



AUTOMATION PORTAL MOBILE

User Guide

Version 2.3

Kelverion Automation Portal Mobile

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Feedback

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Trademarks

IOS is a trademark or registered trademark of Cisco in the U.S. and other countries and is used under license.

Requirements

The Kelverion Automation Portal Mobile has the following requirements:

- Kelverion Automation Portal 4.3 and later
- Compatible with iOS 18.0 or later

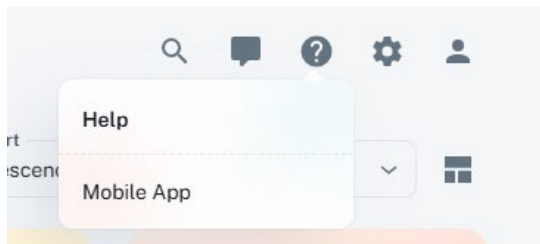
Connecting to Automation Portal

Quick Setup

Quickly configure the mobile app using the Portal Settings QR Code available in the web Automation Portal.

Locating the Portal Settings QR Code

The Portal Settings QR Code can be located in the web Automation Portal in the Help Menu. Click on **Mobile App** to display the Portal Settings QR Code.



Mobile App ×

Use the **Portal Settings** QR Code to quickly configure the Automation Portal Mobile App.

1. Install the Automation Portal Mobile App from the App Store.
2. Launch the Automation Portal App.
3. Tap QR Code.
4. Tap OK to allow access to the camera.
5. Scan the Portal Settings QR Code to configure the App.

When the configuration is complete the Sign In button will appear.

Portal Settings



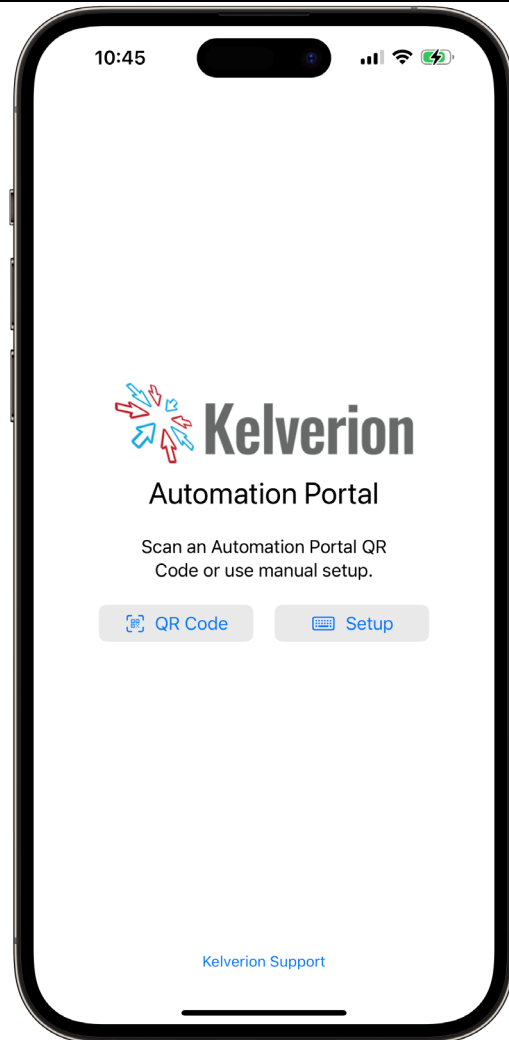
Download

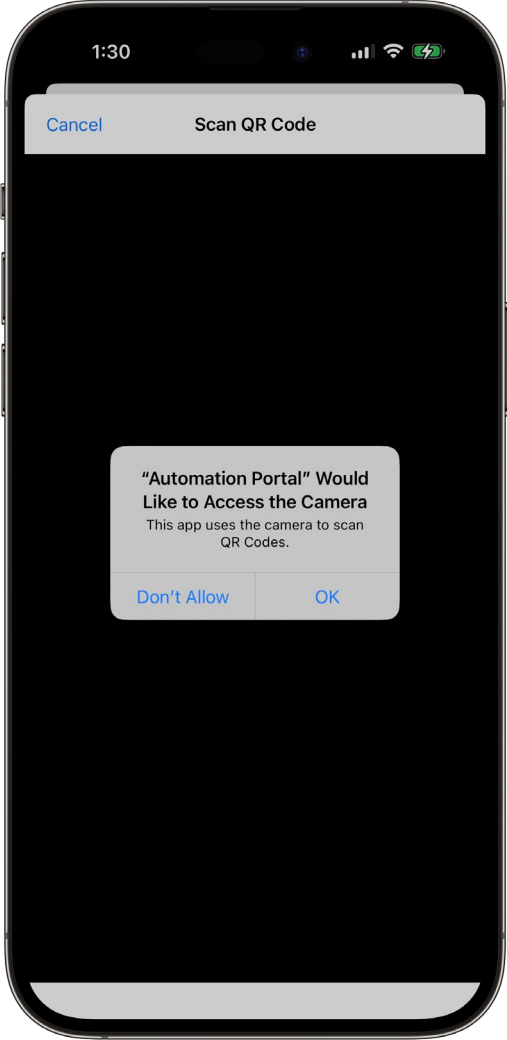
If you need help, please contact [support](#) for assistance.

Scanning QR Code

Scan the QR Code located in the web Automation Portal.

1. Tap **QR Code**.



2. Tap OK to allow access to the camera.	
3. Scan the Portal Settings QR Code to config the App. When the configuration is complete the Sign In button will appear.	
4. Sign In	

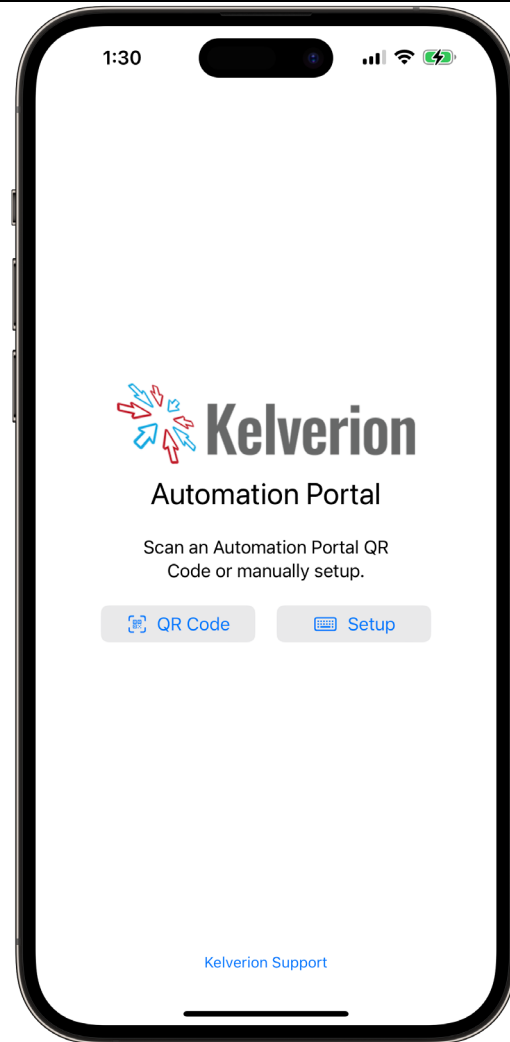
Manual Setup

Before you can connect the mobile app to your Automation Portal you will need the following information:

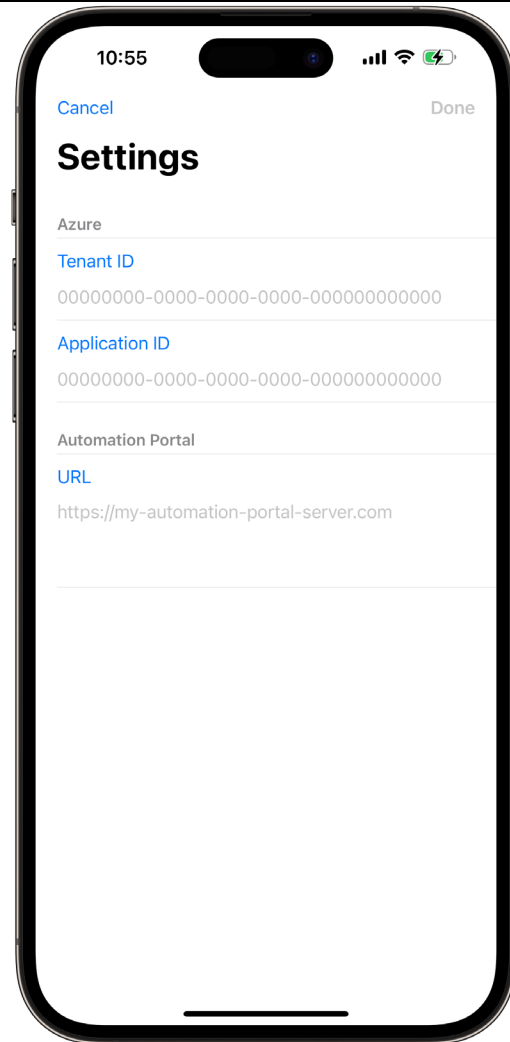
- **Azure Tenant ID** – This is the Azure Tenant ID where the Keverion Automation Portal is registered.
- **Azure Application ID** – This is the Azure Application ID of the Keverion Automation Portal.
- **Portal URL** – This is the URL of the Keverion Automation Portal.

To configure the mobile app, use the guided Setup when first launching the app.

1. Tap **Setup**.

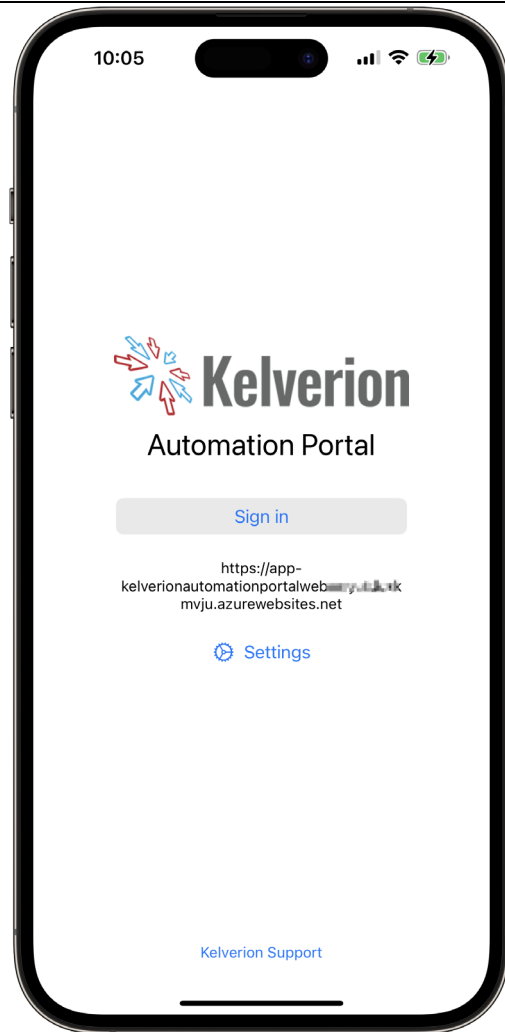


2. Specify your **Azure Tenant ID**.
3. Specify your **Azure Application ID**.
4. Specify your **Automation Portal URL**.
5. Tap **Done**.



Sign In

1. Tap **Sign In**



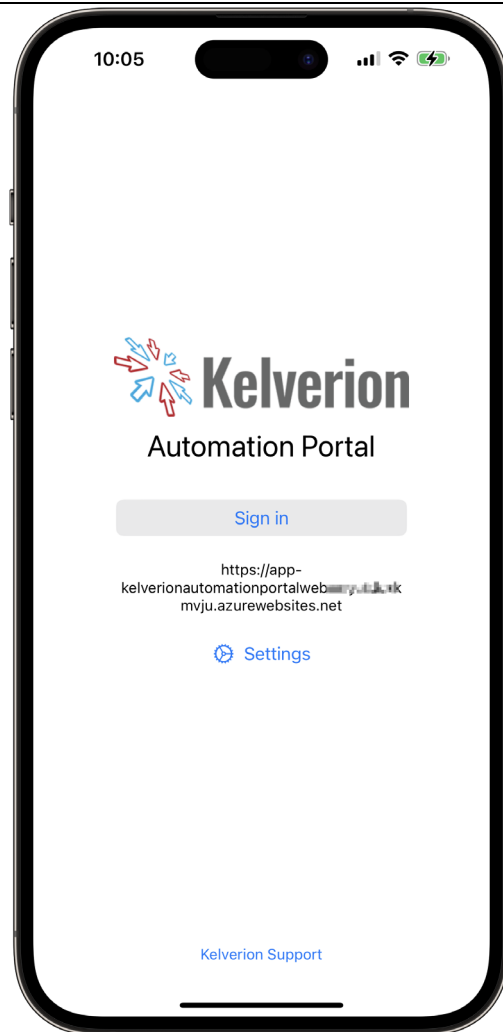
2. Follow the Microsoft login prompts to sign in.

