



# **Mobile Application Support**

**AgilePoint BPMS v5.0 SP2**

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# Preface

## Disclaimer of Warranty

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AgilePoint, Inc. makes no representations or warranties, either express or implied, by or with respect to anything in this document, and shall not be liable for any implied warranties of merchantability or fitness for a particular purpose or for any indirect, special or consequential damages.

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## Trademarks

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## Government Rights Legend

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Use, duplication or disclosure by the U.S. Government is subject to restrictions set forth in the applicable license agreement and as provided in DFARS 227.7202-1(a) and 227.7202-3(a) (1995), DFARS 252.227-7013(c)(1)(ii) (Oct 1988), FAR 12.212(a) (1995), FAR 52.227-19, or FAR 52.227-14, as applicable.

## Virus-free software policy

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AgilePoint recognizes that viruses are a significant security consideration for our customers. To date, we have had no report of AgilePoint BPMS carries any virus. AgilePoint takes the following measures to ensure our software is free of viruses upon delivery:

- AgilePoint is built on top of Microsoft .NET framework. The pre-compiled executable is a .NET Common Language Runtime (CLR) application, not a native machine binary. As far as is known at this time, there are no viruses that infect .NET CLR executables.
- The virtual environment for the product packaging process is fully isolated and protected, and anti-virus software is installed and running during packaging.
- The deliverable package is scanned by anti-virus software before upload to our customer download site.

## Document Revision Numbers

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AgilePoint documentation uses the revision number format **rX.Y.Z**. The letters and numbers in this revision number can be interpreted as follows:

- **r** - Indicates "revision." This helps to differentiate the document *version* numbers, which start with **v**.
- **X** - The major version number for AgilePoint BPMS to which this document refers. For example, AgilePoint releases 5.0, 5.0 SP1, and 5.5 would all have an **X** value of **5**.
- **Y** - The major document revision number. This number typically changes only when either there is a new AgilePoint release, or there are major changes to the document.
- **Z** - The minor document revision number. This number is incremented each time the document is republished.

## AgilePoint Documentation in PDF and HTML

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AgilePoint documentation is provided in both print-friendly (PDF) and web-based (HTML) formats.

### Advantages of HTML Documentation

- HTML is the **primary delivery format** for AgilePoint documentation.
- Unified, global **search** across all documentation. PDF documents allow you to search only within the context of a given PDF file.
- **All hyperlinks supported**. Links in PDFs are only supported in certain contexts.
- "One-stop shopping" for all information related to AgilePoint BPMS.
- The HTML documentation is updated more frequently than the PDF documentation. Web-based documentation is updated periodically between AgilePoint releases to address errors and omissions, but the PDF documentation is updated only at the time of a software release.

### Advantages of PDF Documentation

PDFs can be more easily **printed**, **archived**, and **transferred** (such as by FTP or email) than HTML documentation.

For more information, see [Downloading Files and Sharing Links from the Documentation Library](#) on the [AgilePoint Support Portal](#).

## Contacting AgilePoint Sales

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AgilePoint is a leading Business Process Management System (BPMS) provider created by a team of driven people who strive to incorporate the principles of relentless innovation for the benefit of our customers. Our mission is to help companies of any size attain and sustain operational success through process excellence.

**Headquarters:** AgilePoint Corporation 1916C Old Middlefield Way Mountain View, CA 94043, USA

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**Web site:** [www.agilepoint.com](http://www.agilepoint.com)

**International:** For AgilePoint EMEA and AgilePoint Asia Pacific, please call the AgilePoint Corporate Office for contact information.

## Contacting Customer Support

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To contact AgilePoint Support, please submit a ticket on the AgilePoint Support Portal: <http://support.agilepoint.com/SupportPortal/>

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

# Mobile Application Support

This document describes the out of the box features that AgilePoint BPMS provides to supports mobile applications.

# AgilePoint Web Application Project Template

ASP.NET Web applications can be used in conjunction with AgilePoint as a foundation for workflow deployments.

