KWizCom Corporation

SharePoint Mobile Extensions

Admin Guide

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GENERAL

This document provides all the information needed to install, evaluate and deploy this KWizCom product:

- Introduction
- Installation Guide
- Administrator Guide
- FAQ

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SharePoint Mobile Extensions Feature is part of the Mobility Bundle
SharePoint Mobile Extensions Feature is part of the Forms Bundle

Smart, focused interface for productive mobile users!

In just a few minutes you can produce a **custom-tailored**, focused mobile solution that **answers your mobile users' specific**

With **SharePoint Mobile Extensions** You have FULL control over your SharePoint Mobile application:

- You define the exact layout – pages and what's displayed on every page
- You define which menus and actions will be visible, according to dynamic conditions
- You define the exact logic

From now on you can provide then without any code development, the exact mobile business solution that they need!

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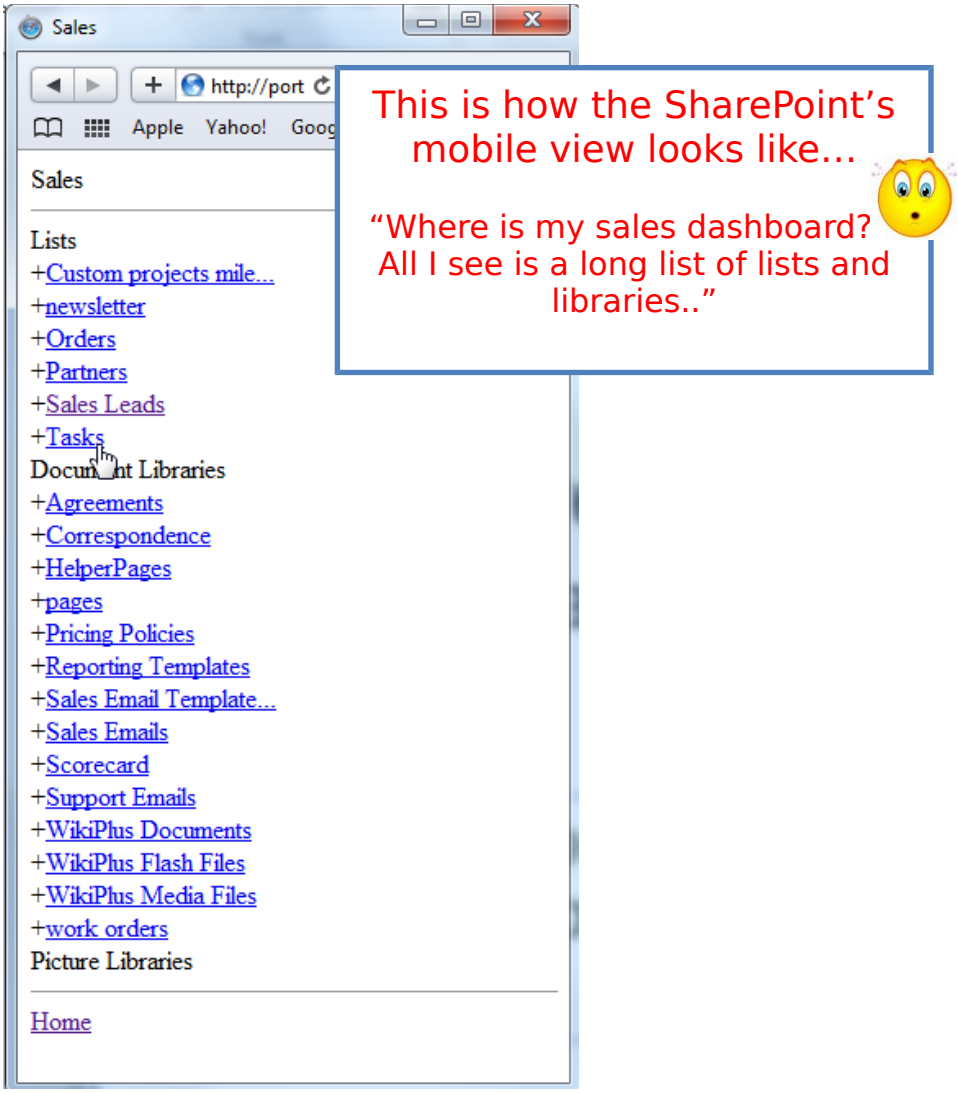
THE BUSINESS NEED

There are available solutions that enable you to connect to SharePoint sites using a mobile device (smartphone, Tablet). The problem with these solutions (including Microsoft's list mobile views), is that they just render the basic SharePoint lists in a "thin" layout which matches the smart phone's interface.

The result is too hard to use!



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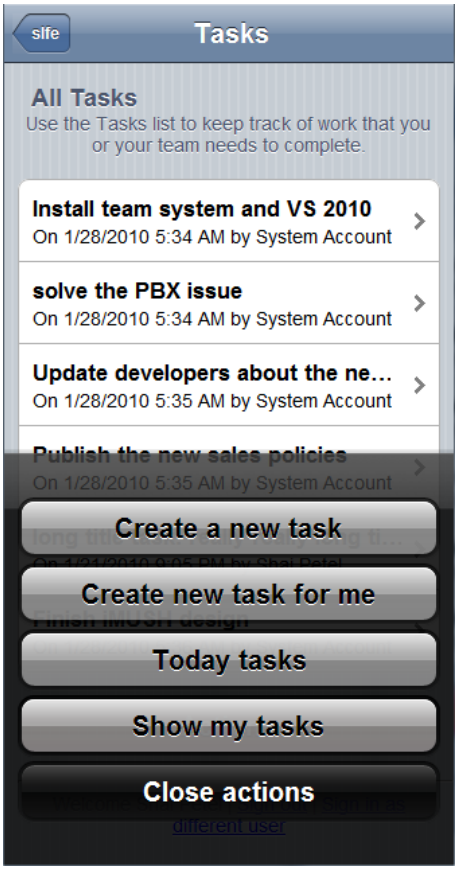
Smartphone/Tablet interface is much more limited than a PC or laptop; therefore you must provide mobile users with a smart interface that shows EXACTLY what the user needs.