Note: If you have the Microsoft Authenticator App installed on your device you will be redirected to the Authenticator to sign in.

Updating Settings

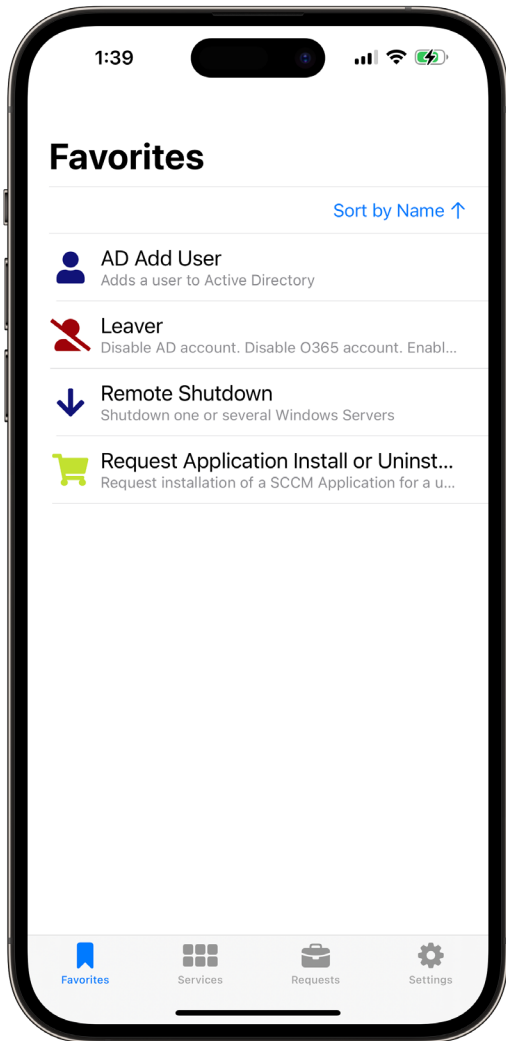
To reconfigure the mobile app, access the Settings on the Sign In screen.

1. Tap **Settings**
2. Update your **Azure Tenant ID**.
3. Update your **Azure Application ID**.
4. Update your **Automation Portal URL**.
5. Tap **Done**.



Favorites

The Favorites tab is where you will find all your favorite **Offerings** you have marked as favorites. To add favorites, see [Adding a Bookmark](#).



Pull to Refresh

To refresh Favorites, scroll to the top of the list and pull down to refresh.

Sorting

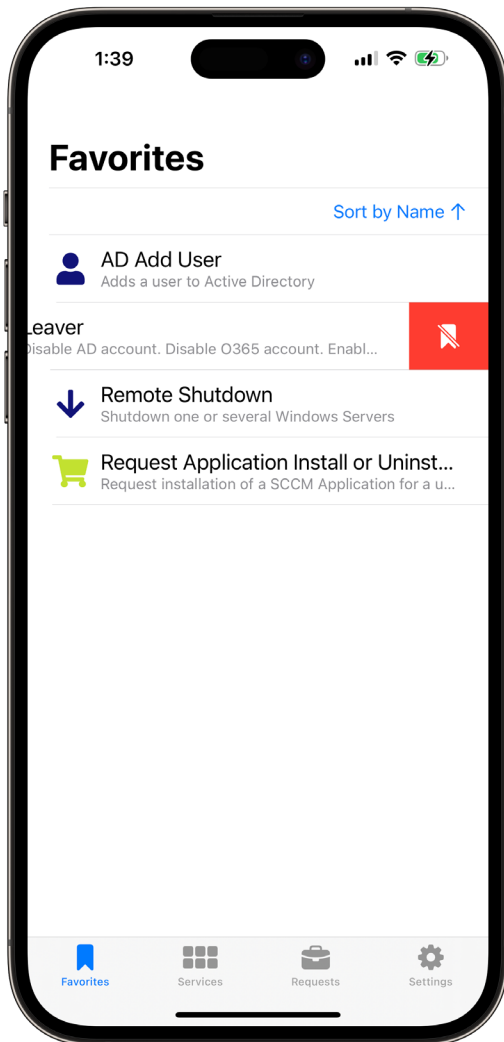
To sort favorites, tap the **Sort by** menu and select the field you wish to sort by.

- Name
- Name (descending)
- Created
- Created (descending)

- Updated
- Updated (descending)

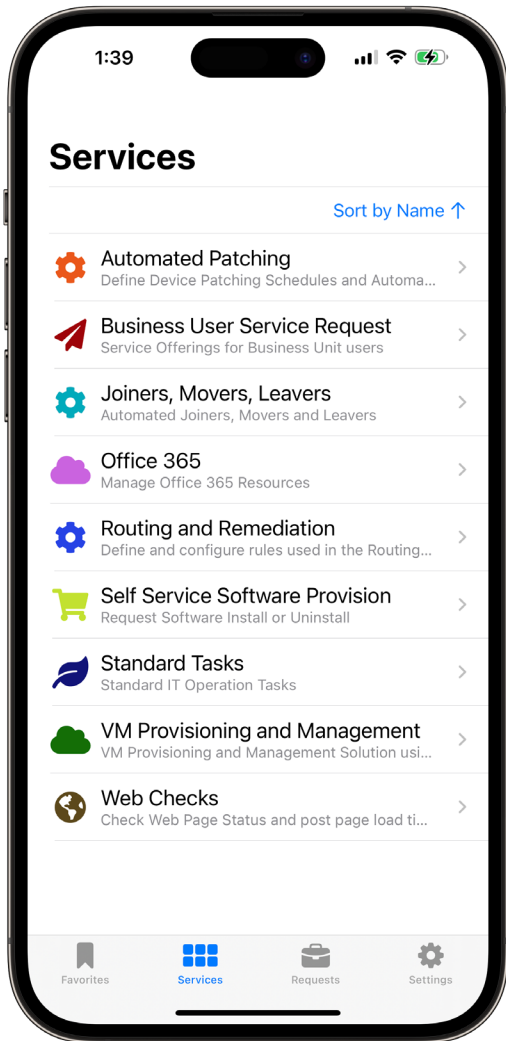
Removing a Favorite

To remove a favorite swipe left on a favorite and tap the red remove bookmark button.



Services

The Services tab is where you will find all **Services** you are permitted to access. Tap on a **Service** to view the **Offerings** it offers.



