Kaldeera Workflow Designer 2009

Administrator's Guide

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Chapter 1: Introduction

Kaldeera Workflow Designer 2009 Overview

Kaldeera Workflow Designer 2009 builds on the functionality provided by the Microsoft OfficeSharePoint Server (MOSS) workflow engine to create a more flexible and powerful workflow solution than could easily be created using the default MOSS features.

By adding Kaldeera Workflow Designer, IT-professionals are saved months of reprogramming SharePoint 2007 to the specific needs of organizations using SharePoint. Kaldeera Workflow Designer is extremely flexible and customizable, and has an abundance of clever and indispensable features.

Important features introduced and improved upon by Kaldeera include:

• Deep integration with MOSS 2007 & WSS 3.0

• Enhanced Workflow Actions

• Setting up the start of workflows

• Field-based workflows

• Enhanced Task Approval

• Drag & Drop technology to design workflows

• Advanced properties edition

• Workflow configuration

• Enhanced workflow task security

• Workflow Management & Maintenance

• Traceability & Monitoring

Chapter 2: Installation and Setup

Installation Overview

Kaldeera is implemented as a standard SharePoint *Solution*, which means that it is very easy to install, configure and distribute between servers using the standard SharePoint controls and integration points.

Where to Install

Kaldeera is delivered with a setup program, which you must run on one of your SharePoint servers. If you have installed SharePoint on a server farm, then Kaldeera will automatically be distributed to the other servers as needed via the standard SharePoint mechanism for server farms.

Thereafter, you can deploy, configure and customize the solution as described in this manual.

SharePoint Structural Hierarchy

Kaldeera fits neatly into the structural hierarchy of SharePoint 2007. SharePoint is designed to scale smoothly to support everything from a single site running on a single server, to a complex distributed solution running on a server farm and supplying several different Web applications, collections and sites. To support this wide range of possible solutions, SharePoint is organized into a hierarchical structure, as shown in the figure below.

Figure: SharePoint 2007 structure
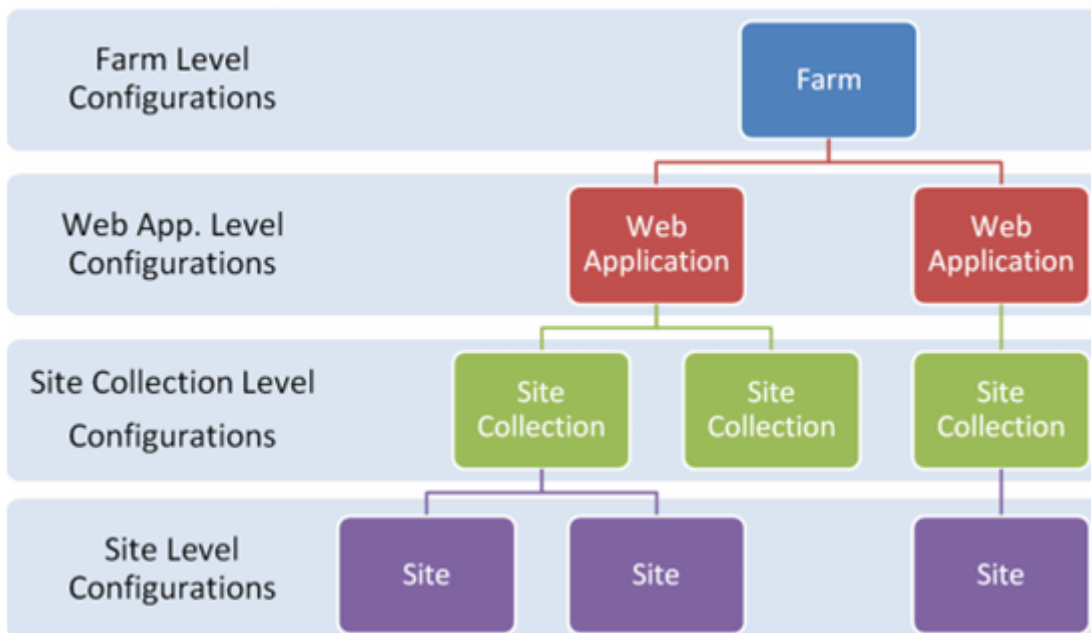
Kaldeera installs into this structure as follows:

• At the farm level:
Basic support for all Kaldeera functions are installed here. As noted above, SharePoint automatically distributes these to all servers in the farm as needed, thereby making Kaldeera available to all application, collections and sites.

• At the application level:
Administrators can choose to deploy Kaldeera to some or all of the applications in effect on the farm. Only those applications to which you choose to deploy Kaldeera will supply its features.

• At the collection level:
Administrators can choose to activate or deactivate Kaldeera for each individual site collection that belongs to an application to which Kaldeera is deployed.

• At the site level:
Here, you can configure specific workflow options for a given list. In some cases, you might create more than one list workflow, each customized to provide specifically results.

Installation and Setup Outline

To install Kaldeera and make its basic, default features available to a give site collection, do the following:

1. Run the Kaldeera setup program on one of the machines in your server farm as described in "Running the Kaldeera Setup Program".

2. Make sure the Kaldeera is activated at the farm level as described in "Activating and Deactivating Farm-Level Features".

3. If you did not choose to deploy Kaldeera when running the setup program, then do so manually afterwards to each relevant application as described in "Manual Deployment".

4. Activate Kaldeera for each site collection where you want to use its features as described in "Activating and Deactivating Kaldeera for a Selected Collection".

System Requirements

Kaldeera Workflow Designer requires the following:

Server requirements:

• Windows Server 2003

• Windows SharePoint Services 3.0 or Microsoft Office SharePoint Server 2007 (MOSS)

• Microsoft .NET Framework 3.5

• Microsoft Silverlight 2.0

• Windows PowerShell 1.0

Client requirements (only for Workflow Designer):

- Internet Explorer v7.0 or greater
- Microsoft Silverlight 2.0

Running the Kaldeera Setup Program

To install Kaldeera Workflow Designer:

1. Go to a machine where SharePoint is installed. If your SharePoint installation is running on a server farm, then you can install on just one machine and then use the standard SharePoint controls to propagate the installation to the other machines.

