



PNMsoft Knowledge Base

Sequence User Guides

Sequence SharePoint App

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Product Version 8.2 and above

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General Document Information

Purpose

The purpose of this document is to describe how to install and configure Sequence's SharePoint App on your SharePoint environment. This will enable you to add Flowtime App Parts to your SharePoint environment, enabling users to manage Sequence processes in this environment.

Prerequisites

- SharePoint 2013/2016 On Premises or SharePoint Online environment
- You must be a SharePoint Administrator.
- You must have a Flowtime Website installed on a separate server.

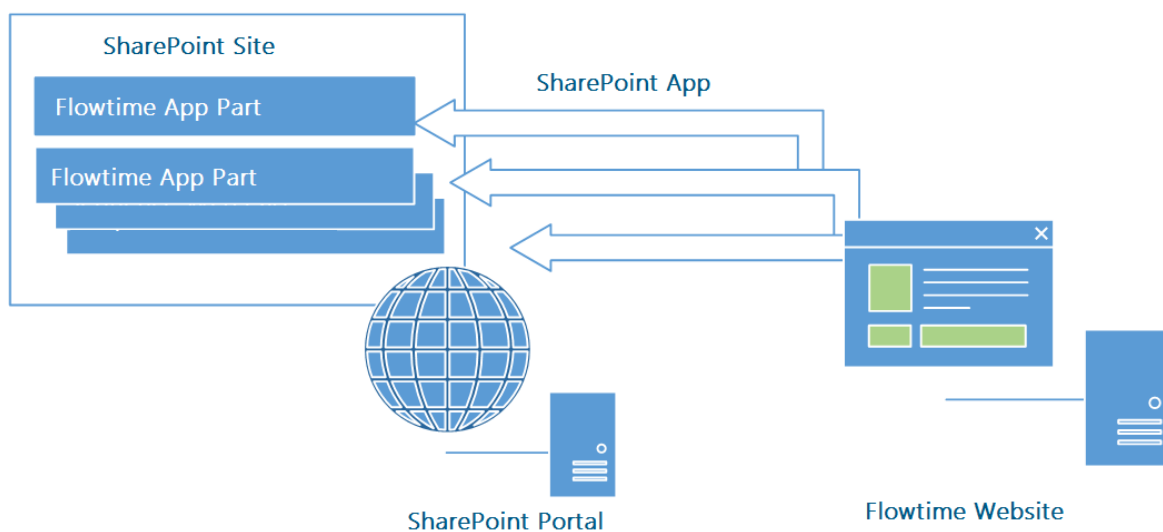
Introduction

Flowtime, Sequence's runtime environment, enables end users to manage processes in a collaborative web interface.

In general, there are two options for Flowtime installation:

- **Flowtime Website:** an independent web site which includes a set of default pages that enable users to manage processes. This option does not require SharePoint. This option is described in [this guide](#).
- **SharePoint App:** adding a Sequence SharePoint App to your SharePoint environment. This app requires that a Flowtime Website be installed on another server. The intent is that your users will access Flowtime functionality via the SharePoint environment. This guide describes this option.

The topology for SharePoint App is as follows:



SharePoint App Topology

Installation

Pre-requisites

- You must have SharePoint 2013/2016 On Premises or SharePoint Online.
- You must have a Flowtime Website installed (see [this guide](#) for instructions).
- You must have SharePoint Administrator rights.
- Your SharePoint must be configured so that you can add Apps to it. Please see [this Microsoft article](#) for assistance.
- Your SharePoint and Flowtime Website must be configured with SSL and https (see [this guide](#) for assistance).

Installation Steps

The major steps of the installation are:

1. Generating App information and sending it to the PNMsoft Support team so they can generate the SharePoint Add-in file.
2. Uploading the SharePoint Add-in file to your SharePoint site.
3. Adding Flowtime App Parts to your SharePoint site pages.

Generating the App Information

You are first required to send some details of your Add-in to the PNMsoft Support team, so that they can generate your Add-in file.

