



# Mobile Application Support

**AgilePoint BPMS v5.0 R2 SP1**

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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.

## Copyright

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

## Opening the Documentation Library

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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

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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

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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

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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.

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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

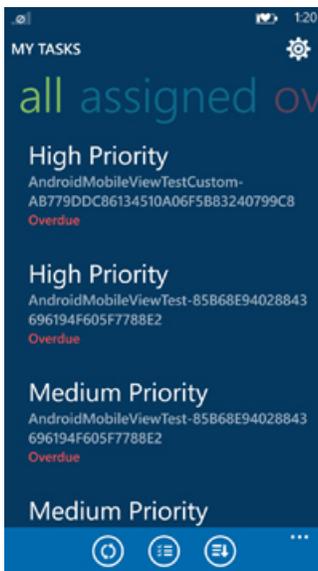
This document describes the out of the box features that AgilePoint BPMS provides to supports mobile applications.

# AgilePoint Mobile Dashboard for Windows Phone

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 Windows Phone.



## More Information

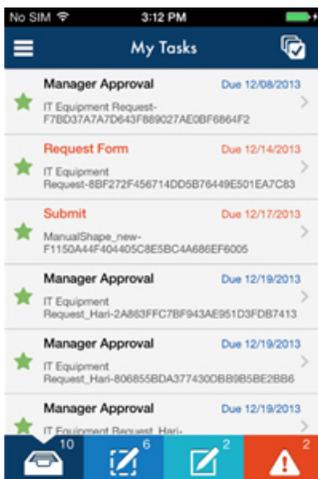
- [AgilePoint Mobile Dashboard for Windows Phone User Guide.](#)

# 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.



## More Information

- [AgilePoint Mobile Dashboard for iPhone User Guide.](#)

# REST API

This document describes the AgilePoint REST API. AgilePoint recommends this API especially for use with mobile applications. JavaScript, Java, and C# examples are provided for each method.

This API has the following endpoints. The name of your AgilePoint Server directory depends upon whether you are using AgilePoint on premises or AgilePoint for Azure:

- **Workflow API** - [https://\[qualified machine name\]:\[port\]/\[AgilePointServer or AgilePointService\]/Workflow](https://[qualified machine name]:[port]/[AgilePointServer or AgilePointService]/Workflow)
- **Administration API** - [https://\[qualified machine name\]:\[port\]/\[AgilePointServer or AgilePointService\]/Admin](https://[qualified machine name]:[port]/[AgilePointServer or AgilePointService]/Admin)



**Note:** For your data security, AgilePoint strongly recommends using SSL (https) for all communication with the AgilePoint REST API.

## More Information

- [REST API Guide](#).

# 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.

## More Information

- [AgilePoint Web Application Project Template](#) in AgilePoint Developer.

# Creating Email Templates for Approvals

You can create an email template for the Activity Entry Email that participants will use to indicate approvals. These templates can be optimized for desktop or mobile devices.

## More Information

- [Creating Email Templates for Approvals](#) in AgilePoint Envision.