

KWizCom Corporation



KWizCom Mobile

Admin Guide

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INTRODUCTION

GENERAL

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

- Introduction
- Installation Guide
- Administrator Guide
- FAQ

PRODUCT OVERVIEW

KWizCom Mobile is part of the [KWizCom Forms Enterprise Edition](#)

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 needs!



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

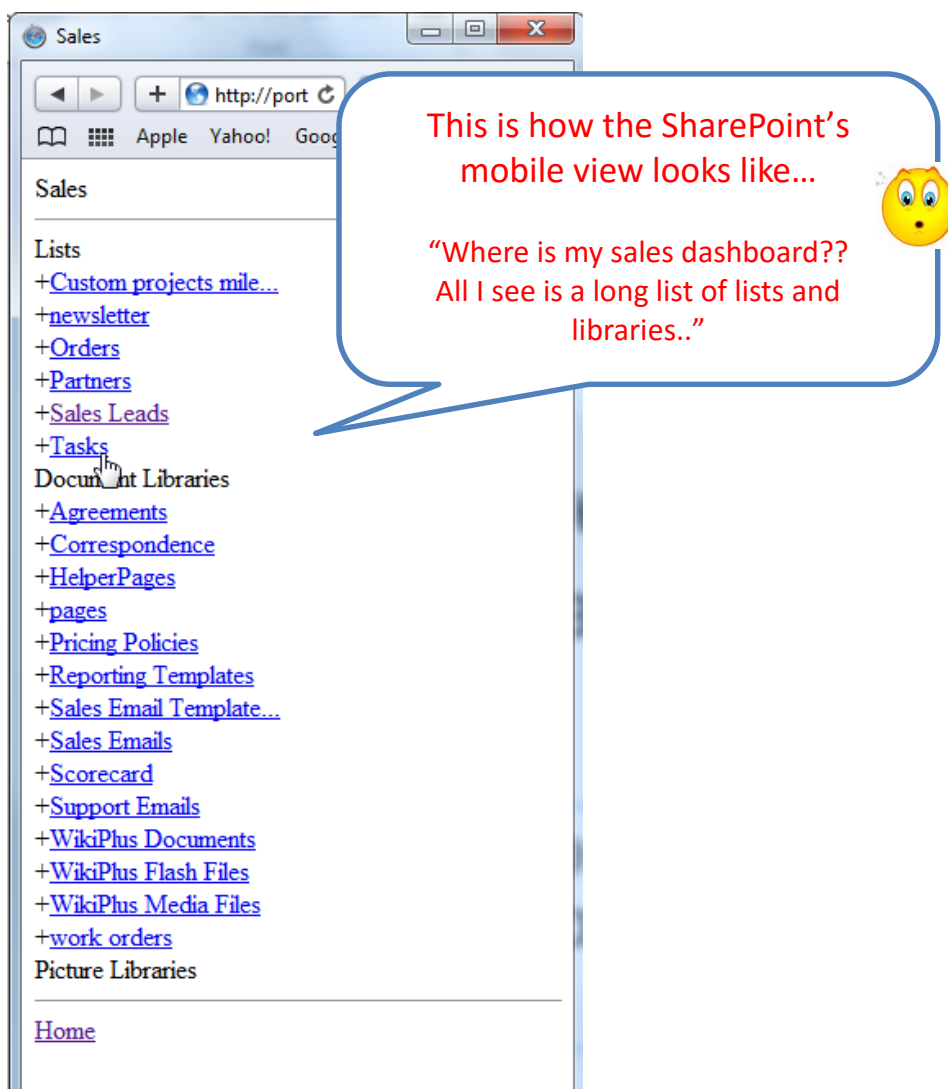
- You define the exact layout – pages and what's displayed on every page
- You define which menus and actions will be visible, according to dynamic conditions
- You define the exact logic