2. Kaldeera Workflow Designer is distributed as a signed EXE file (it's actually a self-extracting MSI file). Copy this file to your target machine and execute the file.

3. The installer extracts itself and launches, showing the **Welcome** page of the setup wizard.
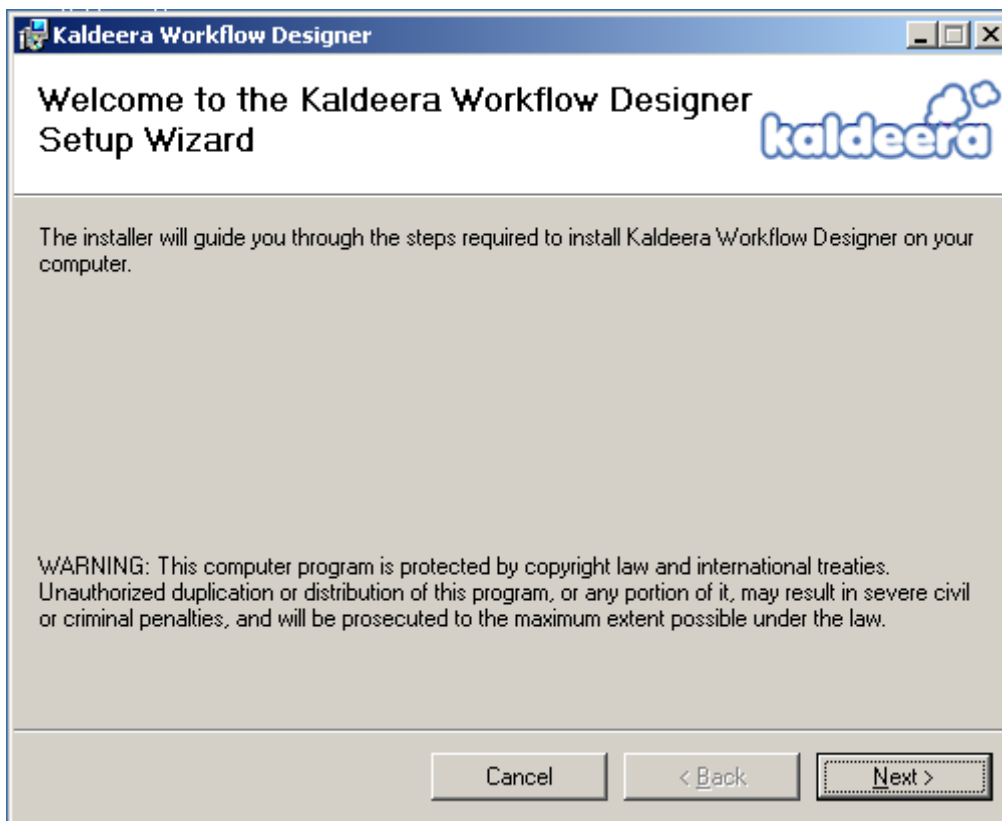
There are no settings on this page, so just read the text shown and click on **Next**.

4. The **System Requirements** page opens.

Click on **Next**.

5. The **License Agreement** page opens.

Read the agreement carefully. If you agree with its terms, then mark the **I accept the terms in the License Agreement** check box and click on **Next**.

6. Kaldeera is now installed. This process may take several seconds—a progress bar is shown. When installation is finished, the **Installation Complete** page is shown.
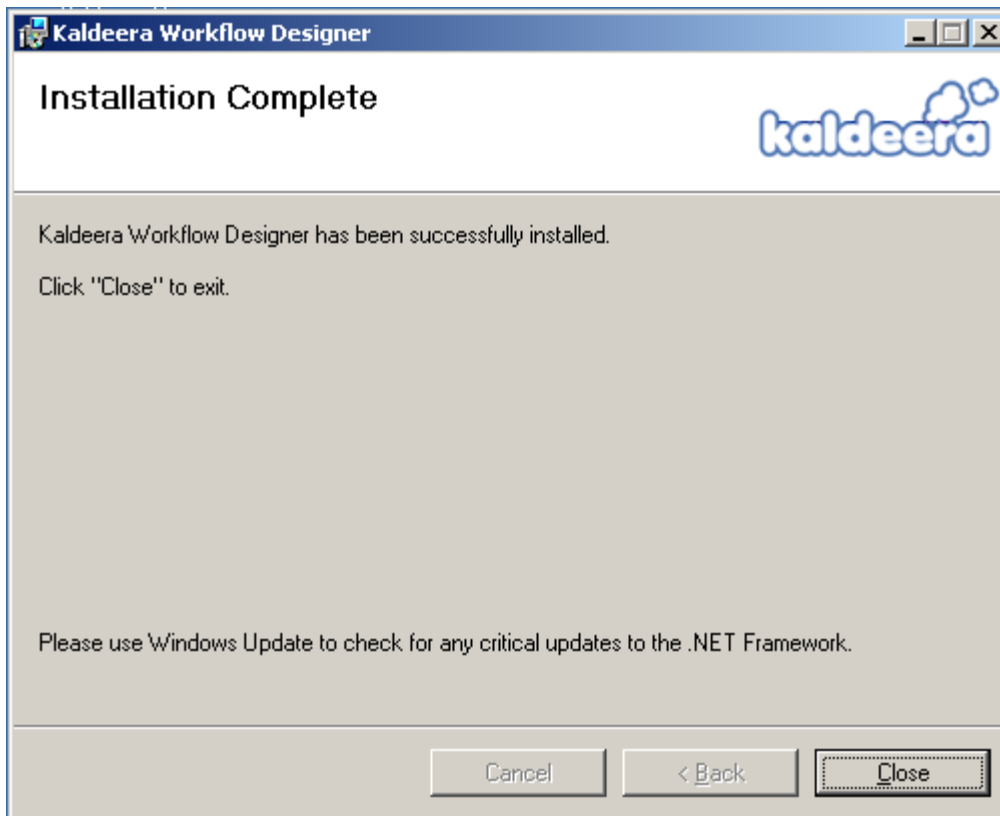

Kaldeera Workflow Designer is now installed. Click on **Close** to quit the installer.

