



Mobile Dashobard User's Guide

iPhone

AgilePoint BPMS v5.0 R2

Document Revision r1.0.5

June 2014

Contents

AgilePoint Mobile Dashboard for iPhone.....	4
Preface.....	5
Disclaimer of Warranty.....	5
Copyright.....	5
Trademarks.....	5
Government Rights Legend.....	5
Virus-free software policy.....	5
Document Revision Numbers.....	5
AgilePoint Documentation in PDF and HTML.....	6
Opening the Documentation Library.....	6
Finding Information in the Documentation Library.....	7
Downloading Files and Sharing Links from the Documentation Library.....	7
Contacting AgilePoint Sales.....	8
Contacting Customer Support.....	8
Sign In Screen.....	9
Logging in to the AgilePoint Mobile Dashboard.....	10
Sidebar Menu.....	12
My Tasks / Team Tasks.....	14
Task Detail Screen.....	15
Completing a Task.....	16
Cancelling a Task.....	16
Reassigning a Task.....	17
Selecting Multiple Tasks.....	17
Filtering the Tasks.....	18
Sorting the Tasks in the Task List.....	18
Viewing a Running Process.....	19
Delegations Screen.....	21
Delegations Detail Screen.....	21
Delegating a Task.....	23
Updating a Delegation.....	24
Activating a Delegation.....	24
Deactivating a Delegation.....	25
Remove a Delegation.....	25
Settings Screen.....	26

Setting Your Server Url.....27

Setting Up Your Language.....27

AgilePoint Mobile Dashboard for iPhone

Use the AgilePoint Mobile Dashboard app to view and manage your tasks in your AgilePoint BPMS processes on your mobile device.

- View your tasks or your team's tasks.
- Complete a task.
- Quick approve, reject, or acknowledge a task.
- Cancel a task.
- Reassign or delegate a task to another user.
- Filter and sort your task list.

This document covers the Windows Dashboard app for iPhone.

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.

Copyright

Copyright © 2013 AgilePoint, Inc. All rights reserved.

Trademarks

AgilePoint, Inc. and AgilePoint's products are trademarks of AgilePoint Inc. References to other companies and their products use trademarks owned by the respective companies and are for reference purpose only.

Government Rights Legend

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.

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

Tel: (650) 968 - 6789

Fax: (650) 968 - 6785

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.

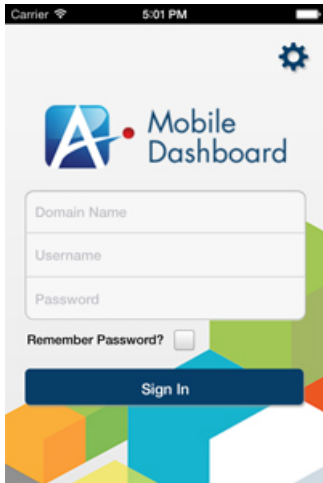
Contacting Customer Support

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

Sign In Screen

Authenticates you to AgilePoint Mobile Dashboard app.



Navigation

1. On your mobile device, open the AgilePoint Mobile Dashboard app.

Field Definitions

Field Name	Definition
Settings (⚙️)	<p><u>Opens the Following Window:</u></p> <p>Settings Screen</p> <p><u>Purpose of this Window:</u></p> <p>Specifies the settings for your AgilePoint Mobile Dashboard app.</p>
Domain	<p><u>Definition:</u></p> <p>The authentication domain.</p> <p><u>Allowed Values:</u></p> <p>A valid domain.</p> <p><u>Default Value:</u></p> <p>None</p>
User Name	<p><u>Definition:</u></p>

Field Name	Definition
	<p>Your AgilePoint user name.</p> <p><u>Allowed Values:</u></p> <p>A user name registered in AgilePoint Server.</p> <p><u>Default Value:</u></p> <p>None</p>
Password	<p><u>Definition:</u></p> <p>The password for the authentication account.</p> <p><u>Allowed Values:</u></p> <p>A valid password.</p> <p><u>Default Value:</u></p> <p>None</p>
Remember Password	<p><u>Definition:</u></p> <p>Specifies whether to store your user name and password on your device.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> • Selected - Stores your user name and password on your device, so you do not have to sign in. • Deselected - Does not stores your user name and password. <p><u>Default Value:</u></p> <p>Deselected</p>

Logging in to the AgilePoint Mobile Dashboard

To log in into the AgilePoint Mobile Dashboard app, do the following.

