Bpm'online mobile

User guide

Simplify the future

CONTENTS

MOBILE APPLICATION

The mobile application is used to work with bpm'online on mobile devices and is a supporting tool to the primary bpm'online application. Configured mobile application can be used for meetings, exhibitions, presentations, etc.

To use a mobile application, you should perform preliminary settings.

The list of sections available in the mobile application is configured with the mobile application wizard. To reduce the synchronization time between the mobile and main applications, we recommend setting up only those sections which you will use.

CONTENTS

MOBILE APPLICATION SETUP

After you install the mobile application and log in for the first time, the application will be synchronized with your bpm'online desktop application. Depending on the mobile app operation mode (online or offline), further synchronization steps may differ.

You can set up automatic synchronization, switch workplaces and view information about the last synchronization on the mobile application settings page.

CONTENTS

SYSTEM REQUIREMENTS FOR MOBILE DEVICES

To install and use the bpm’online mobile application, the user's phone / tablet must meet the system requirements below:

Characteristics	iOS	Android
Supported version (minimal)	8.0	4.1
Recommended version	Latest version available	5.0+
Supported devices (minimal)	iPhone 5s	Nexus 7
Recommended devices	• iPhone 8 or higher; • iPad 3 or higher,	Google Pixel or higher.

SEE ALSO

- Installation and first login
- Mobile application settings

INSTALLATION AND FIRST LOGIN

Bpm’online mobile application is available on:

- The App Store for iOS users.
- The Google Play Store for Android users.

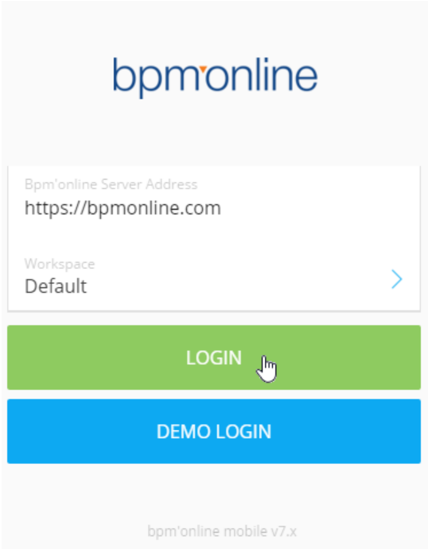
The mobile application will be synchronized with bpm'online upon first login.

ATTENTION

A signed certification authority license certificate is required to sync with bpm’online deployed “on-site”. Mobile application security policies do not support connections to sites that use self-signed certificates.

Enter the address of the bpm'online server, specify the workplace and tap the [Next] button (Fig. 1) to log in to the mobile application. If SSO is configured, you'll see the a login and password form on the provider page. If SSO is not configured, enter your login and password and tap the [Login] button.

Fig. 1 Logging in



NOTE

Connection protocols (http://, https://) are determined by the application automatically. You can specify the connection protocol manually if the application is unable to automatically determine the protocol.

After this, the mobile application will start the synchronization process with the primary bpm'online application. After the synchronization process is complete, the application becomes operational.

Tap the [Demo login] button to connect to the demo version. After this the mobile application will be synchronized with the demo database.

NOTE

Login and password are not required to access the demo version. The application opens automatically after the synchronization.

NOTE

The [Demo login] button is displayed if primary synchronization was not performed. If the synchronization with the bpm'online server has been performed, you will need to clear the application cache.

SEE ALSO

- Online/offline modes
- Mobile application settings

ONLINE/OFFLINE MODES

There are two modes available for the mobile application in bpm’online: “online” and “offline”. You can select the mode in the [Mobile application operation mode] system setting.

NOTE

Regardless of the working mode, mobile devices only display data for which the users have access permissions.

WORKING IN ONLINE MODE

If you select the **online** working mode, there is no need to manually synchronize the application. Synchronization with the bpm'online server is performed automatically, in real time, i.e., if you add a task using the mobile application, the task will be immediately displayed in the main application and vice versa.

NOTE

To work properly in the “online” mode, you need a stable Internet connection to the bpm’online server.

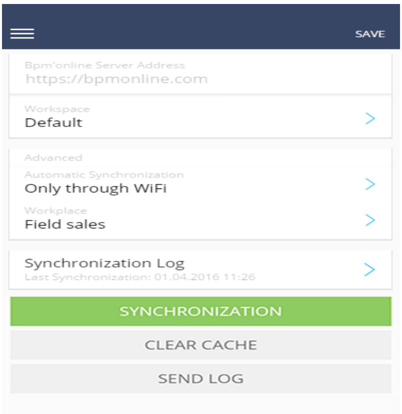
WORKING IN OFFLINE MODE

In **offline** mode, the mobile application user should synchronize periodically with the main bpm’online application. Changes made to the mobile application are saved on the bpm'online server only after synchronizing with the main application. If there were any conflicts during synchronization,

To synchronize manually while in “offline” mode:

1. Tap the button and select [Settings].
2. On the opened page, tap the [Synchronization] button (Fig. 2).

Fig. 2 Running synchronization in the mobile application



As a result, the data from the main application will be displayed in the mobile application and the main application will display the records that were created using the mobile application.

ATTENTION

If changes were made to the same record (for example, the duration of the activity) in both the desktop and the mobile application, then the conditions for saving these changes after synchronization depend

> on the order in which they were made. If the record was modified in the desktop application first, and then in the mobile application, the changes made in the mobile application will be saved during the synchronization. If changes in the main application are made during or after the synchronization, then they will be saved in the system.

Synchronization with the main application is performed by the OData protocol.

For example, there is a business process logic in the main application according to which if the opportunity advances to the next stage, an activity is automatically generated in the system. When the opportunity moves to such stage, the synchronization with the main application will be performed. The business logic of creating an activity will be handled on the main application, then the created activity will be displayed in the mobile application.

A user working in the "online" mode will not notice this because the application will be working directly with the server. The new activity will appear in the mobile application immediately after the corresponding business process completes and without the need for manual synchronization. Users who work in the "offline" mode will need to run synchronization for the activity to be displayed.

Synchronization log

The synchronization log is available only in the offline mode. The log displays the date of the last synchronization and any conflicts that occurred when records were last synchronized with the desktop application.

The **[Log]** tab includes a list of all found conflicts. Conflict details are specified for each record individually.

The **[Pending changes]** tab includes all data that were not yet exported to the desktop application during the last synchronization attempt.

Depending on the conflict, clicking the record in the log will display the following actions:

[Revert changes] - undo all changes and delete the record from the synchronization log. If triggered, the local copy of this record will be overwritten with a server copy. For example, your system administrator took away your rights to edit the account's type. A conflict occurs once you edit the [Type] field and attempt to synchronize with the desktop application. To resolve this conflict, you can undo the changes and re-synchronize. A detailed example of a synchronization conflict due to insufficient rights is described in a separate article. Read more >>>

[Go to record] - opens the record edit page. For example, a field that could previously be left blank is now required. Creating a new account without populating this field will result in a conflict during the next synchronization attempt. To resolve this conflict, open the record edit page, populate the required field, and re-synchronize.

[Request access] - opens your preferred mobile mail client and creates a template of a request to provide the necessary access rights to complete the synchronization.

> NOTE
> To send requests to system administrators, please make sure that their correct email address is specified in the "Email for sending permission requests" system setting.

SEE ALSO

- Mobile application settings

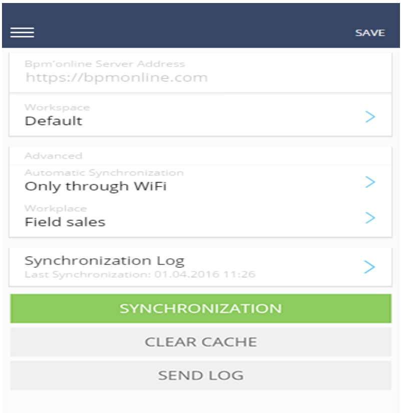
MOBILE APPLICATION SETTINGS

Use the mobile application settings page to:

- Specify the connection parameters with the main bpm'online server

- Select workplace and synchronize the mobile application
- Log out of the application
- Clear application cache (Fig. 3)

Fig. 3 Mobile application settings page



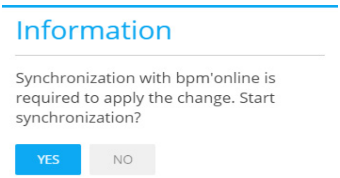
NOTE

To connect to a different bpm'online server, enter the address in the [Bpm'online server address] field and fill in the [Username] and [Password] fields. Then tap the [Synchronization] button.

SELECTING A WORKPLACE

To switch workplaces while working in the mobile application, tap the [Workplace] field and select one of the available workplaces. The mobile application will need to be synchronized again after switching to a different workplace (Fig. 4).

Fig. 4 Synchronizing the mobile application after switching to a new workplace



NOTE

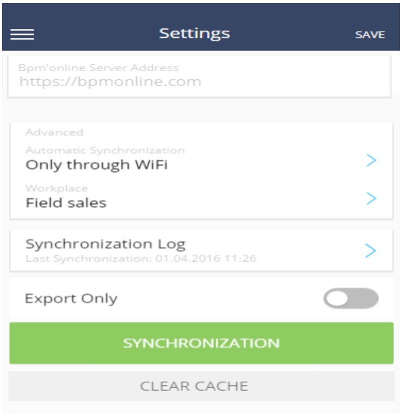
The workplaces of the mobile application are set up in the Mobile Application Wizard, which is available in the main application.

HOW TO CLEAR CACHE AND SYNCHRONIZE

During the synchronization with the primary bpm'online application, the database structure and other information is downloaded by the mobile application.

If the database structure changes (when adding new sections and details to the mobile application), the structure is updated in the mobile application. For proper synchronization of the modified structure, delete the outdated database structure and data that are stored in the cache of the mobile application. To do so, tap the [Clear cache] button (Fig. 5).

Fig. 5 Clearing mobile application cache



NOTE

Clearing the cache will discard all changes in the mobile application that were not synchronized with the main application. It is recommended to run the synchronization before clearing the cache.

SEE ALSO

- Online/offline modes

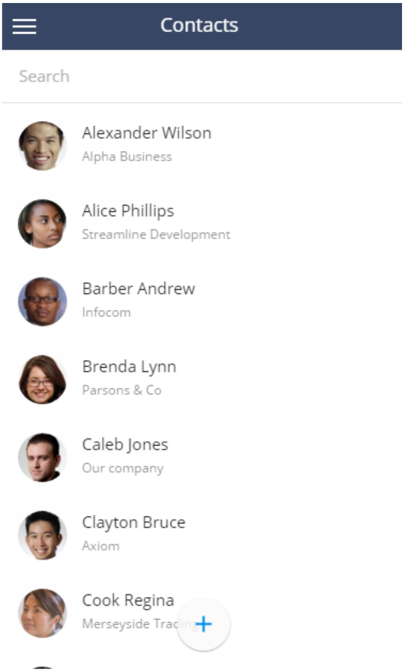
VIDEO TUTORIALS

- Mobile app wizard

MOBILE APPLICATION INTERFACE

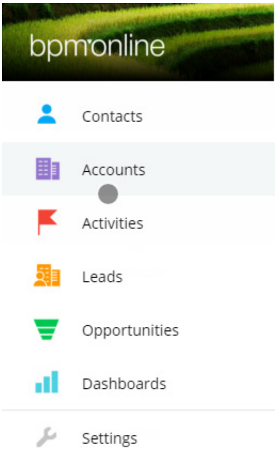
After synchronizing with bpm'online server you can start working with mobile application (Fig. 6).

Fig. 6 Mobile application workplace



The main menu (Fig. 7) is accessed by tapping  and is used to move between sections of mobile application.

Fig. 7 Mobile application main menu



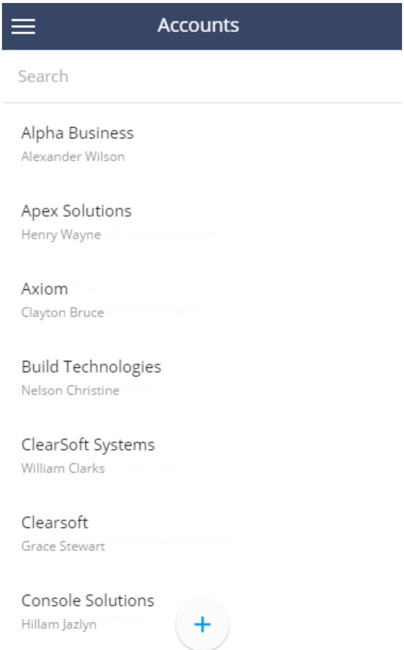
The main menu of the mobile application contains a list of sections that can be configured in the mobile application wizard and [Settings] menu.