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

THE BUSINESS NEED

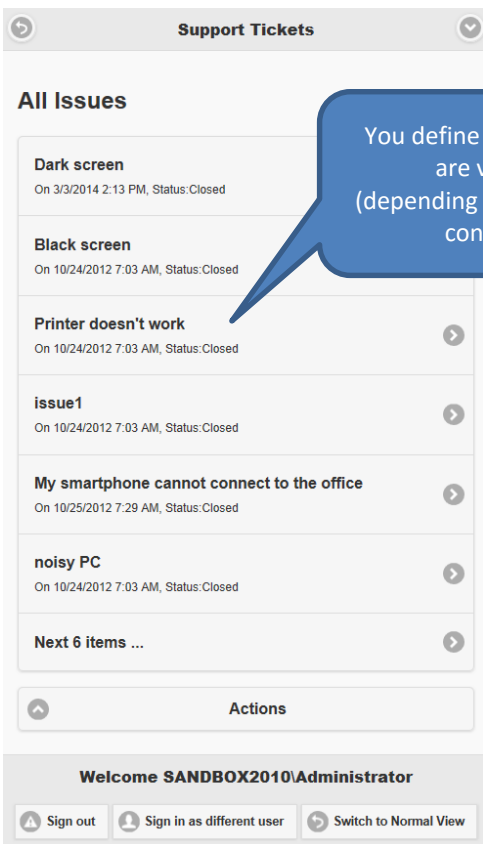
There are available solutions that enable you to connect to SharePoint sites using a mobile device (smartphone, Tablet). The problem with these solutions (including Microsoft's list mobile views), is that they just render the basic SharePoint lists in a "thin" layout which matches the smart phone's interface.

The result is too hard to use!

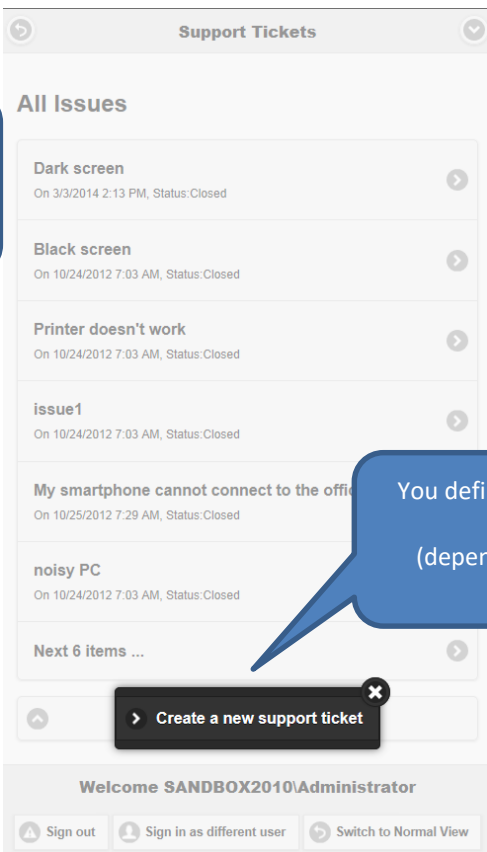


Smartphone/Tablet interface is much more limited than a PC or laptop; therefore you must provide mobile users with a smart interface that shows EXACTLY what the user needs.

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 “this is 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!

KEY FEATURES

Main key features of KWizCom Mobile are:

Feature	KWizCom Mobile	KWizCom Mobile as part of KWizCom Forms Enterprise	SharePoint 2007/2010/2013 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	✓	✓	
Support for viewing rich text fields and KWizCom WikiPlus pages.	✓	✓	
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 SP2010/2013
Custom item-level actions/menus *		✓	
Custom list-level actions/menus *		✓	
Context-sensitive/conditions menus *		✓	
Attach a workflow to an action *		✓	
Connect to external data *		✓	

INSTALLATION GUIDE

SOFTWARE REQUIREMENTS

SERVER REQUIREMENTS

- WSS 3.0/SharePoint 2007 Server or SharePoint 2010/2013 Foundation/Server

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, which are part of KWizCom Forms Enterprise edition:
 - KWizCom Forms – Enables you to turn the out-of-the-box SharePoint list forms into powerful, feature-rich web forms.
 - KWizCom Custom Actions – Enables you to create custom menus at the list/item levels.
7. When the installation process is complete it will recycle all application pools automatically.

SHAREPOINT 2010/2013

1. Log in as SharePoint administrator account to your SharePoint front-end server.
2. Browse the product's page on KWizCom's website and click the "Go" link under the "Install using our Web Installer" section.

This will start the KWizCom web installer.

Note: The KWizCom Web Installer will automatically offer you to upgrade other existing KWizCom products on your farm, in case you have old versions installed. You can check which products you wish to update at this time.

3. In case you prefer just to download the relevant .wsp packages and manually deploy them, then in the web installer UI check the "Download only" option (3rd page in the installer's wizard). When the installer finishes you will be able to go to the installer's folder on your server, and install the KWizCom packages by simply running the "SP-WSPInstaller" PowerShell script.
4. At the end of the installation process, you should see all packages deployed in the **Central Admin >System settings>Manage Farm Solutions** page, and the KWizCom SharePoint Foundation package should be deployed also in the Central Admin's web application.

POST INSTALLATION

SHAREPOINT 2007

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

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







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

2. 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:

Central Administration > Operations > Manage Farm Features

Manage Farm Features

This page allows you to manage SharePoint-wide features.