Solution Deployment

After installing Kaldeera Workflow Designer, you need to deploy the solutions. Kaldeera Workflow Designer will not be available to any of your sites or applications until you deploy it. To deploy Kaldeera Workflow Designer, use the standard procedure for deploying solutions in SharePoint as follows:

1. Open the SharePoint Central Administration site.

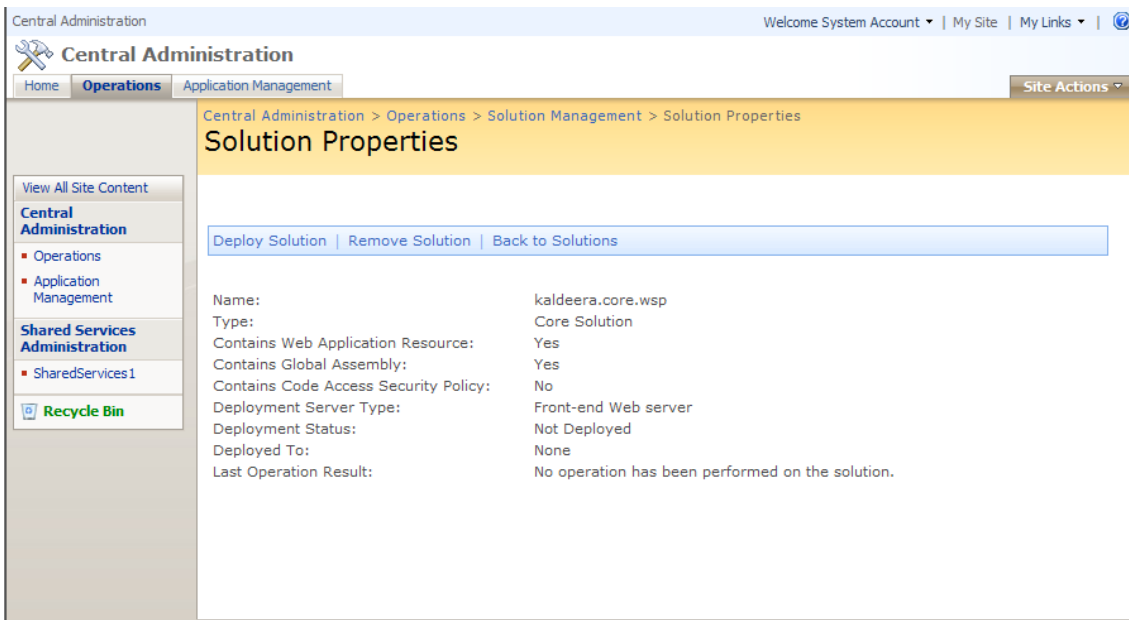2. Click on the **Operations** tab.
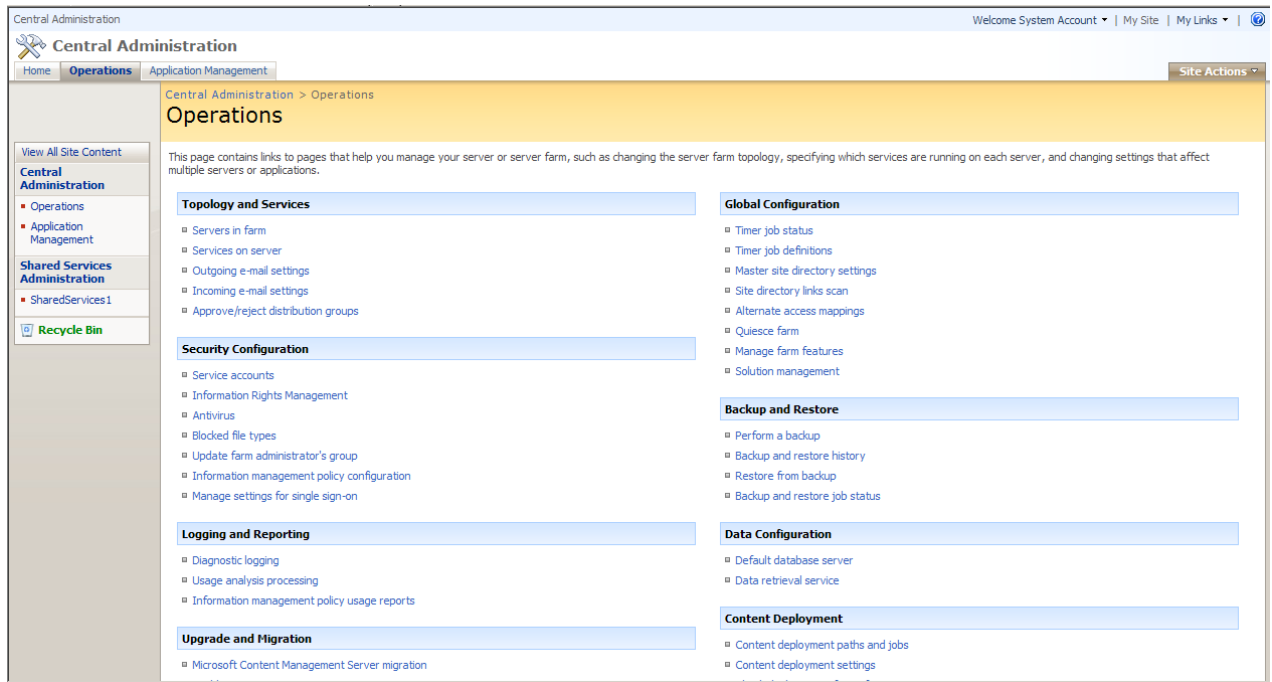
3. On the **Operations** page, select **Solution management** under the **Global Configuration** heading.