CONTENTS

MOBILE APPLICATION LIST

The mobile application list (Fig. 8) contains a list of section records. The list and display method are configured in the main application

Fig. 8 [Accounts] section list of mobile application



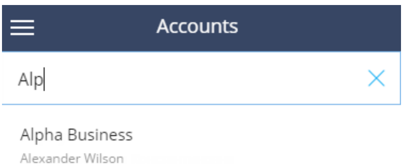
To open record, tap it in the list.

SECTION SEARCH

To search for a record in a section, enter the search parameters (for example, a fragment of a company name) in the [Search] field (Fig. 9). The search is performed in the current section and by the primary displayed column (the first column configured in the mobile application wizard).

For example, enter a fragment of an account name in the [Accounts] section and in a couple of seconds the result corresponding to the search parameters will be displayed. In the [Accounts] section the search is performed only by account name. Searching by primary account won't return any search results.

Fig. 9 Search in section list



To display all the records of a section, clear the search field.

HOW TO ADD A RECORD TO THE LIST

To create a new record, tap the button in the section list. Fill the page and save the changes.

SEE ALSO

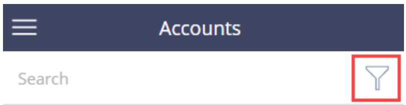
- Mobile application section page
- How to edit section records in the mobile application

MOBILE APPLICATION FILTERS

You can filter records in bpm'online mobile app sections and details by the values specified in one or more columns. For example, using the filters you can quickly display all companies of a specific type or activities with a certain status and priority.

To access the filter, tap the button to the right of the search field (Fig. 10) of the section or detail list. As a result, a filter page will open, where you can set up your filter.

Fig. 10 The filter button in a section



NOTE

If you set a filter in a detail of one of the section records, same filter will be set for this detail in other records of this section.

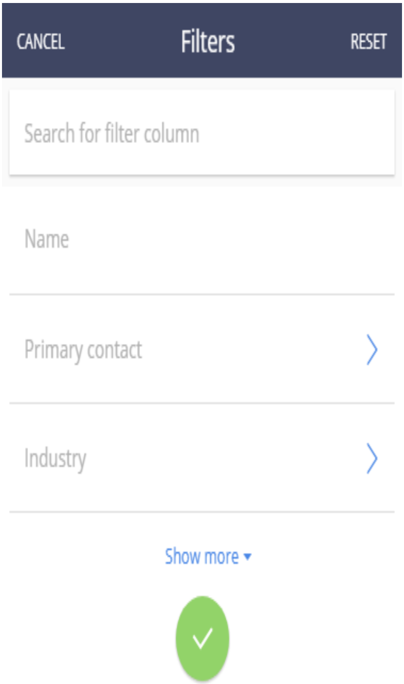
NOTE

In the [Activities] section, the filter is available in the list view only.

THE FILTER PAGE

Use the filter page (Fig. 11) to set up filter conditions. Tap a column that you want to filter records by and specify the filter value.

Fig. 11 The filter page



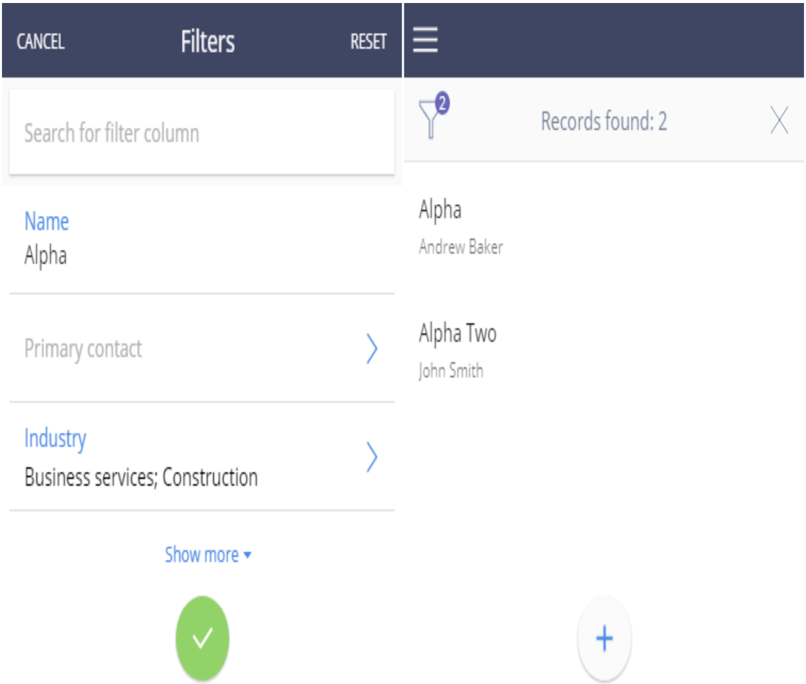
When opened, the filter page displays the same columns as the corresponding section page. If the application is in the online mode, tap [Show more] to display all section columns. In the offline mode, only preliminary configured columns will be displayed.

NOTE
Use the [Search] field at the top of the filter page to quickly locate the needed columns.

NOTE
The columns in the section record page can be configured in the Mobile application wizard in the System designer of the desktop application.

After selecting the filter values, tap  to apply the filter. Filtered records will be displayed in the section or detail list (Fig. 12).

Fig. 12 Applying filters in a section



The number at the top right of the funnel icon represents the number columns used in the currently applied filter.

NOTE

If a filter uses several columns, then only the values that match all filter conditions will be displayed after applying the filter (similar to using the "AND" logical operator to group filter conditions in the desktop application).

Tap the button to edit the filter condition.

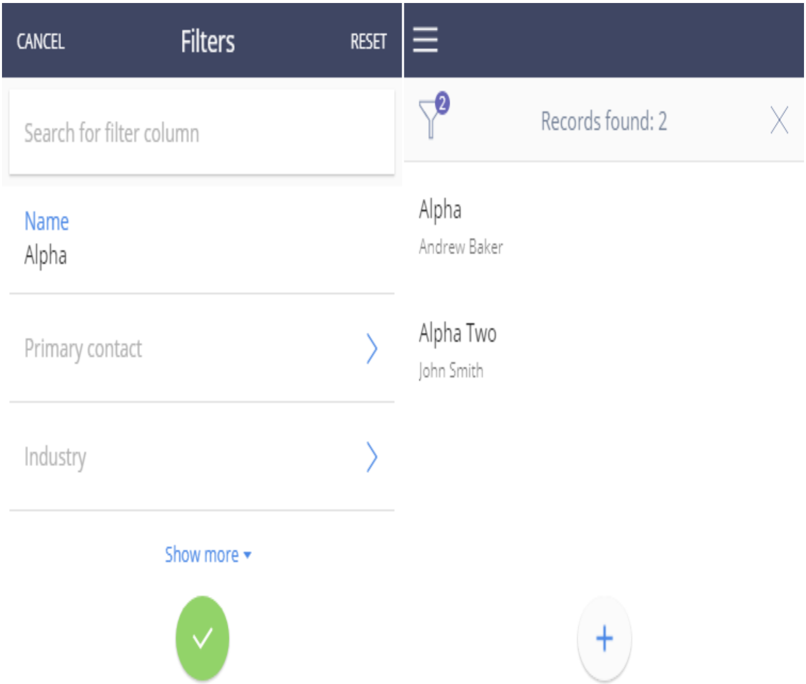
Tap the button to remove the filter.

The filter settings will persist after updating the page or switching sections. The filters will reset upon logout.

TEXT COLUMN FILTERS

Tap a text column on the filter page and enter the filter value (fully or partially) using keyboard (Fig. 13).

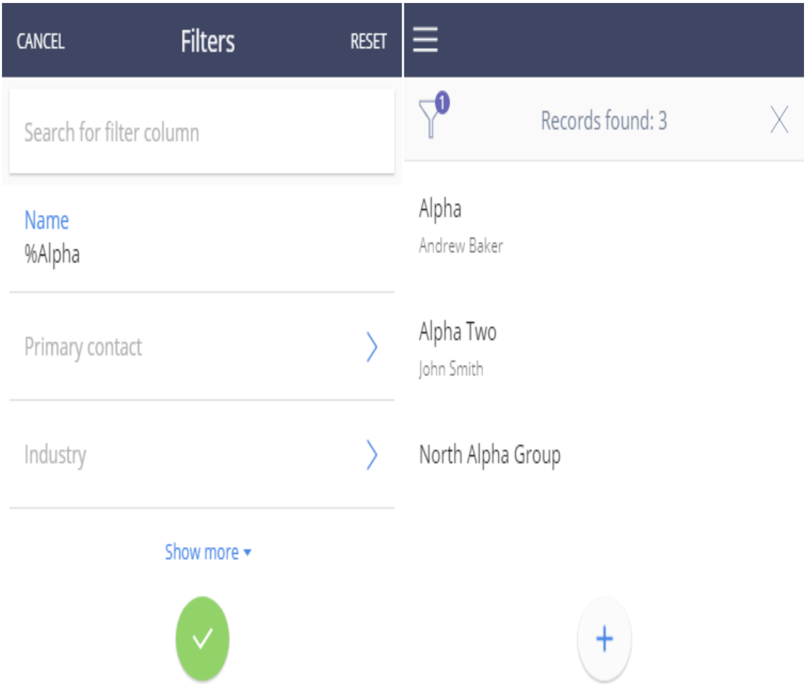
Fig. 13 Filtering by a text column



By default, all text column filters use the “starts with” condition. This means, that to match a text field filter, the value of a corresponding record column must start with the text specified on the filter page. For example, if you enter the “Alpha” value in the [Name] column of the Account filter and apply the filter, all companies with the name starting with “Alpha” will be displayed.

Use the “%” character to set “wildcards” filter values. For example, in the [Accounts] section, enter the "%Global" as the value of a [Name] column filter to display all companies that contain “Global” in their names (Fig. 14).

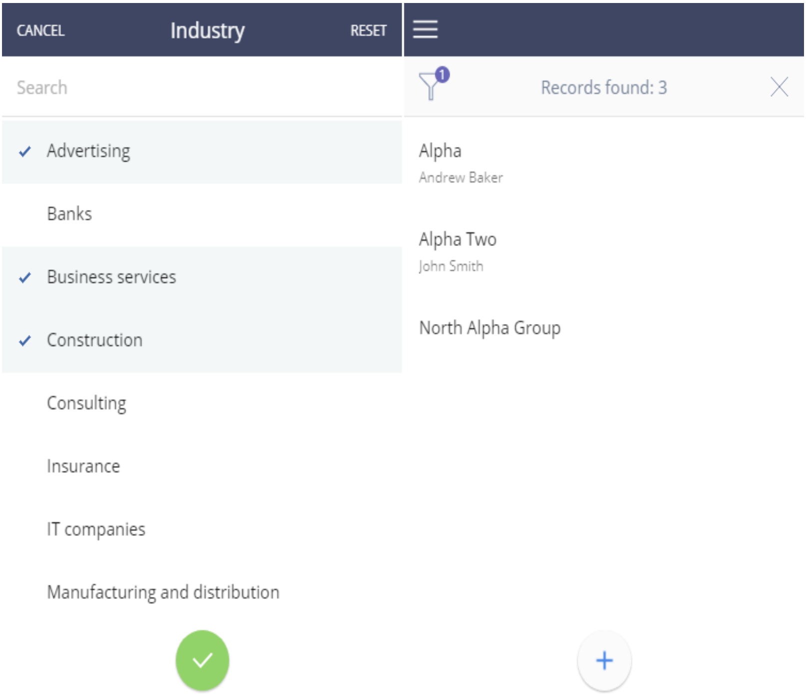
Fig. 14 Using the"%" character to specify text filter values



LOOKUP COLUMN FILTERS

Tap a lookup column and select the filter values from the list of the corresponding lookup records. If a several lookup values are selected, the records that contain any of selected values will match this filter. For example, you can view all accounts whose industry is either "Advertising", "Business services" or "Construction" (Fig. 15).

Fig. 15 Filtering by a lookup column

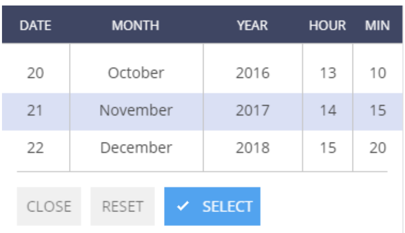


DATE COLUMN FILTERS

The filter by the date column can be set as a date range manually via date/time data picker or selected from presets.

