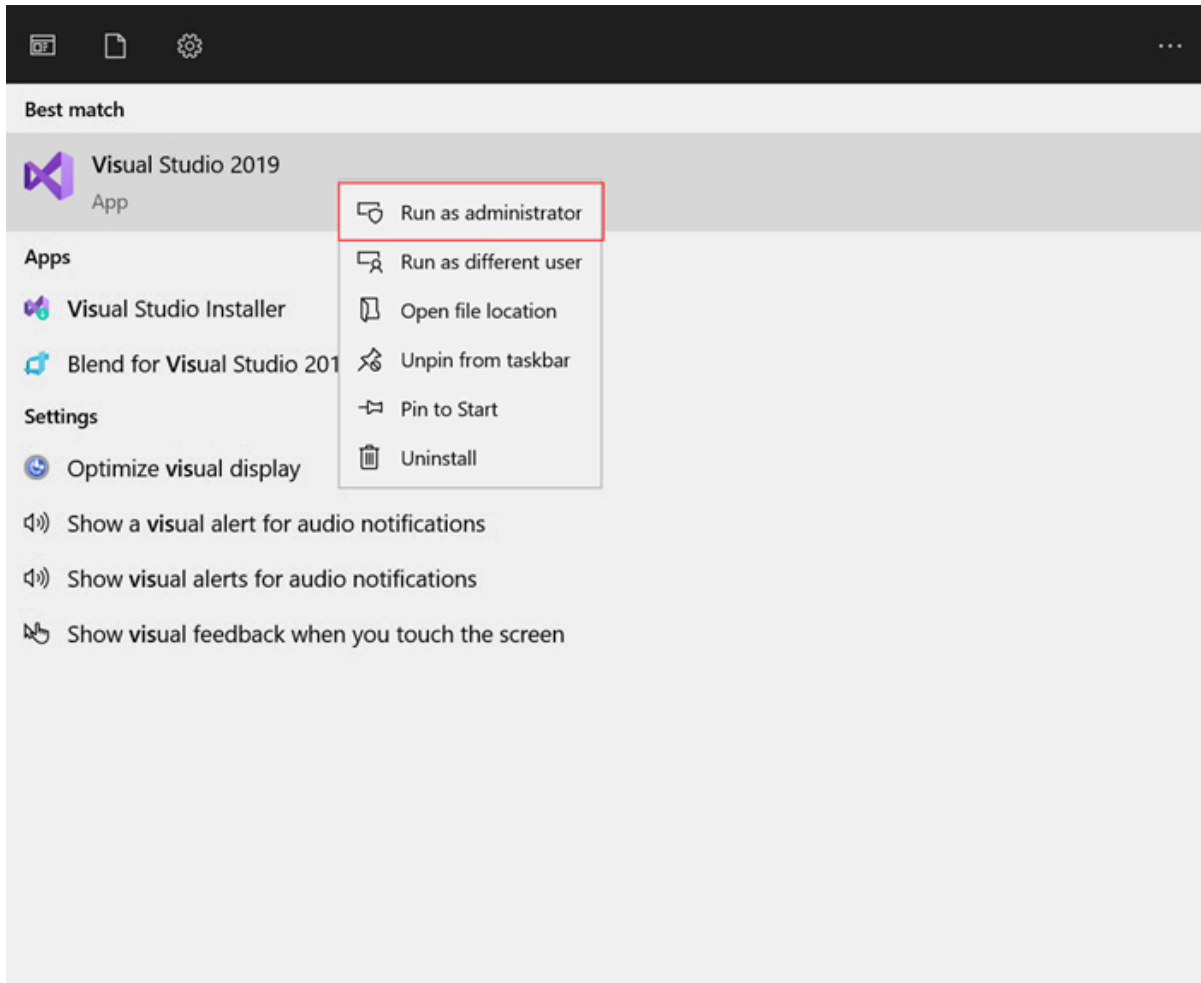
User Name *

Organization *

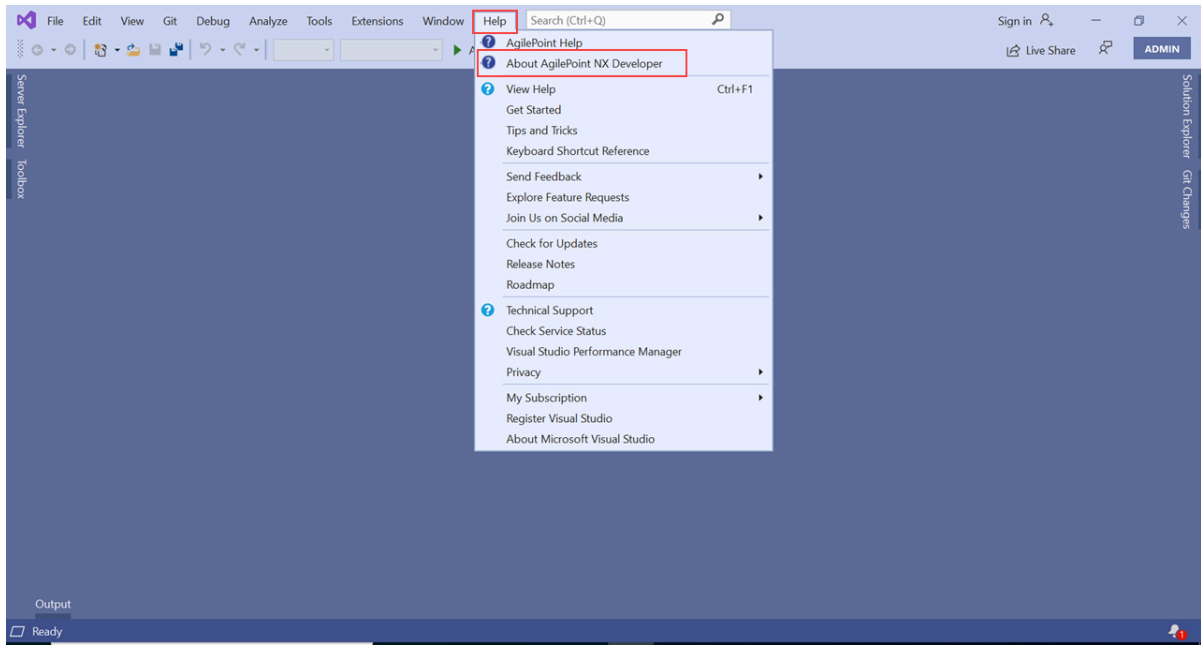
License Key *

Cancel Back Next

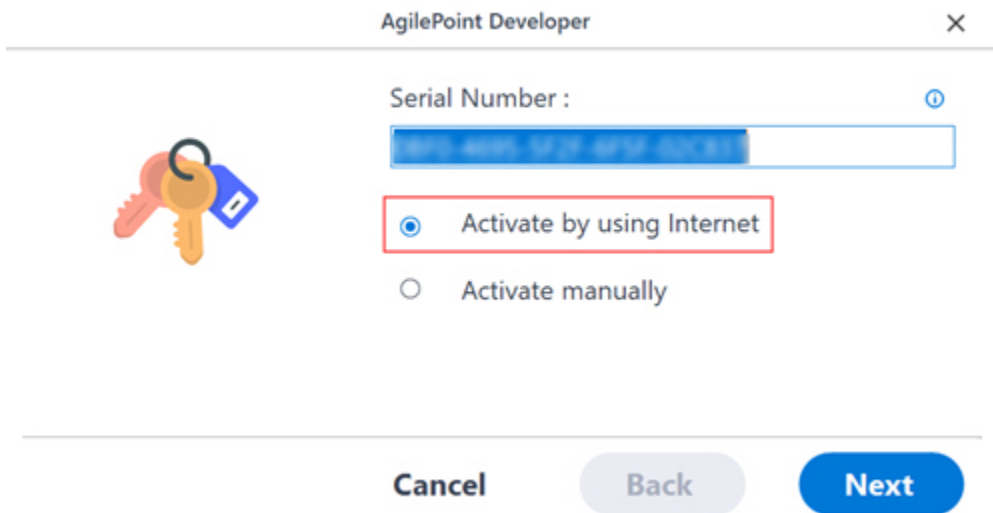
3. Click **Next** and complete the AgilePoint NX Developer installation.
4. On the AgilePoint NX Developer machine, on the **Start** menu, right-click **Microsoft Visual Studio**, and click **Run as administrator**.



