



AGILEDIALOGS USER GUIDE

Table of Contents

1.	Introduction	3
1.1	Disclaimer of warranty	3
2.	AgileDialogs basics	4
2.1	AgileDialogs concepts	4
2.1.1	Page	4
2.1.2	Question	5
2.1.3	Sub-Dialog	5
3.	AgileDialogs Execution	5
3.1	Dialog Title	6
3.2	Breadcrumb	6
3.3	Page Title	7
3.4	Page Questions Container	7
3.5	Comments Container	11
3.6	Action buttons	11
3.6.1	Back button	12
3.6.2	History button	12
3.6.3	Viewer button	13
3.6.4	Cancel button	13
3.6.5	Review button	14

AgileDialogs User Guide

1. Introduction

This document describes the usage of AgileDialogs from end user's perspective.

With AgileDialogs Users can fill out dialogs to save information in Microsoft Dynamics CRM or other systems.

A dialog is a set of steps to be executed in a specific order as defined by the dialog designer (See *AgileDialogs Designer Guide*). The user responses guide him/her through the dialog.

1.1 Disclaimer of warranty

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.

Copyright © 2012, AgilePoint Inc. All rights reserved.

GOVERNMENT RIGHTS LEGEND: Use, duplication or disclosure by the U.S. Government is subject to restrictions set forth in the applicable AgilePoint Inc. 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.

'AgilePoint Inc.' and all its products are trademarks of AgilePoint Inc.. References to other companies and their products use trademarks owned by the respective companies and are for reference purposes only.

2. AgileDialogs basics

An AgileDialog is a set of pages (forms) comprising of prompts and responses, to convey and get information from a user, using a flow modeled as a Business Process in MS Visio.

AgileDialogs can be used for many purposes, for example:

- Self-help guides
- Troubleshooting wizards
- Call Scripts in Call Centers
- Help users to fill out complex forms
- Create Surveys
- Create Tests & Exams

During the dialog the user can go forward or backward (either one step or several steps) in order to fulfill the required information. The dialog is presented to the user using a web page.

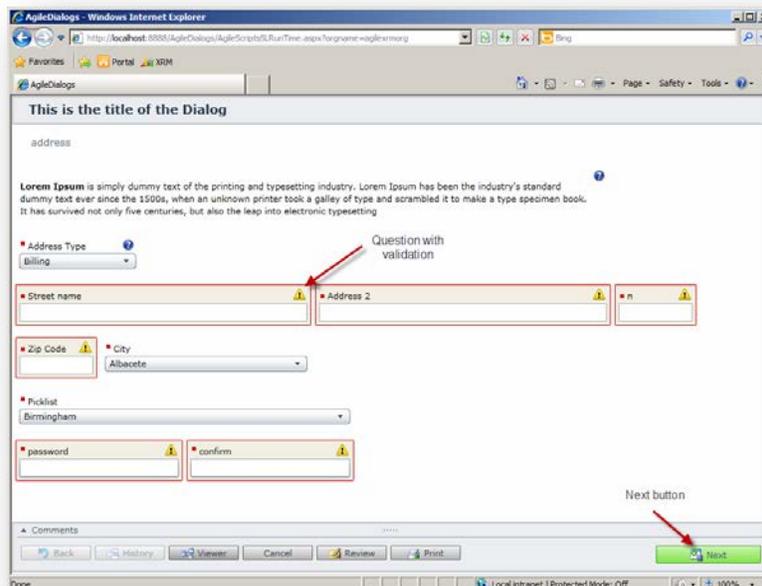
2.1 AgileDialogs concepts

These are the basic concepts that an AgileDialog user must know.