This project template is used to create a new AgilePoint-enabled ASP.NET Web application that will implement the user interfaces of a specific process model based on the Generic process template from AgilePoint Envision.

If specified, it will also create mobile pages for the web application. This enables easy support for mobile devices.

## Creating an AgilePoint Web Application

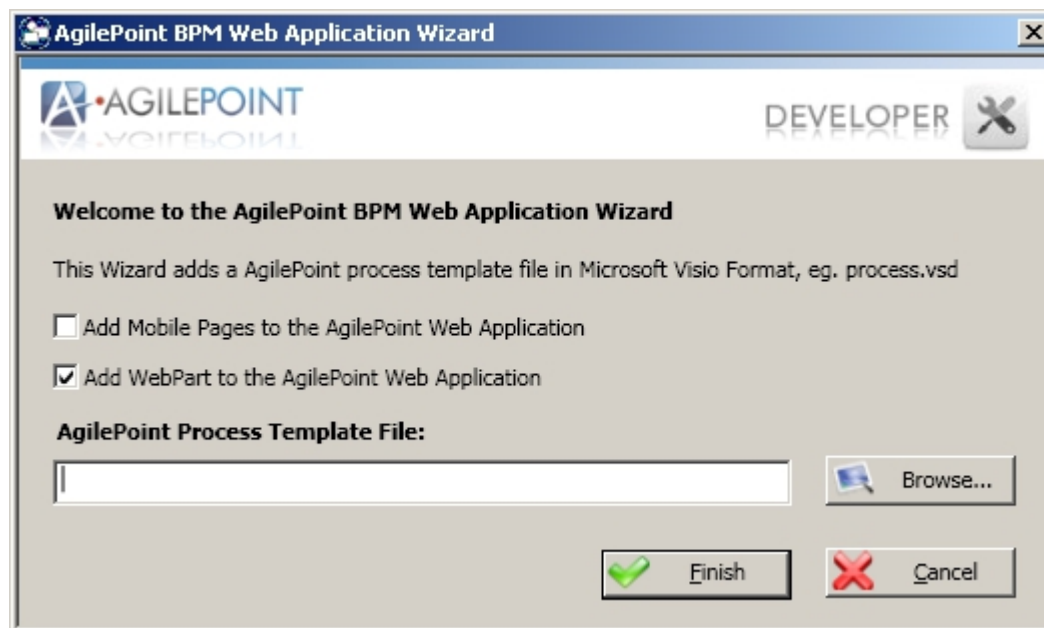
To create a new AgilePoint web application:

1. In AgilePoint Developer, click **File > New > Web Site**.
2. Specify the **Name** and **Location** for the web application, and click **OK**.
3. Complete the fields on the [AgilePoint BPM Web Application Wizard](#), and click **Finish**.


AgilePoint Developer creates the necessary skeleton in Visual Studio for the project.

## AgilePoint BPM Web Application Window

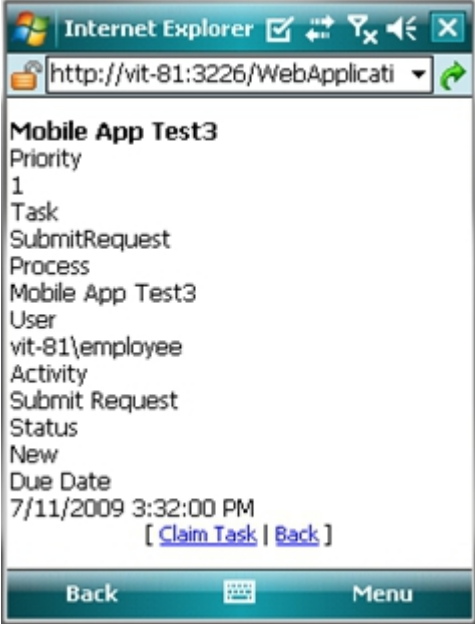
This window enables you to specify the options for a web application.