5. In **Microsoft Visual Studio**, click **Help > About AgilePoint NX Developer**.

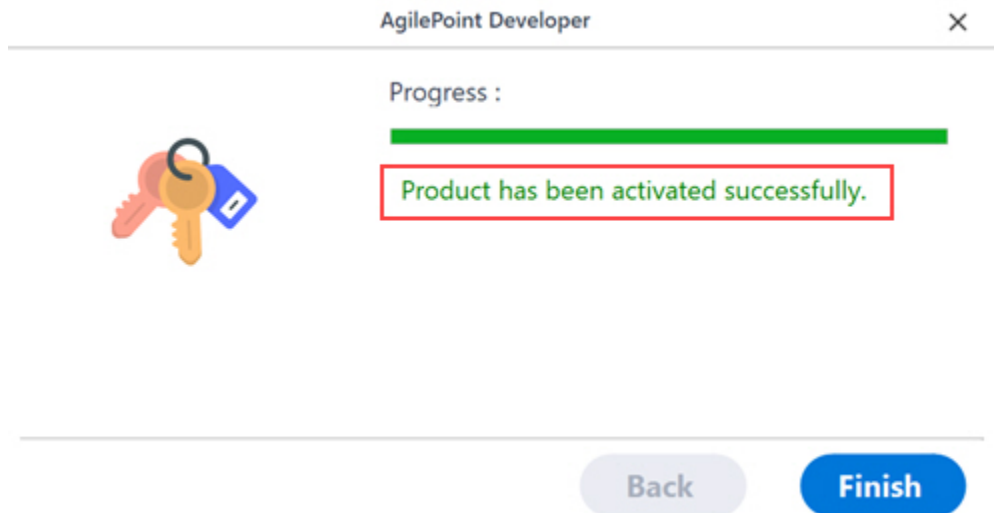


- 6. On the **AgilePoint Developer** screen, select **Activate by using internet**.



- 7. Click **Next**.

The license key activates automatically within a few seconds, and this successful message shows.



To fix the issue, do the following:

- Click **Back** and enter the license key again.
- Check the Internet connection. If the machine does not have an Internet connection, click **Back**, and activate the license manually.

For more information, refer to [Activate a Product License Manually without an Internet Connection](#).

- If these procedures do not fix the issue, [contact AgilePoint Customer Support](#).

Activate a Product License Manually without an Internet Connection

To activate an AgilePoint product license on a machine that is not connected to the Internet, do the procedure in this topic.

Prerequisites

- Manual license activation is required if you are installing an AgilePoint NX component on a machine that does not have an Internet connection.

This situation is not typical, but it can occur, for example, in Development environments, on virtual machines, or in organizations with strict security policies regarding installing software with a live Internet connection.

- An Internet connection is required to activate the product license and retrieve the license key activation file. Thus, you must have access to a machine that has an Internet connection, even if the installation

machine does not have one. You must also have a way to transfer files from the installation machine to the Internet-connected machine, such as a USB drive, a shared file system, or copy-and-paste capability.

- You are activating the license key in one of these situations during initial installation:
 - During the installation of AgilePoint Server.
 - After installing the AgilePoint NX Developer, when you run the application for the first time.

Activate the AgilePoint Server License Key Manually

1. Start installing AgilePoint Server.

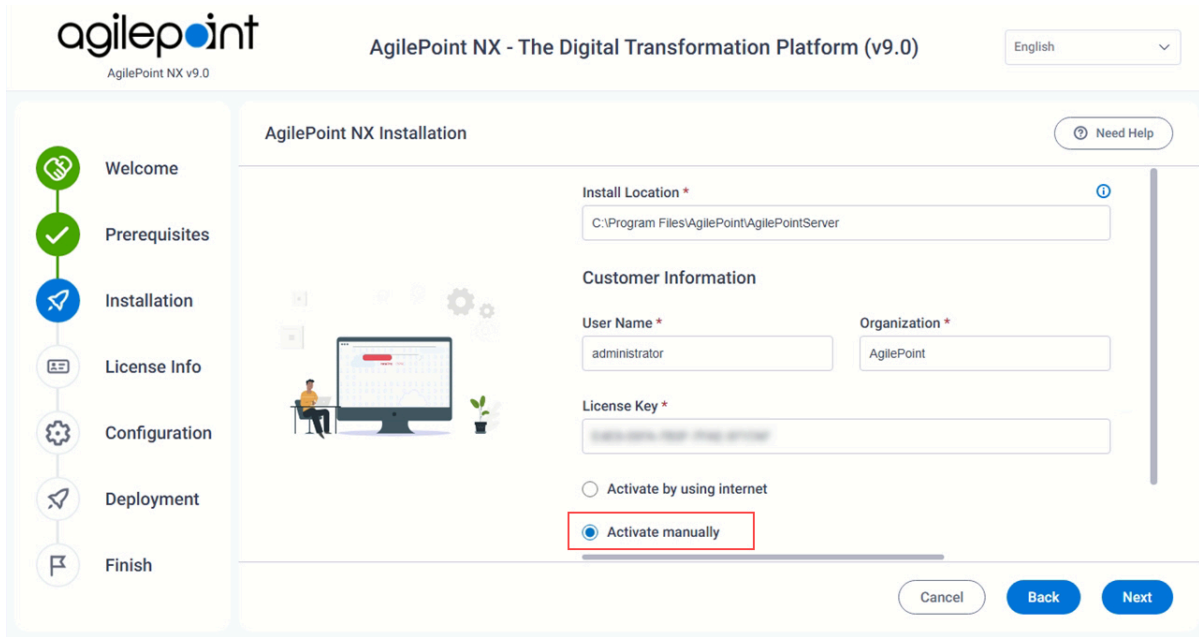
For more information, refer to [Install AgilePoint Server](#).

2. On the **AgilePoint NX Installation** screen, in the **License Key** field, enter the AgilePoint NX license key provided by AgilePoint.

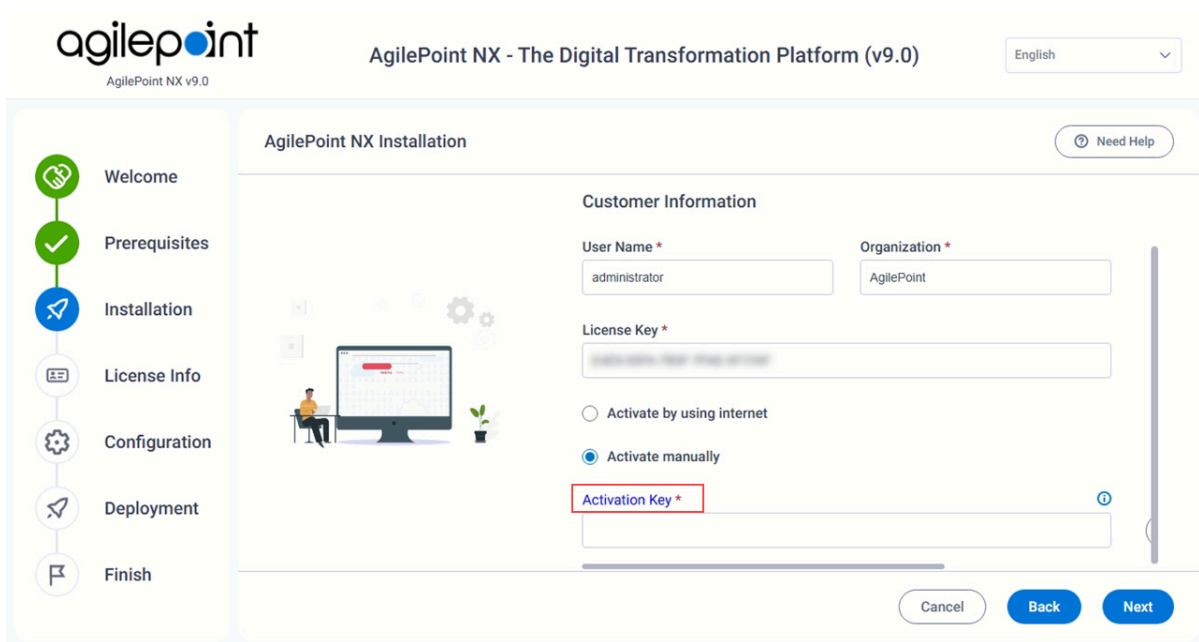
For more information, refer to [Obtain AgilePoint License Keys](#).