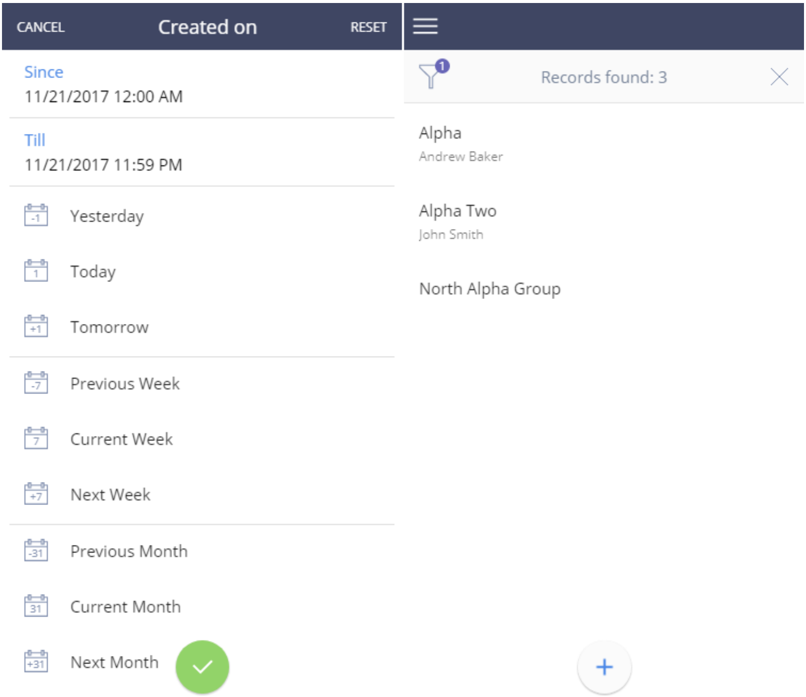
To select date via the **date picker** (Fig. 16), tap the [Since] and/or [Till] field, select date and time and tap the [Select] button. To cancel the operation, tap the [Close] button and to clear a filter field, tap the [Reset button].

Fig. 16 Date/time picker for the [Since] and [Till] fields



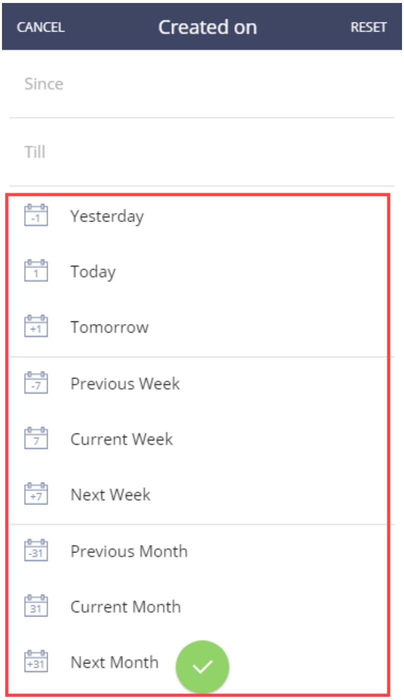
As a result, after applying the filter, bpm'online will display a list of records, where corresponding date value falls within the specified filter range. For example, you can view all accounts created from 10/15/2017 and 11/2/2017.(Fig. 17)

Fig. 17 The date column filtering



Date/time filter presets (Fig. 18) contain most commonly used filter settings.

Fig. 18 Date/time filter presets

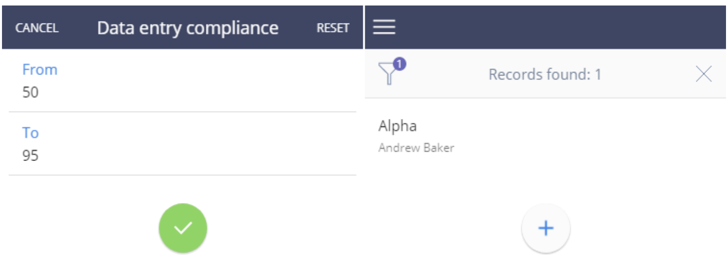


For example, you can view all activities that are due next week.

NUMERIC COLUMN FILTERS

The filter value for the number column is selected as a range of numbers. To enter filter value, tap it and specify the boundaries of the numeric range in the [From] and/or [To] field, using keyboard. For example, you can view all contacts whose profile is from 50 to 95 percent complete (Fig. 19).

Fig. 19 The numeric column filtering



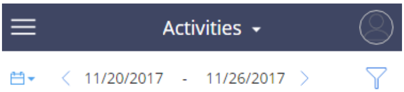
QUICK FILTERS IN THE [ACTIVITIES] SECTION

In addition to the standard filter , the [Activities] section has two "quick filters": by activity start/end dates and by owner. Quick filters are permanently displayed at the top of the section in both list and the calendar views.

> **NOTE**
> Filtering by owner is described in the "Viewing the calendar of another owner." article.

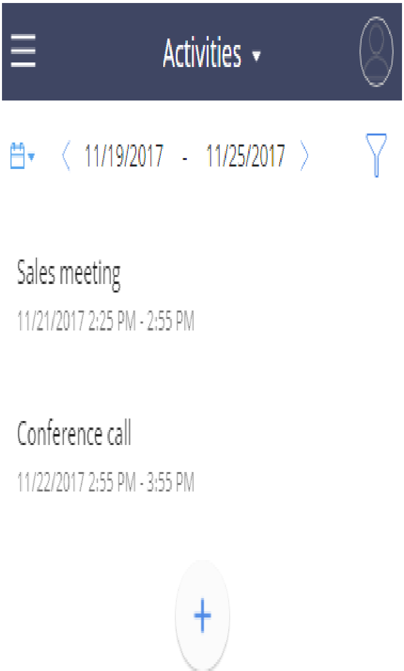
The "Period" filter manages the period for which the calendar is shown. You can set the date manually, by tapping or at the top of the page (Fig. 20). You can also access filter presets by tapping (Fig. 20).

Fig. 20 Start/end date in the [Activities] section



The standard filter settings are applied in parallel with the quick filters. For example, you can display all activities for the "Alpha" company in the previous week, by selecting the "Previous week" quick filter preset and setting a standard filter by the [Account] field (Fig. 21).

Fig. 21 Filtering of the activities

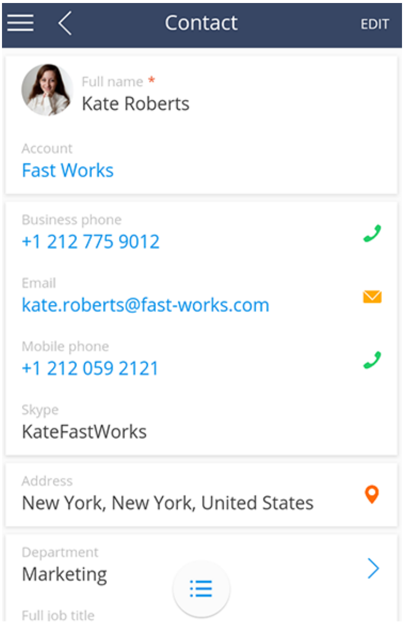


NOTE
When a standard filter is applied in the activity calendar, the quick filters become inaccessible.

MOBILE APPLICATION SECTION PAGE

To open a mobile application section page, tap a record in the section list. The section page contains columns, embedded details and standard details (Fig. 22) configured in the mobile application wizard.

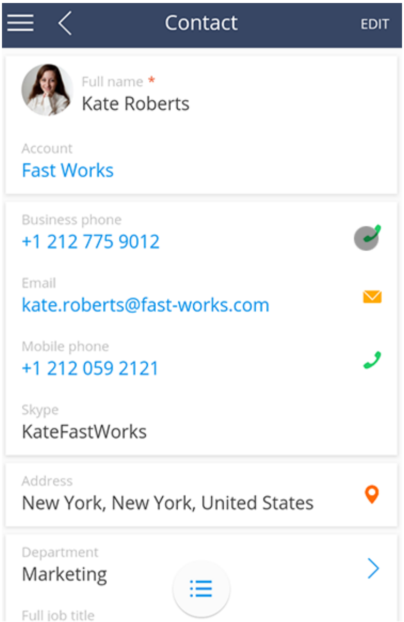
Fig. 22 [Contacts] section of mobile application



HOW TO MAKE CALLS

You can make a call by tapping the button on the right of the phone number in the communication options for a contact, account or lead (Fig. 23).

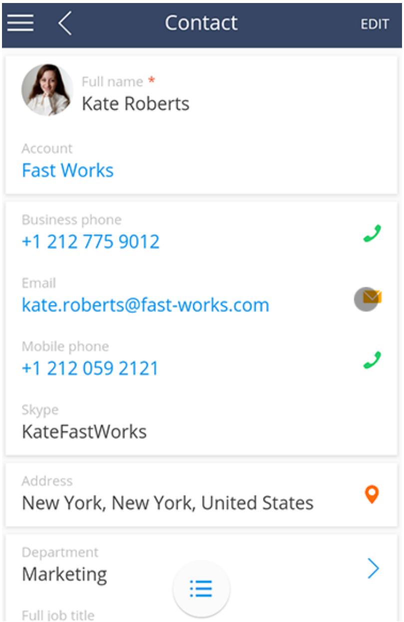
Fig. 23 Making a call



HOW TO SEND AN EMAIL

If communication options of a contact, company and lead contain email address you can send an email by tapping the ✉ button on the right of the email address (Fig. 24).

Fig. 24 Creating an email

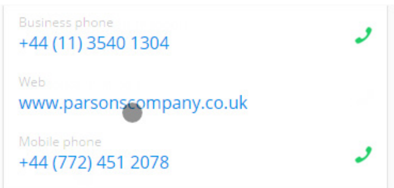


The email client installed on the mobile device opens so that you can create and send emails.

HOW TO OPEN A CONTACT'S OR ACCOUNT'S WEBSITE

You can go to the site by tapping the site's address in the (Fig. 25) [Web] column.

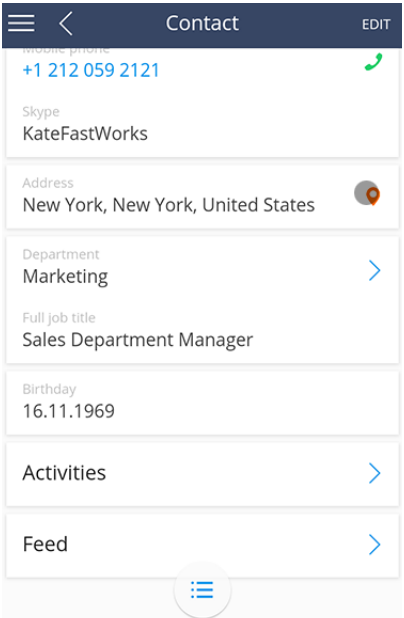
Fig. 25 Going to a website from the section's page



HOW TO VIEW THE MAP

You can open the map to view the location by tapping the button on the right of the address (Fig. 26).

Fig. 26 Viewing the map



The address of a contact, account or lead opens in Google Maps by default.

HOW TO EDIT SECTION RECORDS IN THE MOBILE APPLICATION

You can edit data either in edit mode or in normal mode (when viewing data).

In view mode, you can make changes to the page's fields and embedded columns. You can also make changes to the page using the actions menu. In section page edit mode all columns are available for editing.

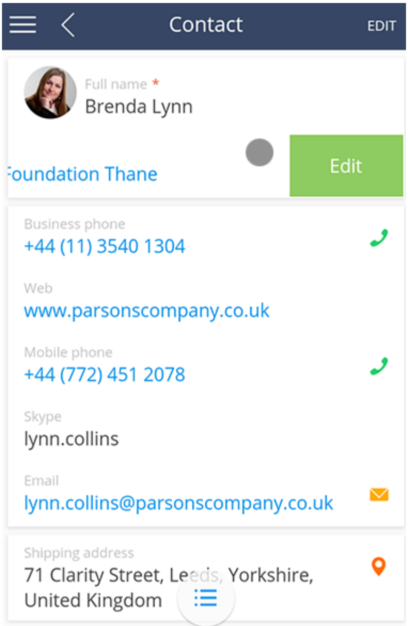
HOW TO WORK WITH A SECTION PAGE IN NORMAL MODE

In normal mode (view mode), column values containing main information and communication options are available for editing.

For example, to change the name of the company where a contact works:

1. Open the [Contacts] section of mobile application.
2. Tap and hold the [Account] column and drag it through the column to the left (Fig. 27).

