



Mobile Application Support

AgilePoint BPMS v5.0 R2

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Preface

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.

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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

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

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

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](#) in the [Documentation Library](#).

Opening the Documentation Library

To open the AgilePoint Documentation Library, do the following.

Prerequisites

You must have a valid account on the AgilePoint Support Portal.

Instructions

1. Log on to the AgilePoint Support Portal.
2. Click **Documentation**.
3. On the **Documentation** page, click the documentation library for your AgilePoint release.
 - For AgilePoint BPMS v5.0 SP1 and higher, the web-based documentation library opens in a new tab or window in your web browser.

- For releases prior to v5.0 SP1, a download starts for a Zip file with the PDF documentation for your release.

Finding Information in the Documentation Library

The information in this topic will help you to locate information in the AgilePoint Documentation Library.

Using the Table of Contents

The table of contents in the AgilePoint Documentation Library is divided by content areas. For example, the Installation section includes all the information you need to install AgilePoint BPMS. The AgilePoint API section includes information about the AgilePoint APIs.

You can use the Table of Contents to explore the AgilePoint documentation content and find the information you want.

Searching

The web-based documentation includes a centralized search for all documentation content. To search for information:

1. In the AgilePoint Documentation Library, click the **Search** tab. In the Search box, enter **1 search term**, and click **Search**.

The search results display in alphabetical order by topic title.

It is important to understand that the third-party software AgilePoint uses to generate web-based documentation allows only 1 search term. More than 1 search term will cause the search to fail.

AgilePoint recommends using a relatively unique search term to find the information you need. For example, entering a common term, such as "process," will return a high percentage of the total documentation topics in the search results.

2. Browse the list of topic titles to find the information you want.

Printing

The PDF documentation is provided mainly for the purpose of printing and archiving. To print a set of information:

1. Navigate to the main page of the Documentation Library from which you want to print.
2. In the list of documents, click the document name in the **PDF** column.
3. From your PDF reader software, print the portion of the document you want.

Downloading Files and Sharing Links from the Documentation Library

You can download and share files AgilePoint's documentation library as you would in any other web page. Note that if you send links to recipients, they must have a Support Portal login to view the file.

These procedures are common examples based on Internet Explorer with the Adobe Reader plug-in. Exact procedures may vary depending on your web browser, PDF viewer, and email client configuration.

Share a Link to an HTML Topic

1. Navigate to the topic you want to share.
2. Copy the URL in the Location box in your web browser.
3. Paste the URL in an email, IM client, etc.

Share a Link to a PDF Document

1. In Internet Explorer, navigate to the Documentation Library home page.
2. In the **PDF** column, right-click the name of the PDF file you want to share.
3. In the quick menu, click **Copy shortcut**.
4. Paste the URL in an email, IM client, etc.

Save a Copy of a PDF Document

1. In Internet Explorer, [open the Documentation Library home page](#).
2. In the **PDF** column, click the name of the PDF file you want to share.
3. In the Adobe Reader plug-in, click **Save** button.

Contacting AgilePoint Sales

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.

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Tel: (650) 968 - 6789

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Email: info@agilepoint.com

Web site: www.agilepoint.com

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

Contacting Customer Support

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

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

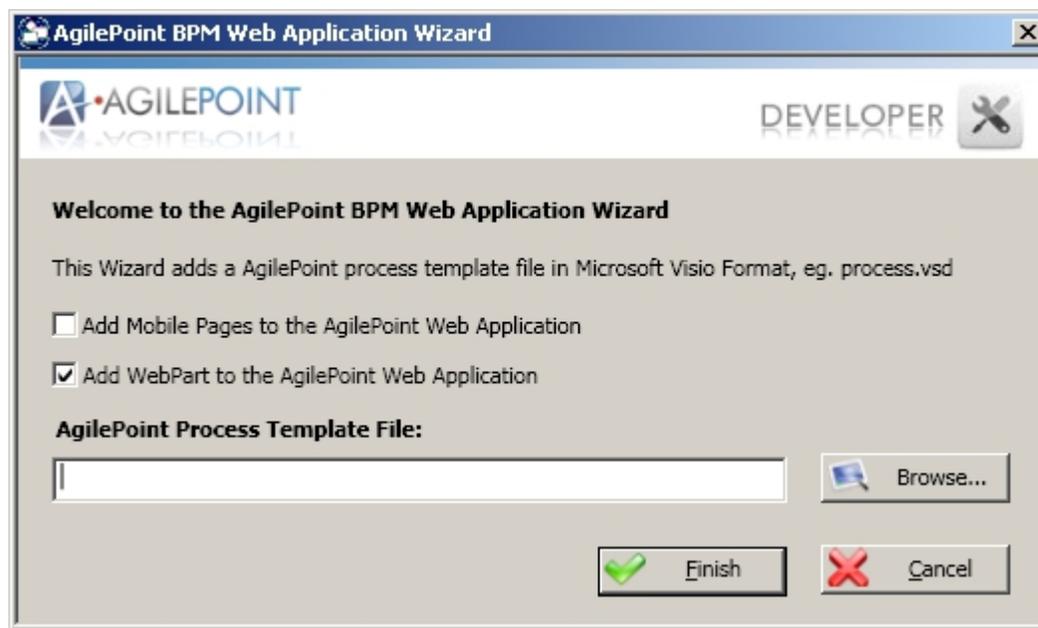
To create a new AgilePoint web application:

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](#).
4. 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
<p>Add Mobile Pages to the AgilePoint Web Application</p>	<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"> • Mobile_LognonForm - A form page where the user can log on to the web application. • Mobile_Default - A default mobile template for an ASP.NET page. • Mobile_TasksPage - 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. • A mobile page for the Work To Perform property of each activity that has the EnableMobile property set to True. <p>The following images show the mobile Task List and Task Detail pages:</p> 

Field Name	Definition
	 <p>The screenshot shows a mobile application interface in Internet Explorer. The browser title is 'Internet Explorer' and the address bar shows 'http://vit-81:3226/WebApplicati'. The main content area displays 'Mobile App Test3' with the following details: Priority 1, Task SubmitRequest, Process Mobile App Test3, User vit-81\employee, Activity Submit Request, Status New, and Due Date 7/11/2009 3:32:00 PM. At the bottom, there are links for 'Claim Task' and 'Back', and a 'Menu' button.</p>
<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"> • Task List • Process Instance List
<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>

Creating Email Templates for Approvals

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.

Prerequisites

- Some mobile devices do not allow you to edit text in the replies. For more information, see [Email Approval on Mobile Devices](#)

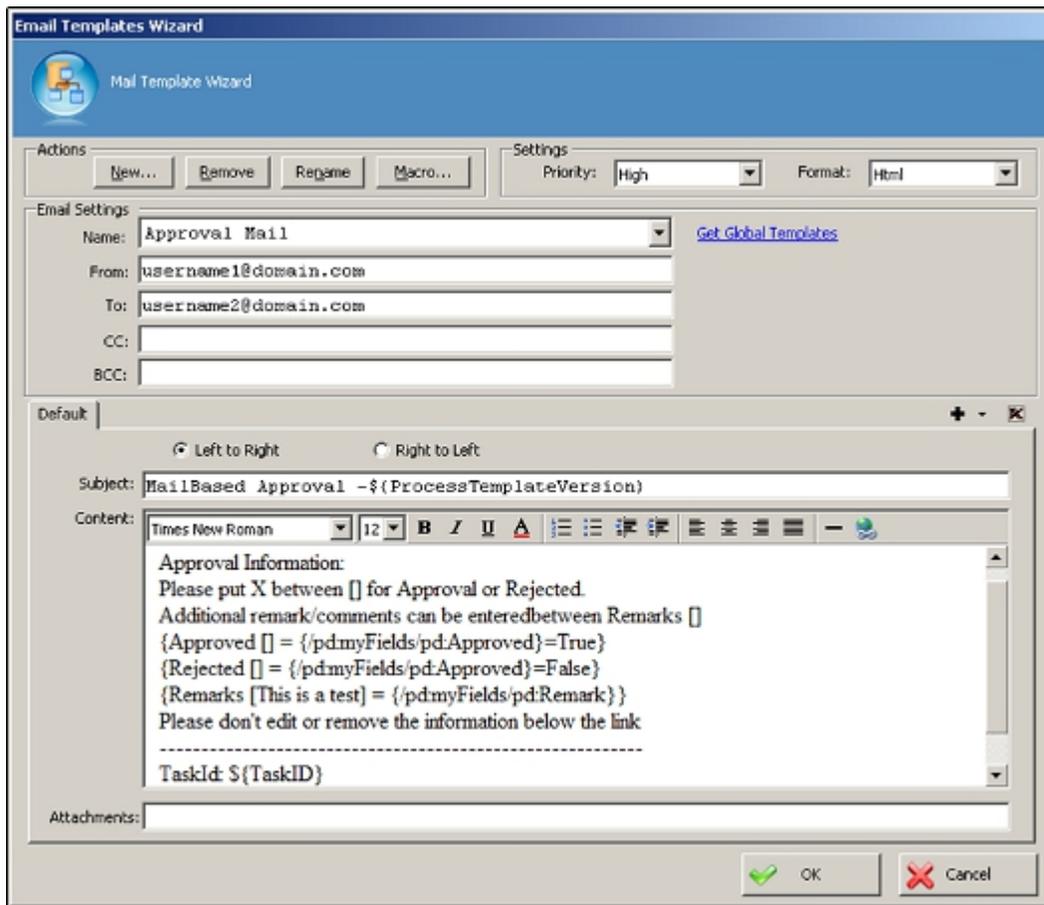
Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:
 - **Activity Entry Message (Email)**
 - **Reminder Message (Email)**
 - **Task Completed Message (Email)**
 - **Task Reassigned Message (Email)**
5. On the **Email Template Wizard**, do one of the following:
 - To modify an existing email template, in the Name list, select the name of the template you want to modify.
 - To create a new email template:
 1. Click **New**.
 2. On the New Name window, enter the name you want to identify your email template.
 3. Click **OK**.