4. The **Solution Management** page is now shown. Here, you can see a list of all solutions installed on your farm.
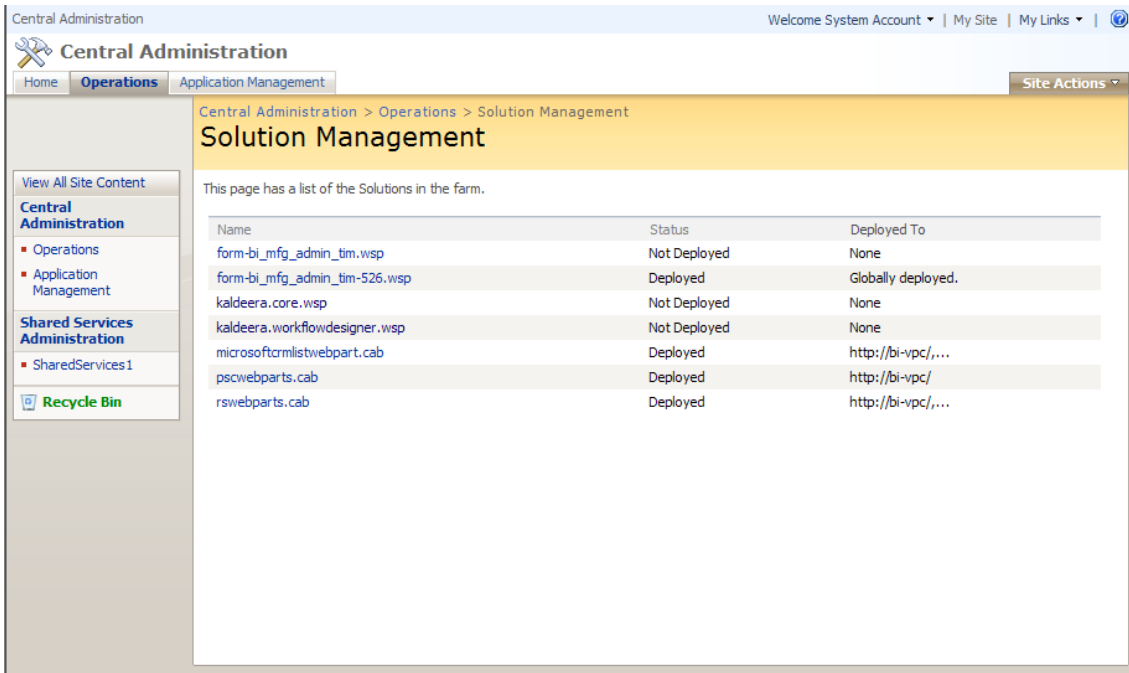
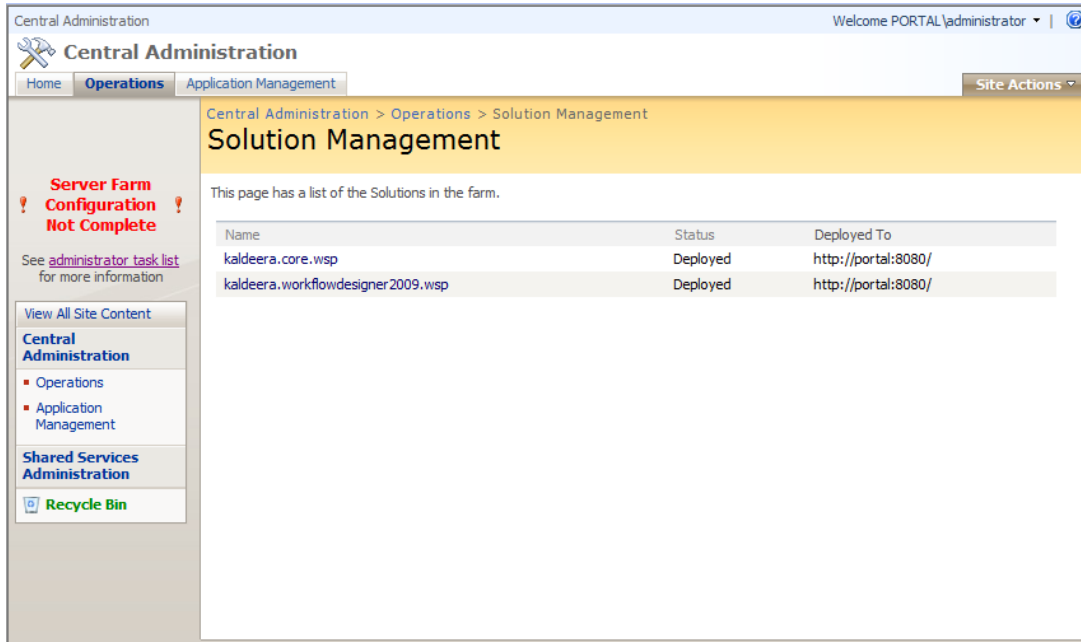Click on **kaldeera.core.wsp** in the solutions list.