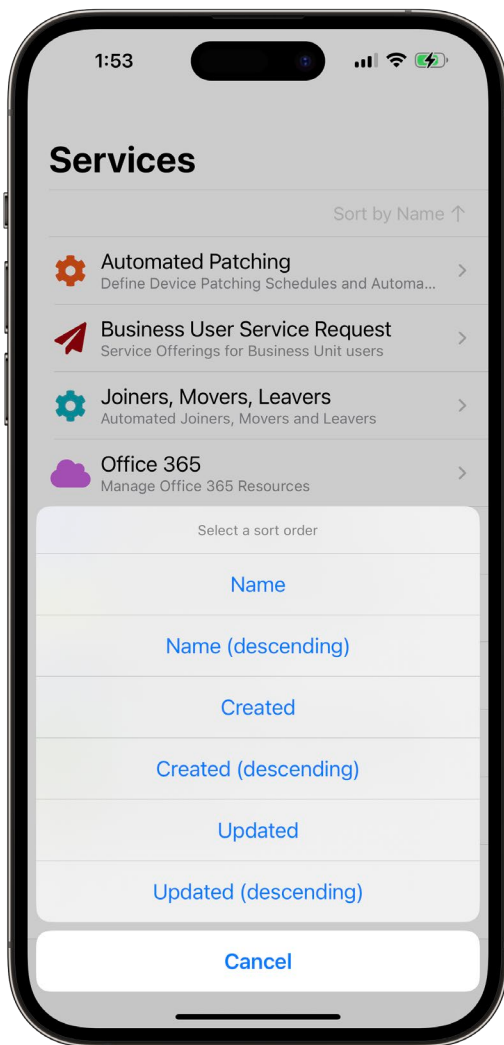
Pull to Refresh

To refresh Services, scroll to the top of the list and pull down to refresh.

Sorting

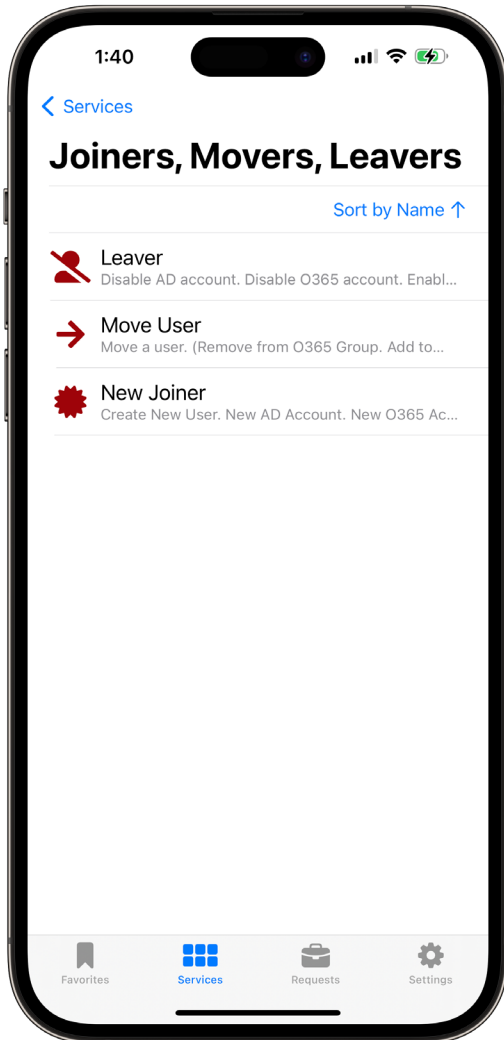
To sort services, tap the **Sort by** menu and select the field you wish to sort by.

- Name
- Name (descending)
- Created
- Created (descending)
- Updated
- Updated (descending)



Offerings

The Offerings screen is where you will find all Offerings of a Service you are permitted to access. Tapping on a **Service** will take you to the **Offerings** screen.



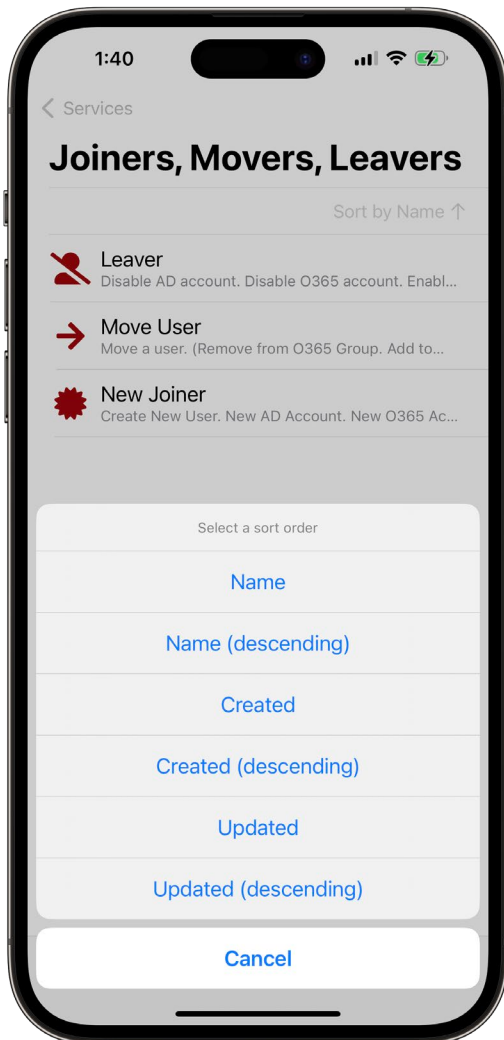
Pull to Refresh

To refresh Offerings, scroll to the top of the list and pull down to refresh.