2.1.1 Page

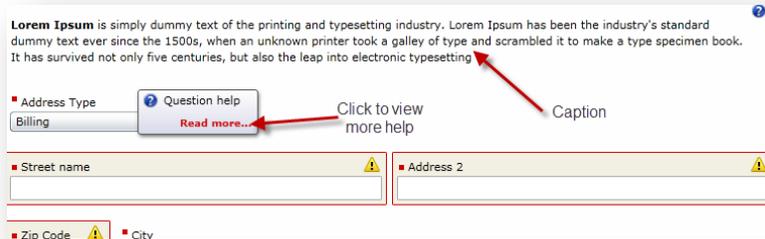
Dialog questions are grouped in pages (a page is like a form with a set of controls). When the page questions have been fulfilled the user can click the *Next* button.

Questions can include validations so that the page cannot be completed until all controls have been validated successfully.



2.1.2 Question

This is the basic unit of a dialog. Each question has a caption that describes the input. Beside this caption, the question can have a tooltip and if needed, more extended help (presented in a modal window).



2.1.3 Sub-Dialog

This is a dialog called from another dialog. It helps organize complex dialogs into manageable pieces, as well as for creating reusable sub-dialogs that can be called in different dialogs.

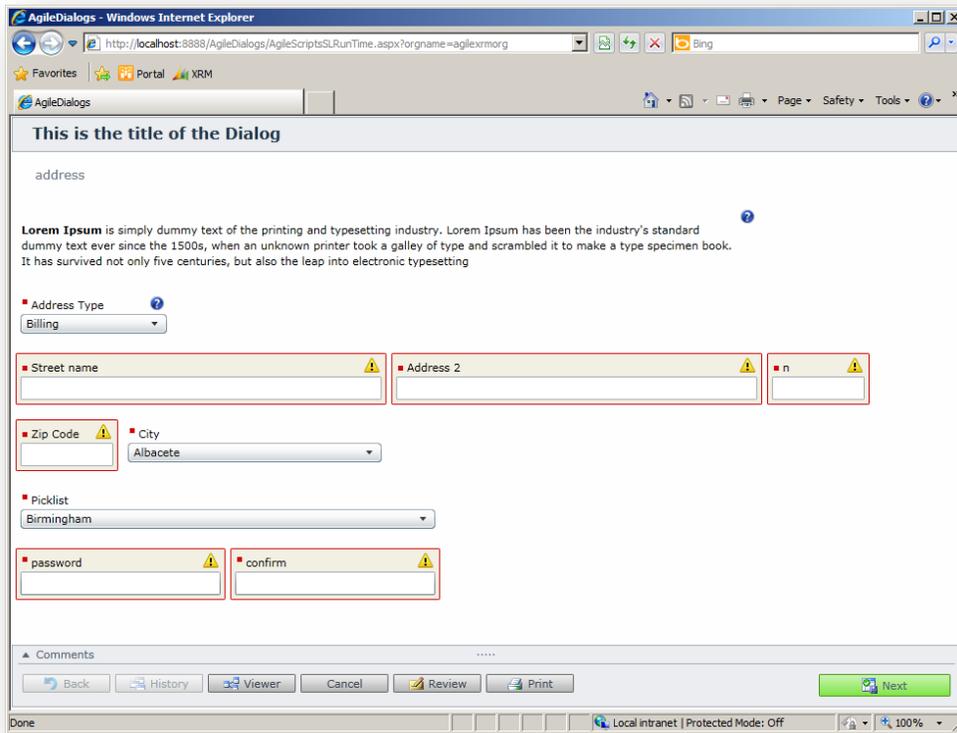
3. AgileDialogs Execution

When an AgileDialog is opened, the user must respond to the questions and using the *Next* button, navigate to the following pages.

The user can go back to the previous page using the *Back* button, or to any other page previously presented, using the *History* button.