1. Navigate to `http://<SharePointWebsite>/_layouts/15/AppRegNew.aspx` on the SharePoint tenancy or farm. The *App Information* screen is displayed.

Client Id:

Client Secret:

Title:

App Domain:
Example: "www.contoso.com"

Redirect URL:
Example: "https://www.contoso.com/default.aspx"

App Information Screen

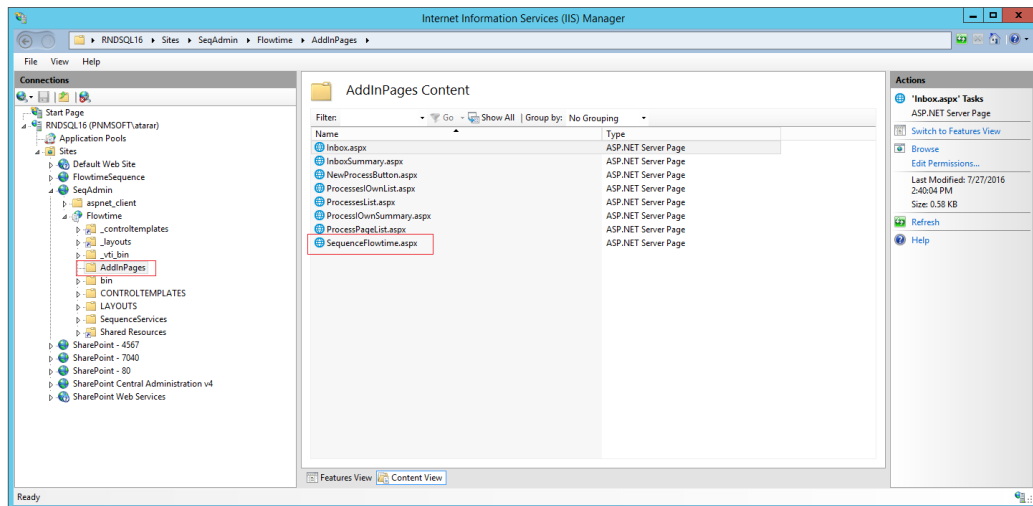
2. Click **Generate**, to generate a **Client Id** and a **Client Secret**. (or enter a Guid of your choice).
3. Enter a friendly **Title** for the App (e.g. "Flowtime App").

4. In the **App Domain**, enter the domain of the Flowtime Website (e.g. MyFlowtime.pnmsoft.digital).
5. In the **Redirect URI**, enter the URL of the default information page about the App from the Flowtime Website. Its URL is:
<the URL of the Flowtime Website>/SequenceFlowtime.aspx.
This is the information page that will appear when users click on the App within SharePoint.



Sequence Flowtime

Business Process Management Suite that extends SharePoint with advanced workflow applications for business critical operations.



SequenceFlowtime.aspx

6. In the *App Information* screen, click **Create**. The information is registered.
7. Send the following values to the PNMsoft Support team:
 - Client Id (from the screen above)
 - URL of the Flowtime Website

The team will use these details to generate your SharePoint Add-in file, which they will send to you. This file will have a name such as:

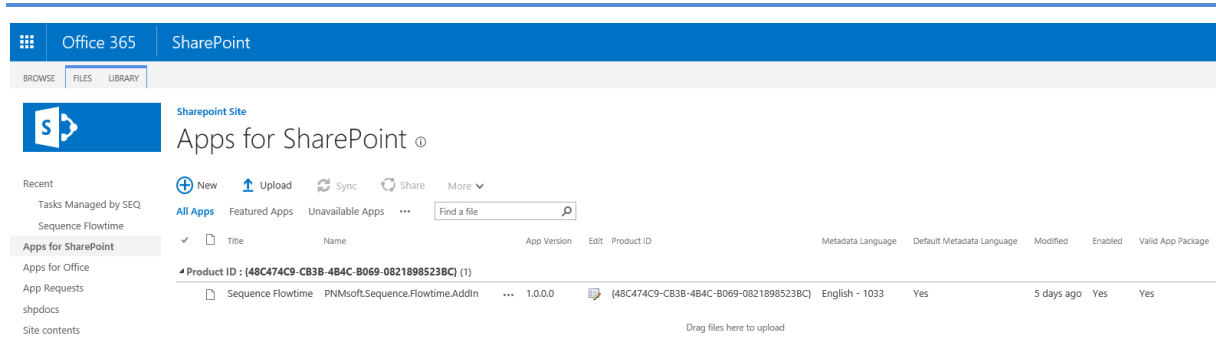
PNMsoft.Sequence.Flowtime.AddIn.app

You will load this file to your SharePoint in the next step.

