Mobile Quick Reference Guide

About web access to ChangePoint using a mobile device

You can access the ChangePoint website from the native Internet browser on a mobile device such as a smartphone or a tablet. These topics describe how to use ChangePoint when accessed in this way.

> **Note:** Web access is different from the ChangePoint mobile app, which you download and install onto your mobile device. However, before you can use the mobile app, the ChangePoint implementation must be configured to support it. Instead of user documentation, the mobile app includes walkthroughs of its features.

It is assumed that the resources who use web access are already familiar with ChangePoint functionality. For more information, see the ChangePoint user guides or online help.

The following ChangePoint functionality can be accessed using the supported mobile devices:

- **My Reminders**:
  - Unsubmitted time entries – you can view and submit unsubmitted time entries
  - Rejected time entries – you can view and correct rejected time entries
  - Tasks requiring status updates – you can view tasks and update their status
  - Late tasks – you can view late tasks and update their status
  - Workflow – you can progress action, status and tri-step workflow steps. Other types of workflow steps will be read-only. Workflow attachments and assign request functionality are not available though mobile access.
  - Time to approve – you can view and approve or reject time entries

    - Expense reports to approve – you can view and approve or reject expense reports and expense line items.

- **My Tasks** – you can view the profile of the tasks that you are assigned to, and you can update the status of your tasks
- **Requests Assigned to Me** – you can view and edit requests that are assigned to you
- **Requests Initiated by Me** – you can view and edit requests that have been initiated by you. Requests that are in Closed, Rejected or Canceled status will not be included.
- **My Time Sheet** – you can enter and submit time entries for regular tasks, open tasks and non-project time. Time entry totals that display in red text indicate that the time in that period cannot be submitted because the payroll lag has passed. To view a list of the time entries for a day, click the day header.
- **My Expenses:**
    - Expenses – you can create expenses
    - Expense reports – you can create, view, and submit expense reports

    Note: Expense reports in **Received** status are not available when accessing ChangePoint using a mobile device.

    - Expense attachments:
        - you can create attachments using your mobile device to take pictures of receipts and other documents
        - you can add attachments to expenses and expense reports

About filtering values in drop-down lists

You can filter the values in drop-down lists by typing a few characters into the field before clicking the drop-down.

For the time and expense approval pages only, the filter criteria will be applied to the item in the selected “sort by” option. For example, if you select to sort by projects, then filter criteria will be applied to the project names.

About signing in to ChangePoint using mobile devices

When using a mobile device, you use the same ChangePoint URL, user ID, and password that you use to access ChangePoint from a desktop or laptop computer. You do not require any

additional security features or access rights.

Setting up paging for a mobile device

By default, the mobile device displays all of the records (tasks, time records, requests, and so on) in a continuous list on a single page. However, you can configure the number of records that are displayed in a single page in ChangePoint. This option limits the amount of data that is brought to the device at once.

1. Using a mobile device, sign in to ChangePoint.
2. Under **Settings**, select **My settings**.
3. Under **Paging settings**, turn paging on or off using the **Paging** field.
4. In the **Items per page** field, enter the number of items to display on each page.
5. Click **Save**.

About selecting request templates for mobile access

If you plan to use a mobile device to create and edit requests in ChangePoint, you must select request templates for creating, editing, and viewing requests. You can select the same request template for all three, if preferred.

It is recommended that you create request templates that are specifically for use with mobile devices. You should preset the values for as many fields as possible in the request templates, and hide all unnecessary fields and tabs in order to reduce the amount of data loading and data entry. For more information, see "About request templates" in the *Request Management User Guide*.

Selecting a request template for mobile access

1. Using a mobile device, sign in to ChangePoint.
2. Under **Settings**, select **My settings**.
3. Under **Select request template**, in the **Creating requests** field, select a request template to use when creating requests.
4. In the **Editing requests** field, select a request template to use when editing requests.
5. In the **Viewing requests** field, select a request template to use when viewing requests.
6. Click **Save**.