A much more Focused, Task-Oriented interface is required.



You define which fields are visible (depending on the user's context)

You define which menus are visible (depending on the user's context)

In contrary to the generic New-View-Edit SharePoint list pages that include too many irrelevant fields and menus, Users need **Task-oriented custom screens** that show

exactly what the user needs, and include customized menus that enable the user perform the needed actions in minimum time.

No need to explain to your customers “how SharePoint works”…

From now on you can provide them the exact mobile business solution that they need, without any code development!

WHO NEEDS IT?

- Field-engineers
- Sales agents
- Support/Help-Desk employees

and..

Anyone who needs the same level of SharePoint Workspace service while being out of the office!

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KEY FEATURES

Main key features of SharePoint Mobile Extensions are:

Feature	SharePoint Mobile Extensions	SharePoint 2007/2010 out-of-the-box
Supports Blackberry, iPhone, Android and Windows 8 based smartphones/Tablets	√	
Enables further UI customization by using CSS files	√	
BYOD support: Server-based deployment, no required installations on devices.	√	
Enables creating Custom mobile pages with zero development	√	
Support for various field types including graphic KPI's and images	√	
Advanced Forms capabilities*: Field-level security, View-level security, Custom default values, Field validation rules, View navigation, conditioned fields	√	Static Field validation rules are available in SP2010
Custom item-level actions/menus **	√	
Custom list-level actions/menus **	√	
Context-sensitive/conditions menus **	√	
Attach a workflow to an action **	√	
Extensible by development	√	√

* In order to have also advanced forms capabilities, you will need to install and activate the SharePoint List Forms extensions feature.

** In order to be able to create custom list and list-item actions, you will need to install and activate the SharePoint List Custom Actions feature.

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SOFTWARE REQUIREMENTS

SERVER REQUIREMENTS

- WSS 3.0/SharePoint 2007 Server or SharePoint 2010 Foundation/Server
- .NET framework 3.5 SP2

CLIENT REQUIREMENTS

- Microsoft Internet Explorer 9 or later (just to access the Mobile Feature settings pages)
- Blackberry, iPhone/iPad, Android and Windows 8 devices

INSTALLATION PROCEDURE

SHAREPOINT 2007

1. Log in using SharePoint administrator account to your SharePoint front-end server.
2. Download the product's latest evaluation version from KWizCom's internet web site. This evaluation version is fully functional for 30 days. Further details about product activation can be found in the Administrator guide (next section).
3. If you have a previous installed version of the product, then uninstall it before you install the new version.
4. Unzip the product's zip file on your SharePoint server.
5. Double-click the .msi file in order to begin the web installation.
6. The installation includes 2 additional optional products, that you can integrate with SharePoint List Custom Actions Feature:
   - SharePoint List Forms Extensions Feature – Enables you to turn the out-of-the-box SharePoint list forms into powerful, feature-rich web forms.
   - SharePoint List Custom Actions – Enables you to create custom menus at the list/item levels.

   These 2 additional optional products are NOT part of the SharePoint

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Custom Actions Extensions Feature, and require separate licensing and payment.

7. When the installation process is complete it will recycle all application pools automatically.

SHAREPOINT 2010 SERVER

1 Log in as SharePoint administrator account to your SharePoint front-end server.

8. Download the product's latest evaluation version (zip file) from KWizCom's internet web site. This evaluation version is fully functional for 30 days.
9. Download the KWizCom SharePoint Foundation zip file: http://www.kwizcom.com/objects/KWizCom%20SharePoint%202010%20Foundation/KWizCom%20SharePoint%20Foundation.zip

REMARK:

KWizCom SharePoint Foundation is a WSP package that includes all KWizCom's shared utilities and licensing modules for SharePoint 2010.

10. Extract both zip files' content into the same folder on your SharePoint's disk. You will find the following .WSP files:

    - **KWizCom SharePoint Foundation.wsp**

      This WSP file includes KWizCom's shared modules and takes care of licensing and activation and therefore must be installed no matter which KWizCom product you're using.
    - **KWizCom SharePoint List Forms Extension Framework.wsp**

      This WSP file is an infrastructure package needed for the product.
    - **KWizCom SharePoint Mobile Extension evaluation.wsp**

      This is the SharePoint Mobile Extensions product package.
    - **2 additional product packages (optional)**
      - KWizCom SharePoint List Forms Extension evaluation.wsp
      - KWizCom SharePoint List Custom Actions evaluation.wsp

      REMARK:

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These 2 additional optional products are NOT part of the SharePoint List Forms Extensions Feature, and require separate licensing and payment. They are included in the product's zip file only to enable you to check-out the features of the integrated solutions.

11. You will need now to install and deploy these standard SharePoint WSP packages. This can be done by using SharePoint's stsadm/Powershell tools, according to Microsoft's guidelines for installing WSP packages.
12. **For a much quicker automatic installation**, right-click the Powershell script file "**SP-WSPsInstaller.ps1**" and select "Run with Powershell". This will start the automatic installation and deployment process.
13. At the end of the installation process, you should see all packages deployed in the Central Admin "Server Solutions" page, and the *KWizCom SharePoint Foundation* WSP package should be deployed also in the Central Admin web application.

POST INSTALLATION

SHAREPOINT 2007

1 After completing the installation, you will see a new KWizCom entry in Windows **Start -> All Programs -> KWizCom** -> **SharePoint Mobile Extensions**

Under *SharePoint Mobile Extensions* entry you'll see the following programs:

- **About SharePoint Mobile Extensions**
  Display General Information about the component.
- **Activate SharePoint Mobile Extensions**
  This utility enables you (the SharePoint Administrator) to activate the downloaded evaluation version.