Adding the SharePoint App to SharePoint

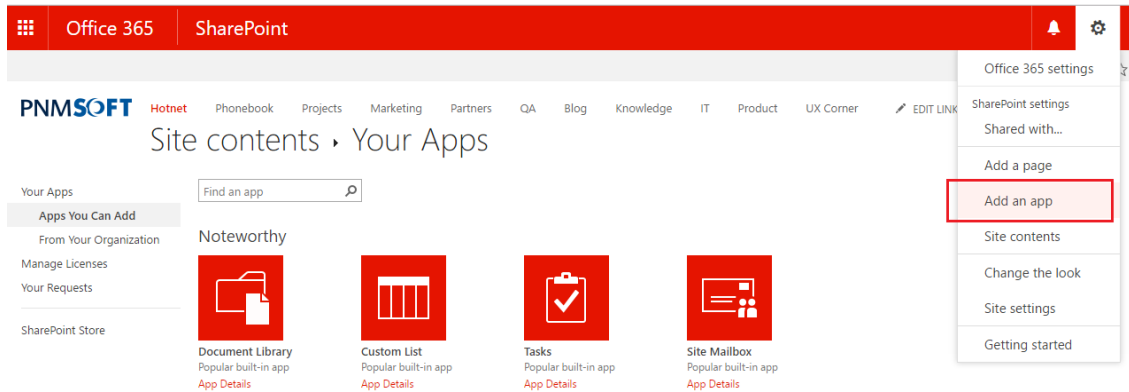
Before performing the steps in this section, you must ensure that you are able to add Apps to your SharePoint environment. Please see [this Microsoft article](#) for how to configure this.

1. If it doesn't already exist, create an **App Catalog** for your organization. See [this Microsoft article](#) for how to configure this.
2. From the catalog, navigate to the **Apps for SharePoint** page.
3. Upload the Add-in file that you received from PNMsoft Support.



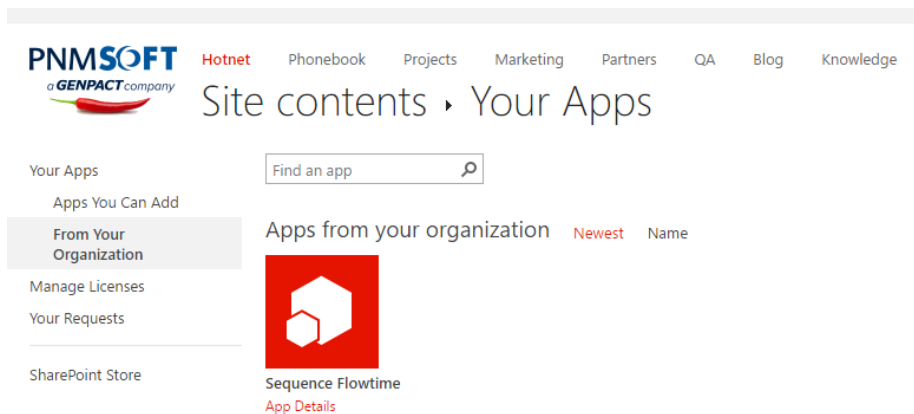
Apps for SharePoint

4. Navigate to the specific SharePoint site or subsite where you want to add the Sequence Add-in.
5. Open Site Settings > Add an app.