The screenshot shows the AgilePoint NX installation interface. At the top left is the AgilePoint logo with the text 'AgilePoint NX v9.0'. To the right is the title 'AgilePoint NX - The Digital Transformation Platform (v9.0)' and a language dropdown menu set to 'English'. Below the logo is a vertical navigation menu with icons and labels: Welcome, Prerequisites, Installation (highlighted in blue), License Info, Configuration, Deployment, and Finish. The main content area is titled 'AgilePoint NX Installation' and includes a 'Need Help' button. The 'Install Location' field contains 'C:\Program Files\AgilePoint\AgilePointServer'. The 'Customer Information' section has fields for 'User Name' and 'Organization'. The 'License Key' field is highlighted with a red border. Below it are two radio buttons: 'Activate by using internet' (selected) and 'Activate manually'. At the bottom right are 'Cancel', 'Back', and 'Next' buttons.

3. Select **Activate manually**.



4. Click **Activation Key**.



5. On the web page that appears, copy the URL.

If you choose this method, you must enter the license key in the Product ID field.

9. Click **Submit**.

The activation key file downloads to the Internet-connected local machine.

Thank you for using AgilePoint BPMS. The following steps will guide you through to manually activate your AgilePoint installation

STEP 1 : Select 'Activate manually' and click 'Next' to proceed

AgilePoint V8 or later AgilePoint V7 or an earlier version

STEP 2 : Copy the 'Product ID' prompted to you in the Activation Wizard Window into the product ID' text box below. Click 'Submit' to retrieve activation key or [download activation key file](#)

Product ID :

If license activation does not go through and does not appear, please click [here](#) and try it again.

STEP 3 : Enter the received Activation Key or upload License Activation Key file into Activation Wizard to complete the manual activation.

If this process fails to generate an activation key, send an email with the following information to [AgilePoint Customer Support](#):

- Your name.
- The name of your company or organization.
- Appropriate contact information.
- The license key to activate.

AgilePoint will reply with the required activation key.

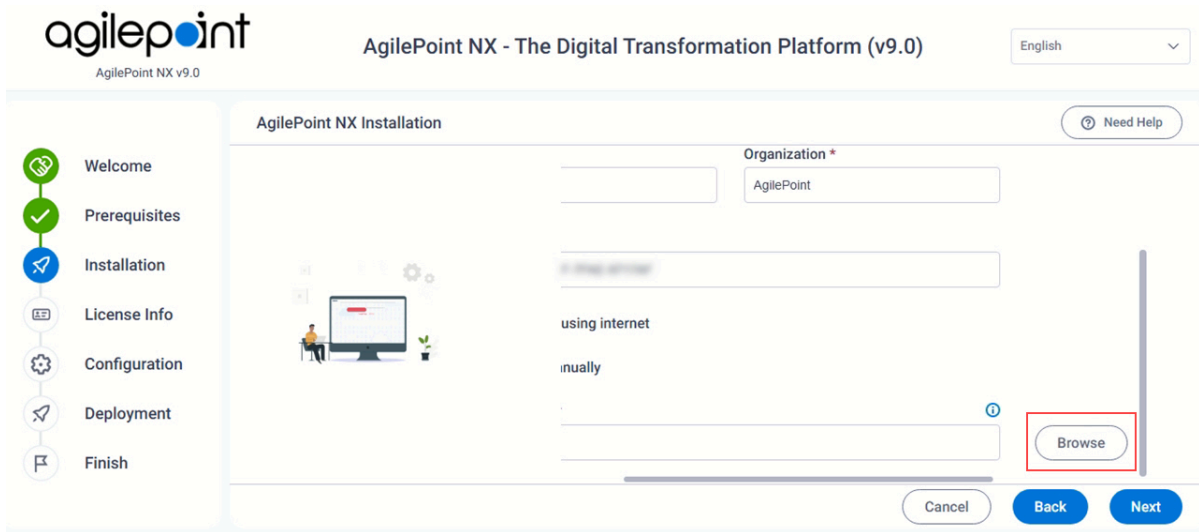
10. Transfer the activation key file from the Internet-connected machine to the machine where you are installing AgilePoint Server.

The activation key file shows in this format:

license-activation-key-xxxxxxxxxxxx.txt

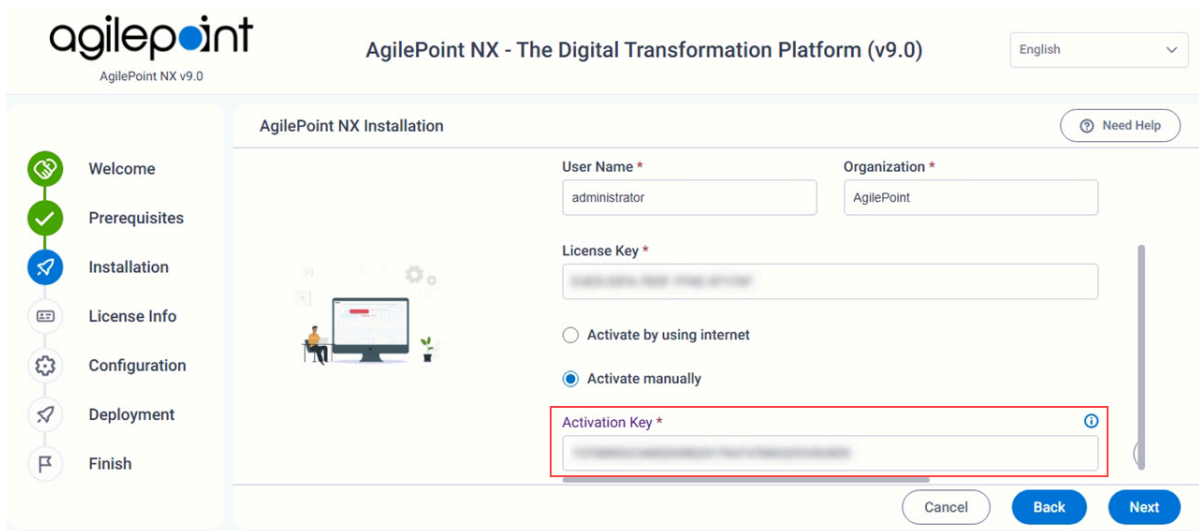
After transferring the activation key file, continue the procedure on the installation machine.