5. You are now shown the **Solution Properties for Kaldeera Core**.

Click on the **Deploy Solution** link to open a page for deploying the solution to selected Web applications at a selected time.
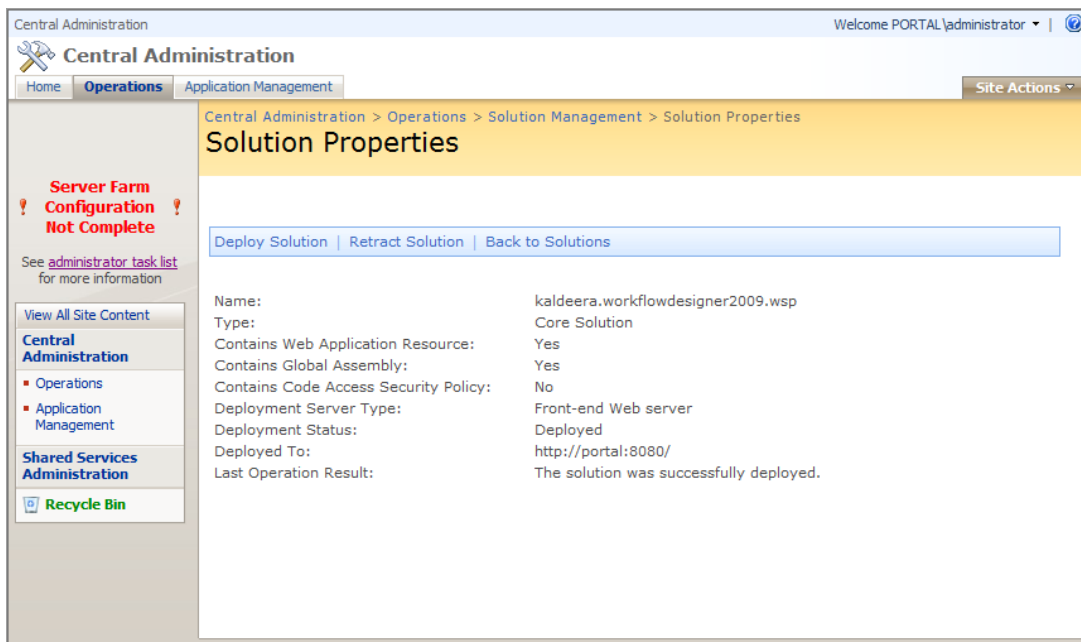
Please see your SharePoint documentation for more information about how to open the SharePoint Central Administration site and use it to work with solutions and other aspects of your SharePoint installation.

6. Go back to the **Solution Management** page. Here, you can see a list of all solutions installed on your farm.

Click on **kaldeera.workflowdesigner2009.wsp** in the solutions list.

7. You are now shown the **Solution Properties for Kaldeera WorkflowDesigner 2009**.

Click on the **Deploy Solution** link to open a page for deploying the solution to selected Web applications at a selected time.

Please see your SharePoint documentation for more information about how to open the SharePoint Central Administration site and use it to work with solutions and other aspects of your SharePoint installation.

Making Kaldeera Workflow Designer Available

To make the features of Kaldeera available to users, your site must provide the following:

• A *Kaldeera Workflow Settings* list menu option, which is available on all lists of your site.

To make Kaldeera Workflow Designer Available to users:

1. **Install and activate Kaldeera for the farm.**

This makes Kaldeera software available at the farm level. See "Running the Kaldeera Setup Program" and "Activating and Deactivating Farm-Level Features" for instructions.

2. **Deploy Kaldeera Workflow Designer for each application.**

See "Solution Deployment" for instructions.

3. **Activate Kaldeera for each relevant site collection.**

This will result in all of the Kaldeera Workflow Setting menu option to be available to the site collection. See "Activating and Deactivating Kaldeera for a Selected Collection" for instructions.

# Chapter 3: Kaldeera Central Administration

Kaldeera Central Administration

When you install Kaldeera, several settings pages are added to your SharePoint Central Administration page. Use these to configure settings that apply to the entire SharePoint farm and/or to specific SharePoint applications.

Farm-Level Functions and Settings

Settings that you make at the farm level will be available to all applications, collections and sites in your SharePoint installation. To find these settings, log into your SharePoint central administration site and go to the **Operations** tab.

Figure: The Operations tab of the SharePoint central administration site
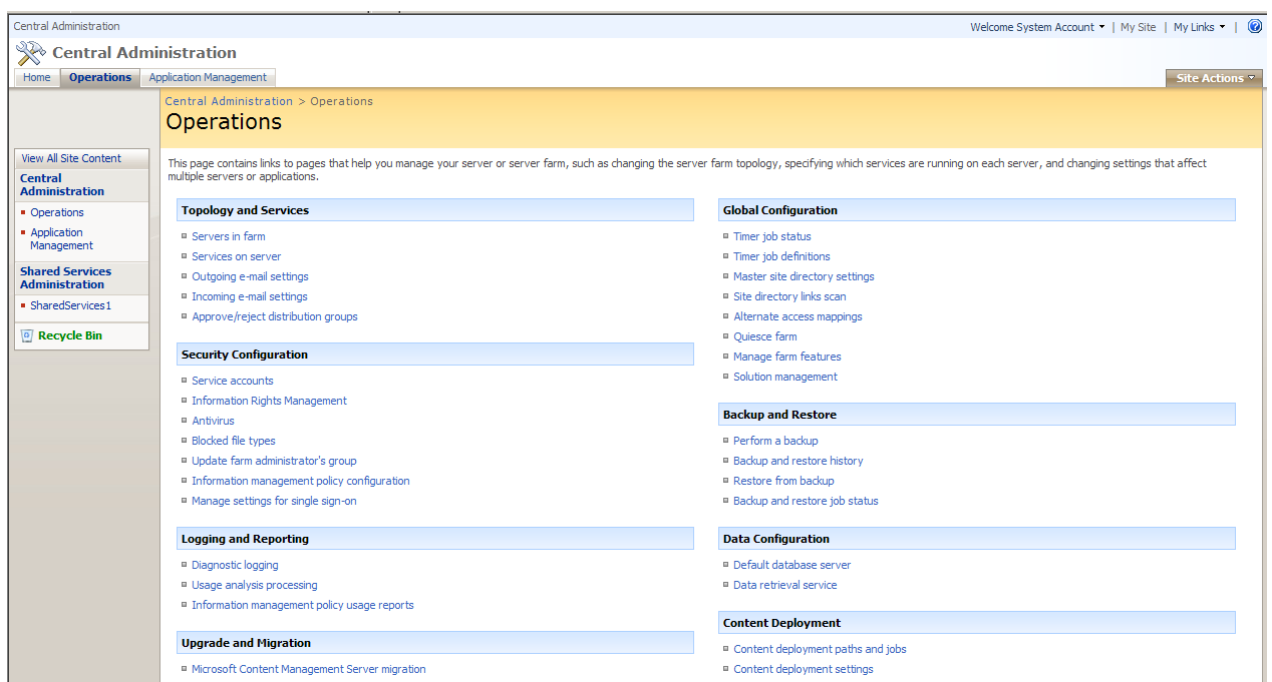
The following two links under the **Global Configuration** heading provide settings that affect the deployment and availability of Kaldeera (and other features and/or solutions you may have installed):