14. The installation adds a new feature in the farm level and in site collection level.
    By default the Farm level feature should be active, enabling you to start using this feature immediately:

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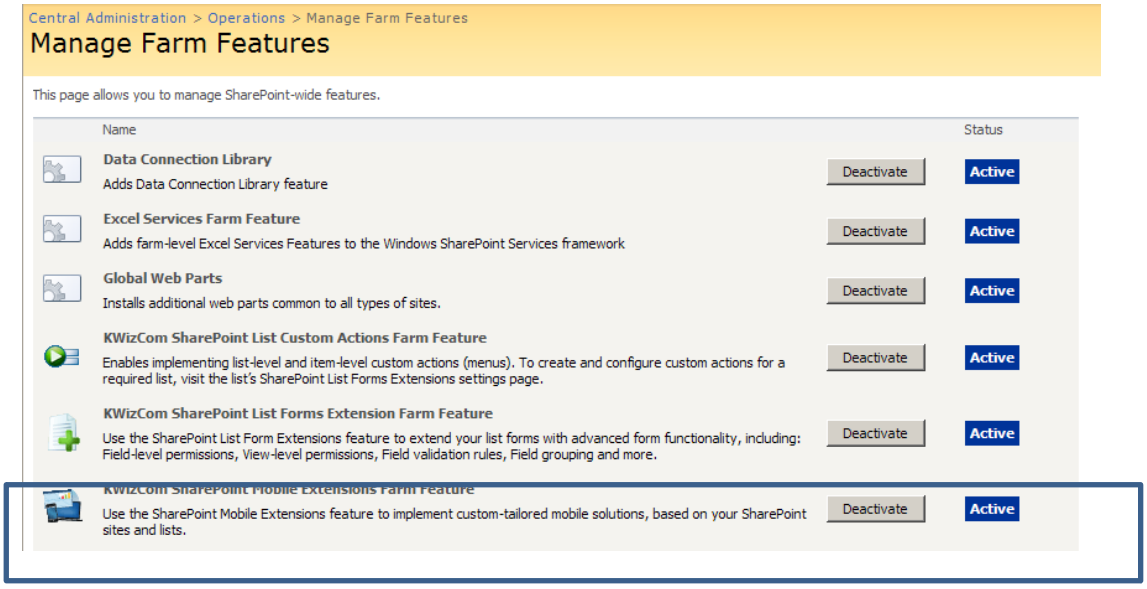

15. In case you wish this feature to be available only in a specific site collection, disable the farm feature, and enable the site collection feature.
16. If you had a previous version installed, and have been deploying the List Forms Extensions Feature is site collection level, you will need to deactivate the farm level feature (because it is automatically activated during installation). If you leave both the farm-level and the site collection-level features active, you will have duplicated links to the List Forms Extensions settings pages at the list settings pages.

SHAREPOINT 2010

1 After you have successfully deployed the required .WSP packages, a new feature is added both to the farm level and to site collection level. By default the Farm level feature should be active, enabling you to start using this feature immediately:

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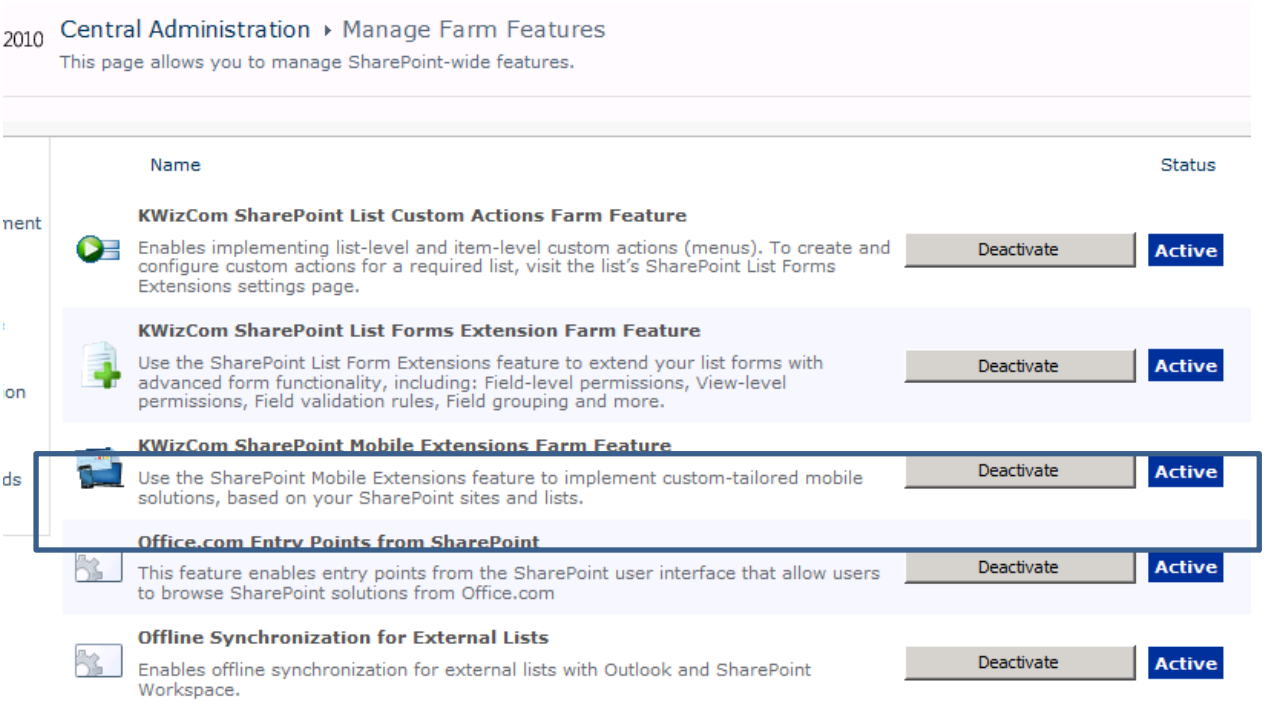

2 If you had a previous version installed, and have been deploying the List Forms Extensions Feature is site collection level, you will need to deactivate the farm level feature (because it is automatically activated during installation). If you leave both the farm-level and the site collection-level features active, you will have duplicated links to the List Forms Extensions settings pages at the list settings pages.

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UN-INSTALLATION PROCEDURE

SHAREPOINT 2007

1. Log in as SharePoint administrator to your SharePoint front-end server.
17. Go to Control Panel and double-click **Add or Remove Programs.**
18. Select SharePoint List Custom Actions entry and click **Remove** button.
19. Click **Yes** to approve the removal of the component.
20. Once the product was un-installed, close the **Add or Remove Programs** screen.