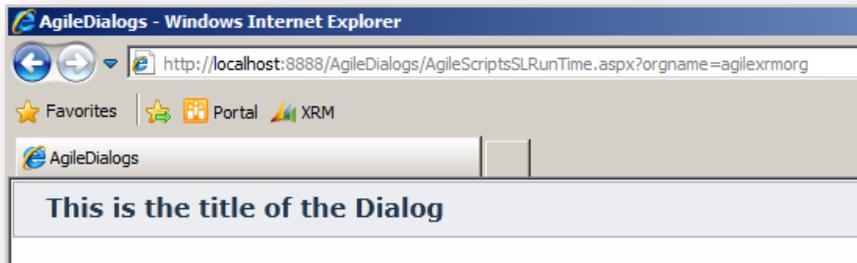
Each page has the following parts:

- Dialog Title
- The Breadcrumb container
- Page Title
- The Page Questions container
- The Comments container
- The Action Buttons container



3.1 Dialog Title

This part of the dialog window contains a descriptive title of the dialog.



3.2 Breadcrumb

If the dialog designer wishes so, the dialog may show a breadcrumb at the top of the pages, as way of guiding the user as to which stage of the dialog he/she is at.



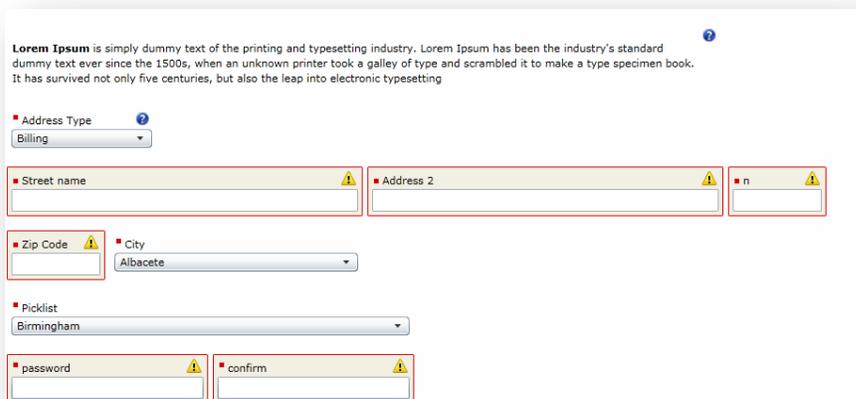
3.3 Page Title

This part contains the descriptive name of the page.

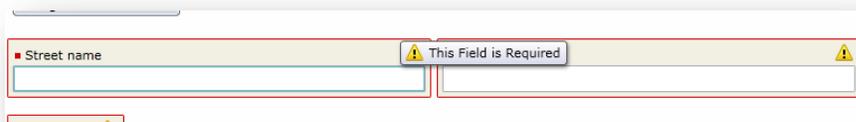


3.4 Page Questions Container

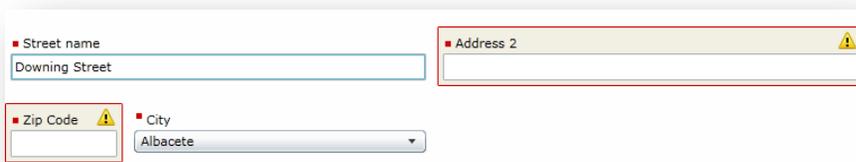
This part contains the questions that are configured for the current step. Here is where the user must introduce the values required to continue the dialog. The content of this container is dynamically updated when the user clicks *Next* and a new page is presented.



The dialog cannot continue until all validation is passed. While the response is not valid, the question is surrounded with a warning rectangle, and hovering the mouse over the warning icon, the validation error message is shown.



Validation information is dynamically updated while the control is being updated, so that the user can easily see if all control has passed validation. For instance, *Street name* field is required; when a value is introduced the validation warning is automatically hidden:



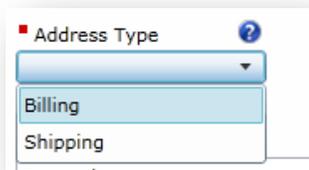
These are the question types that this container can include:

- **Textbox:** this question type is used to introduce a text value



A screenshot of a form element titled "Street name" with a red square icon. Below the title is a text input field containing the text "Text value".