About changing the view for the Time to Approve page for mobile access

When using a mobile device, you can change the view for the **Time to Approve** page to one of the following:

- **Details** – displays detailed time entries, sorted alphabetically by resource. If you subsequently apply a filter on the **Time to Approve** page, then the detailed time entries are sorted according to the filter.
- **Summary by project** – displays a summary page that lists projects with the total time entered, from which you can access the time entries by project
- **Summary by resource** – displays a summary page that lists resources with a total of their time entries, from which you can access the time entries by resource

Changing the view for the Time to Approve page for mobile access

1. Using a mobile device, sign in to ChangePoint.
2. Under **Settings**, select **My settings**.
3. Under **Time approval settings**, select one of the options in the **Time to Approve view** field.
4. Click **Save**.

Setting up time entry in days for mobile access

You can specify the time increments for entering time in days. The time increments are in fractions of a day and range from 1/4 to 1/32.

1. Using a mobile device, sign in to ChangePoint.
2. Under **Settings**, select **My settings**.
3. Under **Time increment settings**, select the fraction that represents the time increments.
4. Click **Save**.

About accessing ChangePoint using tablet devices

When using a tablet device, you use the same ChangePoint URL, user ID, and password that you use to access ChangePoint from a desktop or laptop computer. You do not require any additional security features or access rights.

In most cases, the tablet device is detected automatically, and the tablet mode is displayed.

Forcing the tablet mode to display

If the mobility site appears when you are using a tablet, you can add a parameter to the end of the ChangePoint URL, which forces the tablet mode to display. For example:

```
<ChangePoint URL:port number>?forcetablet=1
```

Accessing the mobility site from a tablet device

If you are using a smaller tablet and prefer to use the mobility site instead, you can use the following extended URL:

```
<ChangePoint URL:port number>/mobile/cplogin.aspx
```

If the standard ChangePoint interface appears instead of tablet mode

If you are using a tablet device and the standard ChangePoint interface is displayed, you must use the parameter that forces the tablet mode to display, as documented above.

> **Note:** Only the specific tablet functionality is certified for tablet devices, and therefore issues that might be encountered in other functional areas will not be supported or addressed by Planview, Inc..

Exception for the Microsoft Surface

Tablet mode is not supported for the Microsoft Surface. When you use the Surface, the standard ChangePoint interface is displayed by default, and all ChangePoint functionality is available. You must use the Surface with the input peripherals attached, to view tool tips, and perform double-clicks in ChangePoint.

Differences when using a tablet to access ChangePoint

It is assumed that the resources who use a tablet device to access ChangePoint are already familiar with ChangePoint functionality. For more information about using ChangePoint, see the ChangePoint user guides or online help.

The following functionality, including the related workflow approvals, is fully supported when accessing ChangePoint using a tablet device:

- Time sheet
- Expense management
- Project Worksheet

For all other functionality, there is view-only access to the data, even if you have edit access when accessing ChangePoint from a desktop or laptop computer. The edit option is available in the **Actions** menu in most entity profiles in tablet mode, if you have edit access to the entity. However, the edit views are available for viewing only.

The following is a list of differences in the tablet mode interface.

Folders view is not available

Due to the limited space, the tablet mode does not include the Folders view. Instead, you can search for entity records.

Reports

To view custom ChangePoint Analytics reports, you must add them to the **My Favorite Reports** portlet.

Time sheet

To enter time

1. Tap twice in a cell to make the keyboard appear.
2. Enter the time, and then tap outside of the cell.

To add tasks

Tap the **Add tasks** link and then expand the tree view to select the tasks.

> **Tip:** There is an option in **Preferences** that automatically displays all active tasks in the time sheet.

Edit views are displayed in tabbed format only

Regardless of the display options that you have selected in **Preferences**, all edit views are displayed in tabbed format.

Right-click menus

To display the right-click menus in the time sheet and tables, touch and hold until the menu appears, and then tap the menu. For example, to pin a task to the time sheet, touch a task and hold until the **Pin to time sheet** option appears.

Project Worksheet

To select multiple rows

1. In the menu bar, tap **Select multiple rows**.
2. Tap each row to select them.
3. Copy and paste, indent or outdent, move, or delete the rows as required.
4. To revert to single row selection, tap **Select a single row**.