## Field Definitions

Field Name	Definition
Add Mobile Pages to the AgilePoint Web Application	<p>If selected, AgilePoint Developer creates mobile versions of all files for the web application. This simplifies development for mobile devices.</p> <p>AgilePoint Developer adds the following mobile files:</p> <ul style="list-style-type: none"> <li>• <b>Mobile_LognonForm</b> - A form page where the user can log on to the web application.</li> <li>• <b>Mobile_Default</b> - A default mobile template for an ASP.NET page.</li> <li>• <b>Mobile_TasksPage</b> - A mobile page that displays the user's Task List. There is also a detail page that displays details about a task when selected in the Task List.</li> <li>• A mobile page for the Work To Perform property of each activity that has the <b>EnableMobile</b> property set to <b>True</b>.</li> </ul> <p>The following images show the mobile Task List and Task Detail pages:</p> 



Field Name	Definition
	
<p>Add Web Part to the AgilePoint Web Application</p>	<p>If selected, AgilePoint Developer creates the following Web Parts for the web application:</p> <ul style="list-style-type: none"> <li>• Task List</li> <li>• Process Instance List</li> </ul>
<p>AgilePoint Process Template File</p>	<p>Specifies the process model you want to associate with the web application.</p> <p>When you create the process template file, skeleton ASP.NET pages are created for each of the Work to Perform properties of the Manual Activities specified in the process model.</p>
<p>Finish</p>	<p>Submits the options specified on the current window.</p>

# Approval Email Templates

You can create an email template for the Activity Entry Email that participants will use to indicate approvals.

## Create a Text-Based Approval Email Template

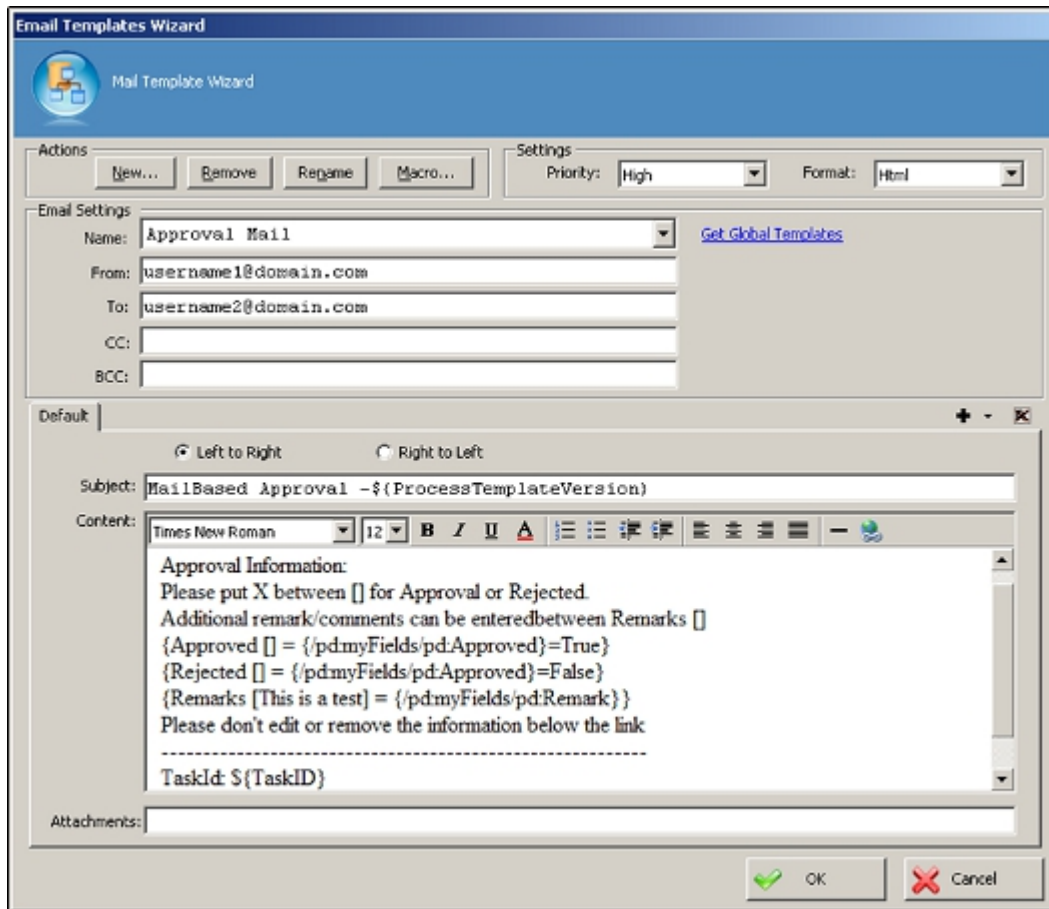
You can create an email template for the Activity Entry Email that participants will use to approve a request using a text-only format.