SHAREPOINT 2010

1. Retract and delete the solution using SharePoint central admin or by using stsadm/powershell command line.

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This section describes all administration activities related to SharePoint Mobile Extensions, including: product localization, product configuration and customization.

COMPONENT ACTIVATION

KWizCom components are available for evaluation prior to purchase. This way you can try our components and verify that they indeed meet your needs. An evaluation version for each KWizCom component contains all features of the component's production version. The only difference is that an evaluation version is time-limited, and will operate for a period of one month.

Once you decide to order a KWizCom component, you will need to follow the following steps:

SharePoint 2007

1. Order the component on the KWizCom website – www.KWizCom.com.
2. Send us the installed evaluation version's *product Code* (you will see the product Code on the "About" product page:

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Please use the Activation Request web form, on KWizCom web site to send us your product code.

3. Get the component activation key – this key will be sent to you by email once your order is processed.

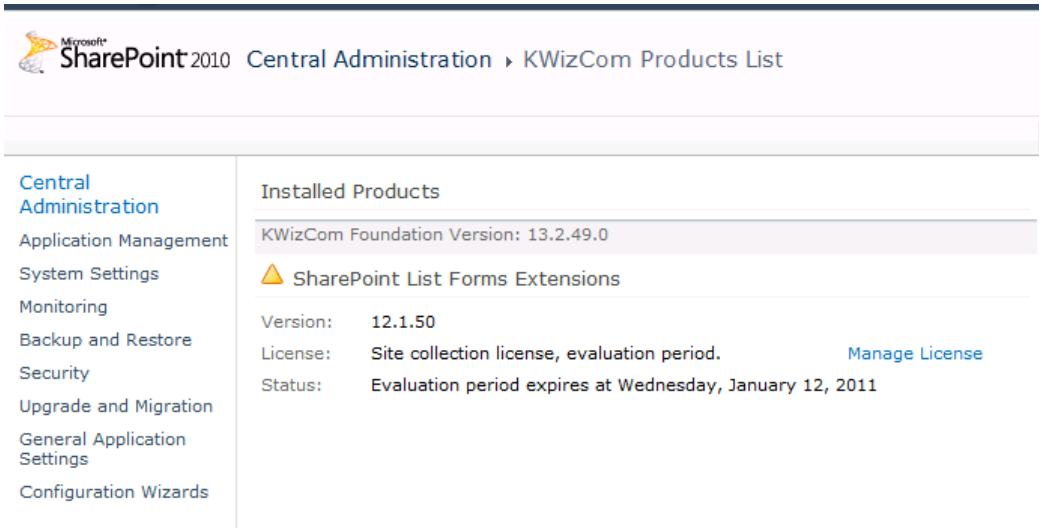
4. Activate your installed evaluation version -
   click **Start -> All Programs -> KWizCom -> SharePoint Mobile Extensions -> Activate SharePoint Mobile Extensions**

SharePoint 2010

1. Order the product on the KWizCom website – www.KWizCom.com, or contact our sales team at sales@kwizcom.com.
2. After the order was made, you can activate your installed evaluation version. Activation is done by the following steps:

a Open SharePoint Central Admin. On the main “Central Administration” page, you will see the “KWizCom Features Administration” icon:

b Click the KWizCom Features Administration icon. You will be redirected to a page that allows you to manage all your installed KWizCom products’ licenses:



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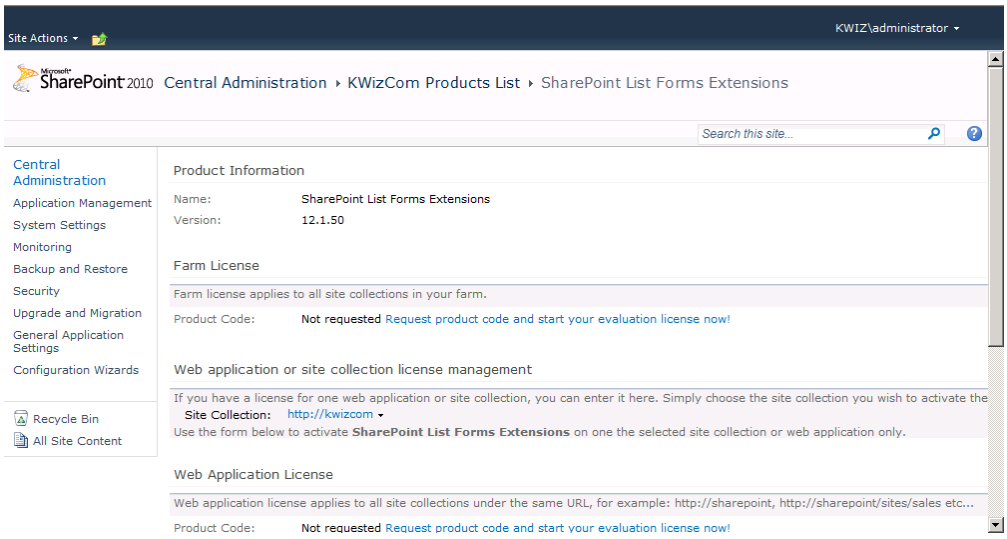
c Click the “Manage License” link next to the product that you wish to activate. You will be redirected to that product’s license management page:



d Click on the “Request product code and start your evaluation now” link, under the required license type (Farm, Web application, Site Collection).
A product code will be generated and displayed as in the following screenshot:

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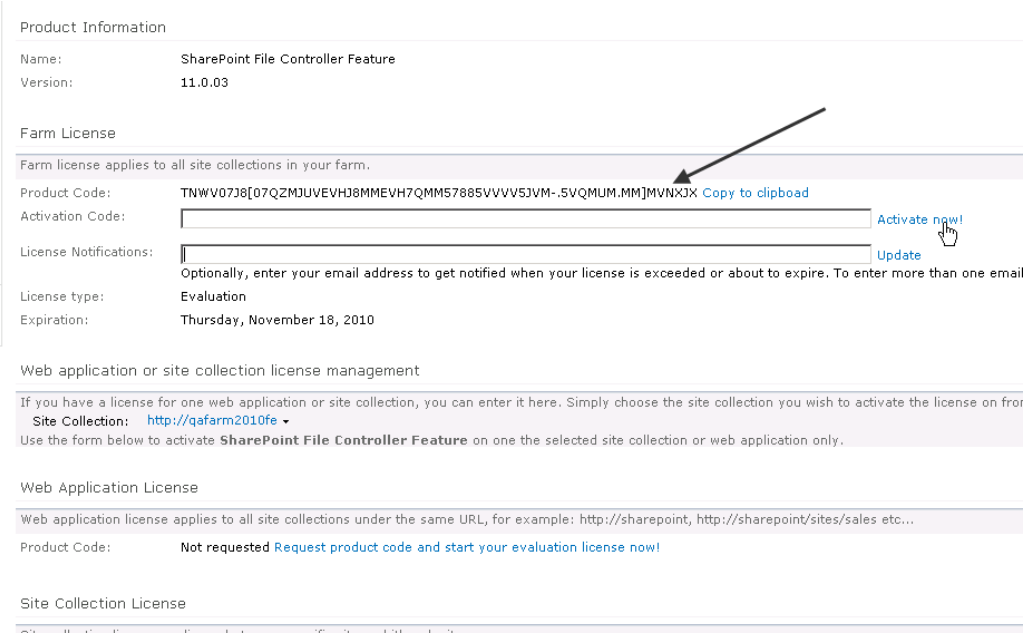
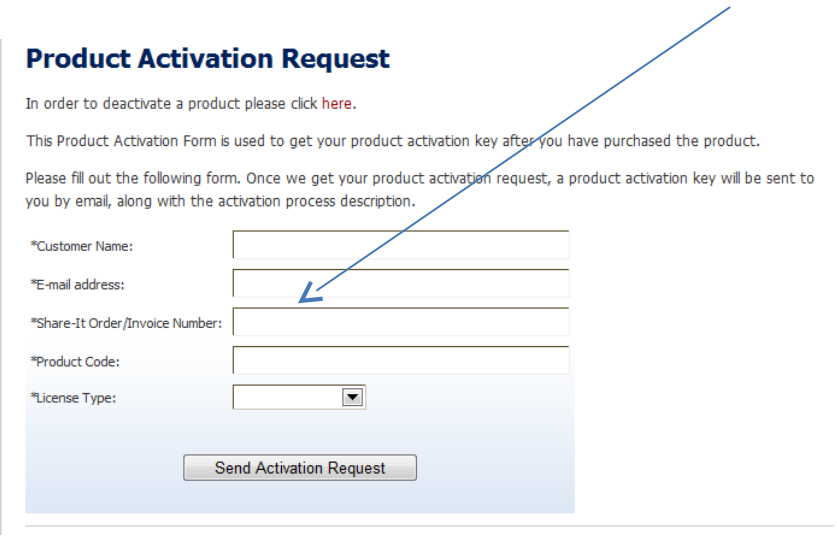


e Copy the product code.

f Browse the *Product Activation Request page* on KWizCom's web site: http://www.kwizcom.com/ProductReg.



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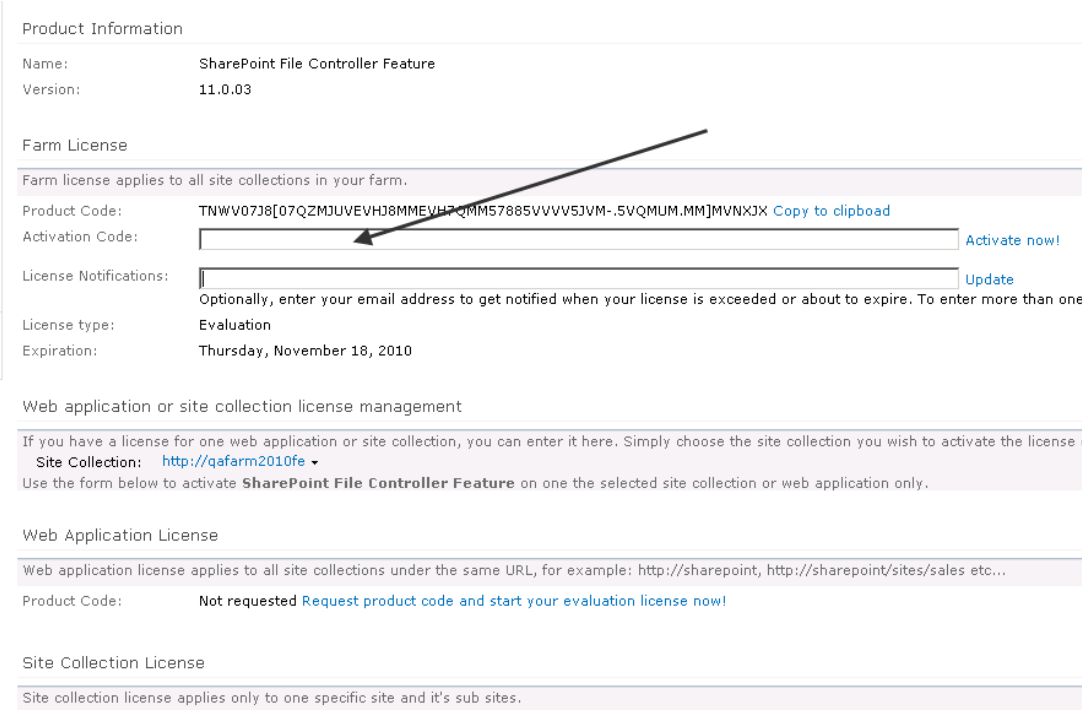
Copy your *Product Code* into the “Product Code” field, and after you fill-out all other form fields, click “Send Activation Request button.

g Once your order is confirmed, you will receive the Activation Code for your product by email.

h Copy the activation code into the “Activation Code” field in the product’s license management page and click “Activate now!” link.



That’s it! Your product is now fully activated.