Fig. 27 Editing a contact's [Account] column



3. Tap the [Change] button.
4. Select a value from the lookup.

Communication options are edited in the same way in view mode.

NOTE

To change, for example, the name of a contact, tap on the column and enter the value.

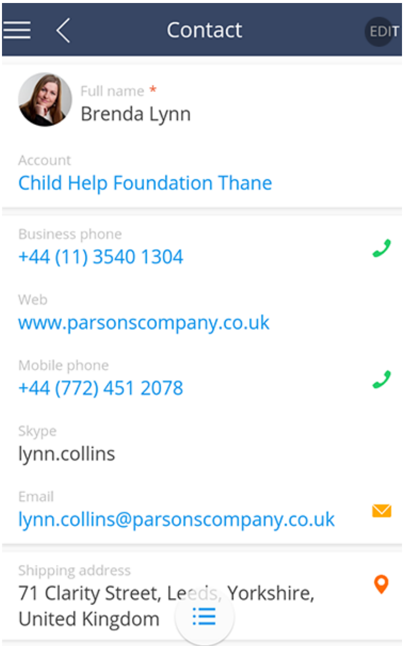
HOW TO WORK WITH A SECTION PAGE IN EDIT MODE

In edit mode all pages are available for editing.

To edit a record:

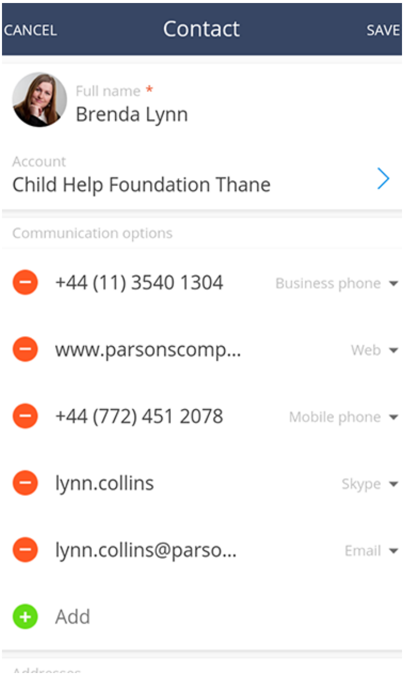
1. Tap the [Edit] button in the upper right corner of mobile application (Fig. 28).

Fig. 28 Editing records in mobile application



2. Enter the required values in the edit page (Fig. 29).

Fig. 29 Editing mobile application section page



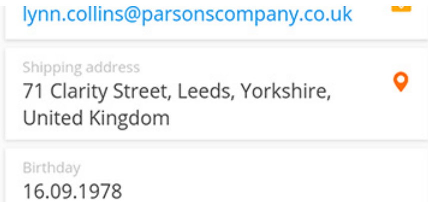
3. Tap the [Save] button.

HOW TO FILL IN LOOKUP FIELDS

All lookup fields are filled in by selecting values from the list. For example, in the [Address type] field values are selected from the lookup and values in the [Owner] field are selected from the [Accounts] section (Fig. 30).

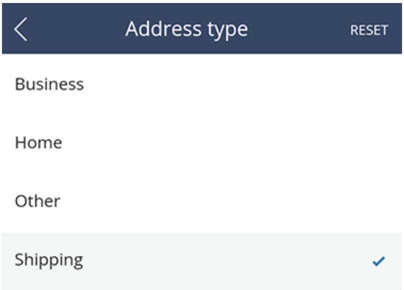
Lookup fields are identified by the › icon.

Fig. 30 Lookup fields on the section page



To fill in a lookup field, tap the field and select a value from the lookup (Fig. 31).

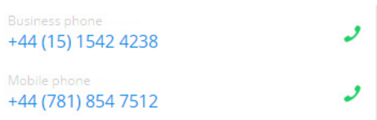
Fig. 31 Selecting a value from the lookup



HOW TO FILL IN TEXT AND NUMERIC FIELDS

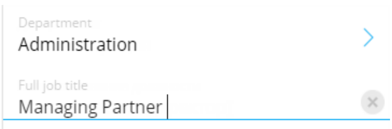
Text and numeric fields are filled with mobile device's virtual keyboard. For example, [Full job name] is a text field, and contact phone number is a numeric one (Fig. 32).

Fig. 32 Numeric fields



To fill in text and numeric fields, tap the field and enter the value (Fig. 33).

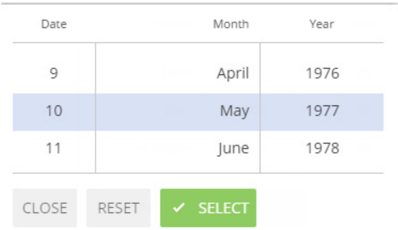
Fig. 33 Editing [Full job name] text field



FILLING IN TIME AND DATE FIELDS

Time and date fields are filled in by selecting values from calendars. For example, a date is selected from the calendar when adding contact's or account's noteworthy event. When adding a new activity from the calendar, the time should be selected as well (Fig. 34).

Fig. 34 Selecting time and date from the calendar

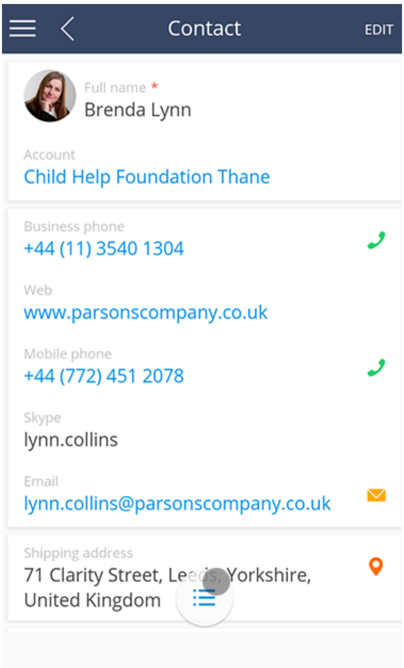


To fill in date and time fields, drag the calendar values field highlighted gray and tap [Select].

SECTION ACTIONS

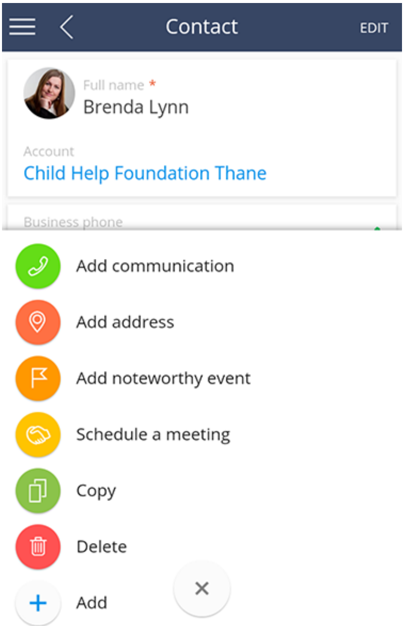
Section actions are contained in the actions menu. To expand the menu, tap the button in the bottom of the record (Fig. 35).

Fig. 35 Expanding section actions menu



The list of actions available in the actions menu depends on the opened section (Fig. 36).

Fig. 36 [Contacts] section actions menu



List of section actions in bpm'online mobile application.

Add communication option	This action is for adding communication options (phone numbers, email addresses, addresses, web pages). When entering a communication option, specify its type. The type of communication option can be changed later.
Add address	This action is for adding additional addresses. When entering the address, specify its type. The type of address can be changed later.
Add noteworthy event	This action is for adding a noteworthy event for a contact or a company.
Add product	This action is available in the [Opportunities] section of the mobile application. it is intended to add product details [Products in opportunity] detail.
Add contact	This action is available in the [Opportunities] section of the mobile application. This action is for adding a contact in the [Opportunity contact] details.
Create task (Make an appointment)	This action is for copying a new activity in the mobile application.

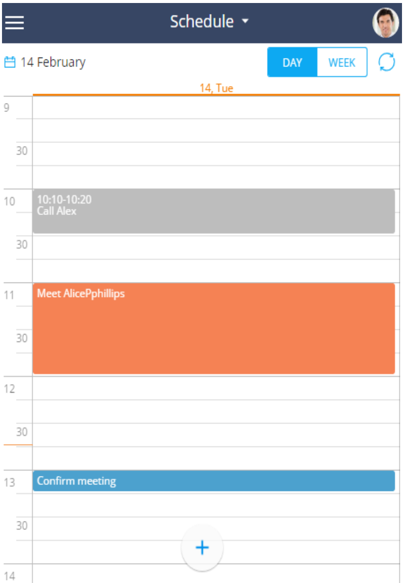
Copy	This action is for copying a section record. It can be used when adding identical records (such as tasks to different employees).
Delete	This action is for deleting a record from a section.

WORK WITH THE CALENDAR

The [Activities] section in the mobile application is synchronized with the primary bpm'online application and can be used both offline and online (Fig. 37).

Tasks can be displayed either as a virtual organizer or a drop-down list. In the **calendar** mode the tasks which you are responsible for, and those in which you were added to [Participants] detail, are displayed. In the **list** mode only the tasks which you are responsible for are displayed.

Fig. 37 [Activities] section of mobile application



CALENDAR MODE

In calendar mode, tasks are displayed in a virtual organizer. The calendar area is divided into days. The date and day of the week are displayed in the heading of each day column. The current day is highlighted.

Depending on the size of your mobile device screen, the default calendar is displayed for the current day or for the current week. If necessary, you can change the display period of the schedule.

NOTE

Due to work limitations of different mobile devices the displaying of the schedule can be different. For tablets: the schedule in the [Activities] section can be changed to weekly or daily mode. For mobile phones: in portrait view, the schedule is always displayed daily and in landscape view it is displayed weekly.

The current time is indicated with an orange line.

In the calendar area all activities are displayed in the form of rectangular blocks whose height corresponds to the duration of the activity.

In the left side of the calendar area time intervals are displayed.

ACTIVITY COLORS IN CALENDAR VIEW

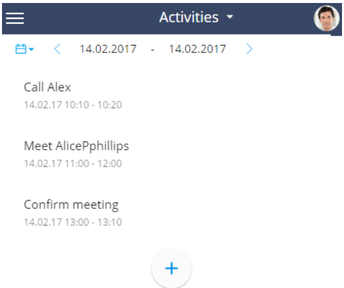
Activities in the calendar view are highlighted with different colors depending on their status and due date.

- Activities are highlighted red when their due time has already passed and are not in the final state yet.
- Activities are highlighted blue when their due time hasn't passed and are not in the final state yet (scheduled or in progress)
- Grey is used to highlight activities that are in the final state (completed or canceled).

DROP-DOWN LIST MODE

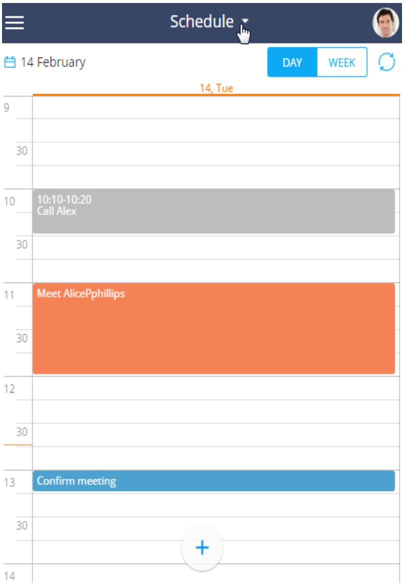
The [Activities] section can also be viewed as a drop-down list (Fig. 38).

Fig. 38 [Activities] section of mobile application as a drop-down list



You can select the view (drop-down list or calendar) in the upper area of the workspace area (Fig. 39).

Fig. 39 Selecting view in [Activities] section



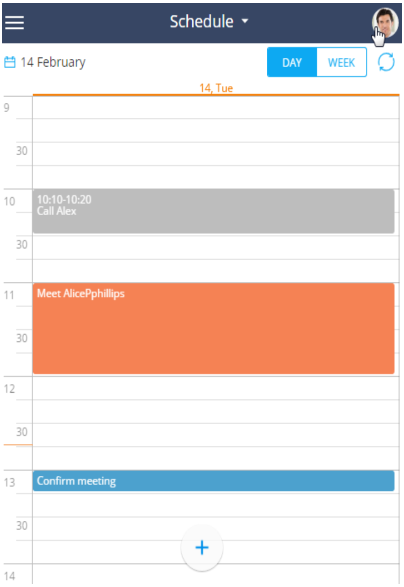
VIEWING THE CALENDAR OF ANOTHER OWNER.

The ability to view the calendar of another owner is only available in online mode.