11. On the **AgilePoint NX Installation** screen, in the **Activation Key** field, click **Browse**.



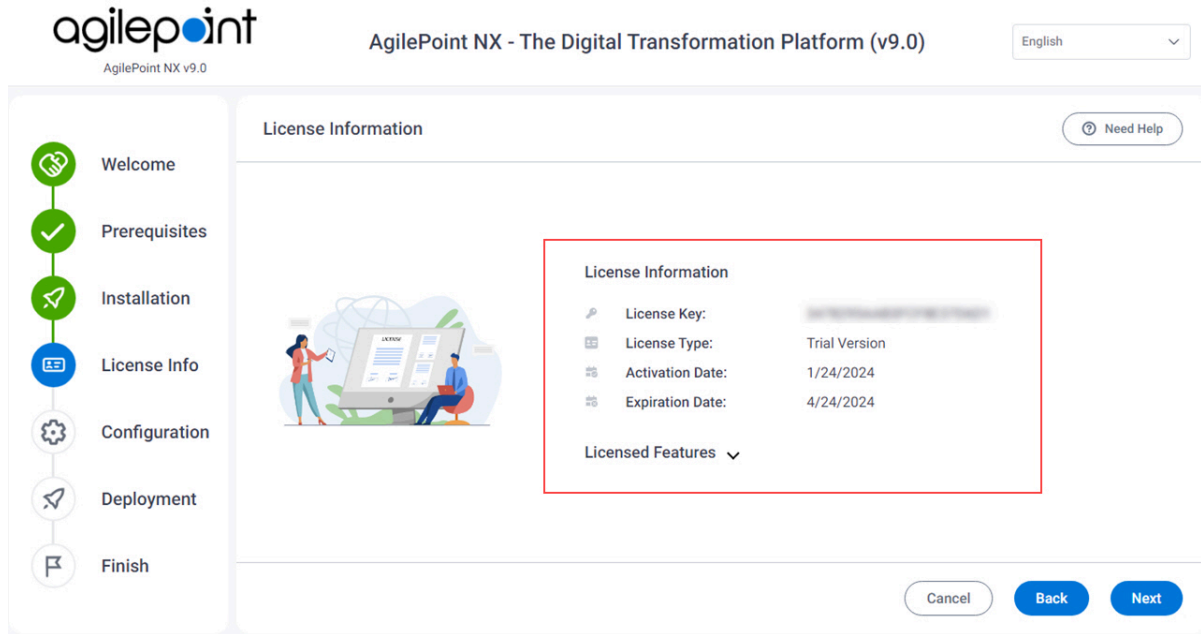
12. Select the activation key file **license-activation-key-xxxxxxxxxxxxx.txt** you transferred from the Internet-connected machine.

The activation code shows in the **Activation Key** field.



13. Click **Next**.

After the license key is activated, the **License Information** screen shows details about the license activation.

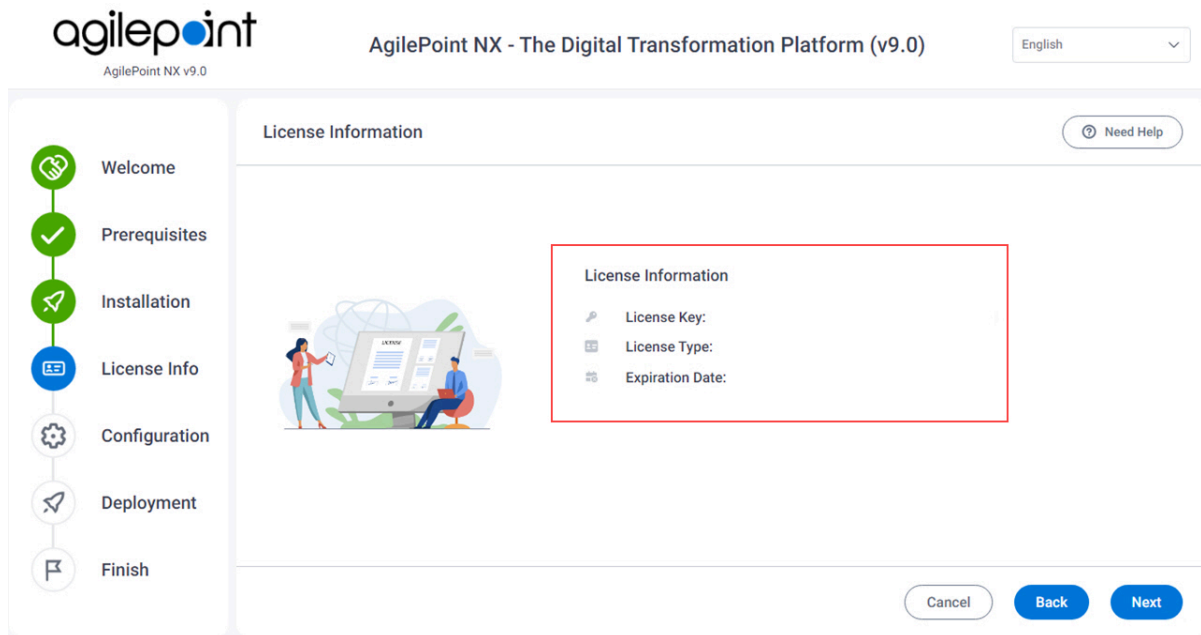


The screenshot shows the AgilePoint NX v9.0 interface. The top navigation bar includes the AgilePoint logo, the text "AgilePoint NX - The Digital Transformation Platform (v9.0)", and a language dropdown menu set to "English". On the left, a vertical sidebar contains icons and labels for "Welcome", "Prerequisites", "Installation", "License Info", "Configuration", "Deployment", and "Finish". The "License Info" step is highlighted in blue. The main content area is titled "License Information" and features a "Need Help" button. A central illustration depicts two people at a computer. To the right, a red-bordered box contains the following license information:

License Information	
License Key:	[Redacted]
License Type:	Trial Version
Activation Date:	1/24/2024
Expiration Date:	4/24/2024
Licensed Features ▾	

At the bottom right, there are three buttons: "Cancel", "Back", and "Next".

If an error occurs, such as an incorrect license key or a license key not activated, the **License Information** screen shows no data.



This screenshot shows the same AgilePoint NX v9.0 interface as above, but the license information box is empty. The "License Information" title and "Need Help" button are present. The central illustration remains. The "License Information" box contains only the title and a dropdown arrow. The "Cancel", "Back", and "Next" buttons are still visible at the bottom right.

To fix the issue, do the following:

- Click **Back** and enter the license key and activation key again.
- If the above procedure does not fix the issue, [contact AgilePoint Customer Support](#).

Activate the AgilePoint NX Developer License Key Manually

1. Start installing AgilePoint NX Developer.

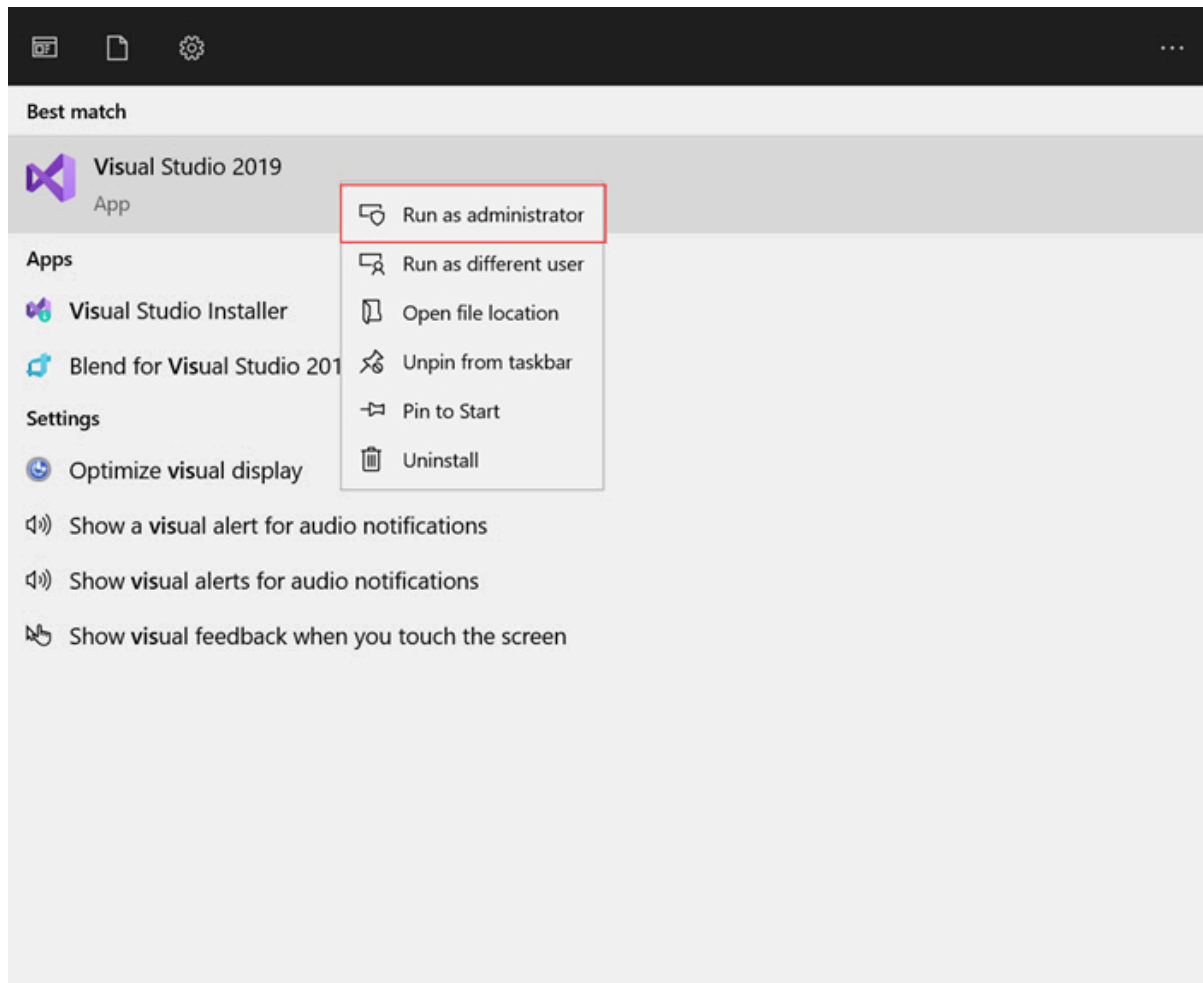
For more information, refer to [Install AgilePoint NX Developer](#).