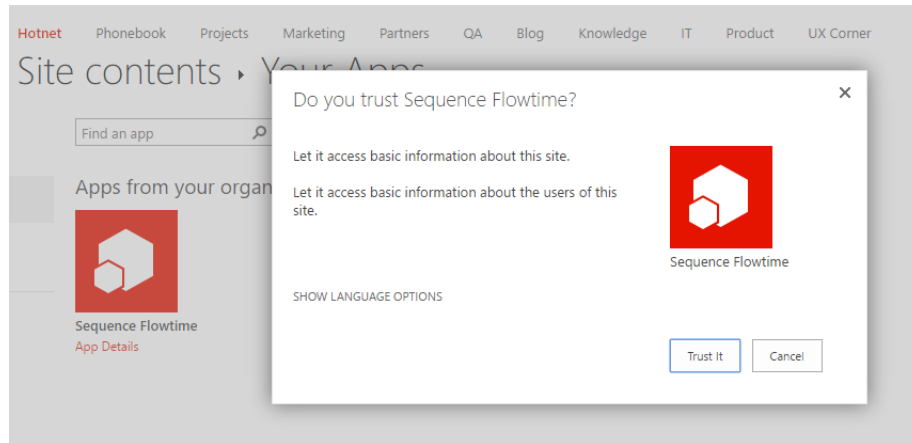
Add an app

6. From the left tree, select **Your Apps > From Your Organization**.



Sequence Flowtime App

7. Click the Sequence Flowtime App. The following screen appears:



Trust Verification

8. Click **Trust It**. The App is added to your site.

Now that the Sequence SharePoint App is added to your SharePoint site, you can begin to add App Parts to your pages, as described in the next section.

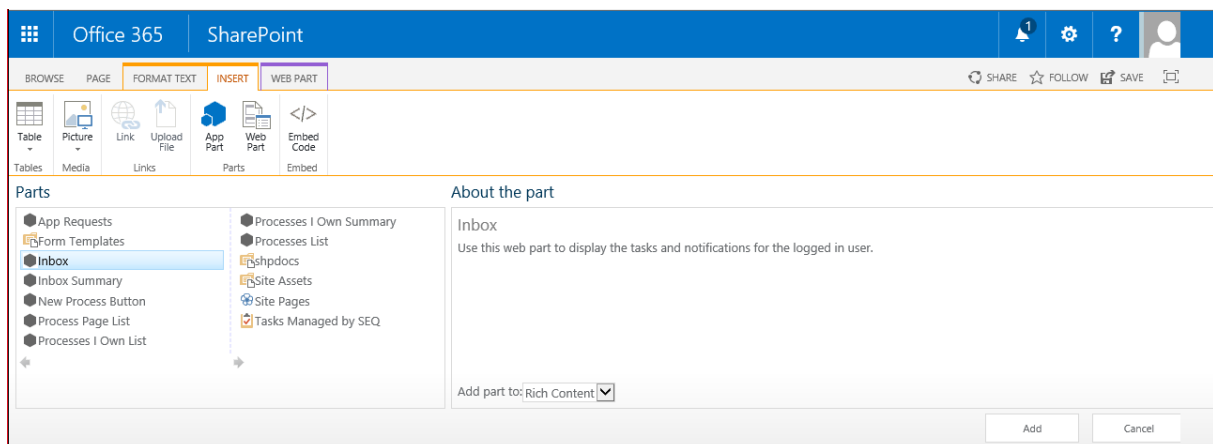
Adding App Parts

You can now add Flowtime App Parts to pages of your SharePoint site, creating a great experience for your end users, and enabling them to manage their processes easily.

Keep in mind that while the Flowtime Website includes a set of web parts already assembled and formatted on a homepage, in this case, you can choose to set up web parts in a way that makes sense for your organization.

To add an App Part to a page:

1. Edit the page.
2. Select **Insert > App Part**.
3. Select a Flowtime App Part to add to the page and click **Add**. The App Part is added to the page.