To view the calendar of another owner:

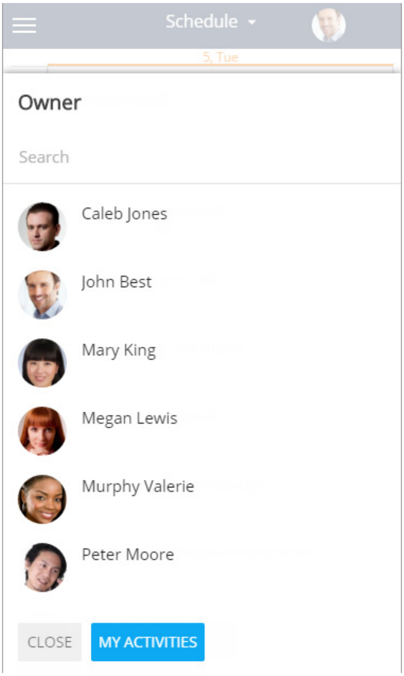
1. Tap the [Edit] button in the upper right corner of mobile application (Fig. 40)

Fig. 40 Changing owner to view the calendar



2. Select an owner in the drop-down list (Fig. 41).

Fig. 41 Selecting an owner to view the calendar

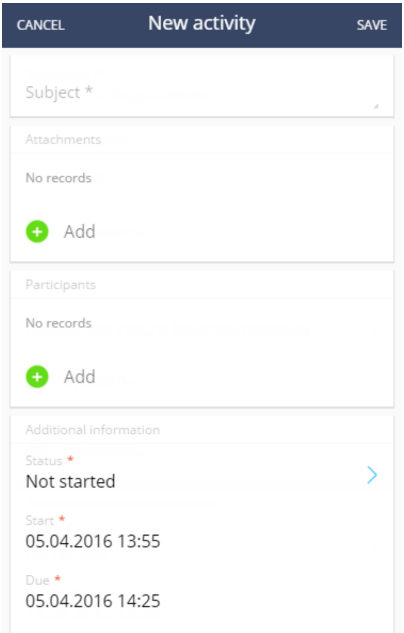


3. To get back to your calendar tap the [My activities] button in the owners drop-down list.

HOW TO CREATE A NEW TASK.

To create a new task in the [Activities] section, tap the + button. Then, fill in the required information and tap [Save] (Fig. 42).

Fig. 42 New task page



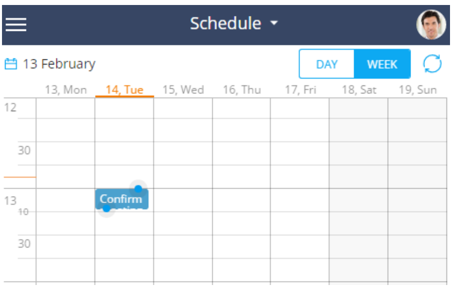
HOW TO CREATE A MULTI-DAY TASK

When working in mobile application you can create multi-day tasks (tasks lasting for more than one day).

To create a multi-day task:

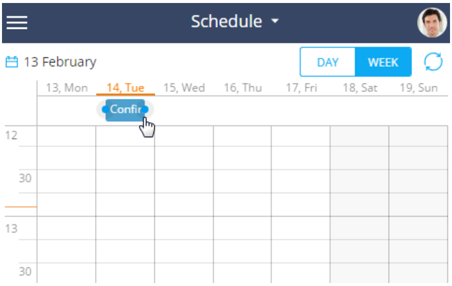
1. Highlight a task in the calendar (Fig. 43)

Fig. 43 Creating a task in the calendar



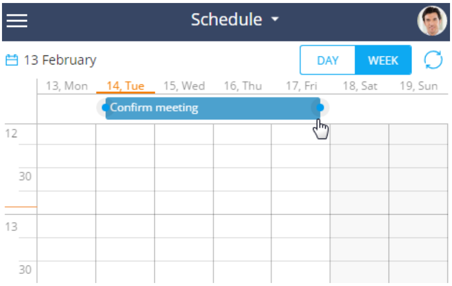
2. Drag a task to the panel with the days of the week (Fig. 44).

Fig. 44 Dragging a task to the panel with days of the week



3. Hold the small circle on the corner of the activity bar and drag it to expand the activity to the required range (Fig. 45).

Fig. 45 How to create a multi-day task

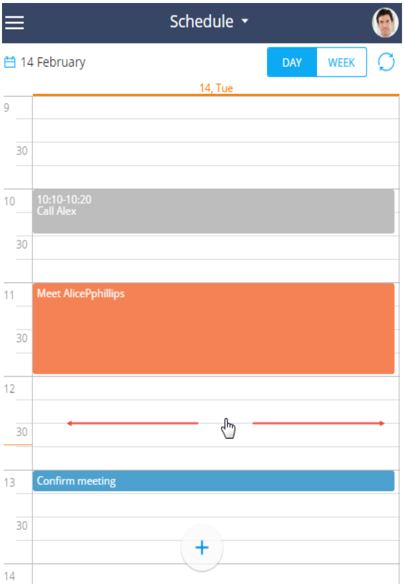


HOW TO CHANGE THE CALENDAR VIEW

To change the display period for tasks in the calendar, tap the DAY WEEK button and select the required time interval.

Tap anywhere on the blank calendar space and swipe right to go to the next day or left to go to the previous day (Fig. 46).

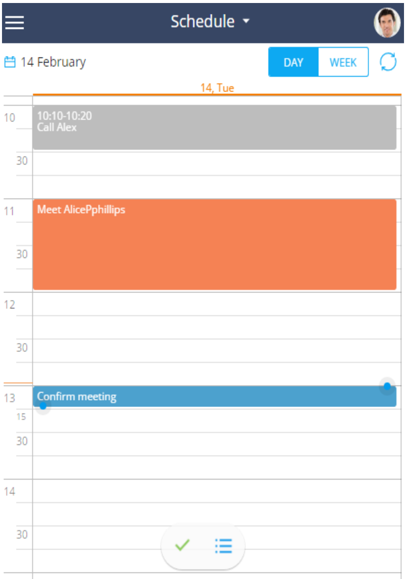
Fig. 46 Switching between days



HOW TO CHANGE ACTIVITY DURATION IN THE CALENDAR

You can also change activity duration without opening its page. Tap an activity, hold the circle at the corner of the activity, and drag it to the required time (Fig. 47).

Fig. 47 Changing activity duration

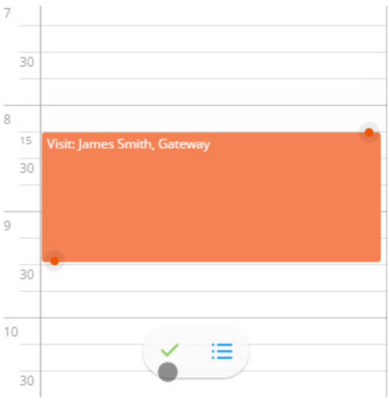


To move an activity to another time, drag it to the required time interval.

HOW TO CHANGE A TASK STATUS

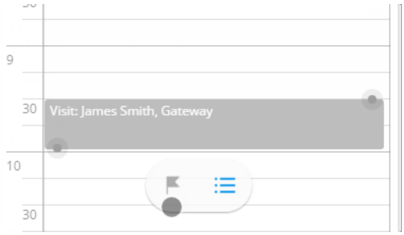
To change a task status, go to the activity edit mode and select the required value in the [Status] field. If you need to mark a task as completed, tap the button in the calendar and then tap the ✓ button (Fig. 48).

Fig. 48 Changing task status



To return a task to its initial state, select it in the calendar and tap (Fig. 49).

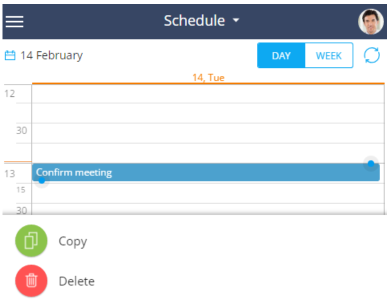
Fig. 49 Changing status of a completed task



ACTIONS MENU

The actions menu is used for copying, deleting and splitting tasks. To view the options, highlight a task and tap (Fig. 50).

Fig. 50 [Activities] section actions panel



The [Copy] action menu is used to **copy** tasks. When copying a task from the calendar, the [Participants] details are also copied. When copying from the activity page a new page is created in which you can fill in all the required information.

To **delete** tasks, select [Delete].

To **split** tasks, for example if several activities overlap in the calendar, use the [Split] action. As a result, the system splits the activity based on the time of the end and the beginning of overlapping tasks.

In online mode you can also display **activities created in the bpm'online main application**. To do this, use the [Refresh] action.

SEE ALSO

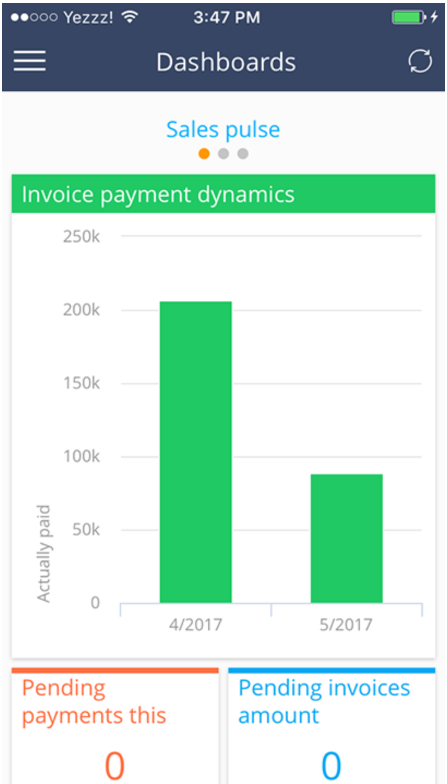
- How to work with the [Cases] section
- How to work in the [Dashboards] section
- Mobile application FAQ

HOW TO WORK IN THE [DASHBOARDS] SECTION

The DASHBOARDS section of the mobile application is used to display collective data from the [Dashboards] section of the primary BPMonline application. (Fig. 51). The data displayed in the section is based on access rights.

We recommend using this section to analyze and plan the work of each employee, each department and the company as a whole.

Fig. 51 The [Dashboards] section in the mobile application



ATTENTION

An Internet connection is required to use the [Dashboards] section, regardless of whether the application is run in the online or offline mode. Learn more about the online/offline mode in a separate article.

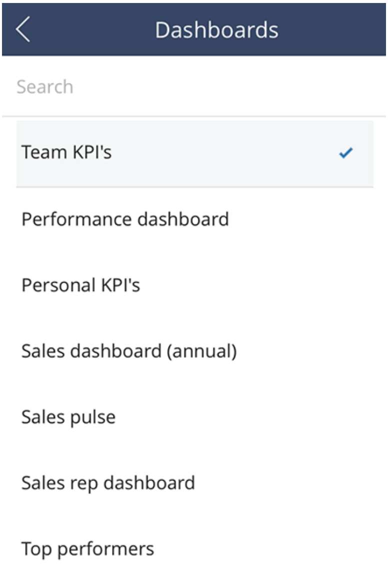
The section data is cached in the mobile application. Press the  button to refresh the section. Cached data is cleared when you exit the section or close the mobile application.

DASHBOARD INTERFACE

Each [Dashboards] section tab of the main BPMonline application is displayed on its respective screen in the mobile app. The tablet version of the mobile application features the dashboards view similar to that of the desktop version. All graphs are scaled to fit different screen sizes. The element size is doubled in the smart phone version of the mobile application. Indicators that occupy less than 50% of the screen in the main application will occupy 50% of the screen of the smartphone.

Swipe left and right to switch between different tabs / dashboards, or use the list of dashboards for navigation (Fig. 52).

Fig. 52 The list of dashboards in the [Dashboards] section



WORKING WITH GRAPHS

The following dashboard types of the primary bpm'online application are available in the mobile version: "Chart", "Metric", "List" and "Gauge". Additionally, mobile dashboards support graphs with multiple series and all sub-types of the "Chart" dashboard. Unsupported dashboard types are hidden in the smart phone version of the mobile application, and greyed out in the tablet version (Fig. 53).

Fig. 53 Unsupported dashboard types in the mobile application

Click on a graphic element (e.g. a column) to display a data label. Use the scrollbar to view larger charts (select the element to activate the scrollbar).

SEE ALSO

- Work with the calendar

MOBILE APPLICATION WIZARD

Use the bpm'online mobile application wizard to customize workplaces for different types of mobile app users. For example, make the [Opportunities] workplace in the mobile application available only for the "Sales managers" role and in it – add only those sections that are necessary for the sales reps who work in the field.