2. On the **AgilePoint NX Installation** screen, in the **License Key** field, enter the AgilePoint NX Developer license key you received from AgilePoint.

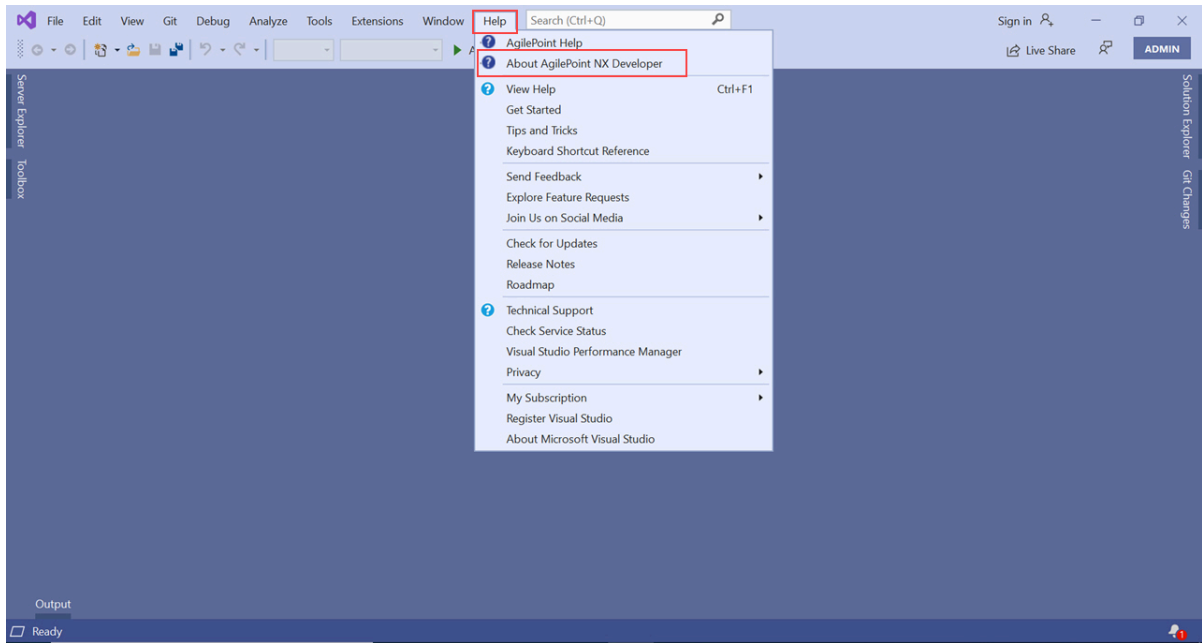
For more information, refer to [Obtain AgilePoint License Keys](#).

The screenshot shows the AgilePoint NX Installation wizard. The window title is "AgilePoint NX - The Digital Transformation Platform (v9.0)". The main title is "AgilePoint NX Installation". On the left, a progress bar shows four steps: Welcome (green), Prerequisites (green), Installation (blue), and Finish (grey). The "Installation" step is active. The main area contains a "License Key" field highlighted with a red border. Other fields include "Install Location *" (C:\Program Files (x86)\AgilePoint\AgilePoint Developer), "Customer Information" with "User Name *" and "Organization *" fields, and a "Need Help" button. At the bottom are "Cancel", "Back", and "Next" buttons.

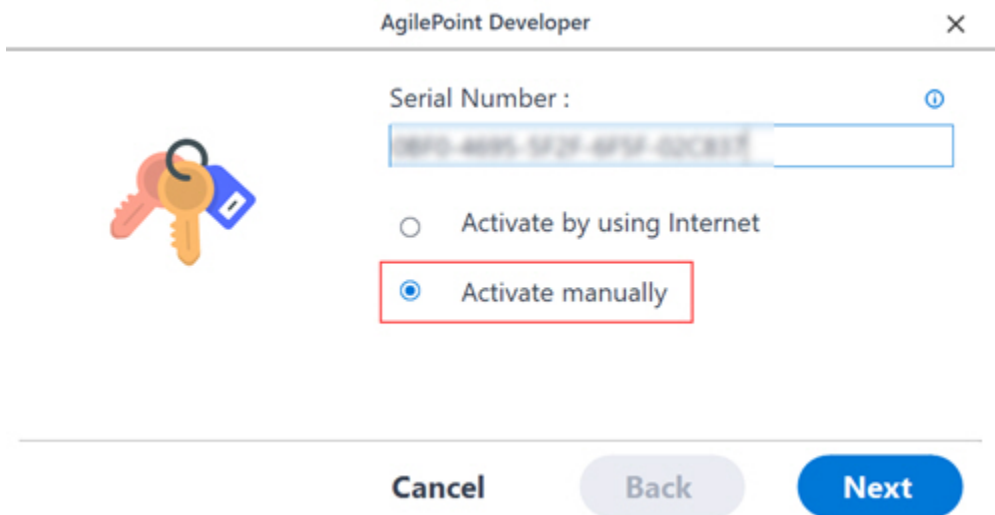
3. Click **Next** and complete the AgilePoint NX Developer installation.
4. On the AgilePoint NX Developer machine, on the **Start** menu, right-click **Microsoft Visual Studio**, and click **Run as administrator**.



5. In **Microsoft Visual Studio**, click **Help > About AgilePoint NX Developer**.



6. On the **AgilePoint Developer** screen, select **Activate manually**.



7. Click **Next**.
8. Click **Activation Key**.

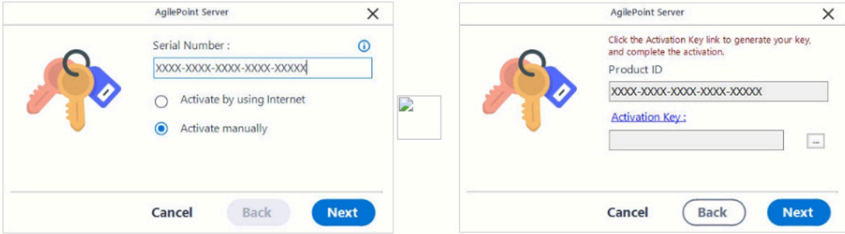
act.agilepoint.com/ActivationServer/ActivationKey.aspx?ProductID=XXXXXXXXXX-XXXXXXXX-XXXXXXXX-XXXXXXXX

agilepoint

Thank you for using AgilePoint BPMS. The following steps will guide you through to manually activate your AgilePoint installation

STEP 1 : Select 'Activate manually' and click 'Next' to proceed

AgilePoint V8 or later AgilePoint V7 or an earlier version



STEP 2 : Copy the 'Product ID' prompted to you in the Activation Wizard Window into the product ID textbox below. Click 'Submit' to retrieve activation key or download activation key file

Product ID :

If license activation does not go through and does not appear, please click [here](#) and try it again.