Sorting

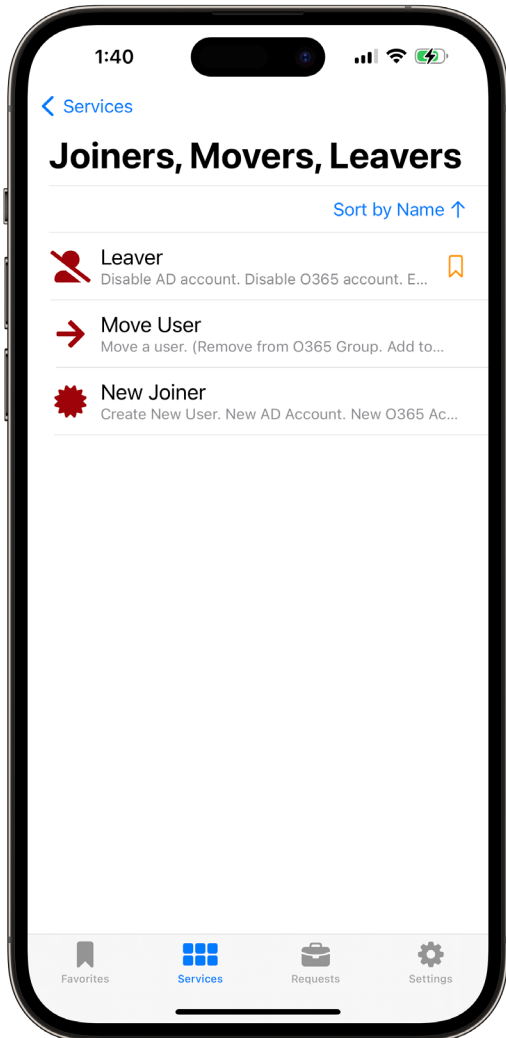
To sort offerings, tap the **Sort by** menu and select the field you wish to sort by.

- Name
- Name (descending)
- Created
- Created (descending)
- Updated
- Updated (descending)



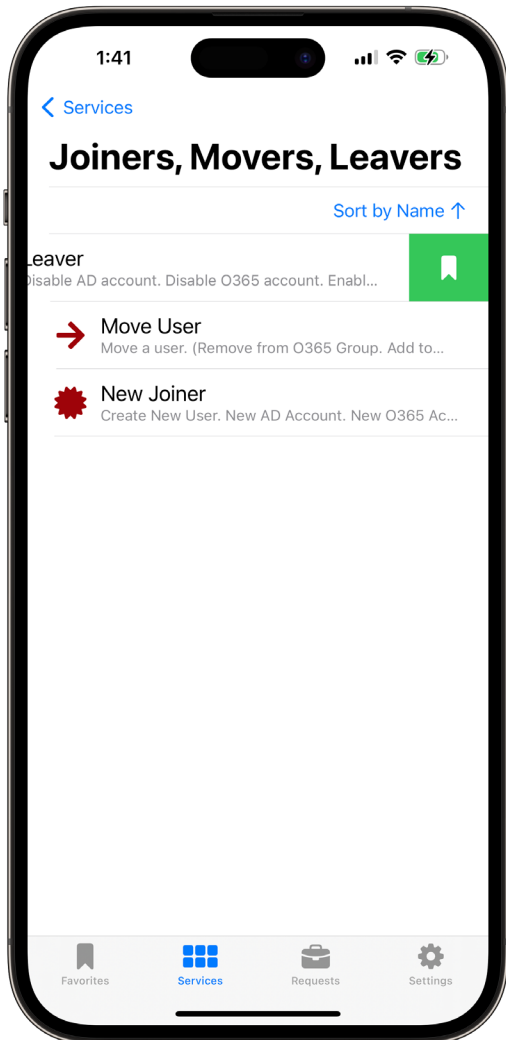
Bookmarks

Offerings can be bookmarked as a favorite. All bookmarked offerings will appear in the Favorites Tab.



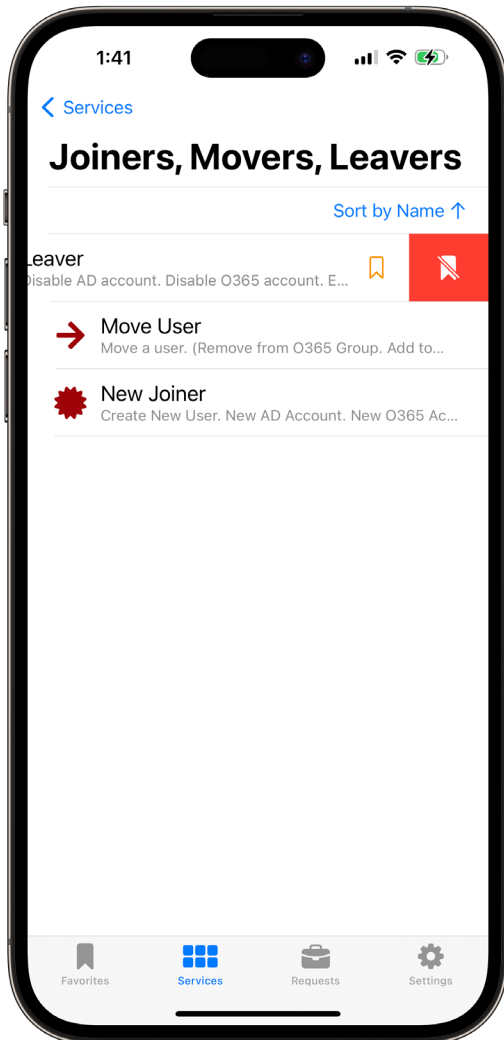
Adding a Bookmark

To bookmark an offering swipe left on an offering and tap the green add bookmark button.



Removing a Bookmark

To remove a bookmarked offering swipe left on an offering and tap the red remove bookmark button.



Creating a Request

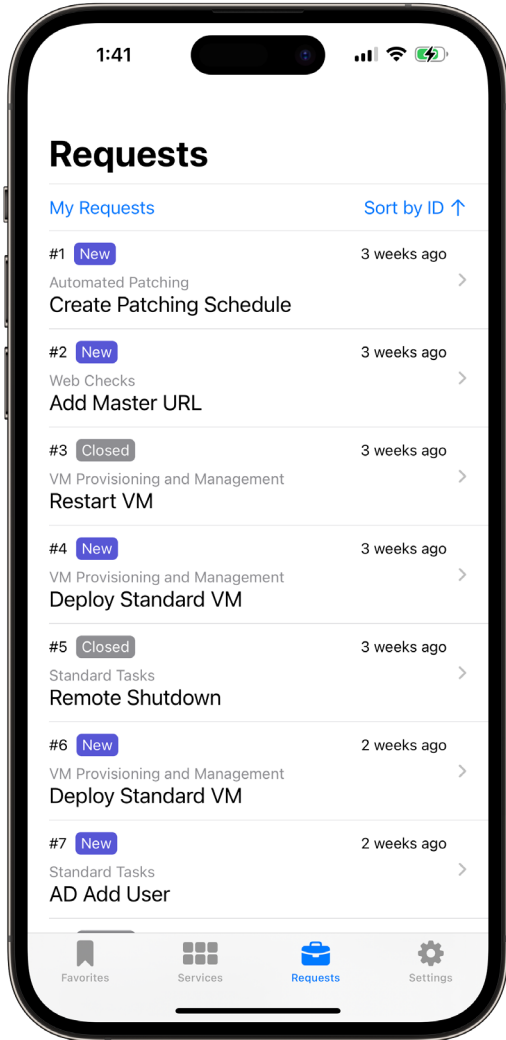
To create a request, tap on an offering to open the create request screen.