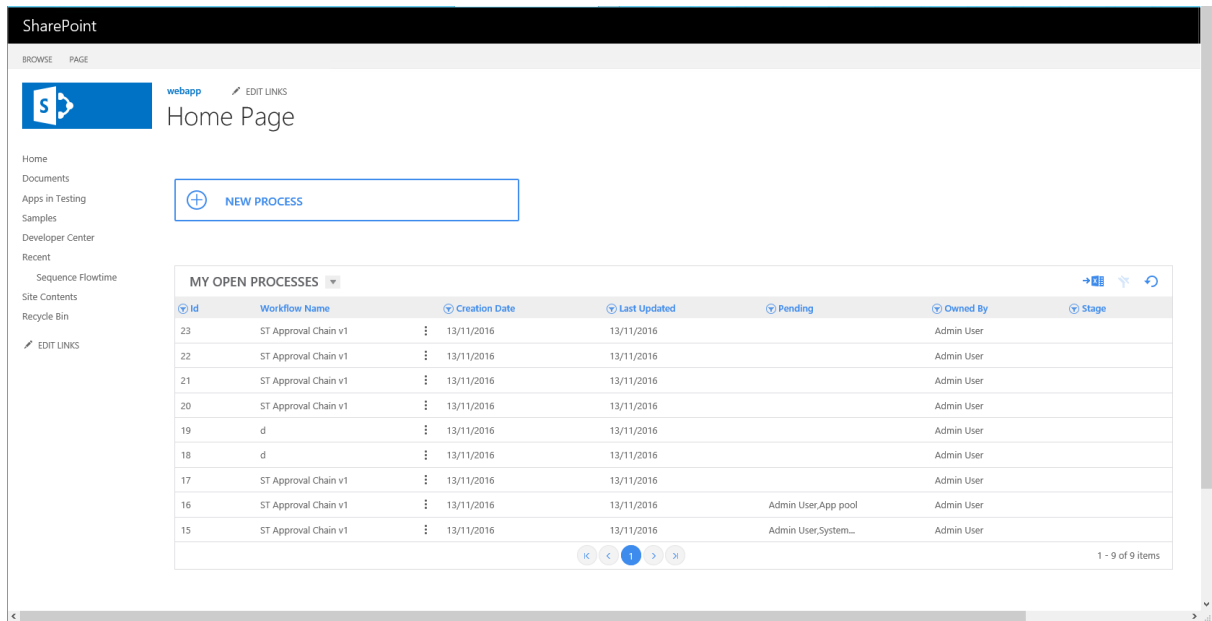


Flowtime App Parts

The following App Parts can be added:

- **Inbox:** a list of process-related messages.
- **Inbox Summary:** a summary showing various totals of the user's Inbox Items.
- **New Process Button:** a button that enables you to start a new process.
- **Process Page List:** a list of the process instances of a specific workflow.
- **Processes I Own List:** a list of open processes that the user owns.
- **Processes I Own Summary:** a summary of the number of open processes the user owns.
- **Processes List:** a list of all the processes the user can start or view.

Here is an example of what the page might look like after adding some App Parts:



App Parts Added to Page

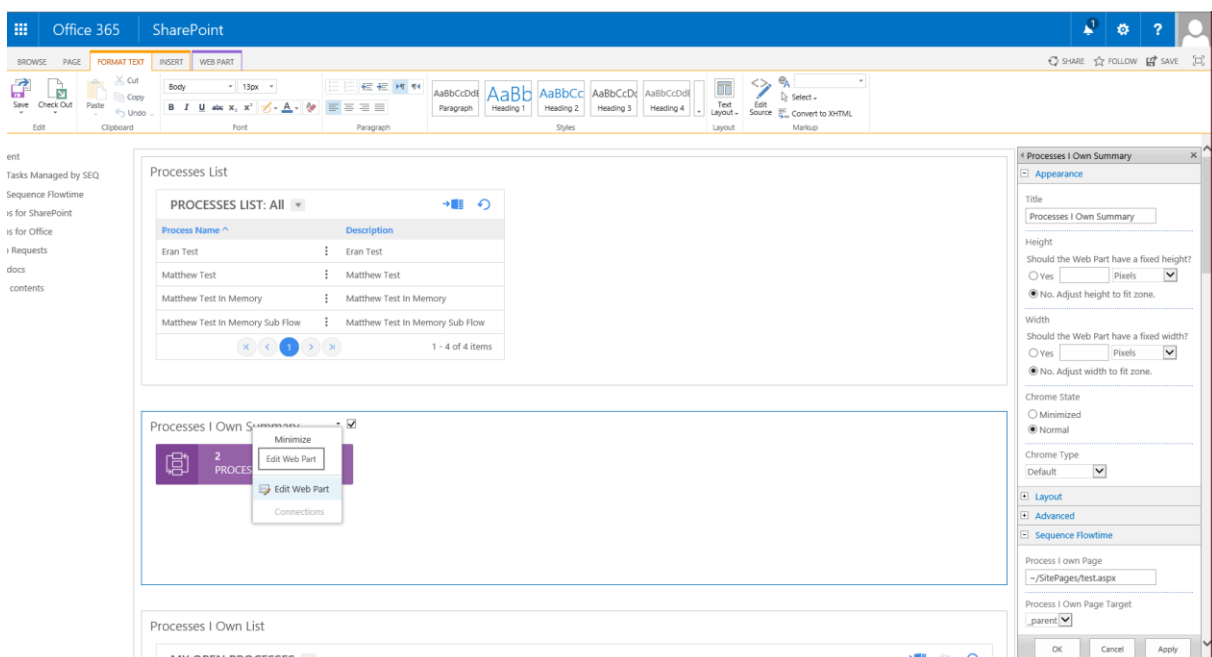
Editing App Parts

You can modify App Parts using the App Part edit menu.

***Note:** Some of the advanced editing options which are available on the Flowtime Website are not available in the App Part menu. These changes should be applied from the Flowtime grid configuration files.*

To edit an App Part:

1. Edit the page.
2. From the App Part menu, select **Edit Web Part**. The Edit menu opens.



Edit Web Part

3. You can edit properties such as the App Part's size, position and layout
4. In the Sequence Flowtime section of the edit menu, you can edit additional options, which vary depending on which type of App Part you are editing.

For example, for clickable App Parts, such as the **Processes I Own Summary**, you can define the URL of the target page that is displayed when the user clicks this App Part.

For the **Process Page List** app part, you must enter the **Workflow Space ID** of the process whose instances you wish to display.



Workflow Space

iframe Properties

App Parts display Sequence content within iframes, so you can define the behavior when clickable App Parts are clicked, by selecting the options in the <Button Name> Target field. The options are:

- **_Top**: open the target page in the current browser tab.
- **_Blank**: open the target page in a new browser tab.
- **_Parent**: open the target page in the parent tab.
- **_Self**: open the target page within the iframe itself.