- **Drop-Down List:** this question type is used to select a single value from a list



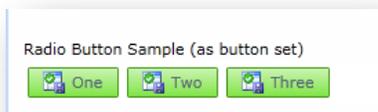
A screenshot of a form element titled "Address Type" with a red square icon and a help icon. Below the title is a dropdown menu with "Billing" and "Shipping" as visible options.

- **Radio Button:** this question type is used to select a single value



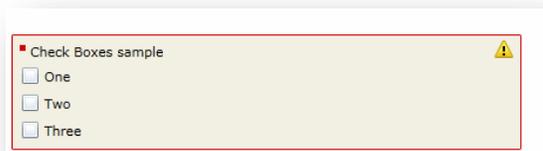
A screenshot of a form element titled "Radio Button Sample" with three radio button options: "One", "Two", and "Three".

- **Button Set:** This question type is the same as the Radio button but represented as a set of buttons. Clicking on one button is like selecting that option AND clicking *Next* in one go



A screenshot of a form element titled "Radio Button Sample (as button set)" with three button options: "One", "Two", and "Three". Each button has a small icon on the left.

- **Checkbox:** This question type allows selecting multiple values



A screenshot of a form element titled "Check Boxes sample" with a red square icon and a warning icon. Below the title are three checkbox options: "One", "Two", and "Three".

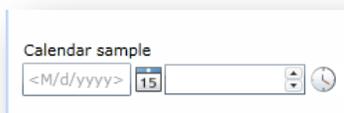
- **Info:** This question type presents information to the user. This information can include images, formatted text and hyperlinks.



- **Yes/No:** This question type is used to select Yes or No as the response to a question. It is just a common use of Radio Buttons



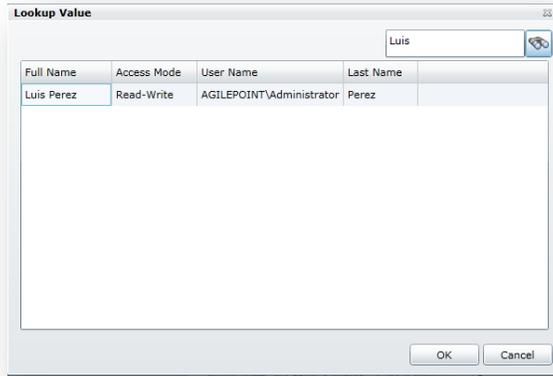
- **Calendar:** This question type is used to select either a Date or a Date and Time



- **Lookup:** this control is used to select an item in a list. The value can be filled using auto-complete feature after the third character is introduced, the available values are automatically filtered and presented to make completion easier

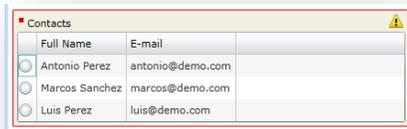


When the user clicks the Search button on the right, the lookup window is opened:

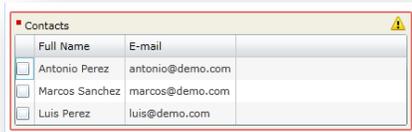


To select an item, just click on it in the grid and click OK

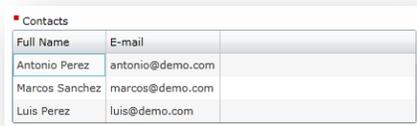
- **Data Grid:** This question type shows a list of items in a table for selecting one of them:



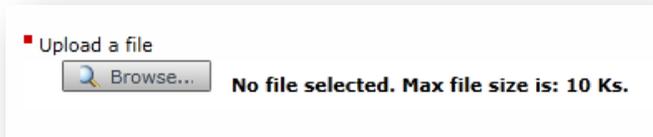
...or selecting multiple items:



...or just show the list for information purposes:



- **File:** This allows selecting a file from the user’s PC. The size of the file could be limited:



- **Password:** It is used to get passwords:



- **Custom Control:** This type of question is for adding your own controls, using AgileDialogs extension mechanisms

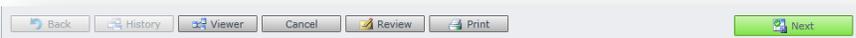
3.5 Comments Container

When the dialog designer configures the dialog to allow including comments, this comments box becomes available for adding comments throughout the dialog. This is very common in Call Centers:



The comments box is collapsible to increase the available space of the window.