- **Manage farm features**: enables you to activate or deactivate Kaldeera and other features for your farm. See "Activating and Deactivating Farm-Level Features" for details.
- **Solution management**: enables you to deploy or retract Kaldeera Workflow Designer and other solutions to/from your various applications. See also "Manual Deployment".

Go to the **Application Management** tab. All of the links under the **Kaldeera Management and Configuration** heading apply only to Kaldeera. The following are provided here:

- **License Management**: enables you to check the status of your Kaldeera licenses, upload license files and manage other types of license-related tasks. Provides a few details about your Kaldeera installation (such as the version number and license type). See also "Managing Kaldeera Licenses".
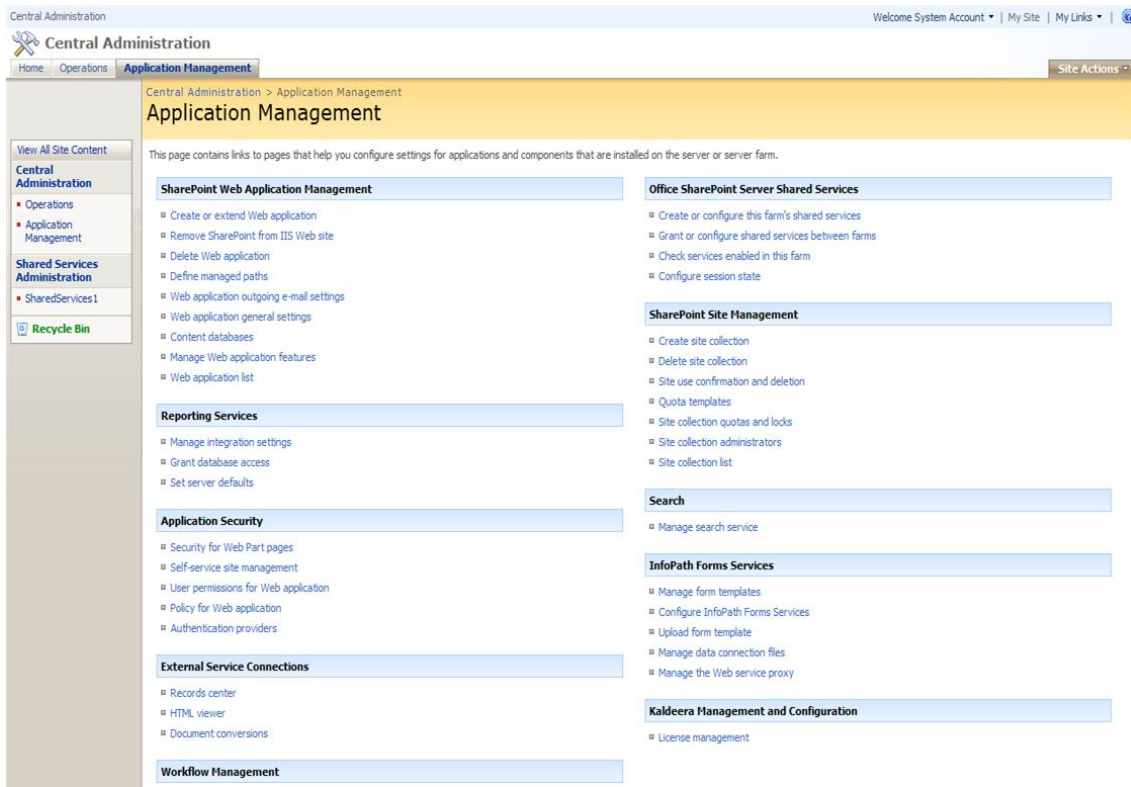
Managing Kaldeera Licenses

To use Kaldeera Workflow Designer, you must request a license that matches your SharePoint installation and other requirements. For example, each license provides support for a specific number of servers, technical support options, updates, feature options, etc. Some licenses, such as trial licenses, may also have an expiration date.

When you request a license, you will receive a *license file*, which encodes a serial number, your selected options and other information. If your installation changes (e.g., because you add more servers to your farm), then you may need to contact Kaldeera and update your license. Once you have done this, you will receive a new license file.

Opening the License Manager

Use the *Kaldeera License Manager* to view details about your installed license files, select the active license, delete licenses and upload new ones. To open the license manager:

1. Open the SharePoint Central Administration site.

2. Click on the **Application Management** tab.

3. On the **Application Management** page, select **License Management** under the **Kaldeera Management and Configuration** heading.

4. The **Kaldeera License Manager** opens.

Figure: The Kaldeera License Manager

Request New License

You need to request a new license in order to activate the product (**applicable for all license type: free, developer, enterprise, trial**).