Prerequisites

- To sign in for the first time on the AgilePoint Mobile Dashboard application, you must set up your [Server URL](#). To find your Server URL, contact your AgilePoint system administrator.

Navigation

1. On your mobile device, open the AgilePoint Mobile Dashboard app.

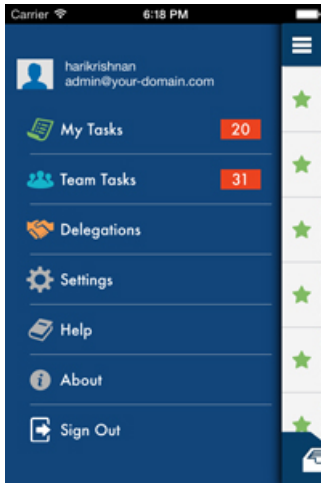
Instructions

1. Complete the following fields.

Field Name	Definition
Domain	<p><u>Definition:</u></p> <p>The authentication domain.</p> <p><u>Allowed Values:</u></p> <p>A valid domain.</p> <p><u>Default Value:</u></p> <p>None</p>
User Name	<p><u>Definition:</u></p> <p>Your AgilePoint user name.</p> <p><u>Allowed Values:</u></p> <p>A user name registered in AgilePoint Server.</p> <p><u>Default Value:</u></p> <p>None</p>
Password	<p><u>Definition:</u></p> <p>The password for the authentication account.</p> <p><u>Allowed Values:</u></p> <p>A valid password.</p> <p><u>Default Value:</u></p> <p>None</p>

Sidebar Menu


Displays the menu options on AgilePoint Mobile Dashboard app.



Navigation

1. Tap the **Sidebar Menu** ()

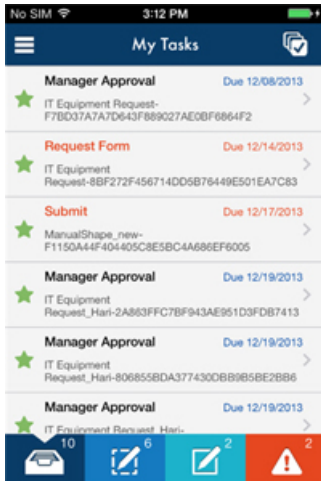
Field Definitions

Field Name	Definition
My Tasks / Team Tasks	<p><u>Opens the Following Window:</u></p> <p>My Tasks / Team Tasks</p> <p><u>Purpose of this Window:</u></p> <p>Shows a list of all of the AgilePoint tasks assigned to you or your team.</p>
Delegations	<p><u>Opens the Following Window:</u></p> <p>Delegations Screen</p> <p><u>Purpose of this Window:</u></p> <p>Delegation is the temporary reassignment of tasks to another user — usually a peer or subordinate. Delegation can be used, for example, to temporarily reassign a task when a user is out of the office.</p>
Settings ()	<p><u>Opens the Following Window:</u></p>


Field Name	Definition
	Settings Screen <u>Purpose of this Window:</u> Specifies the settings for your AgilePoint Mobile Dashboard app.
Help	<u>Function:</u> Displays quick reference help for the app.
About	<u>Function:</u> Displays details about the app, publisher, and version.
SignOut	<u>Function:</u> Logs you out of the AgilePoint Mobile Dashboard app.

My Tasks / Team Tasks






Shows a list of all of the AgilePoint tasks assigned to you or your team.




Navigation

1. Tap the **Sidebar Menu** (.
2. On the sidebar menu, tap **My Tasks** or **Team Tasks**.

Field Definitions

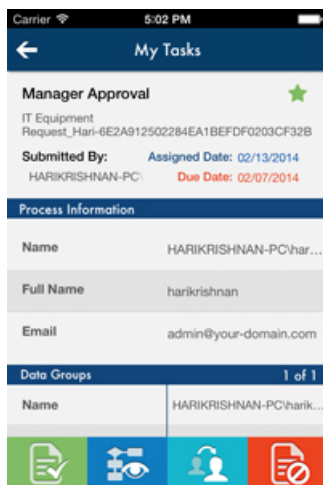
Field Name	Definition
All Tasks ()	<u>Function:</u> Displays a list of all your tasks and team tasks.
Task Pool ()	<u>Function:</u> Displays all the unassigned tasks in a pool.
Assigned Tasks ()	<u>Function:</u> Displays only the tasks assigned to specified user.
Overdue Tasks ()	<u>Function:</u> Displays the tasks that have not been completed by the time they are due.
Multiple Tasks ()	<u>Function:</u>

Field Name	Definition
	Displays multiple tasks in the task list.
Sidebar Menu 	<p><u>Opens the Following Window:</u></p> <p>Sidebar Menu</p> <p><u>Purpose of this Window:</u></p> <p>Displays the menu options on AgilePoint Mobile Dashboard app.</p>


Task Detail Screen

Shows the details for a task. If Mobile View is enabled for the task in AgilePoint Enterprise Manager, this screen also displays options to complete the task.