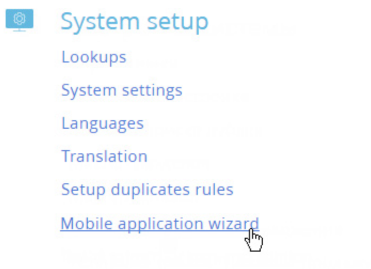
With the help of the mobile wizard, you can also customize section lists, pages and details for each workplace. For example, you can customize the page of the [Accounts] section in the [Opportunities] workplace by displaying only information that is relevant for sales reps.

> **NOTE**
> Modifications made to the bpm'online configuration when working with the mobile app wizard are saved in the package specified in the "Current package" system setting. If the system setting value is empty, or if the specified package is inaccessible by the current user, then the Mobile Wizard will prompt you to select a different package. By default, the "Custom" package is used. If you want to use another package, make sure that it is inherited from the "Mobile" package.

> **ATTENTION**
> All changes made to the configuration by using the mobile application wizard will be applied to all users on next synchronization between their mobile app and bpm'online.

To start working with the mobile application wizard, open the System Designer in your primary application and click the [Mobile application wizard] link in the [System setup] block (Fig. 54).

Fig. 54 Running the Mobile Application Wizard



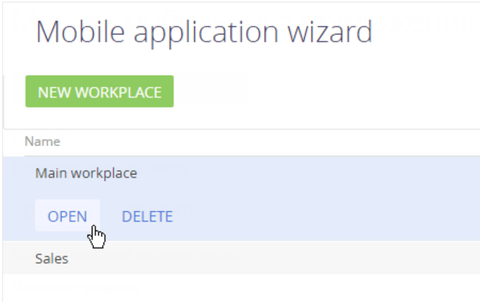
> **NOTE**
> You can open the mobile application wizard only if you have access to the [Mobile app setup] system operation.

MOBILE APP SECTION SETUP PAGE

Section setup page is used for setting up the list of sections available for mobile app users. To open section setup page:

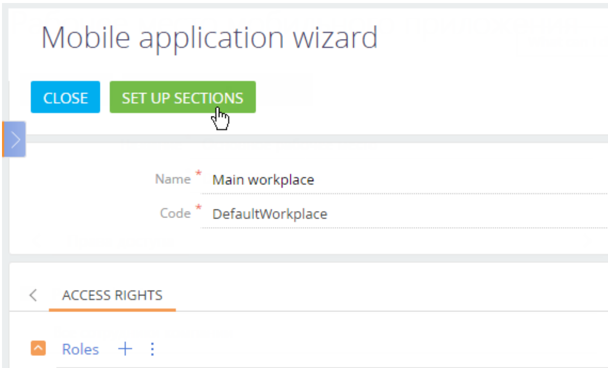
1. On the mobile application wizard page, select the workplace to modify and click **[Open]** (Fig. 55).

Fig. 55 Editing a workplace



2. Click the **[Set up sections]** button on **the workplace page** (Fig. 56).

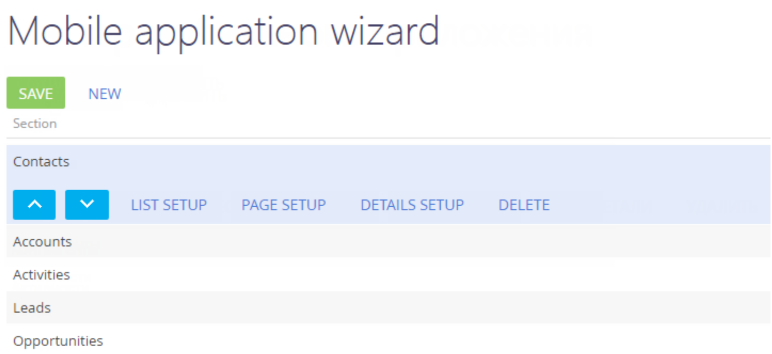
Fig. 56 Mobile application workplace page:



As a result, the mobile application **section setup page** (Fig. 57) will open. On this page, you can:

- Manage the sections available in the mobile application by adding or removing them from the list.
- Configure the lists of records for the mobile app sections.
- Set up mobile app section pages.
- Set up mobile app section details.

Fig. 57 Section setup page in mobile application wizard



CONTENTS

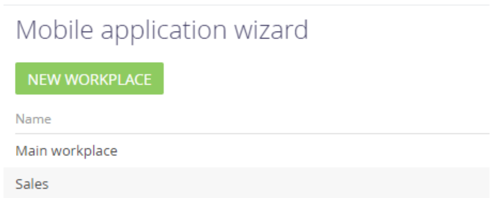
HOW TO SET UP WORKPLACES IN THE MOBILE APP

When you run the mobile application wizard, a page with the list of workplaces will open (Fig. 58). Here you can manage workplaces available in the mobile app.

NOTE

By default, the mobile application has a single "primary" workplace. As a rule, mobile app workplaces are configured by bpm'online administrators.
Installing bpm'online marketplace extensions (e.g., Field Sales) may add more workplaces.

Fig. 58 A list of mobile app workplaces



CONTENTS

ADDING A NEW WORKPLACE

To add a new workplace:

1. Go to the mobile application wizard (Fig. 58) and click the **[New workplace]** button.

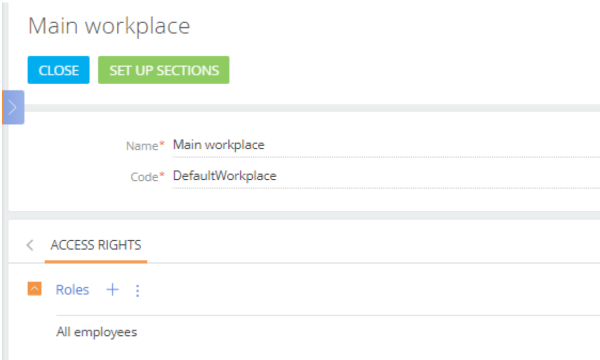
2. Populate the page for the new mobile application workplace (Fig. 59):
   a. Enter the workplace **name**.
   b. Specify a **unique code** that would identify the workplace.

ATTENTION

The unique code can contain numbers and Latin characters only.

   c. Use the [Roles] detail to **specify user roles** that have access to the workplace in the mobile application.

Fig. 59 The workplace setup page



3. Save the page.

NOTE

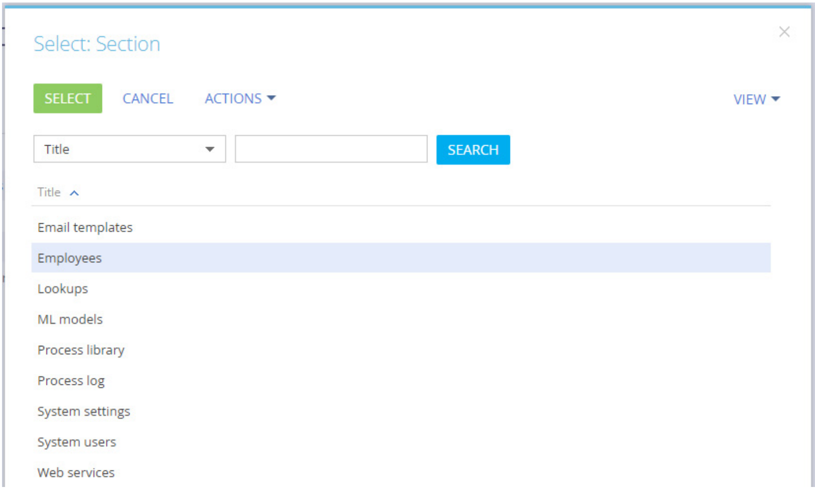
A new workplace will have default sections. You can add or remove sections by editing the workplace.

HOW TO SET UP THE WORKPLACE SECTION LIST

You can add or remove sections from a workplace and change their order. Use the mobile application **section setup page** to set up section list. To set up the workplace section list:

1. Click the necessary section and use the and buttons to change its order in the list.
2. Click the **[New]** button and select a section to add it to the workplace (Fig. 60).

Fig. 60 Selecting a section



3. Select a section in the list and click the **[Delete]** button to exclude it from the workplace.

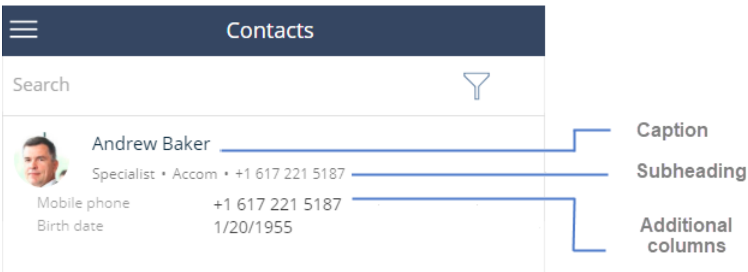
NOTE

The mobile app structure contains only the sections that exist in bpm'online. Use the section wizard of the desktop application to add custom sections to bpm'online.

HOW TO SET UP LISTS IN A MOBILE APPLICATION SECTION

Records in a mobile app list consist of three data blocks: "caption", "subheading" and "additional columns" (Fig. 61).

Fig. 61 The [Contacts] section list record in mobile application



The caption can display only one column, but you can set up displaying any number of columns for other blocks.

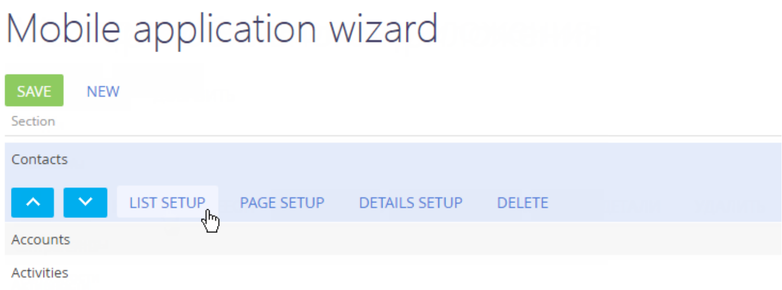
NOTE

A maximum of 13 lookup columns can be displayed in a mobile application list. There are no restrictions for the columns of other types.

To set up a section list:

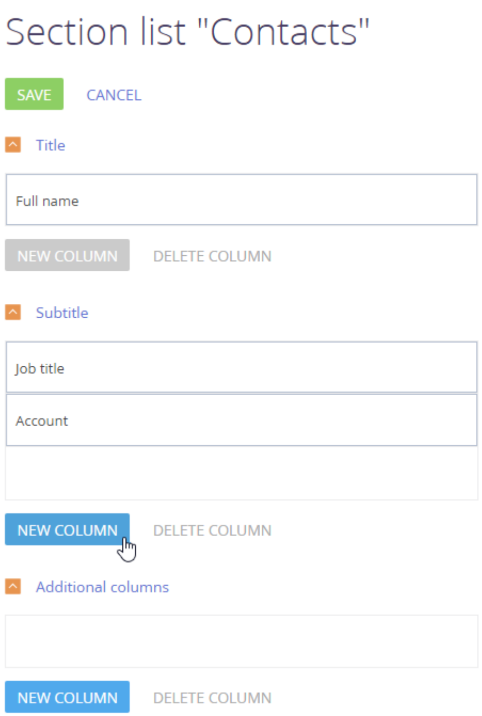
1. Go to the mobile application wizard, select a section and click the **[List setup]** button (Fig. 62).

   Fig. 62 Setting up a section list



2. Set up the columns in the section list for the current workplace (Fig. 63).

   Fig. 63 Adding columns to a section list



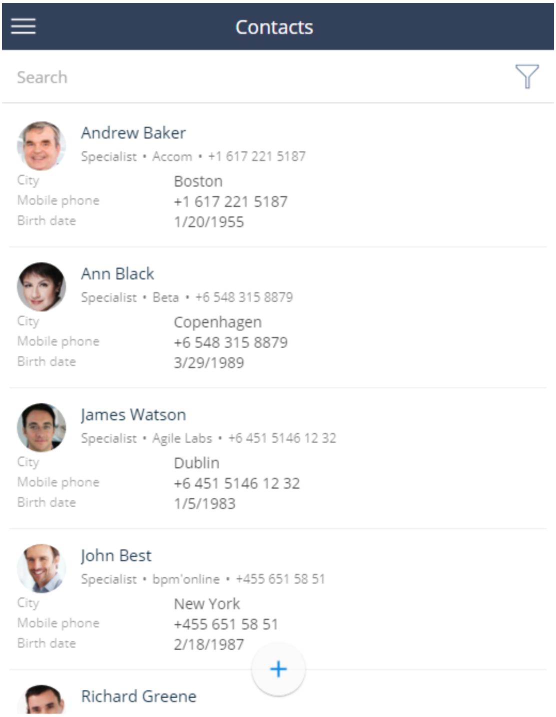
   a. Click the **[New column]** button and select a column from the list.

    b. You can drag and drop columns to change their positions.