Steps to request a new license:

1. Generate and save the request license file (*.krlf).
    To do this:
    - Open the **Kaldeera License Manager** as described above.
    - Click on the **Request License** of the target license in the table.
    - Save the file (*.krlf).
2. Submit the request file (*.krlf) by e-mail to: sales@kaldeera.com

Uploading a New License

When you activate your license (e.g., a free license or to add support for additional servers), you will receive a new license file from Kaldeera. You must then upload this file to your Kaldeera installation. To do this:

1. Open the **Kaldeera License Manager** as described above.

2. Click on the **Upload License** button in the toolbar.

3. Follow the instructions on your screen to select the new license file and upload it.

Setting the Active License

Of all of the licenses shown in the License Manager, only one license is actually active. The other licenses may represent older licenses, trials or developer licenses. You may occasionally need to switch the active license (e.g., to go from a developer license to a production license or back again).

The currently active license shows a check mark on the Status Column in the License Manager table.

Deleting a License

If you no longer need a license (e.g., after upgrading from a free license), then you can delete its license file from your servers. Thereafter, the deleted license will no longer be shown in the Kaldeera License Manager and it will no longer be available unless you upload it again. You cannot delete the currently active license.

To delete a license:

1. Open the **Kaldeera License Manager** as described above.

2. Click on the **Delete License** of the target license in the table.

4. Follow the instructions on your screen to complete the delete operation.

Chapter 4: Activating and Deactivating Kaldeera

Activating and Deactivating Kaldeera

Kaldeera Workflow Designer is implemented as a standard SharePoint "Feature", which means that it can be activated or deactivated at the farm or collection level.

- When deactivated at the collection level, its features will not be available to the affected collection(s) and the workflow functionality for that collection will disable.
- When deactivated at the farm level, the Kaldeera farm-level features (such as deploying or activating Kaldeera) will no longer be available, but all collection that already have Kaldeera Workflow Designer deployed and activated will still function normally.

When deactivated, Kaldeera Workflow Designer retains all of its current settings and can easily be re-activated at any time. If you do not want to use Kaldeera anymore, then you can uninstall it by running its setup program.

Activating and Deactivating Farm-Level Features

When deactivated at the farm level, the Kaldeera farm-level features will no longer be available. This has the following effects:

- Kaldeera operations will not be available on the SharePoint Central Administration site.
- It will not be possible to deploy Kaldeera to new applications.
- It will not be possible to re-activate Kaldeera for existing site collections where it is currently deactivated.
- All site collections that already have Kaldeera deployed and enabled will still function normally.

To activate or deactivate Kaldeera farm-level features, do the following:

1. Open the SharePoint Central Administration site.

2. Click on the **Operations** tab.
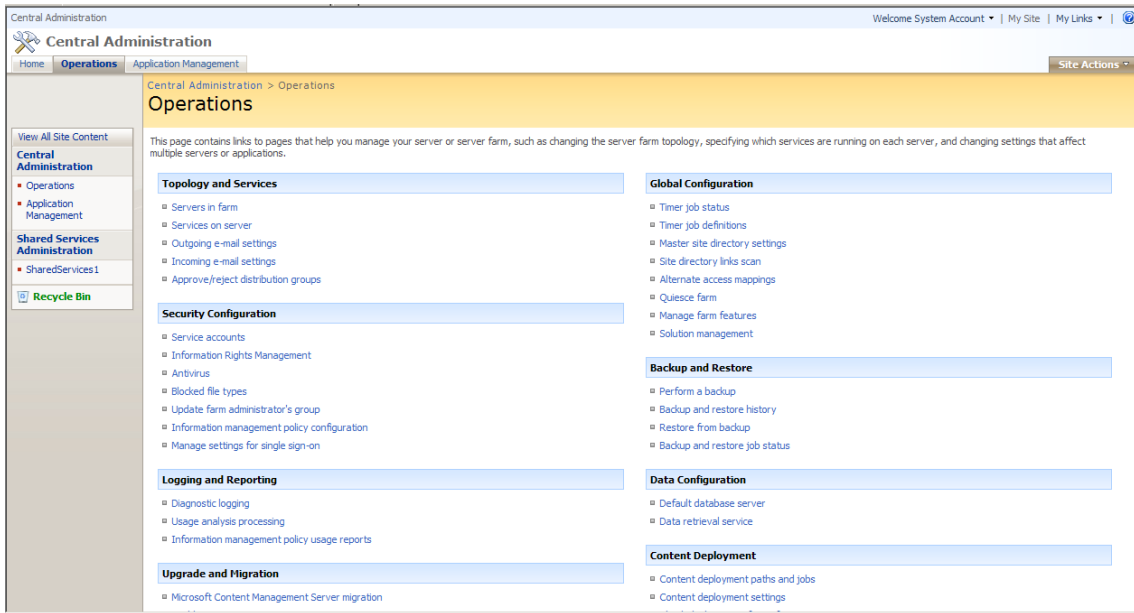
3. The **Operations** page is now shown. Select **Manage farm features** under the **Global Configuration** heading. The **Manage Farm Features** page is now shown. Here, you can see and modify the activation status of each installed feature.
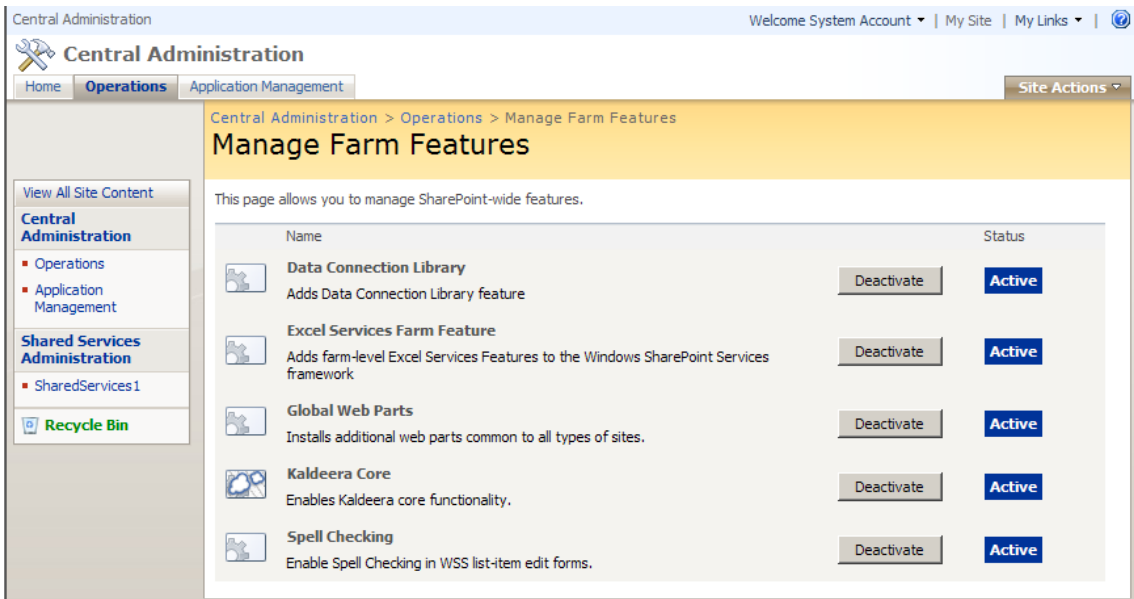
4. To toggle the activation status of Kaldeera, click on the button next to the **Kaldeera Core** icon.