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CREATING A MOBILE INTERFACE FOR YOUR SHAREOINT SITE

GENERAL

As a site administrator, you can create a custom mobile interface so that your mobile users will be able to keep using their workspace in a productive way while they are out of the office, by using their smartphones/tablets. This section guides you through the steps needed to create a custom mobile interface.

MOBILE INTERFACE TERMINOLOGY

This section defines the basic terms used in the KWizCom SharePoint Mobile Extensions solution.

- **Mobile solution** – a solution consists of the mobile interface produced for a SharePoint site.
- **Mobile pages** – Every mobile solution includes mobile pages. Each page is accessible via URL.
- **Page parts** – Every mobile page includes one or more page parts (same as a SharePoint web part pages includes web parts).
- **Action** – this is a button/menu that when a user clicks it, it performs some action.
- **Page part type** – there are several types of page parts:
    - **List View** – This type of page part displays a list view. When you select this type, you then have to select the list name and view that you wish to display in the page part.
      A list view renders the following display (this one for example shows a KPI list):

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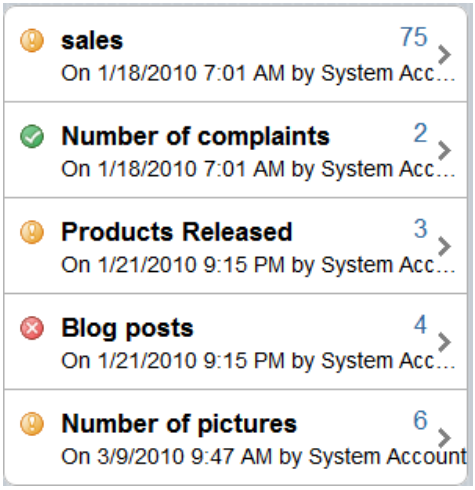
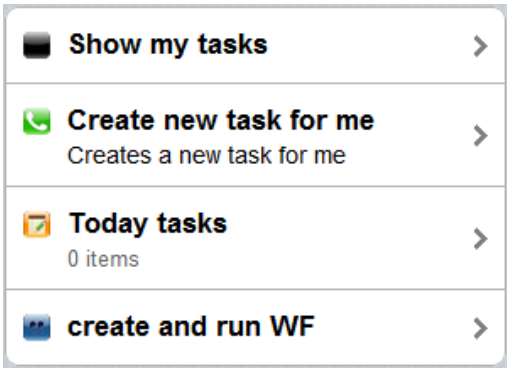


- **Actions List** – This type of page part displays action buttons in a vertical layout.
  An action list renders the following display:



- **Actions Grid** - This type of page part displays action buttons in a matrix layout (4 in a row).

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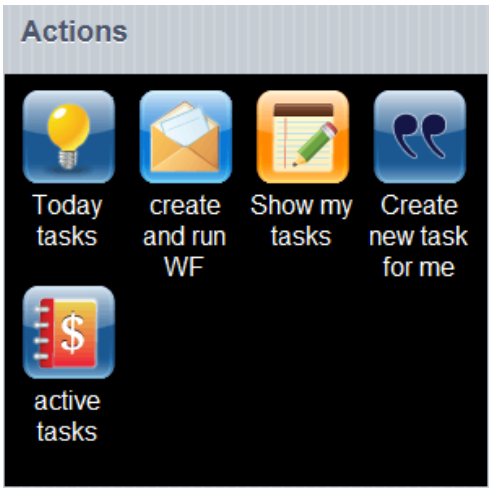

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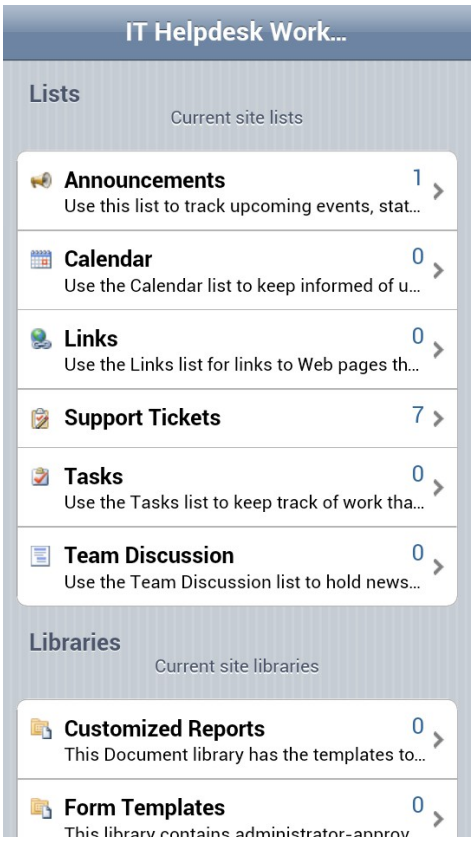
DEFAULT BEHAVIOUR AFTER ACTIVATING THE MOBILE FEATURE

Once you install and activate the SharePoint Mobile Feature, you can start using the default mobile view without configuration needed.

This default mobile view simply gives you access to all of the lists and libraries in the site collection where you have activated the feature.

Once you browse your SharePoint site using a mobile device, you'll get the following default mobile display:



You can use the default mobile view to add/edit/delete items in your lists/libraries.

* If you have *KWizCom List Forms Extensions* Feature and/or *KWizCom Custom Actions* Feature installed, then you will be able to use them in the default mobile view (Enhanced forms, custom menus/buttons in lists).

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CONFIGURING YOUR MOBILE SOLUTION

You can configure your mobile SharePoint solution in 2 levels:

- **List/Library level**
  At this level you can configure which fields will be displayed in the mobile view (see next section for details)
- **Site level**
  At this level you can create custom mobile pages.

The following sections describe the various configuration settings available at the List and Site levels.