STEP 3 : Enter the received Activation Key or upload License Activation Key file into Activation Wizard to complete the manual activation.

You can also access the AgilePoint License Activation page with this URL:

- <http://act.agilepoint.com/ActivationServer/ActivationKey.aspx>

If you choose this method, you must enter the license key in the Product ID field.

13. Click **Submit**.

The activation key file downloads to the Internet-connected local machine.

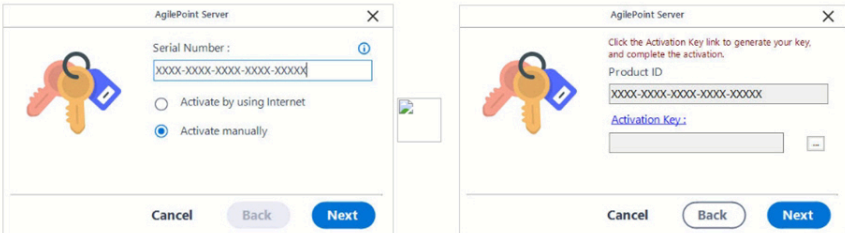
act.agilepoint.com/ActivationServer/ActivationKey.aspx?ProductID=XXXXXXXXXX-XXXXXXXX-XXXXXXXX-XXXXXXXX

agilepoint

Thank you for using AgilePoint BPMS. The following steps will guide you through to manually activate your AgilePoint installation

STEP 1 : Select 'Activate manually' and click 'Next' to proceed

AgilePoint V8 or later AgilePoint V7 or an earlier version



STEP 2 : Copy the 'Product ID' prompted to you in the Activation Wizard Window into the product ID textbox below. Click 'Submit' to retrieve activation key or download activation key file

Product ID :

If license activation does not go through and does not appear, please click [here](#) and try it again.

STEP 3 : Enter the received Activation Key or upload License Activation Key file into Activation Wizard to complete the manual activation.

If this process fails to generate an activation key, send an email with the following information to [AgilePoint Customer Support](#):

- Your name.
- The name of your company or organization.
- Appropriate contact information.
- The license key to activate.

AgilePoint will reply with the required activation key.

14. Transfer the activation key file from the Internet-connected machine to the AgilePoint NX Developer machine.

The activation key file shows in this format:

license-activation-key-xxxxxxxxxxxxx.txt

15. On the **AgilePoint Developer** screen, in the **Activation Key** field, click **Ellipses (...)**.

AgilePoint Developer

Click the Activation Key link to generate your key, and complete the activation.

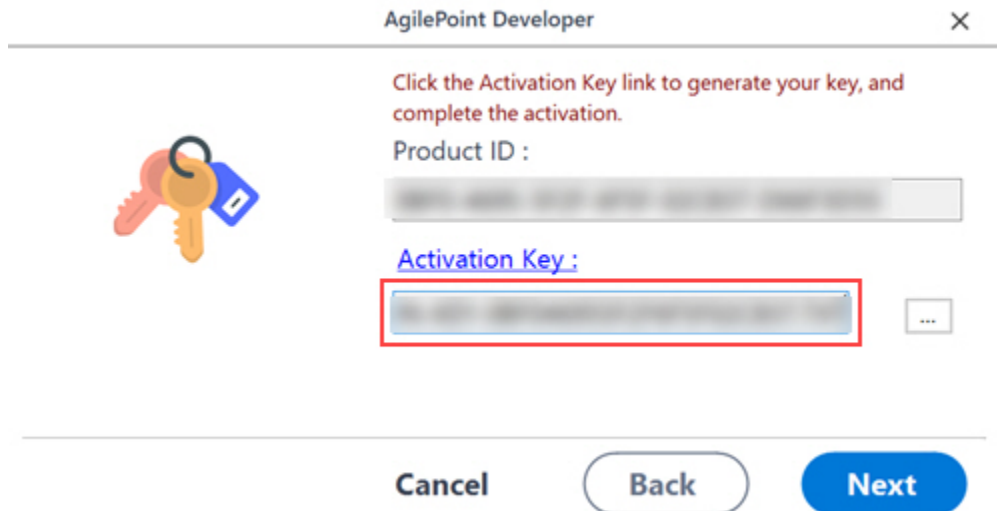
Product ID :

Activation Key :

Cancel Back Next

16. Select the activation key file **license-activation-key-xxxxxxxxxxxxx.txt** you transferred from the Internet-connected machine.

The **Activation Key** field shows the activation key file.



AgilePoint Developer

Click the [Activation Key](#) link to generate your key, and complete the activation.

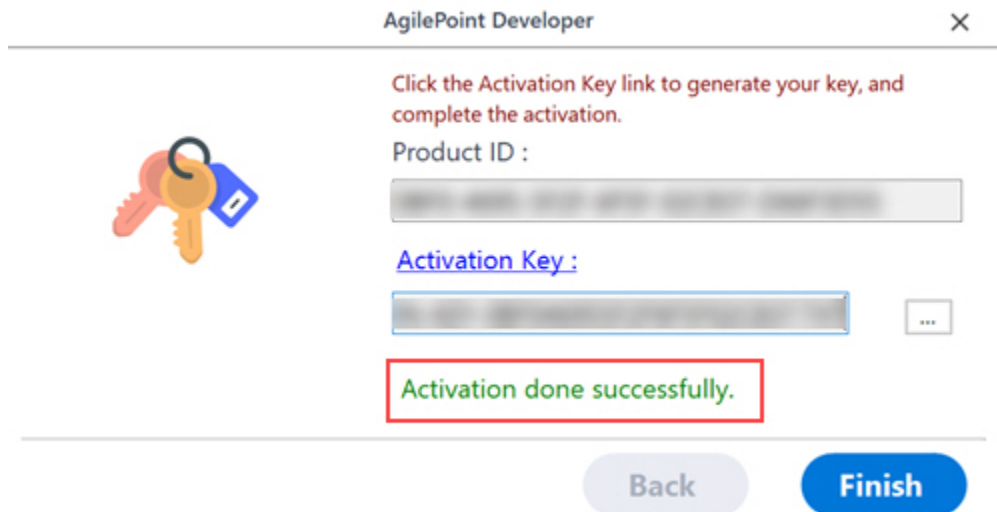
Product ID :

Activation Key :

Cancel Back Next

17. Click **Next**.

Once the license key is activated, the successful message shows.



AgilePoint Developer

Click the [Activation Key](#) link to generate your key, and complete the activation.

Product ID :

Activation Key :

Activation done successfully.

Back Finish

To fix the issue, do the following:

- Click **Back** and enter the license key and activation key again.
- If the above procedure does not fix the issue, [contact AgilePoint Customer Support](#).

Troubleshooting AgilePoint NX Installation

This section helps you resolve issues that occur during the pre-installation checks that run during AgilePoint NX installation.

For more information, refer to [Troubleshooting Installation](#)

Troubleshooting AgilePoint Server Installation

To resolve issues you encounter during the preinstallation checks for [AgilePoint Server](#), do the procedures in this topic.

Verifying System Requirements screen (AgilePoint Server)

agilepoint
AgilePoint NX v9.0

AgilePoint NX - The Digital Transform

Your system does not meet some of the requirements. View the tooltip to fix the issue, and run the check again. For more information, refer to the Installation Guide.