Please see your SharePoint documentation for more information about how to open the SharePoint Central Administration site and use it to work with Features and other aspects of your SharePoint installation.

Activating and Deactivating Kaldeera for a Selected Site Collection

Kaldeera features are made available to users when it is activated at the site-collection level. When deactivated at the collection level, Kaldeera features will be unavailable to the affected collection(s) and the workflow functionality for that collection will disable.

When you first activate Kaldeera for a given site collection, the following things happen:

- A Kaldeera Workflow Settings list menu option is created (the workflow does not already exist)

When you deactivate Kaldeera Workflow Designer for a site collection, the following things occur:

- Kaldeera Workflow Settings list menu option is removed from the Sharepoint lists.

To activate or deactivate Kaldeera Workflow Designer for all of the sites in a given site collection, do the following:

1. Open a SharePoint site that is part of the site collection you want to modify.

2. Select **Site Actions > Site Settings > Modify All Site Settings** from the command menu. The **Site Settings** page opens.

3. Select **Site collection features** under the **Site Collection Administration** heading. The **Manage Site Collection Features** page opens. Here, you can see and modify the activation status of each installed feature.


4. To toggle the activation status of Kaldeera Workflow Designer, click on the button next to the **Kaldeera Workflow Designer** icon.

Please see your SharePoint documentation for more information about how to open the SharePoint Central Administration site and use it to work with Features and other aspects of your SharePoint installation.

Chapter 5: Kaldeera Workflow Designer

New List Menu Action

A new list menu option appears in the Sharepoint list.
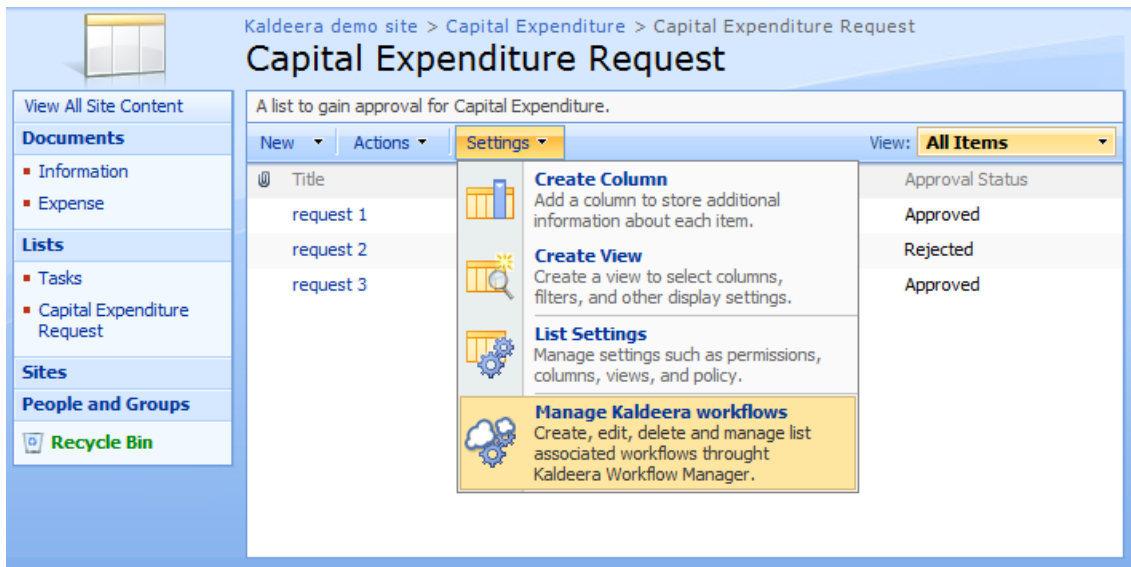
Chapter 6: Known Issues

Common errors

Error 2104: Unhandled Error in Silverlight 2 Application.

Fixing Error: Unhandled Error in Silverlight 2 Application
Code: 2104
Category: Initializer Error
Message: Could not download the Silverlight application.
Check web server settings.

When you're hosting Silverlight, you have to tweak your IIS6 settings to allow the server to know how to handle the extensions that it's not familiar with. I'm sure in the future, Microsoft will encode this directly into new releases of IIS, but for now, you have to add these MIME types yourself.

.xaml   application/xaml+xml
.xap   application/x-silverlight-app
.xbap   application/x-ms-xbap

To add the MIME types to IIS6:

1. Choose the Virtual Directory or Default Web Site in IIS
2. Open the context menu and choose "Properties"
3. Select the "HTTP-Headers" tab
4. Click the button labeled "File Types..." in MIME Map section
5. Choose "New Type" and type the extension from above into the extension field and the application type into the MIME type field.
6. After adding all 3, click "OK" then click "Apply" on the main menu. You're done. No restart needed.