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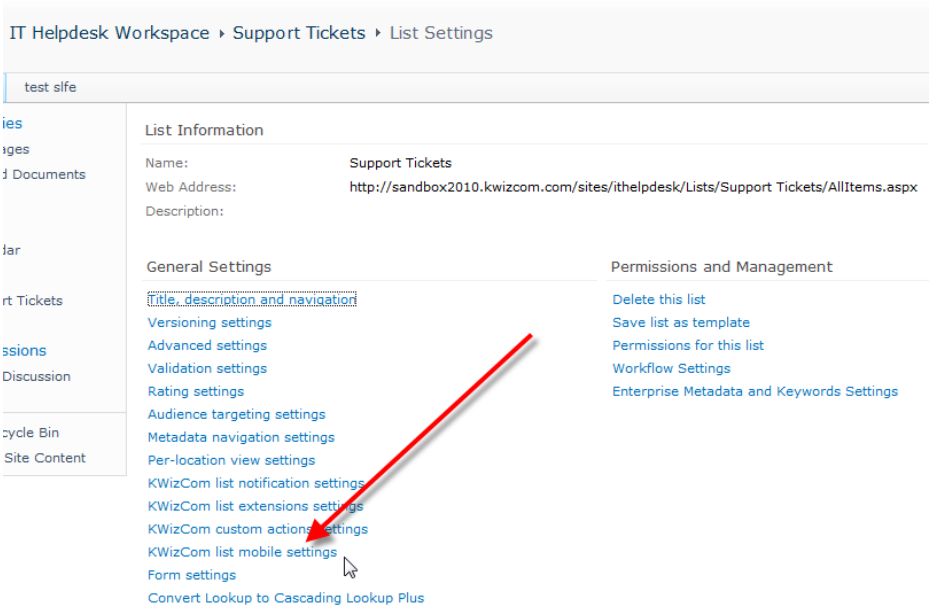
LIST-LEVEL MOBILE SETTINGS

To start configuring your list's mobile settings, go to the list settings page and click the "KWizCom list mobile settings" link:



The following settings page will appear:

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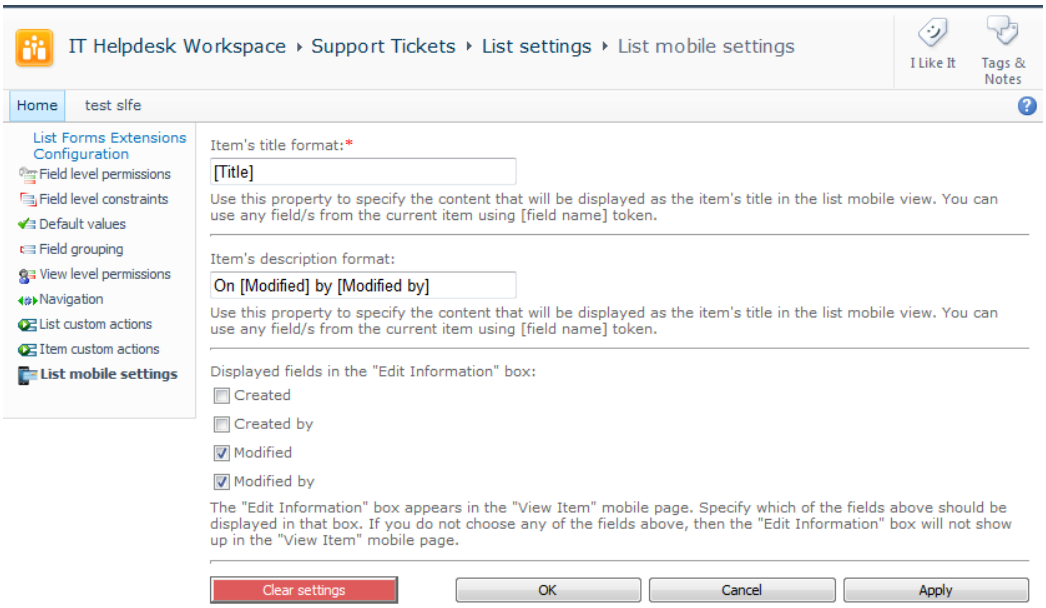

This page allows you to configure the following list mobile view settings:

Property	Description
Item's title format	Use this property to specify the content that will be displayed as the **item's title*** in the list mobile view. You can use any field/s from the current item using [field name] token.
Item's description format	Use this property to specify the content that will be displayed as the **item's description*** in the list mobile view. You can use any field/s from the current item using [field name] token.
Displayed fields in the "Edit Information" box:	The **"Edit Information" box**** appears in the "View Item" mobile page. Specify which of the fields above should be displayed in that box. If you do not choose any of the fields above, then the "Edit Information" box will not show up in the "View Item" mobile page.

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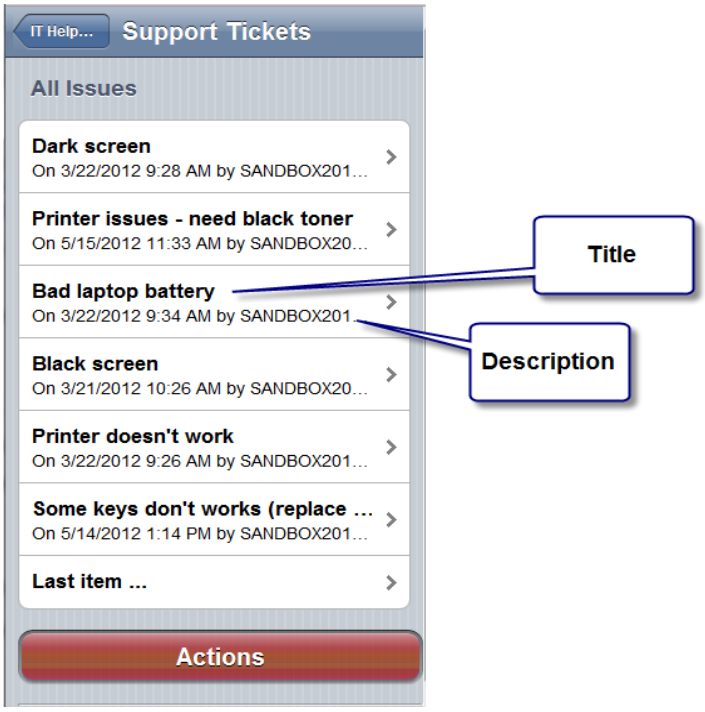
* When a list is displayed in the mobile view, you can display for each item a Title (appears bold) and Description (appears below the title):