3.6 Action buttons



Depending on the configuration of the dialog, the buttons available may be different. All dialogs have the buttons *Back* (enable from second step), *History* (enabled from second step too) and

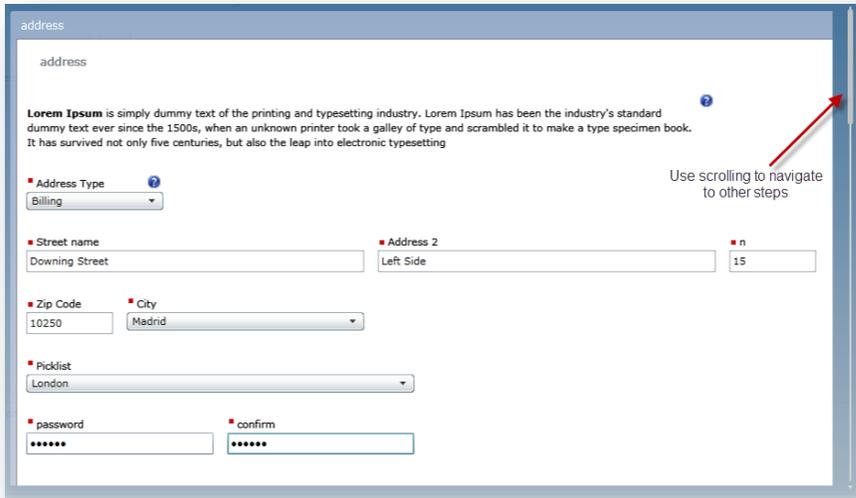
Next. The other buttons are based on configuration.

3.6.1 Back button

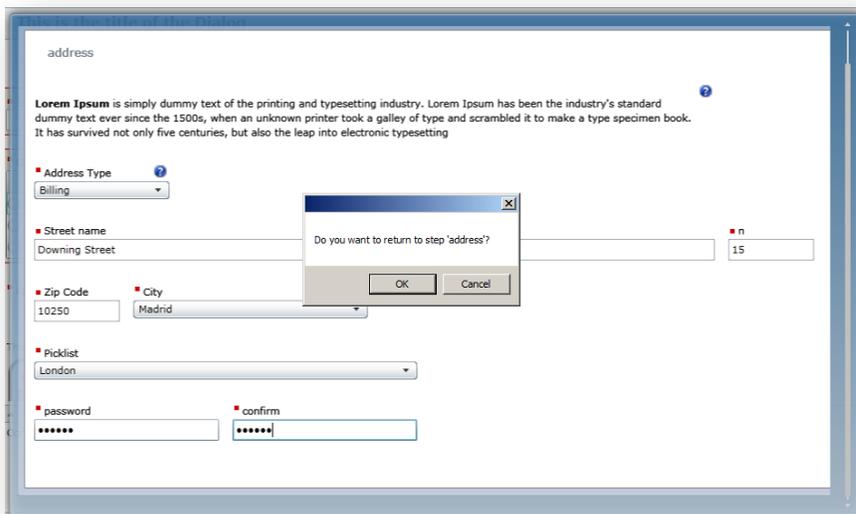
This button is used to return to the previous step. This button is not enabled for the first step and could be disabled if the dialog designer has configured it so.

3.6.2 History button

This button opens a scrollable list of previous pages that have already been visited. This allows checking the values introduced previously, or optionally, returning to a previous page.