Instructions

1. On the [Email Template Wizard](#), complete the fields, with the exception of the email body, as required.
2. Complete the body field using the following guidelines. Note the following information:
 - **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.

Use the following example as a guide.



- Approved or rejected options:
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}}

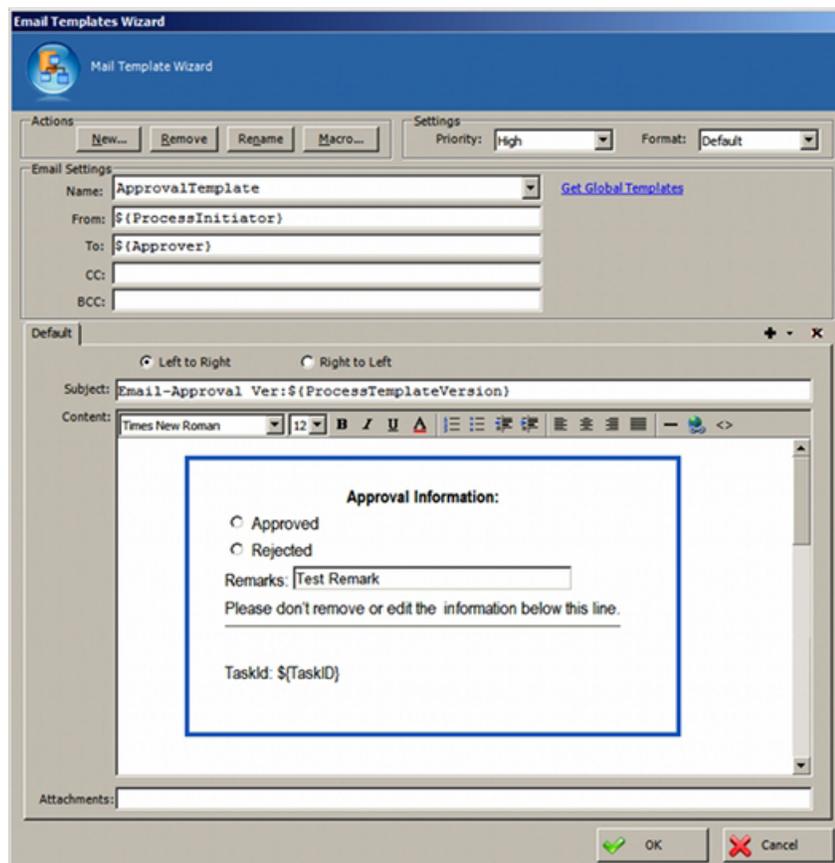
 **Note:** The Remarks should be entered between the [] in Remarks [].

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, do the following.

Prerequisites

- HTML-based approval templates work only with mobile or web-based email. This functionality does not work with the Outlook client application for Windows.
- Some mobile devices do not allow you to edit text in the replies. For more information, see [Email Approval on Mobile Devices](#)



Navigation

1. In AgilePoint Envision, open a process template.
2. Drag any AgileWork, and drop it on the Process Model.
3. To view the entire list of properties, in the **Design Tasks** pane, click **Show Properties**.
4. In one of the following fields, click **Add Mail Template**. The specific fields that display vary, depending upon the AgileShape you are using:

- **Activity Entry Message (Email)**
 - **Reminder Message (Email)**
 - **Task Completed Message (Email)**
 - **Task Reassigned Message (Email)**
5. On the **Email Template Wizard**, do one of the following:
- To modify an existing email template, in the Name list, select the name of the template you want to modify.
 - To create a new email template:
 1. Click **New**.
 2. On the New Name window, enter the name you want to identify your email template.
 3. Click **OK**.

Instructions

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
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. Complete the fields on the [Email Template Wizard](#) as required.

Email Approval on Mobile Devices

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

Remarks are not supported using this method.