** In the item's mobile view page you can see at the bottom part, the "Edit Information" box:

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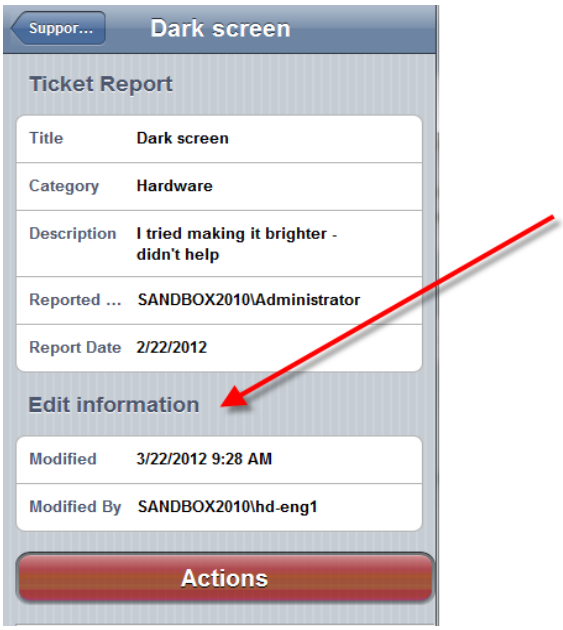

SITE-LEVEL MOBILE SETTINGS

To start creating your custom mobile pages, click the “SharePoint Mobile Extensions settings" menu below the “Site Actions” menu. The following settings page will be displayed:

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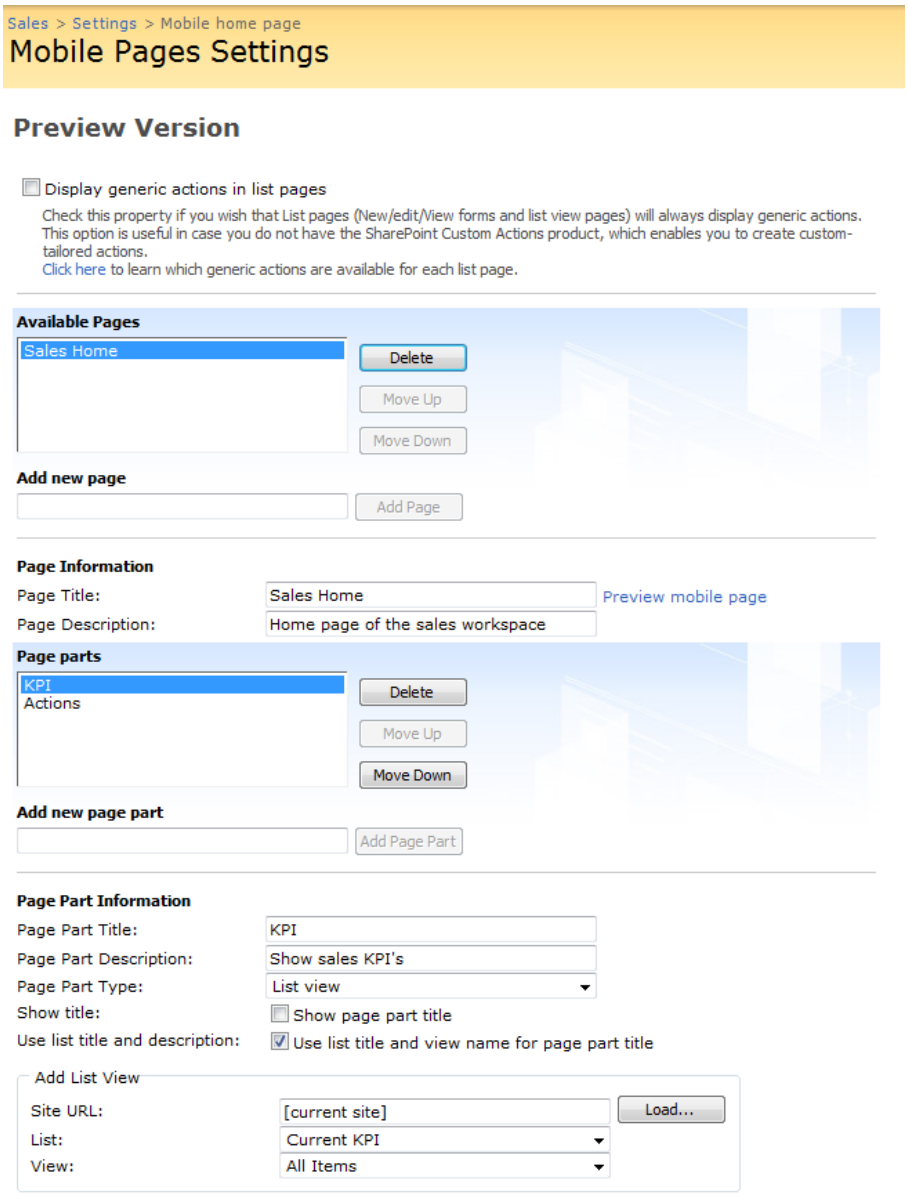
Sales > Settings > Mobile home page
Mobile Pages Settings
Preview Version
Display generic actions in list pages
Check this property if you wish that List pages (New/edit/View forms and list view pages) will always display generic actions. This option is useful in case you do not have the SharePoint Custom Actions product, which enables you to create custom-tailored actions.
Click here to learn which generic actions are available for each list page.
Available Pages
Sales Home
Delete
Move Up
Move Down
Add new page
Add Page
Page Information
Page Title:
Sales Home
Preview mobile page
Page Description:
Home page of the sales workspace
Page parts
KPI
Actions
Delete
Move Up
Move Down
Add new page part
Add Page Part
Page Part Information
Page Part Title:
KPI
Page Part Description:
Show sales KPI's
Page Part Type:
List view
Show title:
Show page part title
Use list title and description:
Use list title and view name for page part title
Add List View
Site URL:
[current site]
Load...
List:
Current KPI
View:
All Items