In the email body, include the following information. Note that the terms used in the email can follow the format approved/rejected, or yes/no.

Approval Keywords	Rejection Keywords
{Approve [] = {Xpath-Node}= Value}	{Reject [] = {Xpath-Node}= Value}
{Approved [] = {Xpath-Node}= Value}	{Rejected [] = {Xpath-Node}= Value}
{Yes [] = {Xpath-Node}= Value}	{No[] = {Xpath-Node}= Value}

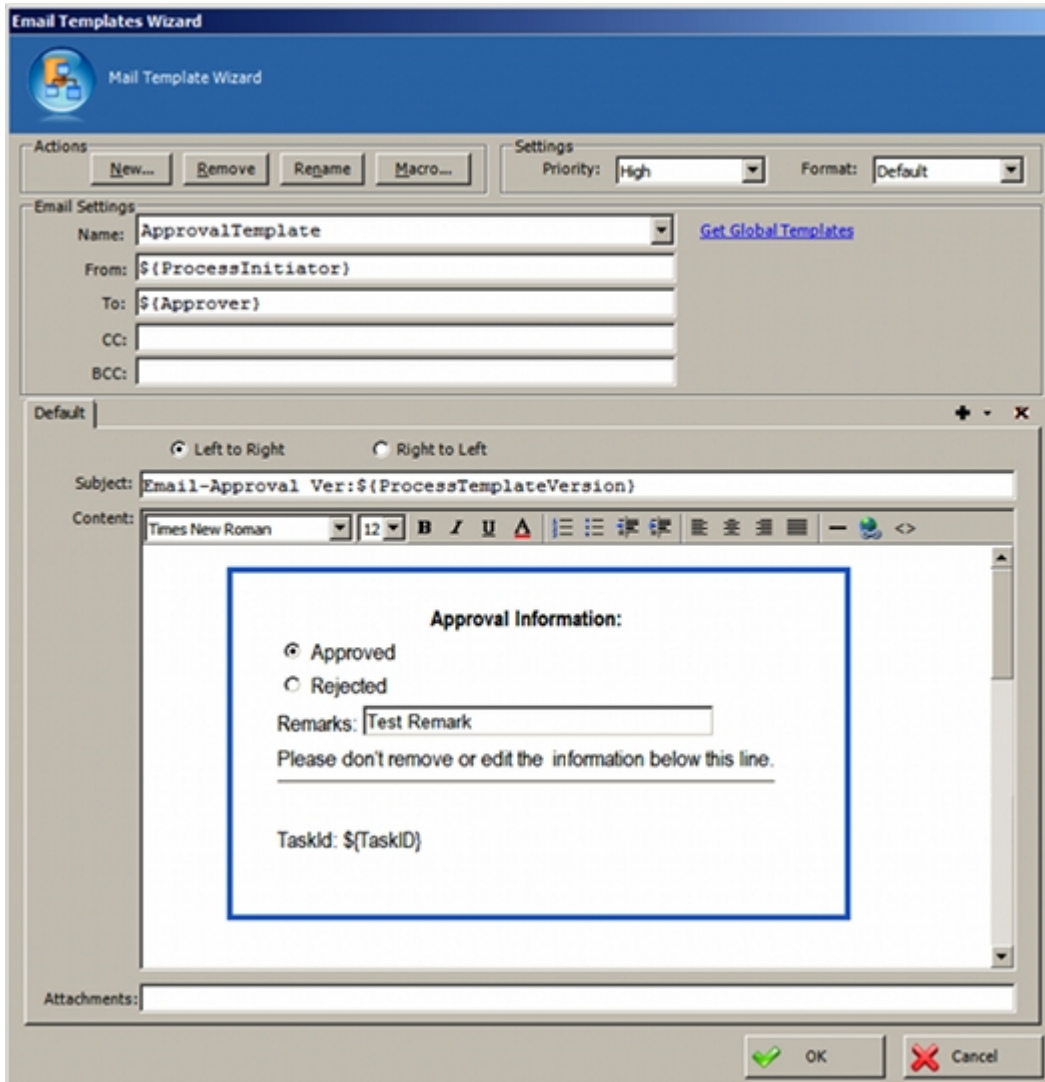
{Remarks [] = {Xpath-Node}}

- **Xpath-Node** represents a valid Xpath node -- for example, {/pd:MyFields/pd:Approval}
- **Value** represents the value you want to pass when the user selects this option. A common usage is True or False. The action that is selected with the X will be processed along with any information in the remarks section.



## Create an HTML-Based Approval Email Template

You can create an HTML-based email template for the Activity Entry Email that participants will use to approve a request.



To create an HTML-based email templates for approval:

1. In the **Email Templates Wizard**, click the **HTML code** button (< >).
2. In the email body, paste the following HTML code.

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
<HTML><HEAD><TITLE></TITLE>
<META http-equiv=Content-Type content="text/html; charset=utf-8">
<META content="MSHTML 6.00.6001.18319" name=GENERATOR>
  </META></HEAD>
<BODY bgColor=#ffffff>
<STYLE type=text/css>
<!--
p.one
{border-left-color:#397dd0;
border-bottom-color:#397dd0;
margin-left:50px;
width:500px;
border-top-style:solid;
```

```

border-top-color:#397dd0;
border-right-style:solid;
border-left-style:solid;
height:225px;
border-right-color:#397dd0;
border-bottom-style:solid}
-->
