Adobe® LiveCycle® Mobile 9.5

Adobe® LiveCycle® Mobile 9.5 enables you to use your Apple® iPhone® or iPad to start and participate in business processes. It also enables you to use your iPhone or iPad to browse, open, and email files that are stored in your organization’s WebDAV server. Supported servers include LiveCycle Content Services 9 and Microsoft® SharePoint® 2010.

Please see the LiveCycle Mobile 9.5 Setup Guide for system requirements and other setup requirements.

Device requirements

LiveCycle Mobile 9.5 is supported on iPhone 3G, iPhone 3GS, iPhone 4, and iPad running iOS 4.2 or higher.

License information


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Launching the application

LiveCycle Mobile 9.5 can be downloaded from the App Store. After installing the application, the LiveCycle Mobile 9.5 icon appears on your iPhone or iPad. Tap the LiveCycle icon to launch the application.

When you launch the application for the first time, a splash screen appears briefly, followed by a screen where you are prompted to configure your LiveCycle server settings. These are the settings that LiveCycle Mobile 9.5 will use to retrieve your tasks and forms:

- **Host Name**: Host name of the LiveCycle server. Contact your administrator if you do not have the necessary information.
- **Server Name**: Description of the server and user account
- **Port**: The port number used by LiveCycle
- **SSL**: Select this option to use SSL when connecting to the server
- **User Name**: User name that you use to connect to the server
- **Password**: The password you use to connect to the server

You can connect to one or more LiveCycle servers, and to one or more user accounts on a server. To add more accounts, see “Connecting to LiveCycle servers” on page 3.
Connecting to LiveCycle servers

You can configure connections to one or more LiveCycle servers, and to one or more user accounts on a server. These are the accounts that LiveCycle Mobile 9.5 will use to retrieve your forms and tasks. You can then switch between the configured user accounts.

➤ To add a new LiveCycle server to your list of available servers

1. (iPhone) Tap menu at the bottom of the LiveCycle Mobile 9.5 screen and then tap Search. The Preferences screen appears.

On the Preferences screen, tap LiveCycle Servers.
(iPad) Open the Menu and tap Servers.

The LiveCycle Servers screen appears.

2. Tap Add New Server. On the LiveCycle Servers screen, specify the following information:
   - **Host Name**: Host name of the LiveCycle server. Contact your administrator if you do not have the necessary information.
   - **Server Name**: Description of the server and user account
   - **Port**: The port number used by LiveCycle
   - **SSL**: Select this option to use SSL when connecting to the server
   - **User Name**: User name that you use to connect to the server
   - **Password**: The password you use to connect to the server

3. Tap Save.
**Tip:** On iPad, select a server name (not the arrow next to it) to return to the Menu where you access Tasks, Forms, and Documents.

To edit the settings for an existing server
1. On the Servers screen, tap the arrow next to the server name.

   **Note:** Tapping the arrow enables you to edit the server settings. Tapping the name of the server returns you to the main menu.

2. Edit the server information as required and tap Save.

To remove a server from the list
1. On the Servers screen, tap Edit.

2. Tap the minus (-) button next to the server that you want to remove. Tap Delete and then Done.
Switching between configured servers/user accounts

If you have configured more than one user account, you can switch between those accounts to access your different task and forms lists. The way that you do this is different on iPhone and iPad.

➤ To switch between accounts on iPhone

1. Tap menu and tap Tasks or Forms. A list of available servers appears.

2. Select a server from the list. The Tasks or Forms list for that server appears.
To switch between accounts on iPad

1. Tap Servers, and in the Servers list, tap the name of the account (not the arrow next to it).
The Menu appears.

2. Tap Tasks, Forms, or Documents to access the items for the selected account.
Connecting to content management systems

LiveCycle Mobile 9.5 enables you to access documents located on Microsoft SharePoint servers or other content management systems that support the WebDAV protocol. You can configure connections to one or more of these servers, and to one or more user accounts on a server. These are the accounts that LiveCycle Mobile 9.5 will use to retrieve your documents. You can then switch between configured user accounts.