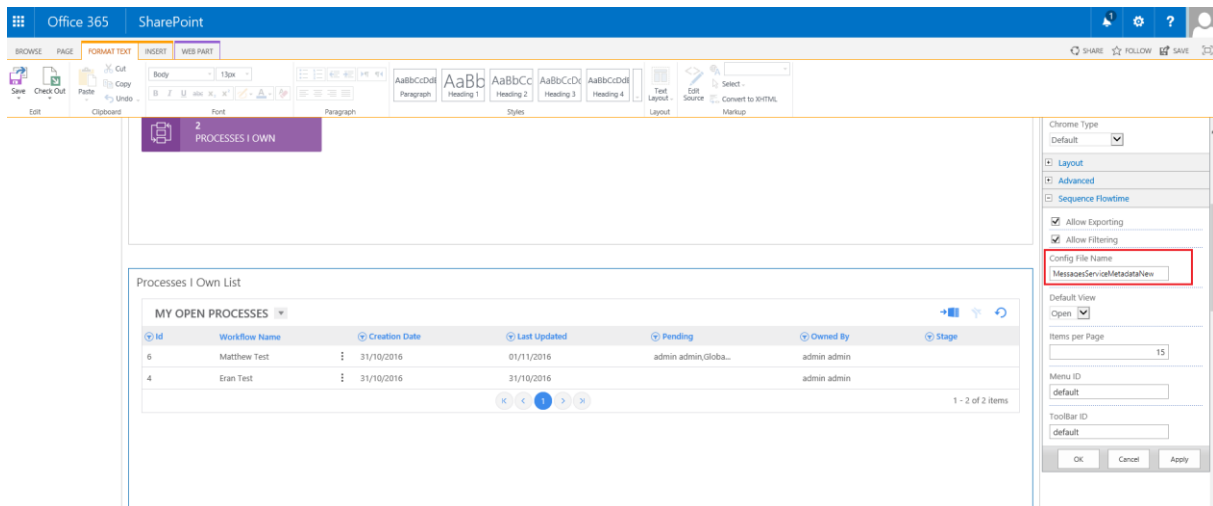
Advanced Customization of an App Part

For more advanced modifications, you can edit the configuration file of each App Part within the Flowtime Website file system (see the [Flowtime Configuration Guide](#) for more details).

For example, you can customize the columns that are displayed in a List App Part. It is best practice to create a duplicate of this file and then edit the duplicate.

In the App Part editor, you can point to name of the edited file in the **Config File Name** field: e.g. "MessageServicesMetadataNew"

The web part will now display your edited version of the App Part.



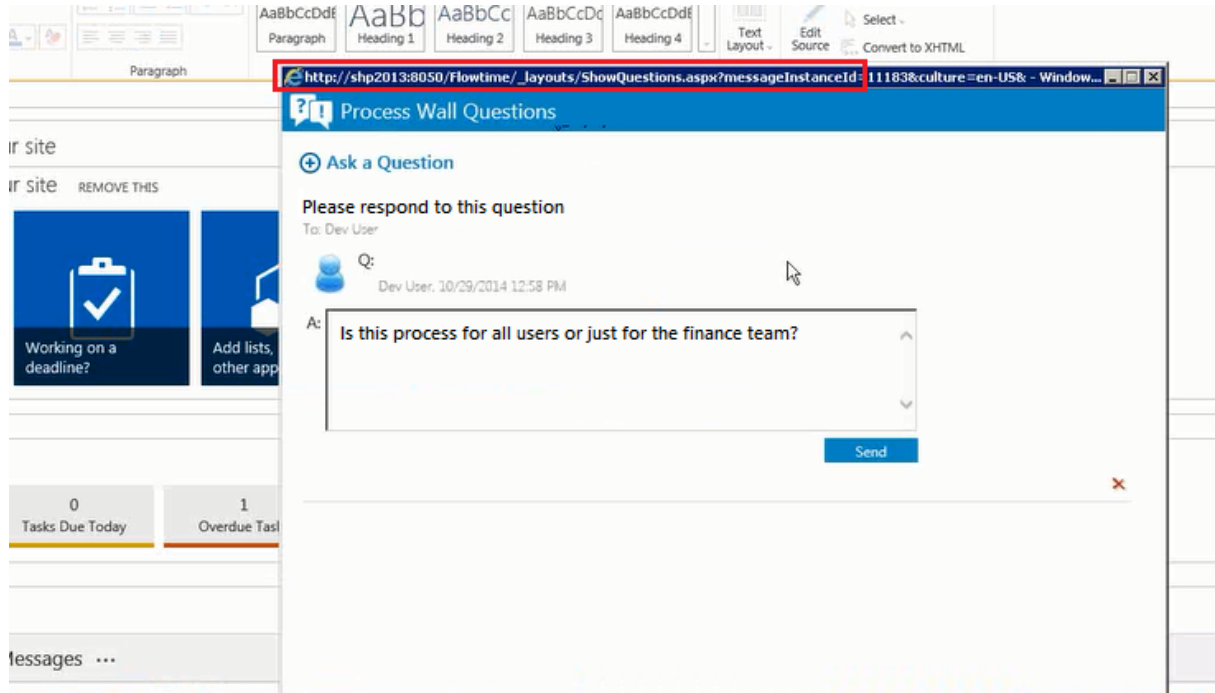
Config File Name

Handling Page Links

It is important to understand that only the Flowtime app part themselves are imported into your SharePoint environment. The data that populates them is retrieved from the Flowtime Website.

Many of web parts include links to other pages. Some of these links open pages on the Flowtime Website, and some of them point to other pages on this site.