For more information, see [Mobile View Configuration](#)







Navigation

1. Tap the **Sidebar Menu** .
2. On the sidebar menu, tap **My Tasks** or **Team Tasks**.
3. On the Task List, tap your task.

Field Definitions

Fields that appear in the task detail vary based on the Mobile View settings for the task in AgilePoint Envision. For more information, see [Mobile View Configuration](#)

Field Name	Definition
Complete Task 	<u>Function:</u> Completes the task.
Process Viewer 	<u>Function:</u> Displays the process viewer for the process.
Reassign Task 	<u>Function:</u> Assigns the task to a new participant.
Cancel Task 	<u>Function:</u> Cancels the task.


Completing a Task

To complete a task, do the following.


Good to Know

- The options that appear on the Task Detail screen, such as Approve, Reject, Acknowledge, and Comments, depend upon the Mobile View options set for the task in AgilePoint Envision.

Navigation

1. Tap the **Sidebar Menu** .
2. On the sidebar menu, tap **My Tasks** or **Team Tasks**.
3. On the Task List, tap your task.

Instructions

1. Depending upon the settings for the task, options may appear to **Approve** or **Reject** the task, or to **Acknowledge** the task. Select the appropriate option as needed for your task.
2. If a **Comments** field appears, enter comments as needed for your task.
3. Tap **Complete Task** .


Cancelling a Task

To cancel a task, do the following.

Prerequisites

- You must have access rights to cancel the task.

Navigation

1. Tap the **Sidebar Menu** ()
2. On the sidebar menu, tap **My Tasks** or **Team Tasks**.
3. On the Task List, tap your task.

Instructions

1. Tap **Cancel Task** ()

Reassigning a Task

To reassign a task in the task list to another participant, do the following.


Prerequisites

- You must have access rights to reassign the task.



Good to Know

- You can only reassign a task that is assigned to you.

Navigation

1. Tap the **Sidebar Menu** ()
2. On the sidebar menu, tap **My Tasks** or **Team Tasks**.
3. On the Task List, tap your task.

Instructions

1. Tap **Reassign Task** ()
2. On list of AgilePoint users, tap your participant.
3. Tap **Reassign Complete** ()


Selecting Multiple Tasks

To select multiple tasks in the task list, do the following.

Navigation

1. Swipe the **Main Menu Handle** ()
2. On the **Main Menu**, tap **My Tasks** or **Team Tasks**.


Instructions

1. Tap **Multiple Tasks** ()
2. Tap your tasks in the task list.

Filtering the Tasks





To filter the tasks in the task list, do the following.

Navigation

1. Tap the **Sidebar Menu** ()
2. On the sidebar menu, tap **My Tasks** or **Team Tasks**.

Instructions


1. Tap one of the following task types to filter the tasks as required.

Field Name	Definition
All Tasks ()	<u>Function:</u> Displays a list of all your tasks and team tasks.
Task Pool ()	<u>Function:</u> Displays all the unassigned tasks in a pool.
Assigned Tasks ()	<u>Function:</u> Displays only the tasks assigned to specified user.
Overdue Tasks ()	<u>Function:</u> Displays the tasks that have not been completed by the time they are due.

Sorting the Tasks in the Task List

To sort the tasks in the task list, do the following.