3. Click the **[Save]** button.

As a result, new data will be displayed in the section list (Fig. 64).

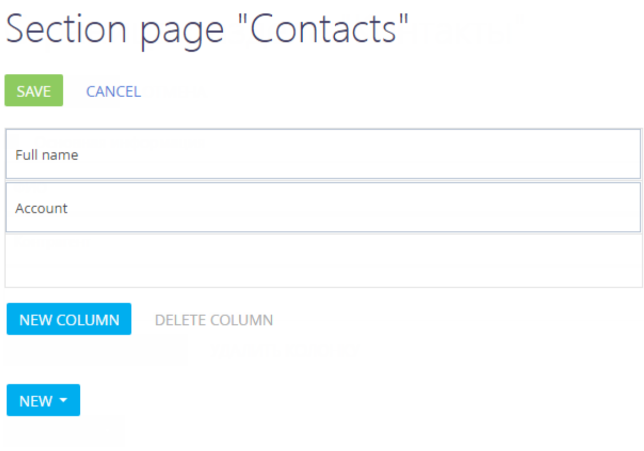
Fig. 64 Custom list of contacts in the bpm'online mobile app



SETTING UP A MOBILE APP SECTION PAGE

By default, a new section page in the mobile application contains a single group of fields: [General information] (Fig. 65). This group of fields cannot be renamed or deleted.

Fig. 65 Default section page



Other fields, details and column groups must be added manually.

CONTENTS

SEE ALSO

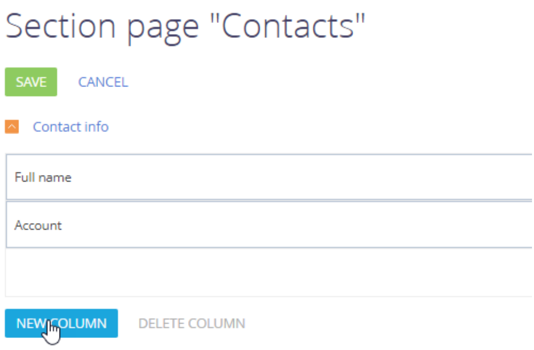
- Section detail setup
- How to set up lists in a mobile application section

HOW TO ADD FIELDS TO THE PAGE IN THE MOBILE APPLICATION

To add a field (a.k.a., “column”) on the section page:

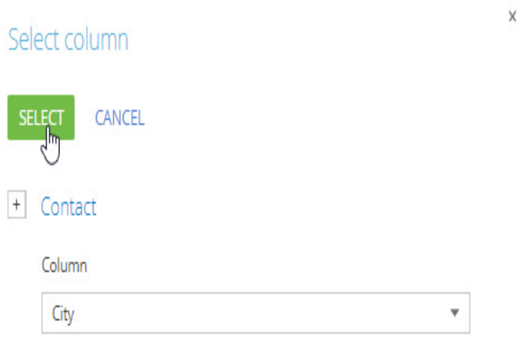
1. Open the **mobile application wizard page** and click the **[Page setup]** button.
2. Click the **[New column]** button in the column group where you need to add a field (Fig. 66).

Fig. 66 Adding fields to a page



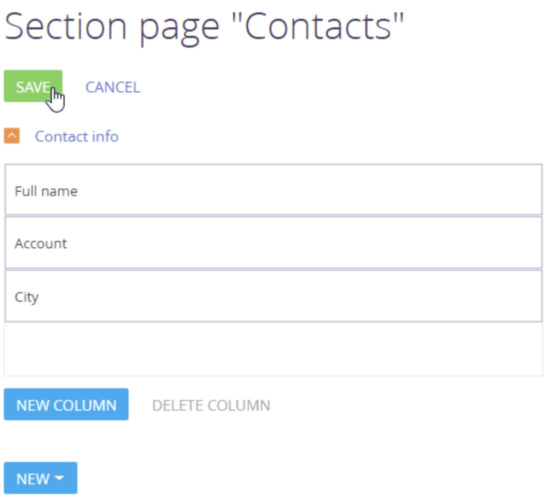
3. Select a column in the **[Select column]** window and click **[Select]** (Fig. 67).

Fig. 67 Selecting a column for adding to page



4. To change the order of the fields on the page, drag and drop them with the left mouse button.
5. Click the **[Save]** button (Fig. 68).

Fig. 68 Saving a mobile app section page with the new column



6. Click the **[Save]** button on the mobile application wizard page.

NOTE

After clicking the [Save] button on the mobile application wizard page, all changes made during the setup will become available for the mobile application users.

SEE ALSO

- How to add field groups (column groups) to the page in the mobile application
- Section detail setup

HOW TO ADD FIELD GROUPS (COLUMN GROUPS) TO THE PAGE IN THE MOBILE APPLICATION

You can add field groups to sections, including groups that are not available in the primary application.

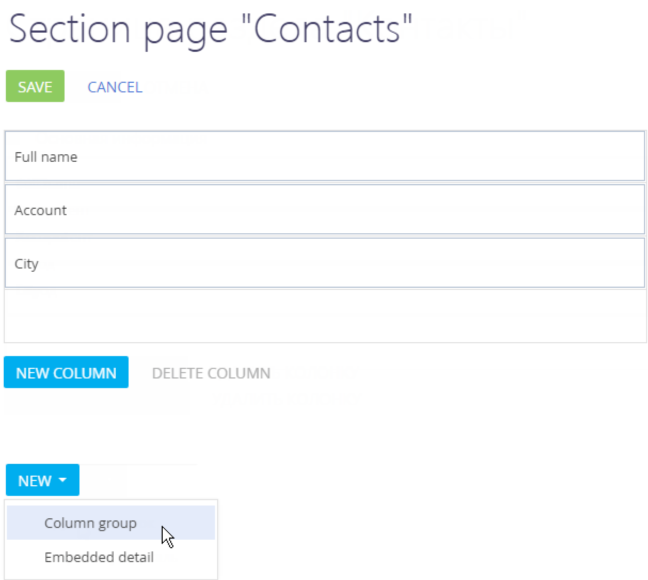
NOTE

The [General information] group cannot be renamed or deleted, but you can add more fields to it.

To add a field group on the section page:

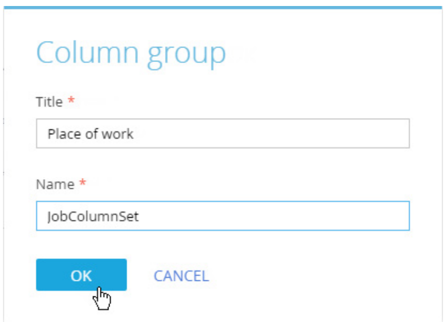
1. Open the mobile application wizard page and click the **[Page setup]** button.
2. Select the **[Column group]** command in the **[New]** menu (Fig. 69).

Fig. 69 Adding a field group



3. Enter a title and name for the field group (Fig. 70).

Fig. 70 Setting up a field group

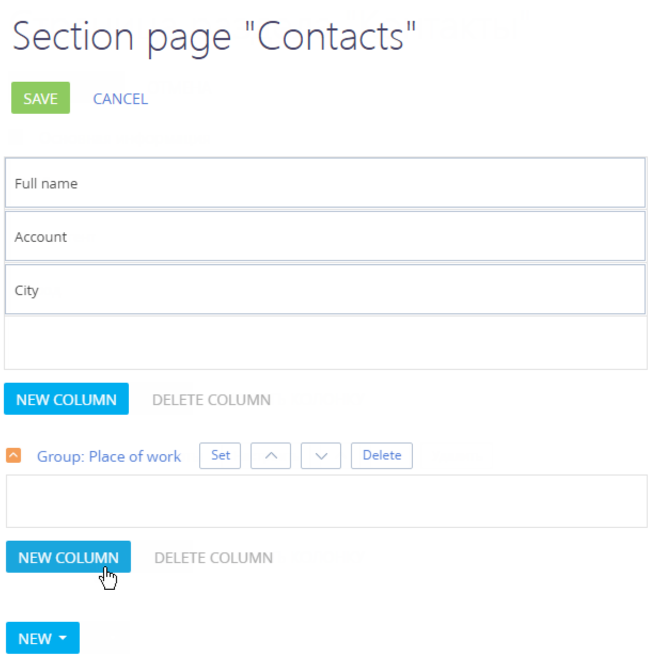


The value in the **[Title]** field will be displayed in the interface of the mobile application. The **[Name]** field is the internal name of the field group and can only contain Latin letters without special symbols.

4. Save the changes.

A new empty field group will appear on the section page (Fig. 71). Add fields to it and save the changes on the page.

Fig. 71 Adding columns to a column group



SEE ALSO

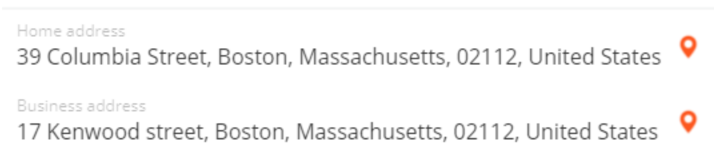
- How to add fields to the page in the mobile application
- Section detail setup

SECTION DETAIL SETUP

There are two types of details in the mobile application:

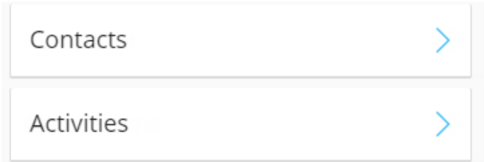
- **embedded details** display all their records on the section record page regardless of the amount of data on the detail (Fig. 72);

  Fig. 72 Embedded detail [Contact address] on the section page

- **standard details** do not display their records on the section page (Fig. 73). Tap a standard detail to view its records on a separate page.

Fig. 73 The [Contacts] and [Activities] standard details



You can add new details and configure the existing ones via the mobile application wizard.

CONTENTS

SEE ALSO

- Setting up a mobile app section page
- How to set up workplaces in the mobile app

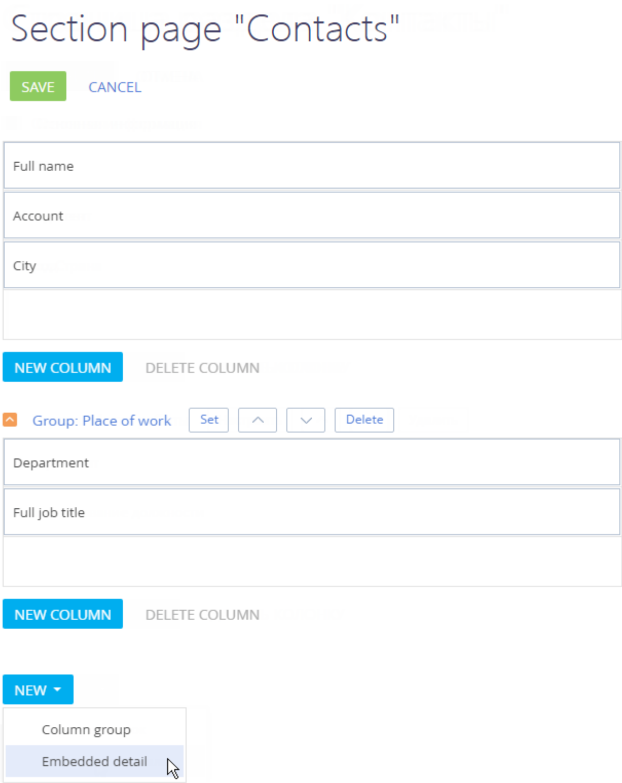
ADDING DETAILS

HOW TO SET UP AN EMBEDDED DETAIL

The embedded details display their records directly on the section page regardless of the amount of data on the detail. To add an embedded detail:

1. Open the **mobile application wizard page** and click the **[Page setup]** button.
2. On the section page, select the **[Embedded detail]** in the **[New]** button menu (Fig. 74).

