

# AGILEDIALOGS USER GUIDE



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# 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

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# 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.

Agrebialogs - Windows Enternet Explorer			
🗲 🕑 🕈 🙋 http://locahost:8888/AgleDiologs/AgleScript	tsSLRunTme.axpx?orgname.eaglexmorg	💌 🔂 🚧 🗶 🔽 Bing	P -
Favorites 🙀 🚺 Portal 🚂 XRM			
AgleDialogs	1	🍈 • 🔂 - 🗂 🛞 • Pag	e - Safety - Tools - 👩 - 🤺
This is the title of the Dialog			
address			
Lorem Ipsum is simply dummy text of the printing a Jummy text ever since the 1500s, when an unknown y It has survived not only five centuries, but also the lear	nd typesetting industry. Lorem Ipsum has printer took a galley of type and acramble pp into electronic typesetting Question W	s been the industry's standard of it is nake a type specimen book.	
Billing •			
Street name	Address 2	<u>A</u> = n	<u>.</u>
• Zip Code 🕼 • City Albacete	•		
Bickhat			
Birmingham	• )		
-			
* password	<u>A</u>		
		Ne	ext button
Comments	2000		1
D Rack	Cancel Anview	sint	2 Next
ne		Local Intranet   Protected Mode: Off	Ø <sub>A</sub> + ₩ 100% +





# 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).

Address Type	Question help	Click to view	Caption	
annig	Read more	more help		
Street name		Address 2		Δ

# 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





Tel: http://iocainost:8888/AgileDialogs/AgileS	criptssukun i ime, aspx?orgname=agi	iexrmorg	, 🔼 Joing	
- Favorites 🛛 🙀 🔀 Portal 🏄 XRM				
AgileDialogs			🏠 • 🔝 + 🖃 🖶 • Page	🔹 Safety 🗸 Tools 🗸 🔞 🗸 🎽
This is the title of the Dialog				
address				
			0	
orem Ipsum is simply dummy text of the printin ummy text ever since the 1500s, when an unkno	g and typesetting industry. Lore wn printer took a galley of type	em Ipsum has been the industry and scrambled it to make a typ	/'s standard e specimen book.	
has survived not only five centuries, but also the	e leap into electronic typesetting	 		
Address Type 🔮				
Street name	Address 2		🔺 💷 n	
Zip Code (1) City Albacete	•			
Picklist				
Birmingham	¥			
password Contirm				
Comments				
🌖 Back 🛛 🚔 History 🔤 Viewer	Cancel 🏼 🗖 Review	Print		Next

# 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.

This is the tit	le of the Dialog	Changed
1 Account Management	2 Invoice Creation	3 Invoice Items Management





#### 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.

Lorem Ipsum is simply dummy text of the printing dummy text ever since the 1500s, when an unknov it has survived not only five centuries, but also the	g and typesetting industry. Lorem Ipsum has be vn printer took a galley of type and scrambled it leap into electronic typesetting	en the industry's standard to make a type specimen book.
Address Type 😧 Billing 🔹		
Street name	Address 2	<u>A</u>
City Albacete	•	
Picklist Birmingham	•	
password 🛕 confirm		

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.

Street name	🔥 This Field is Required	Δ
<b>^</b> -		

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:

Street name		Address 2
Downing Street		
Zip Code		
Albacete	•	
71000000		





These are the question types that this container can include:

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

Street name	6
Text value	ı
	J

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

Address Type	2	
	-	
Billing		
Shipping		

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

Radio Button Sample	
One	
O Two	
O 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



• Checkbox: This question type allows selecting multiple values

Check Boxes sample	<u> </u>
One	
Two	
Three	





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

This is a information control <i>with formatted text</i> <u>hyperlink</u> and an image:
de
ant
<b>プ</b>

• 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

Yes/No Sample	
<ul> <li>Yes</li> </ul>	
O No	

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

~M/d/a				
<m d="" td="" y<=""><td>/yy&gt; 15</td><td> </td><td>0</td><td></td></m>	/yy> 15	 	0	

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

Mic <mark>rosoft</mark>		
Microsoft		J
crosore	 	





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

ookup Value						23
				Luis		1
Full Name	Access Mode	User Name	Last Na	me		
Luis Perez	Read-Write	AGILEPOINT\Administrator	Perez			
				0	K    '	Cancel

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:

	Full Name	E-mail	
0	Antonio Perez	antonio@demo.com	
0	Marcos Sanchez	marcos@demo.com	
	Luis Perez	luis@demo.com	

... or selecting multiple items:

Full Name	E-mail	
Antonio Perez	antonio@demo.com	
Marcos Sanchez	marcos@demo.com	
Luis Perez	luis@demo.com	

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

Full Name	E-mail	
Antonio Perez	antonio@demo.com	
Marcos Sanchez	marcos@demo.com	
Luis Perez	luis@demo.com	





• File: This allows selecting a file from the user's PC. The size of the file could be limited:

upload a file	Quote for customer.doc
_	
Upload a file Q Browse	No file selected. Max file size is: 10 Ks.
_	

• **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:

omments box		
Click to collapse		
🄊 Back 🔤 History 🗖	🛛 Viewer Cancel 🌌 Review 🖂 Print	强 Next

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.

address			
Lorem Ipsum is simply of dummy text ever since th It has survived not only fi	dummy text of the printing an ie 1500s, when an unknown p ive centuries, but also the lea	d typesetting industry. Lorem Ipsum has been the i inter took a galley of type and scrambled it to mak into electronic typesetting	industry's standard re a type specimen book.
Address Type			Use scrolling to navigate to other steps
Street name		Address 2	<b>n</b>
Downing Street		Left Side	15
Zip Code City 10250 Madr	id	•	
Picklist London		•	
password	• confirm		
•••••	•••••		
			÷

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

dummy text ever since the It has survived not only five	1500s, when an unknow centuries, but also the l	n printer took a galley of type and scrambled it to make a t eap into electronic typesetting	type specimen book.
Address Type			
Street name		Do you want to rati in to stan 'address'	• n
Downing Street			15
Zip Code City		OK Cancel	
10230			
Picklist			
London		•	
password	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:

Remove	Sten	Comment	Created
×	address (AgileScriptsDialogs.80)	Missing option in check box list: "Shipping"	6/14/20
4			ł
∢ [ pmments			Þ
◀	rol size		•
↓ omments Vrong cont	rol size		

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.