Navigation

1. Tap the **Sidebar Menu** ()
2. On the sidebar menu, tap **My Tasks** or **Team Tasks**.

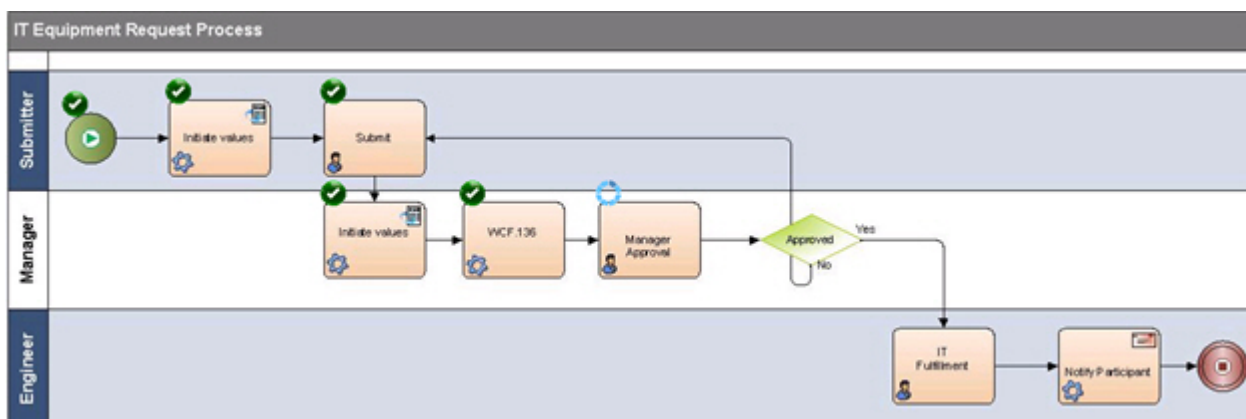
Instructions

1. On the task list, swipe down to see the sorting options.
2. Tap one of the following options to sort the tasks.


Field Name	Definition
Due Date	<u>Function:</u> Sorts the tasks by due date.
Priority (★)	<u>Definition:</u> Specifies the importance of a task. <u>Allowed Values:</u> The labels are as follows: <ul style="list-style-type: none"> • Low Priority (★) • Medium Priority (★) • High Priority (★)
Most Recent	<u>Function:</u> Sorts the tasks by most recent first.
Sort By User (👤)	<u>Function:</u> Sorts the tasks by user name.

Viewing a Running Process


Use the Process Viewer to view a running process in real-time. To open the Process Viewer, do the following.



Navigation

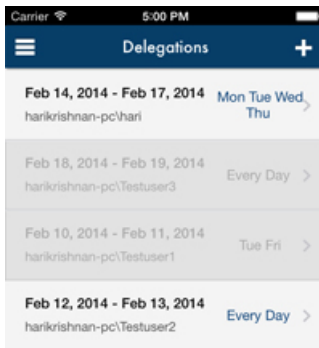
1. Tap the **Sidebar Menu** .
2. On the sidebar menu, tap **My Tasks** or **Team Tasks**.
3. On the Task List, tap your task.

Instructions

1. Tap **Process Viewer** .
2. Tap any AgileShape to view details.

Delegations Screen

Shows your delegations. Delegation is the temporary reassignment of tasks to another user — usually a peer or subordinate. Delegation can be used, for example, to temporarily reassign a task when a user is out of the office.



Navigation

1. Tap the **Sidebar Menu** (☰).
2. On the sidebar menu, tap **Delegations**.



Field Definitions

Field Name	Definition
Create Delegation (+)	<p><u>Opens the Following Window:</u></p> <p>Delegations Detail Screen</p> <p><u>Purpose of this Window:</u></p> <p>Creates or modifies a delegation.</p>

Delegations Detail Screen

Creates or modifies a delegation.

Navigation

1. Tap the **Sidebar Menu** (.
2. On the **Main Menu**, tap **Delegations**.
3. Do one of the following:
 - To create a new delegation, tap **Create Delegation** (.
 - To modify an existing delegation, tap the delegation in the list.

Field Definitions

Field Name	Definition
Delegate To	<p><u>Definition:</u></p> <p>Specifies a participant to whom to temporarily reassign a task when the assigned participant is unavailable — for example, if the participant is out of the office.</p> <p><u>Allowed Values:</u></p> <p>A valid participant name.</p> <p><u>Default Value:</u></p> <p>None</p>
From	<p><u>Definition:</u></p> <p>Specifies the date the delegation starts.</p> <p><u>Allowed Values:</u></p> <p>A valid date in the format [mm dd, yyyy].</p> <p><u>Default Value:</u></p>

Field Name	Definition
	<p>None</p> <p><u>Example:</u></p> <p>11 30, 2013</p>
To	<p><u>Definition:</u></p> <p>Specifies the date the delegation ends.</p> <p><u>Allowed Values:</u></p> <p>A valid date in the format [mm dd, yyyy].</p> <p><u>Default Value:</u></p> <p>None</p> <p><u>Example:</u></p> <p>11 30, 2013</p>
Activate Delegation	<p><u>Definition:</u></p> <p>Specifies whether a delegation is active.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> • Selected - The delegation is active. • Deselected - The delegation is not active. <p><u>Default Value:</u></p> <p>Selected</p>
Coverage	<p><u>Definition:</u></p> <p>Specifies whether the delegation applies to the specified days.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none"> • Deselected - Disables the delegation for the specified days. • Selected - Enables the delegation for the specified days. <p><u>Default Value:</u></p> <p>Deselected</p>


Delegating a Task

To create a delegation, do the following.