Fig. 74 Adding an embedded detail



3. In the detail setting window:
   a. Select a detail to add.

NOTE

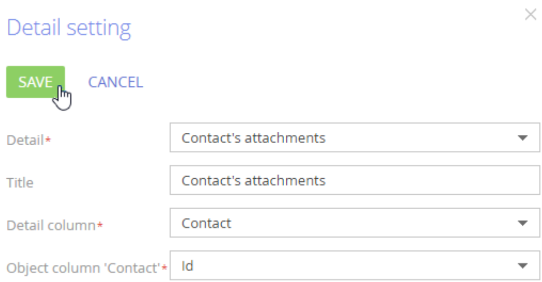
Some of the existing details are designed for specific sections. Be sure to select the version of a detail whose name specifically indicates that the detail was designed for this particular section. For example, when adding the [Attachments] detail to the [Contacts] section page, select the "Contact's attachments" detail.

   b. Specify the detail title.
   c. In the **[Detail column]** field, select the column that connects detail records to the current record in the section. For example, records on the [Attachments] detail in the [Contacts] section are connected to the [Contacts] section by the [Contact] column.
   d. In the **[Object column...]** field, specify the section column whose values will be used to filter the records that are displayed on the detail. If the detail is connected to the current record of the section, specify the "Id" column in this field.
   e. Save the detail setup parameters.

As a result, a new detail will be added to the section page. For some details, the default columns may not be configured. In this case, you must add the displayed columns manually. Adding columns to a detail is similar to adding columns to a section page. Read more >>>

4. Save the detail (Fig. 75).

Fig. 75 Setting up an embedded detail



HOW TO SET UP A STANDARD DETAIL

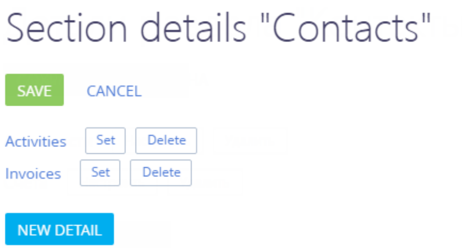
Standard details are displayed on section pages as bars, tapping a standard detail bar opens a separate page with the list of detail records. To add a standard detail:

1. Open the **mobile application wizard page** and click the **[Page setup]** button.

NOTE
To display data correctly on the standard detail, add the corresponding section in the mobile application. For example, to display data on the [Documents] detail of the contact's page, add the [Documents] section in the mobile application.

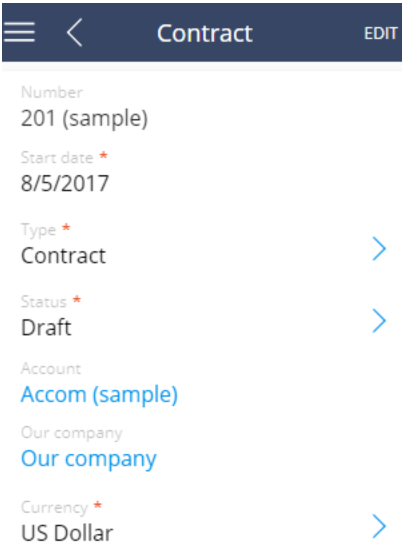
2. On the section detail setup page (Fig. 76), click the **[New detail]** button.

Fig. 76 Section detail settings page



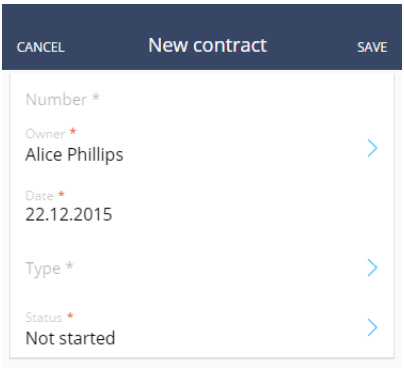
3. The page of a newly added standard detail will contain only required fields (Fig. 77).

Fig. 77 Required fields on a detail page



Thus, if you add the [Documents] standard detail to any of the sections in the mobile application, the detail page will contain only required fields (Fig. 78).

Fig. 78 Detail page with required fields



4. Add the corresponding section to mobile application and configure it for the correct operation and display of details.

   For example, add the [Documents] section in the mobile application wizard to display additional fields on the [Documents] detail page. and set up fields on the edit page.

SEE ALSO

- Adding a standard detail to the section in mobile application

- Editing details
- How to add fields to the page in the mobile application

EDITING DETAILS

HOW TO EDIT EMBEDDED DETAILS

To edit embedded details, use the buttons next to the detail name (Fig. 79).

Fig. 79 Embedded detail editing buttons

Click the **[Set]** button to edit the detail. In the **[Detail setting]** window (Fig. 75), make your changes and click **[Save]**.

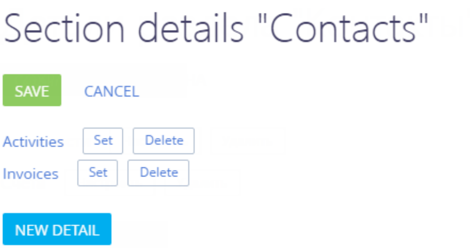
Use the and buttons to modify the location of the detail on the section page.

To delete the embedded detail from the section page, click the **[Delete]** button.

HOW TO EDIT STANDARD DETAILS

To do this, move to the detail configuration page (Fig. 80).

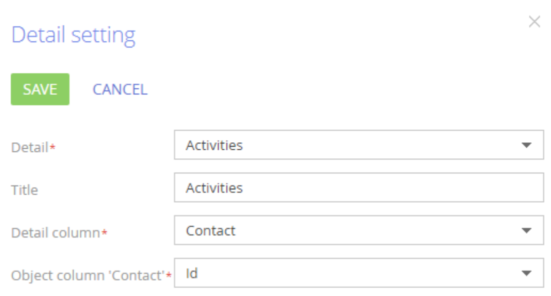
Fig. 80 Section detail settings page



To delete a standard detail from a section page, click the **[Delete]** button next to the detail name.

To modify the parameters of existing standard details, click the **[Set]** button next to the detail name. Setting up parameters of the standard detail is identical to setting up parameters of an embedded detail (Fig. 81).

Fig. 81 Setting up a detail



NOTE

You can specify a column of a connected object detail and configure data filtering by this object. For example, on the activity page, you can display the contacts connected to the account, which is specified in the activity. To do this, add the [Contacts] detail to the activity record page and specify "Account" in both the [Detail column] and [Object column] fields

SEE ALSO

- How to set up a standard detail
- How to set up an embedded detail
- How to edit embedded details

MOBILE APPLICATION FAQ

WHY WON'T THE MOBILE APP SYNC IN ONLINE MODE (ERROR "ITEM% 24 BATCH NOT FOUND)?

Online sync errors are often associated with the "on-site" deployment of bpm'online. Certain combinations of the IIS, .NET Framework, and ASP.NET services screen special characters ($ character) in website URLs. The mobile app cannot connect to the bpm'online website because of that.

To omit the "$" character while generating request URLs , introduce a different type of query generation by setting up configuration files on the bpm'online server. To do this:

1. Open the [bpm'online root directory path]\Web.config file with any text editor, e.g. Notepad. Find the <appSettings> part and add the following line:

   ```
   <add key="aspnet:UseLegacyRequestUrlGeneration" value="true" />
   ```

   Save the changes.
2. Make the same adjustments to the [bpm'online root directory path]\Terrasoft.WebApp\Web.config configuration file.
3. Restart the web site in IIS and clear the Redis server cache.

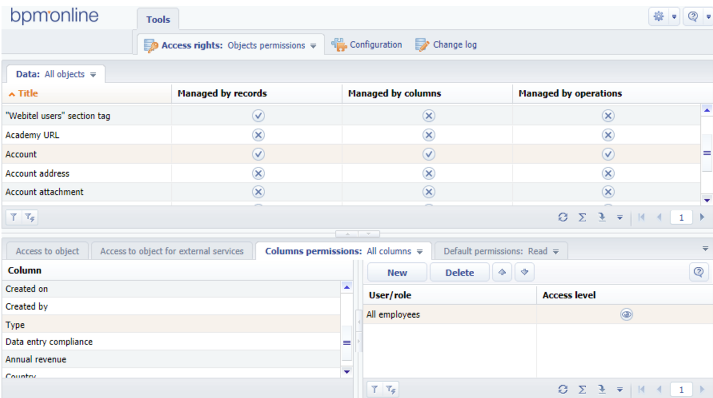
HOW TO RESOLVE THE SYNCHRONIZATION CONFLICT IN THE OFFLINE MODE?

If the conflict occurred because of access permission during the synchronization with the desktop application, you can resolve it by canceling the modifications you made in the mobile application.

CASE

The administrator has restricted the access rights to edit the account type for all employees (Fig. 82). The mobile user changes the account type in the offline mode. During the synchronization process the user gets notification about conflict (Fig. 83).

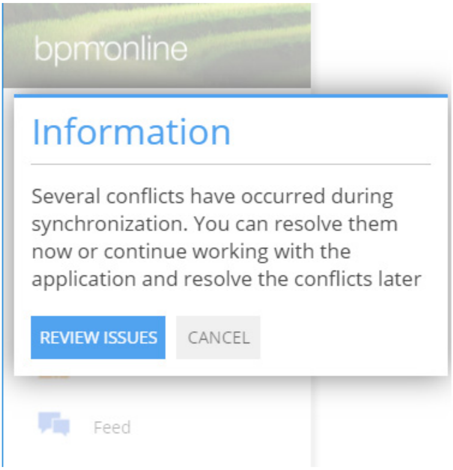
Fig. 82 Restriction of access permissions to change the value of the "Type" column of the "Account" object.



NOTE

Managing user access permission to the system objects is covered in the separate article. Read more >>>

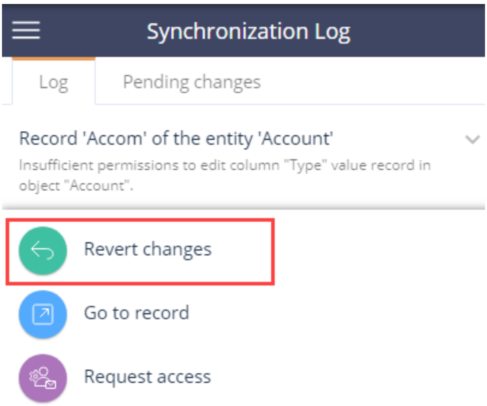
Fig. 83 Notification about conflicts during synchronization



To resolve the conflict:

1. Tap the [Review issues] button.
2. Select a record that invoked a conflict of insufficient permissions in the synchronization log.
3. Tap the [Revert changes] button (Fig. 84).

Fig. 84 The [Revert changes] action in the synchronization log



As a result, all changes made in the account's record will be reverted and the record will be removed from the synchronization log. Local record will be updated with the latest data from the desktop application.

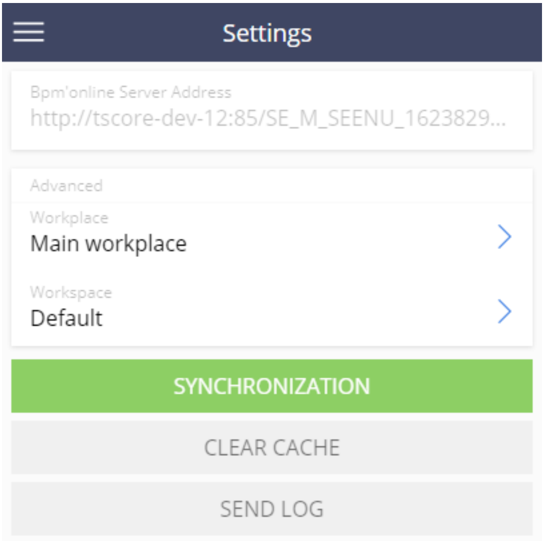
You can send a request for an access permission to administrator. More details about actions with records in the log are described in a separate article. Read more >>>

HOW TO CLEAR THE MOBILE APP CACHE?

You can clear the mobile app cache in one of the following options:

- Enter the [Settings] section of the mobile application and tap the [Clear cache] button(Fig. 85).

Fig. 85 Clearing mobile application cache



- Log out of the application and login to another bpm'online site, for example, to a trial version. In this case, the app cache will be cleaned automatically.
- Perform the cache cleanup of the mobile device.

ATTENTION
After cleaning the mobile application cache, all data modifications that were made offline and not synchronized with the main application will be deleted.

HOW CAN I SET UP PUSH NOTIFICATIONS FOR MOBILE APPLICATION USERS?

Mobile application users will now receive push notifications and reminders with valuable updates, such as meeting reminders or feed notifications. The configuration of push notifications is performed in the process designer: Read more >>>

SEE ALSO

- The [Columns permissions] detail of the [Object permissions] section.
- Online/offline modes
- Mobile application setup
- Mobile application interface
- Work with the calendar

- How to work with the [Cases] section
- How to work in the [Dashboards] section
- Mobile application wizard