➤ To add a new Microsoft SharePoint server to your list of available servers

1. (iPhone) Tap menu at the bottom of the LiveCycle Mobile 9.5 screen and then tap The Preferences screen appears.

On the Preferences screen, tap Microsoft SharePoint Servers.
(iPad) On the Menu, tap Servers.

2. Tap Add New Server. On the Microsoft SharePoint Servers screen, specify the following information:
   - **Host Name**: Host name of the Microsoft SharePoint server. Contact your administrator if you do not have the necessary information.
   - **Server Name**: Description of the server and user account
   - **Port**: The port number used by Microsoft SharePoint
   - **SSL**: Select this option to use SSL when connecting to the server
   - **User Name**: User name that you use to connect to the server
   - **Password**: The password you use to connect to the server

3. Tap Save.

➤ **To edit the settings for an existing server**

1. On the Servers screen, tap the arrow next to the server name.

2. Edit the server information as required and tap Save.
To remove a server from the list

1. On the Servers screen, tap Edit.
2. Tap the minus (-) button next to the server that you want to remove. Tap Delete and then Done.

Switching between configured servers/user accounts

If you have configured more than one user account, you can switch between those accounts to access your different document lists. The way that you do this is different on iPhone and iPad.

To switch between accounts on iPhone

1. Tap menu and tap Documents. A list of available servers appears.
2. Select a server from the list. The Documents list for that server appears.
To switch between accounts on iPad

1. Tap Servers, and in the Servers list, tap the name of the account.

   The Menu appears.

2. Tap Documents to access the documents for the selected account.
Setting preferences

You can specify how LiveCycle Mobile 9.5 handles the tasks in your Tasks list. You can also specify how it displays dates and times.

➤ To specify task preferences

1. **(iPhone)** Tap menu at the bottom of the LiveCycle Mobile 9.5 screen and then tap 📲. The Preferences screen appears.

On the Preferences screen, tap Tasks.
(iPad) On the Menu, tap Servers and then tap the Preferences icon.

2. On the Task Preferences screen (iPhone) or LiveCycle Settings screen (iPad), specify the following options:
   - **Show Shared Queue Tasks**: A shared queue is a task list that another user has shared with you so that you can view and complete their tasks. When this option is set to On, tasks from shared queues are displayed in your task list.
   - **Download PDFs in background**: When this option is set, PDF files will load faster. You may wish to turn off this option to save on mobile data usage, particularly when roaming.
   - **Show Overdue Tasks**: When this option is selected, tasks that have passed their deadline are displayed in your Tasks list. When it is not selected, overdue tasks are removed from your Tasks list.
   - **Show Only Mobile Tasks**: When this option is selected, the Tasks list on your iPhone or iPad will display only tasks that can be completed on a mobile device.
   - **Sort Tasks**: Specifies whether to sort the tasks in your list by date or by deadline

➤ **To specify date and time preferences**
   - (iPhone) On the Preferences screen, select a Date Format or Time Format and tap Save.
   - (iPad) On the LiveCycle Settings screen, select a Date Format or Time Format and tap Save.
Accessing forms

Accessing forms on iPhone

To access your Forms list, tap menu at the bottom of the LiveCycle Mobile 9.5 screen and then tap Forms.

The Forms list contains all of the forms that you can initiate from your device, organized into categories. If a category contains more forms than can fit on the screen, scroll horizontally to see the additional forms.

Note: If you have more than one LiveCycle Server account configured, you are prompted to select an account before the Forms list is displayed. There is also an additional Servers button in the header that enables you to switch user accounts.

To open a form for filling, tap the form name. When you submit the form, you are returned to the Forms list.
Accessing forms on iPad

To access your Forms list, go to the Menu and tap Forms.

The Forms list contains all of the forms that you can initiate from your device, organized into categories. You can swipe up and down to scroll the list. To open a form for filling, tap the form name. The form is displayed to the right of the Forms list.

If you have more than one LiveCycle Server account configured, and you want to display the forms associated with another account, see “To switch between accounts on iPad” on page 7.