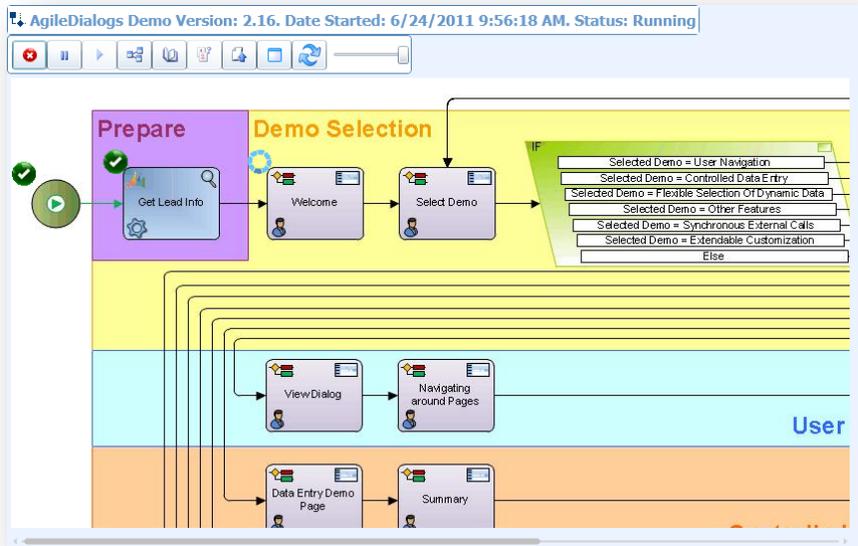


To return to a specific page, click it in the History window and confirm:



3.6.3 Viewer button

This button will be enabled if the modeler has configured it so (normally, it is not). This feature is used to view the dialog status. Each shape represents an activity.

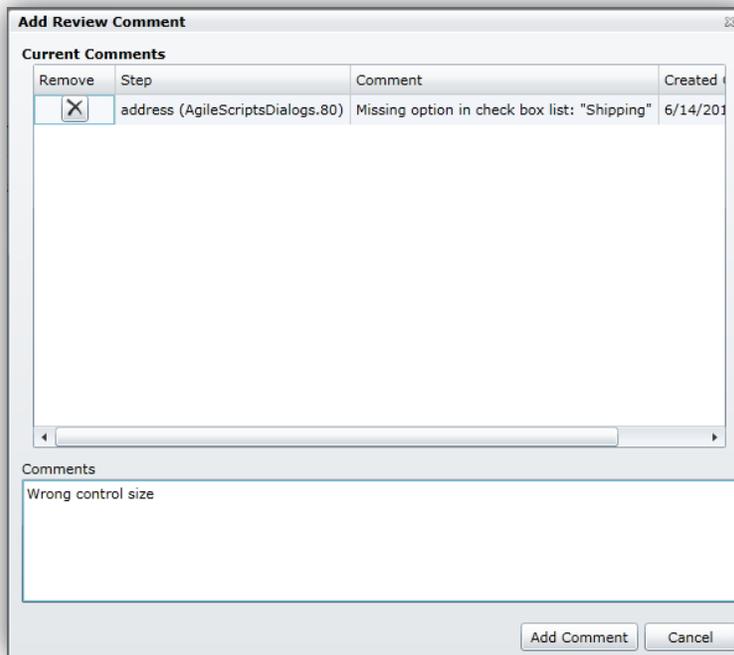


3.6.4 Cancel button

This button is used to cancel the dialog execution. This button is visible if the dialog modeler has configured it so.

3.6.5 Review button

During the dialog design the modeler of the dialog can enable feedback comments gathering to help him/her improve the dialog. This button is used to open this window:



That allows including comments regarding the dialog configuration.

The comment is linked to the current step, dialog version, user and dialog template. Comments are stored in XRM repository for further review by the dialog designer.

This window allows removing comments using the button Remove on the left of each item.