For example, if you open a question page, it is opened from the Flowtime Website:



Question Page

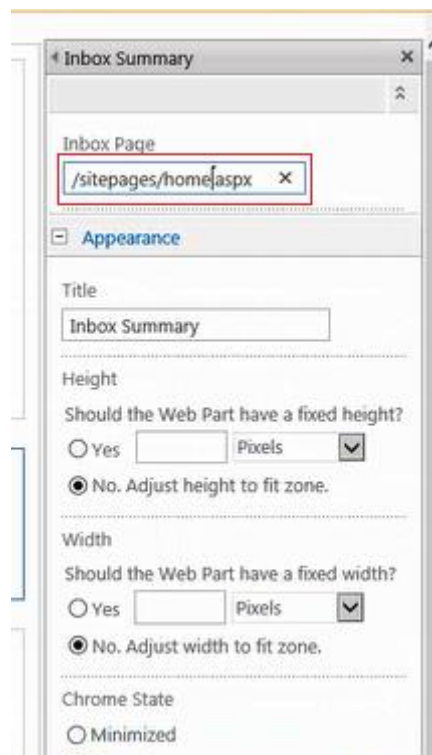
The following tables provide a partial list of links to pages by type. This list is not exhaustive, but is intended to give you direction regarding the two types of links.

| Pages that are opened on the Flowtime server | |
|--|-----------------------|
| Page | Opened from page |
| RunTime.aspx | Inbox.aspx |
| ShowComments.aspx | Process instance page |
| ShowMessage.aspx | Inbox.aspx |
| ShowQuestions.aspx | Process instance page |
| ViewTrace.aspx | OpenProcesses.aspx |
| WFStatusDiagram.aspx | OpenProcesses.aspx |

| Pages which are navigated from a web part | |
|---|-------------------------|
| Web Part | Page |
| Inbox Summary | Inbox.aspx |
| Processes I Started | OpenProcesses.aspx |
| Processes Grid | Monitoring/default.aspx |
| Process List | Process.aspx |
| Visual | ProcessRecords.aspx |

For pages which are navigated from a web part (the 2nd type mentioned above), you can choose to create the page, or edit the link using the Edit Web Part widget.

For example, the button **Inbox**, in the Inbox Summary web part links to *inbox.aspx*, but since that page does not exist on your SharePoint site, you must either create an *inbox.aspx* page, or edit the link to lead to a page which does exist. This is easy to do from the Edit Web Part menu:



Edit Web Part Menu

Process Page List

The Process Page list part requires the space id as a parameter. This parameter can be passed using the web part editor or through the query string.

Using the query string enables you to use a single page to display a variety of processes.

To enable the part to use the query string parameter, use the following script in the script editor on the page that hosts the Process Page List:

```
<script src="http://code.jquery.com/jquery.js" type="text/javascript"></script>
<script type="text/javascript" src="/_layouts/15/sp.runtime.js"></script>
<script type="text/javascript" src="/_layouts/15/sp.js"></script>
<script type="text/javascript" >
var arrAppIFrames = document.getElementsByTagName("iframe");
for(i = 0; i< arrAppIFrames.length; i++)
{
    var currentiFrame=arrAppIFrames[i];
    var propertValue="WorkflowSpace";
    if(currentiFrame.src.indexOf(propertValue) != -1)
    {
        var queryStringValue = GetUrlKeyValue('WorkflowSpaceId', false,
window.location.href, true);
        if(queryStringValue != null)
        {
            var re = new RegExp("([?|&])" + propertValue + ".*?(&|\$)","i");
            queryStringValue = queryStringValue.replace(/-/ig, "%252D");
            currentiFrame.src=
currentiFrame.src.replace("%26WorkflowSpace%3D000000000%252D0000%252D0000%252D0000
%252D00000000000000", "%26WorkflowSpace%3D"+queryStringValue);
        }
    }
}
</script>
```

Miscellaneous Notes

- The SharePoint App supports Windows and Claims authentication, but not Forms authentication.
- The SharePoint App supports English language only.