Completing tasks

Tasks are assigned to you as a part of a business process. Depending on the preferences you have set, the Tasks list will display all of the tasks assigned to you (and optionally tasks that are part of a shared queue), or only the tasks that can be completed on a mobile device. (See “Setting preferences” on page 13.)

When a task is nearing its due date, the deadline date is displayed in red. You can set your preferences to sort your task list by deadline. (See “Setting preferences” on page 13.)
Completing tasks on iPhone

To access your Tasks list, tap menu at the bottom of the LiveCycle Mobile 9.5 screen and then tap Tasks.

Note: If you have more than one LiveCycle Server account configured, you are prompted to select an account before the Tasks list is displayed. There is also an additional Servers button in the header that enables you to switch user accounts.

To open a task, tap on it in the list and follow the instructions provided on the Task Details screen.

Tapping the underlined “From” name on the Task Details screen displays a pop-up window containing contact information for that person. You can tap the phone number to place a call (iPhone only), or tap the email address to create a new email message.
Completing tasks on iPad

To access your Tasks list, go to the Menu and tap Tasks.

If you have more than one LiveCycle Server account configured, and you want to display the tasks associated with another account, see “To switch between accounts on iPad” on page 7.

To open a task, tap on it in the list. The task is displayed in the right pane.
Tapping the underlined “From” name on the Task Info screen displays a pop-up window containing contact information for that person. You can tap the phone number to place a call (iPhone only), or tap the email address to create a new email message.

Tap ☑️ to display any instructions provided with the task.

When you have finished reviewing and entering any necessary information, tap Complete Task and select an action.

Accessing files

You can open the following types of files using LiveCycle Mobile 9.5:

- PDF documents (PDF)
- Image files (JPG, JPEG, PNG, BMP, BMPF, GIF, TIFF, TIF, SVG, XBM)
- Video files (M4V, MP4, MOV)
- Microsoft Office documents (DOC, DOCX, DOCM, DOTX, DOTM, PPT, PPTX, PPSX, POTX, POTM, PPTM, XLS, XLSX, XLSM, XLTX, XLTM)

LiveCycle Mobile 9.5 displays the names of any unrecognized files in your folders. You can use the Send button to send those files via email, but the Open button is unavailable.
**Note:** The files are not editable.

➤ To display the Documents list

  - (iPhone) Tap menu at the bottom of the screen and then tap Documents.
  - (iPad) Go to the Menu and tap Documents.

**Browsing folders and files**

The Documents screen enables you to browse through a folder structure to locate files. Tap folders to open them. To return to a previous folder, tap the folder name in the breadcrumb trail. You can slide the breadcrumb trail from side to side if the folder you are looking for is hidden. To access your list of favorite files, tap Favorites.

**Note:** The image above shows the Documents screen on iPhone. It looks slightly different on iPad, but you browse through folders the same way.
Opening files

(iOS) When you tap a file name, the Details screen appears. To open the file, tap Open.
(iPad) When you tap a file name, the content is displayed. To display information about the file, tap 📋:

Sending files via email

You can send a file as an email attachment.

➤ To send a file

1. (iPhone) On the Documents screen, tap the file name. The Details screen appears. Tap Send.

   (iPad) Open the document and tap ✉️.
2. A new message is created in the iOS native email application, with the file as an attachment.

![Emailing Approved Documents](Approved Documents.pdf)

Sent from my iPhone

3. Specify the To address and fill in the other fields as appropriate. You can edit the subject line and add text to the body of the email message.

4. Tap Send.

Marking files as favorites

You can create a Favorites list that contains links to files that you use often. You cannot add folders to the Favorites list.

➢ To mark a file as a favorite

1. **(iPhone)** On the Documents screen, tap the file name. The Details screen appears.

   **(iPad)** Open the document and tap ⭐️.

2. Move the Favorites Option slider to ON.
3. When you go back to the Documents list, the file name has a star beside it, indicating that it’s a favorite.

![Image showing a star next to a file name]

**Note:** This screenshot and the one in the next step were taken on an iPhone, but the behavior is the same on iPad.

To view a list of your favorite files, tap the Favorites button.