Verifying System Requirements

Need Help

Node.js v18 is installed	✗ ⓘ
Supported operating system is installed	✗ ⓘ
IIS is available	✓
IIS 6 Management Compatibility Role Service is active	✓
ASPNET Server Role is installed	✓
Supported version of .NET Framework is installed	✓
Current user has local administrator privileges	✓
User Account Control (UAC) is turned off	✓
Windows Process Activation Service (WAS) is active	✓
World Wide Web Publishing Service (W3SVC) is active	✓
Logon as a Service permission is enabled	✗ ⓘ

Cancel Back Next

Procedure

Issue	Resolution
Node.js v18 is installed	Install Node.js on the AgilePoint Server machine .
Supported operating system is installed	Install a supported operating system on this machine. For more information, refer to System Requirements for AgilePoint Server .
IIS is available	Install or start an IIS version that is supported by your operating system.
IIS 6 Management Compatibility Role Service is active	Activate Management Compatibility Role Service on IIS 6 or higher. For more information, refer to Verify the IIS 6 Management Compatibility Role Service .
ASP.NET Server Role is installed	Install ASP.NET Server Role on this machine. The correct version of the ASP.NET Server Role is different for different versions of Windows Server. For more information, refer to Verify the ASP.NET Server Role is Installed .
Supported version of .NET Framework is installed	Install a supported version of .NET Framework on this machine. For more information, refer to System Requirements for AgilePoint Server .
Current user has local administrator privileges	Sign in to this machine as a user with administrator privileges.
User Account Control (UAC) is turned off	Turn user access control (UAC) off. For more information, refer to Turn Off User Account Control (UAC) .
Windows Process Activation Service (WAS) is active	Activate Windows Process Activation Service (WAS) on this machine. For more information, refer to Windows Process Activation Service (WAS) is Active .
World Wide Web Publishing Service (W3SVC) is active	Activate World Wide Web Publishing Service (W3SVC) on this machine. For more information, refer to IIS World Wide Web Publishing Service (W3SVC) is Active .
Logon as a Service permission is enabled	Add the Log on as a Service permission to the account.

Issue	Resolution
	For more information, refer to Add the Log on as a service Right to the AgilePoint Service Account .

Troubleshooting AgilePoint Data Services Installation

To resolve issues you encounter during the preinstallation checks for AgilePoint [Data Services](#), do the procedures in this topic.

Prerequisites screen (Data Services)

Procedure

Issue	Resolution
Supported operating system is installed	Install a supported operating system on this machine. For more information, refer to System Requirements for AgilePoint Server .

Issue	Resolution
Current user has local administrator privileges	Sign in to this machine as a user with administrator privileges.
User Account Control (UAC) is turned off	Turn user access control (UAC) off. For more information, refer to Turn Off User Account Control (UAC) .
Supported version of .NET Framework is installed	Install a supported version of .NET Framework on this machine. For more information, refer to System Requirements for AgilePoint Server .

Troubleshooting AgilePoint SharePoint Integration On Premises Installation

To resolve issues you encounter during the preinstallation checks for AgilePoint [SharePoint Integration](#) on premises, do the procedures in this topic. The same procedures apply to SharePoint 2016 and SharePoint 2013.

Verifying System Requirements screen (SharePoint Integration)

agilepoint
AgilePoint NX v9.0 SharePoint

AgilePoint NX - The Digital Transform

Your system does not meet some of the requirements. View the tooltip to fix the issue, and run the check again. For more information, refer to the Installation Guide.

Verifying System Requirements Need Help

- Welcome
- Prerequisites**
- Installation
- Deployment
- Finish

Supported version of Microsoft SharePoint Server is installed	✓
SharePoint Administration Windows Service is running	✓
SharePoint Timer Windows Service is running	✓
SharePoint Management Shell is available	✓
SharePoint Web Application is available	✓
SharePoint Farm Administrator Permissions are available	✓
User Account Control (UAC) is turned off	✗ ⓘ
Supported version of .NET Framework is installed	✓

ⓘ After you fix all prerequisites, please restart the Installer.

Cancel Back Next

Procedure

Issue	Resolution
<p>Supported version of Microsoft SharePoint Server is installed</p>	<p>Install and activate a supported version of Microsoft SharePoint Server.</p> <p>For more information, refer to System Requirements for AgilePoint SharePoint Integration.</p>
<p>SharePoint Administration Windows Service is running</p>	<p>Start the Windows service SharePoint Administration.</p>
<p>SharePoint Timer Windows Service is running</p>	<p>Start the Windows Service SharePoint Timer.</p>
<p>SharePoint Management Shell is available</p>	<p>This tool is installed with SharePoint. Reinstall SharePoint.</p>
<p>SharePoint Web Application is available</p>	<ul style="list-style-type: none"> • Make sure at least one SharePoint web application is created. • Make sure the SharePoint web application is up and running. • Make sure the SharePoint web site can be browsed in Microsoft Edge or Google Chrome with no errors • Make sure the AgilePoint Service account is a member of the Site Collection Administrators group.
<p>SharePoint Farm Administrator Permissions are available</p>	<p>Make sure the AgilePoint Service account is a member of the SharePoint Farm Administrators group, and the SharePoint Farm Administrator account has access to the SharePoint database.</p> <p>To verify access, run the following PowerShell command on the primary SharePoint machine:</p> <pre style="background-color: #f0f0f0; padding: 10px;">Get-SPDatabase Add-SPShellAdmin [domain]\[AgilePoint Service Account user name]</pre>
<p>User Account Control (UAC) is turned off</p>	<p>Turn user access control (UAC) off.</p> <p>For more information, refer to Turn Off User Account Control (UAC).</p>

Issue	Resolution
<p>Supported version of .NET Framework is installed</p>	<p>Install a supported version of the .NET Framework on all SharePoint Server machines in your environment.</p> <p>For more information, refer to System Requirements for AgilePoint SharePoint Integration.</p>

Troubleshooting AgilePoint NX Developer Installation

To resolve issues you encounter during the preinstallation checks for [AgilePoint NX Developer](#), do the procedures in this topic.

Verifying System Requirements screen (NX Developer)

The screenshot shows the 'Verifying System Requirements' screen of the AgilePoint NX Developer v9.0 installer. The top left features the AgilePoint logo and the text 'AgilePoint NX Developer v9.0'. The top right displays the product name 'AgilePoint NX - The Digital Transform' and a tooltip that reads: 'Your system does not meet some of the requirements. View the tooltip to fix the issue, and run the check again. For more information, refer to the Installation Guide.' The main content area is titled 'Verifying System Requirements' and includes a 'Need Help' button. On the left, a navigation pane shows four steps: 'Welcome', 'Prerequisites', 'Installation', and 'Finish'. The 'Prerequisites' step is currently active. The central area contains a list of requirements with their status: 'Supported version of Visual Studio is installed' (green checkmark), 'User Account Control (UAC) is turned off' (red X with a help icon), 'Supported version of .NET Framework is installed' (green checkmark), and 'Current user has local administrator privileges' (green checkmark). Below the list, a note states: 'After you fix all prerequisites, please restart the Installer.' At the bottom right, there are three buttons: 'Cancel' (highlighted with a red box), 'Back', and 'Next'.