The screenshot shows a mobile application interface for creating a new joiner. The screen is titled 'New Joiner' and has 'Cancel' and 'Create' buttons at the top. The form contains several input fields and selection options:

- First Name ***: A text input field.
- Last Name ***: A text input field.
- Password ***: A text input field with a note below it: "Default User Password. Must change on next login."
- Select Domain ***: A selection field with a "Select row" link.
- Select OU ***: A selection field with a "Select row" link and a note below it: "Select the AD Organisational Unit to create the User in".
- AD Group ***: A selection field with a "Select row" link and a note below it: "Select the AD Group to add the User to".
- O365 Groups ***: A selection field with a "Select rows" link.
- Job Title**: A text input field.
- Location ***: A selection field with a "Select item" link.
- PreferredMailAlias**: A text input field (partially visible at the bottom).

Requests

The Requests tab is where you will see all Requests you are permitted to view.



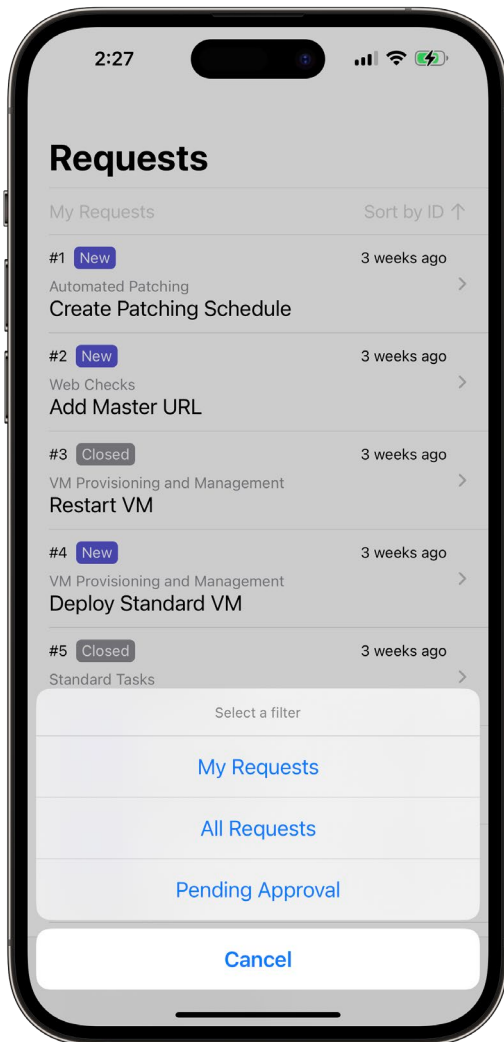
Pull to Refresh

To refresh Requests, scroll to the top of the list and pull down to refresh.

Filters

The following request filters are available.

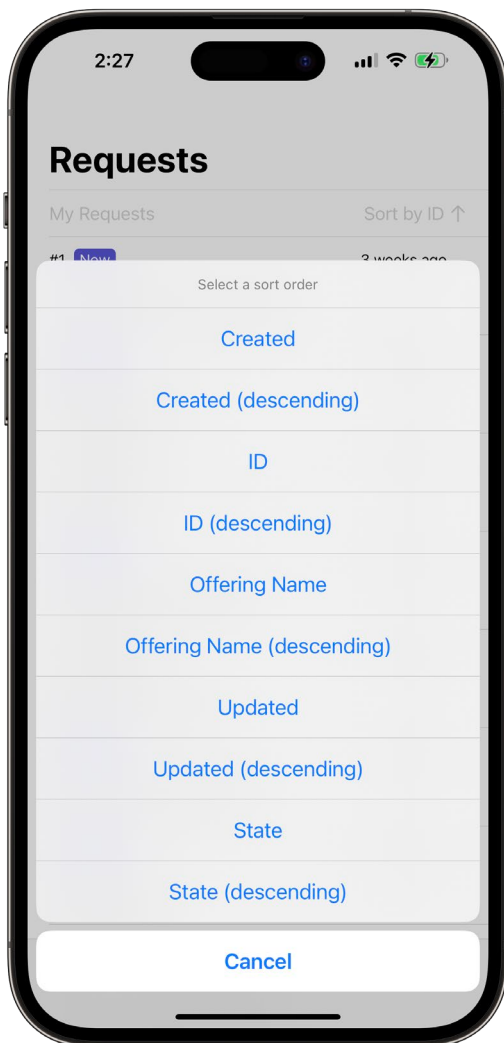
- **My Requests** – Displays only your requests.
- **All Requests** – Displays all requests you are permitted to view.
- **Pending Approval** – Displays all pending requests you are permitted to view.



Sorting

To sort requests, tap the **Sort by** menu and select the field you wish to sort by.

- Created
- Created (descending)
- ID
- ID (descending)
- Offering Name
- Offering Name (descending)
- Updated
- Updated (descending)
- State
- State (descending)



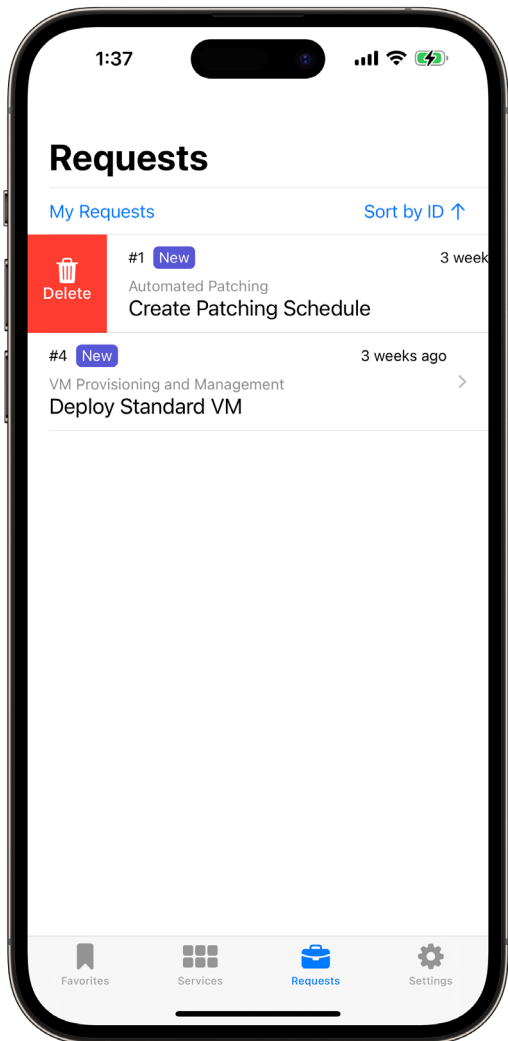
Actions

To perform an action on a Request, swipe left on a request and tap the action you wish to perform.