</STYLE>
<P class=one style="WIDTH: 444px;
HEIGHT: 257px"><BR>
<TABLE name="ApprovalInfo">
<COLGROUP width=25></COLGROUP>
<TBODY>
<TR>
<TD></TD>
<TH><SPAN style="FONT-FAMILY: Arial Narrow">
Approval Information:</SPAN></TH></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">
<INPUT type=radio CHECKED
name={/pd:myFields/pd:Approved}> Approved</INPUT>
</SPAN></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">
<INPUT type=radio name={/pd:myFields/pd:Approved}>
Rejected</SPAN></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">Remarks:
</SPAN><INPUT
style="WIDTH: 250px" size=25 value="Test Remark"
name={/pd:myFields/pd:Remarks}></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">Please
don't remove or edit the information below this line.
</SPAN></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">
<HR>
</SPAN></TD></TR>
<TR>
<TD></TD>
<TD><SPAN style="FONT-FAMILY: Arial Narrow">
TaskId: ${TaskID}</SPAN></TD>
</TR>
<TR></TR>
<TR></TR>
</TBODY>
</TABLE></P></BODY></HTML>

```

3. Modify the text of the email template as required.

4. When you have finished modifying the email template, click **OK**.

## Email Approval on Mobile Devices

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If an approver is using a mobile device, he or she cannot use the standard email approval methods because it is not possible to edit email histories on many mobile email applications.

As an alternative to the standard text or HTML email approval methods, an approver can reply to the approval email with one of the following keywords as the **first word in the email body**.

Approval Keywords	Rejection Keywords
Approve	Reject
Approved	Rejected
Yes	No