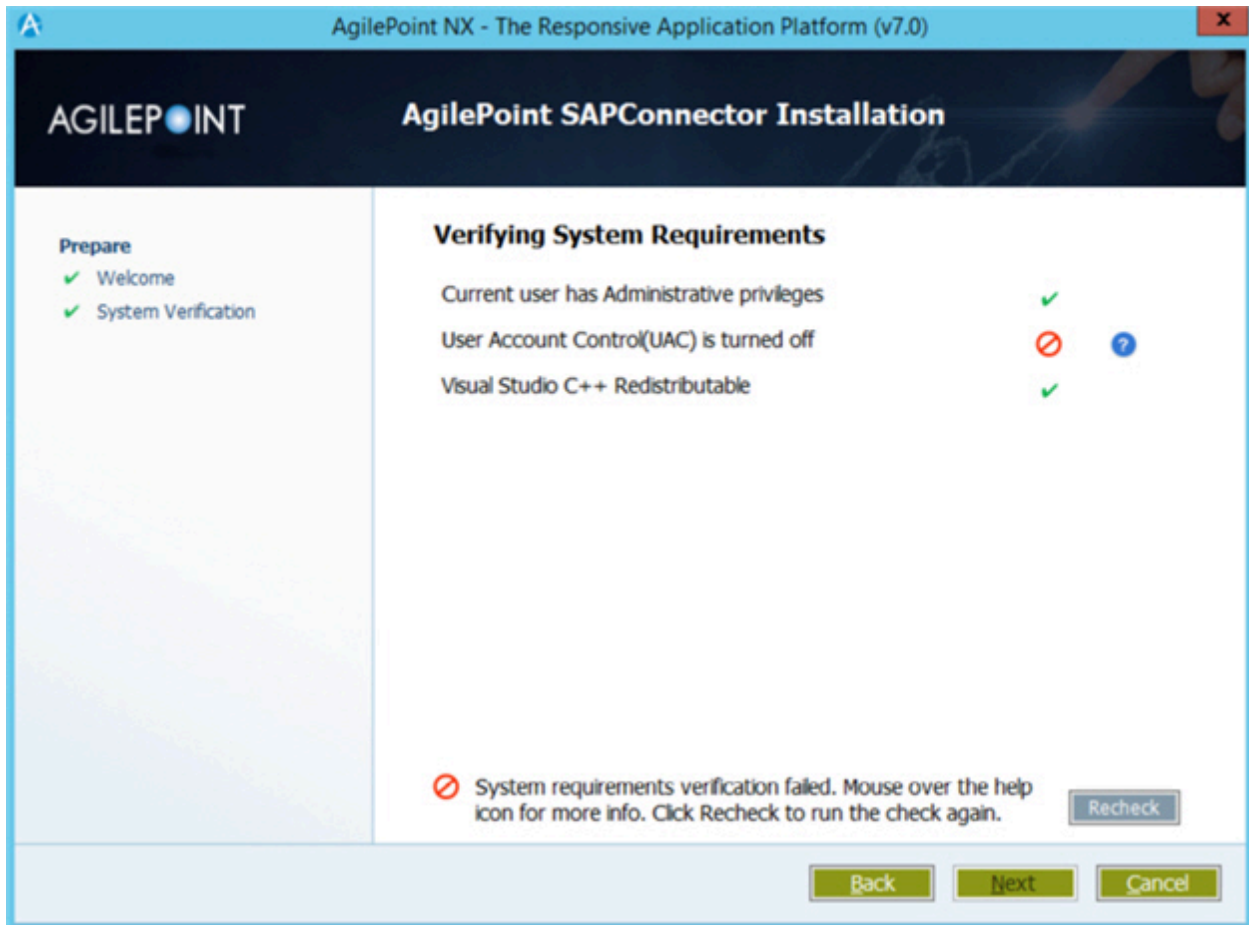
Procedure

Issue	Resolution
Supported version of Visual Studio is installed	Install a supported version of Visual Studio on this machine. For more information, refer to System Requirements for AgilePoint NX Developer .
User Account Control (UAC) is turned off	Turn user access control (UAC) off. For more information, refer to Turn Off User Account Control (UAC) .
Supported version of .NET Framework is installed	Install a supported version of .NET Framework on this machine. For more information, refer to System Requirements for AgilePoint NX Developer .
Current user has local administrator privileges	Sign in to this machine as a user with administrator privileges.

Troubleshooting AgilePoint SAP Connector Installation

To resolve issues you encounter during the preinstallation checks for the AgilePoint SAP Connector, do the procedures in this topic.

Verifying System Requirements screen (SAP Connector)



Procedure

Issue	Resolution
Current user has local administrator privileges	Sign in to this machine as a user with administrator privileges.
User Account Control (UAC) is turned off	Turn user access control (UAC) off. For more information, refer to Turn Off User Account Control (UAC) .
Visual Studio C++ Redistributable	Install C++ Redistribution for Visual Studio on this machine. For more information, refer to System Requirements for the AgilePoint SAP Connector .

Uninstall AgilePoint

This section provides instructions for uninstalling each AgilePoint component.

! This section includes procedures to uninstall all AgilePoint components. Not all of these components may be installed in your environment.

! Uninstalling a licensed AgilePoint component (for example, [AgilePoint Server](#)) that has already been activated will not deactivate any license keys that were used to activate the component. Although previously activated license keys can be re-used to activate the same version of the AgilePoint component on the same computer, it will not allow you to use the key to activate on a different computer or for a different version.

Uninstall AgilePoint Server

To uninstall [AgilePoint Server](#), do the procedure in this topic.

Prerequisites

1. Delete all AgilePoint Server service instances from the AgilePoint Server Manager.

These services will not be removed automatically.

For more information, refer to [AgilePoint Server Manager](#).

2. Manually back up the `netflow.cfg` file in your AgilePoint Server installation directory.

Good to Know

- Uninstalling the AgilePoint Server component does not affect the [workflow database](#). That is to say, this procedure removes the AgilePoint Server software only, and it does not delete any other data. If you want to re-install AgilePoint Server on the same machine, and you want to start over with new data, you must remove the data base and any web applications that may have been created. Web applications are usually located in IIS.

Procedure

1. On the [AgilePoint Server machine](#), in Windows, use **Add or Remove Programs** to remove the following program:
 - **AgilePoint Server**

Uninstall AgilePoint SharePoint Integration

Prerequisites

1. Log on to the [SharePoint](#) machine as a user with sufficient privileges to access the SharePoint configuration [database](#).
2. Manually back up the **web.config** file of your SharePoint site.

The SharePoint web.config file is located under the Virtual Directory of your SharePoint web site. When it is installed in the default web site, the location is **c:\inetpub\wwwroot\wss\VirtualDirectories\[port number]**.
3. 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.
 - a. Microsoft Internet Explorer
 - b. Any web pages that include the SharePoint Web Parts.
 - c. Microsoft IIS
 - d. Microsoft [InfoPath](#) (If it is installed)

Procedure

1. Navigate to ([AgilePoint Integration for SharePoint installation folder](#)) C:\Program Files\AgilePoint\AgilePoint Integration for SharePoint.
2. Run the **UninstallSharePointV2Integration.bat** file.

Please contact AgilePoint Support if you cannot locate this file.
3. On the [AgilePoint Server machine](#), in Windows, use **Add or Remove Programs** to remove the following program:
 - **AgilePoint SharePoint Integration**

4. Remove the folder **[SharePoint server extensions folder]\TEMPLATE\LAYOUTS\AP**
5. It is recommended to restart your system after uninstalling the AgilePoint **SharePoint Integration** component.

Uninstall AgilePoint Data Services

To uninstall AgilePoint **Data Services**, do the procedure in this topic.

Procedure

1. On the **AgilePoint Server machine**, in Windows, use **Add or Remove Programs** to remove the following program:
 - **AgilePoint Data Services**

Uninstall AgilePoint NX Developer

To uninstall **AgilePoint NX Developer**, do the procedure in this topic.

Procedure

1. On the **AgilePoint NX Developer machine**, in Windows, use **Add or Remove Programs** to remove the following program:
 - **AgilePoint Developer**

Uninstall the AgilePoint SAP Connector

To uninstall the AgilePoint **SAP Connector**, do the procedure in this topic.

Prerequisites

- Before you uninstall the AgilePoint SAP Connector, you must take note of the configuration. **SAP access tokens** use these configuration settings to connect to SAP.

Procedure

1. On the [AgilePoint Server machine](#), in Windows, use **Add or Remove Programs** to remove the following program:
 - **AgilePoint RFC Platform for SAP**

Upgrade to AgilePoint v6.0 NX or Higher

If you have a version of AgilePoint installed that is lower than v6.0, and you want to install AgilePoint v6.0 or higher, you must [contact AgilePoint Professional Services](#).

If you have installed AgilePoint version v6.0 and you want to install AgilePoint v6.0 SP1 or higher, refer to [Upgrade Guide](#).