The following actions are available depending on your permissions.

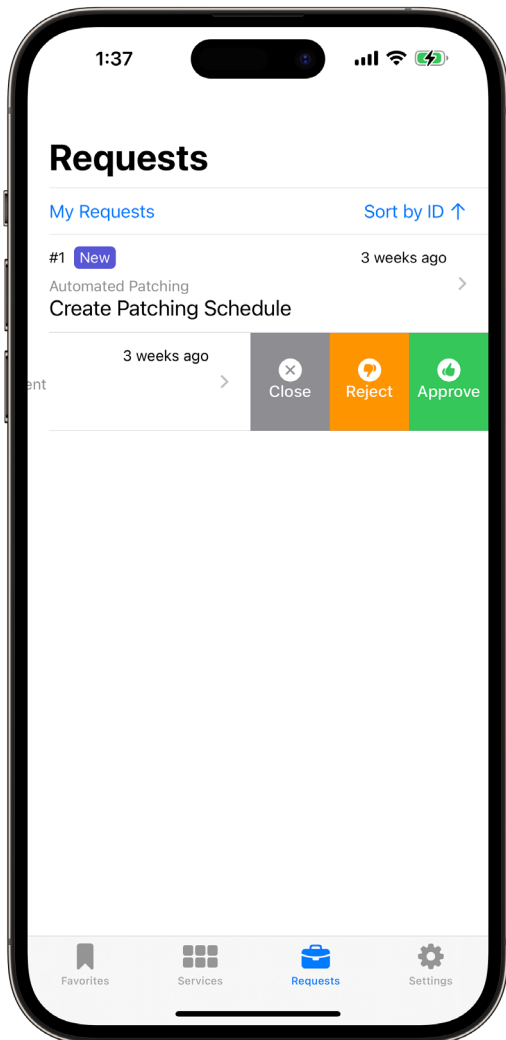
Swipe Right Actions

- Delete (administrator only)



Swipe Left Actions

- Approve (administrator and approver only)
- Reject (administrator and approver only)
- Close



Details

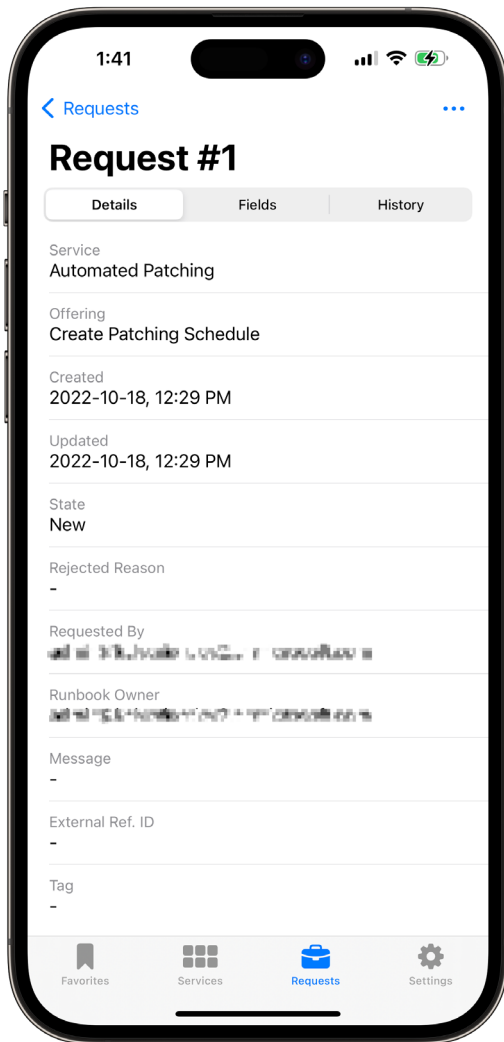
Request details can be viewed by tapping on a request. The following sections are available on the Request details screen.

Pull to Refresh

To refresh Request details, scroll to the top of the list and pull down to refresh.

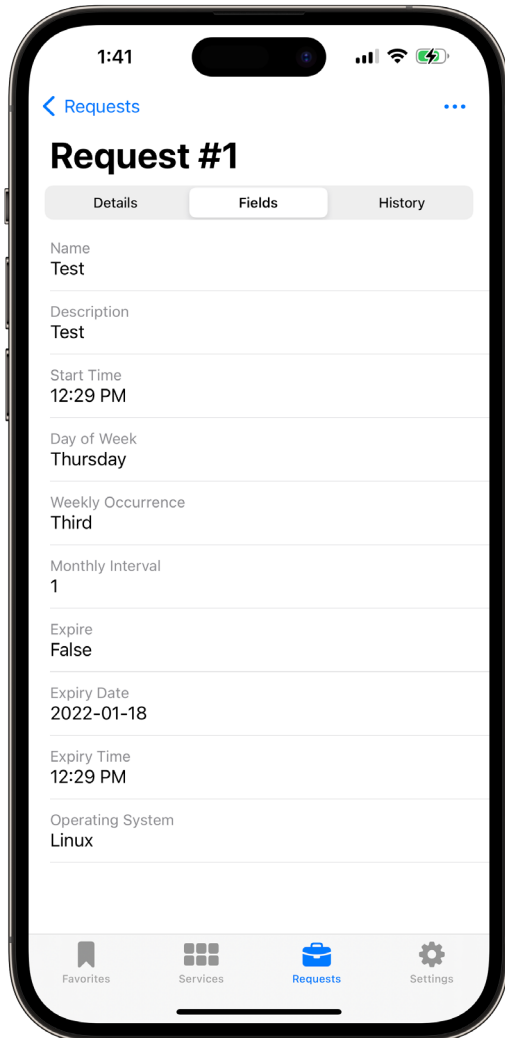
Details Tab

Displays details about the request.