Good to Know

- If the delegation is created in AgilePoint Enterprise Manager, you must manually [activate the delegation](#).

Navigation

1. Tap the **Sidebar Menu** ()
2. On the sidebar menu, tap **Delegations**.


Instructions

1. Tap **Create Delegation** ()
2. Complete the fields on the [Delegations](#) page as required.
3. Tap **Create**.

Updating a Delegation

To update a delegation, do the following.

Navigation

1. Tap the **Sidebar Menu** ()
2. On the sidebar menu, tap **Delegations**.


Instructions

1. In the **Delegations** list, tap your delegation.
2. On the [Delegations](#) page, make the changes you want.
3. Tap **Update**.

Activating a Delegation

To activate a delegation, do the following.

Navigation

1. Tap the **Sidebar Menu** ()
2. On the sidebar menu, tap **Delegations**.


Instructions

1. In the **Delegations** list, tap your delegation.
2. Select **Activate delegation**.

Deactivating a Delegation

To deactivate a delegation, do the following.

Navigation

1. Tap the **Sidebar Menu** ()
2. On the sidebar menu, tap **Delegations**.


Instructions

1. In the **Delegations** list, tap your delegation.
2. Deselect **Activate delegation**.


Remove a Delegation

To remove a delegation, do the following.

Navigation

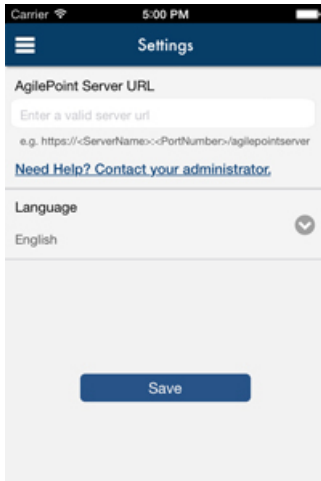
1. Tap the **Sidebar Menu** ()
2. On the sidebar menu, tap **Delegations**.

Instructions


1. Swipe left on your task.
2. Tap **Delete Delegation** ()

Settings Screen

Specifies the settings for your AgilePoint Mobile Dashboard app.



Navigation

1. Tap the **Sidebar Menu** .
2. On the sidebar menu, tap **Settings**.

Field Definitions


Field Name	Definition
AgilePoint Server URL	<p><u>Definition:</u></p> <p>The URL of your AgilePoint Server.</p> <p><u>Allowed Values:</u></p> <p>A valid AgilePoint Server URL.</p> <p><u>Default Value:</u></p> <p>None</p>
Language	<p><u>Definition:</u></p> <p>Specifies the language for the AgilePoint mobile app.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none">• English

Field Name	Definition
	<ul style="list-style-type: none"> Spanish Japanese Dutch Chinese(Traditional) Chinese(Simplified) Arabic <p><u>Default Value:</u></p> <p>None</p>

Setting Your Server Url

To set your AgilePoint Server URL, do the following.

Navigation

1. Tap the **Sidebar Menu** .
2. On the sidebar menu, tap **Settings**.


Instructions

1. In the **Server URL** field, enter the URL for your AgilePoint Server.
For more information, see:
 - [Finding Your AgilePoint Service URL on Premises](#)
 - [Finding Your AgilePoint Service URL in Azure](#)
2. Tap **Save**.

Setting Up Your Language

To set up your language, do the following.

Navigation

1. Tap the **Sidebar Menu** .
2. On the sidebar menu, tap **Settings**.

Instructions

1. Complete the following field.

Field Name	Definition
Language	<p><u>Definition:</u></p> <p>Specifies the language for the AgilePoint mobile app.</p> <p><u>Allowed Values:</u></p> <ul style="list-style-type: none">• English• Spanish• Japanese• Dutch• Chinese(Traditional)• Chinese(Simplified)• Arabic <p><u>Default Value:</u></p> <p>None</p>

2. Tap **Save**.