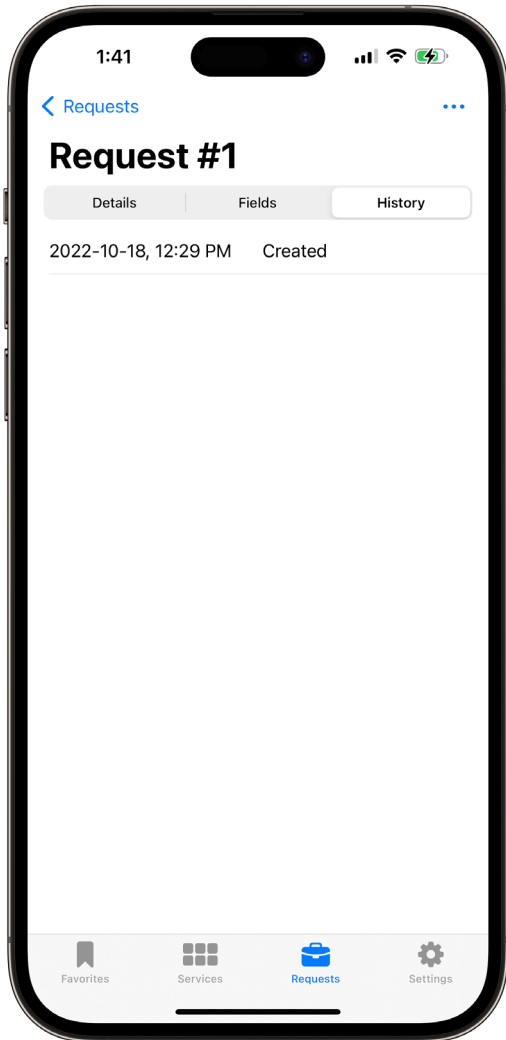
Fields Tab

Displays the field data of the request.



History Tab

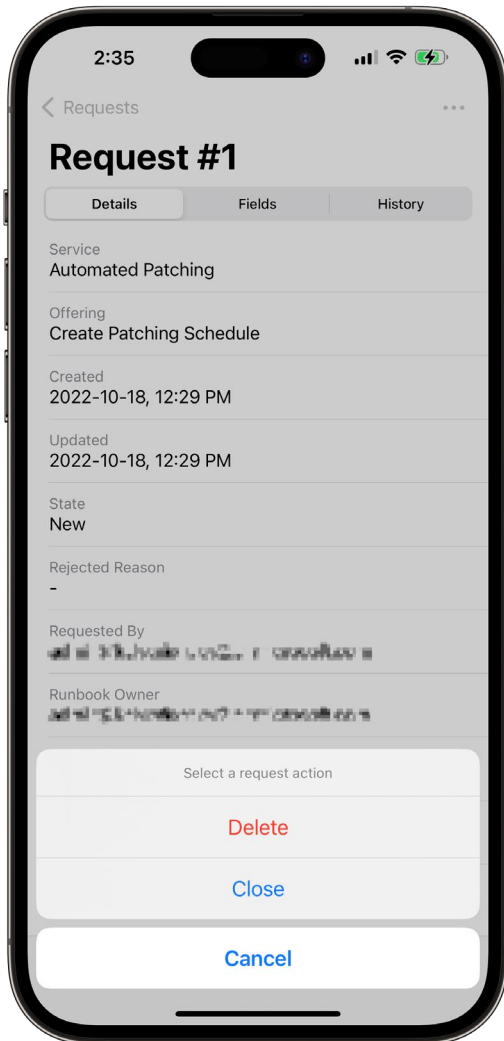
Displays history of the request.



Actions

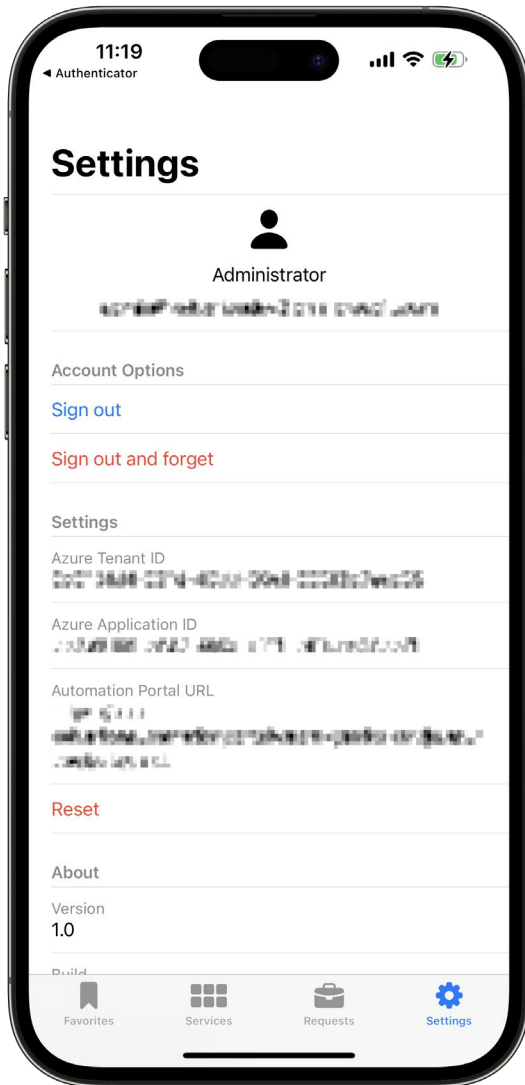
The following actions are available in the action menu depending on the current state of the request and your permission level. Tap on the ... action menu to display available actions.

- Approve (approver only)
- Reject (approver only)
- Close
- Delete (administrator only)



Settings

The Settings tab contains user information, connection information and information about the Automation Portal Mobile app.



Account Options

- **Sign out** – Sign out of the current user.
- **Sign out and forget** – Sign out and forget the current user.

Portal Settings

- **Azure Tenant ID** – Displays the current Azure Tenant ID.
- **Azure Application ID** – Displays the current Application ID.
- **Automation Portal URL** – Displays the current Automation Portal URL.
- **Reset** – Signs out and resets Portal Settings.

About

- **Version** – Version number of the Automation Portal Mobile app.
- **Build** – Build number of the Automation Portal Mobile app.
- **Third-party notices** – List of third-party notices.
- **Contact Support** – Kelverion support link.

Administration

Mobile Device Management (MDN)

Enterprise administrators can configure the Automation Portal mobile app in their MDM solution. Please refer to your MDM solution documentation for configuring application settings.

In your MDM solution configure the following three keys in your Automation Portal app entry.

- **TenantId** – This is the Azure Tenant ID the Kelverion Automation Portal is registered.
- **ApplicationId** – This is the Azure Application ID of the Kelverion Automation Portal.
- **PortalUrl** – This is the URL of the Kelverion Automation Portal.