Name	Status
 Data Connection Library Adds Data Connection Library feature	Deactivate Active
 Excel Services Farm Feature Adds farm-level Excel Services Features to the Windows SharePoint Services framework	Deactivate Active
 Global Web Parts Installs additional web parts common to all types of sites.	Deactivate Active
 KWizCom SharePoint List Custom Actions Farm Feature Enables implementing list-level and item-level custom actions (menus). To create and configure custom actions for a required list, visit the list's SharePoint List Forms Extensions settings page.	Deactivate Active
 KWizCom SharePoint List Forms Extension Farm Feature Use the SharePoint List Form Extensions feature to extend your list forms with advanced form functionality, including: Field-level permissions , View-level permissions , Field validation rules , Field grouping and more.	Deactivate Active
 KWizCom SharePoint Mobile Extensions Farm Feature Use the SharePoint Mobile Extensions feature to implement custom-tailored mobile solutions, based on your SharePoint sites and lists.	Deactivate Active

3. 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.
4. 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 2010/2013

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:

2010 Central Administration > Manage Farm Features
 This page allows you to manage SharePoint-wide features.

Name	Status
 KWizCom SharePoint List Custom Actions Farm Feature Enables implementing list-level and item-level custom actions (menus). To create and configure custom actions for a required list, visit the list's SharePoint List Forms Extensions settings page.	<input type="button" value="Deactivate"/> <input checked="" type="button" value="Active"/>
 KWizCom SharePoint List Forms Extension Farm Feature Use the SharePoint List Form Extensions feature to extend your list forms with advanced form functionality, including: Field-level permissions, View-level permissions, Field validation rules, Field grouping and more.	<input type="button" value="Deactivate"/> <input checked="" type="button" value="Active"/>
 KWizCom SharePoint Mobile Extensions Farm Feature Use the SharePoint Mobile Extensions feature to implement custom-tailored mobile solutions, based on your SharePoint sites and lists.	<input type="button" value="Deactivate"/> <input checked="" type="button" value="Active"/>
 Office.com Entry Points from SharePoint This feature enables entry points from the SharePoint user interface that allow users to browse SharePoint solutions from Office.com	<input type="button" value="Deactivate"/> <input checked="" type="button" value="Active"/>
 Offline Synchronization for External Lists Enables offline synchronization for external lists with Outlook and SharePoint Workspace.	<input type="button" value="Deactivate"/> <input checked="" type="button" value="Active"/>

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.

UPGRADE PROCEDURE

For a detailed upgrade from SP2010 to SP2013 procedure, please refer to this [KB article](#).

UN-INSTALLATION PROCEDURE

SHAREPOINT 2007

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

SHAREPOINT 2010/2013

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

ADMINISTRATION GUIDE

This section describes all administration activities related to KWizCom Mobile, 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:



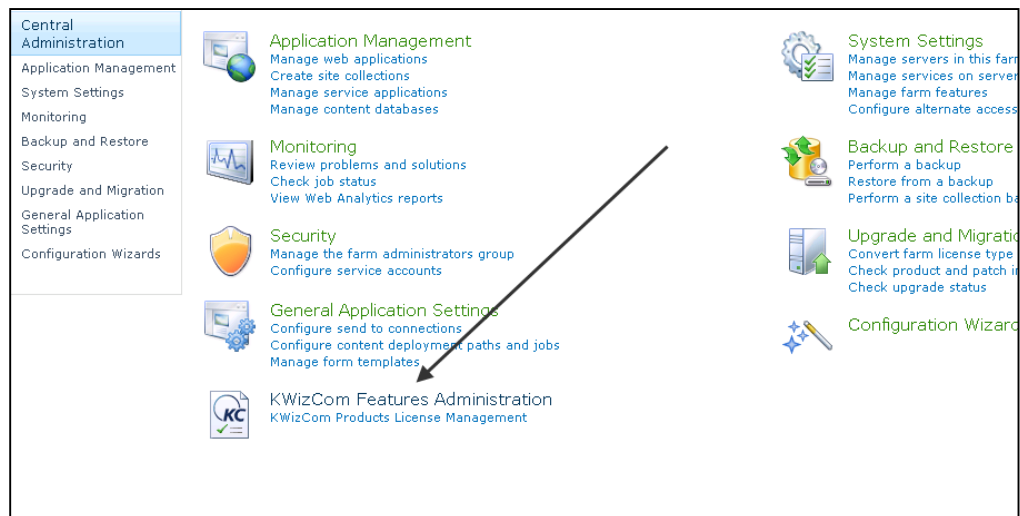
Please use the [Activation Request web form](#), on KWizCom web site to send us your product code.

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 -

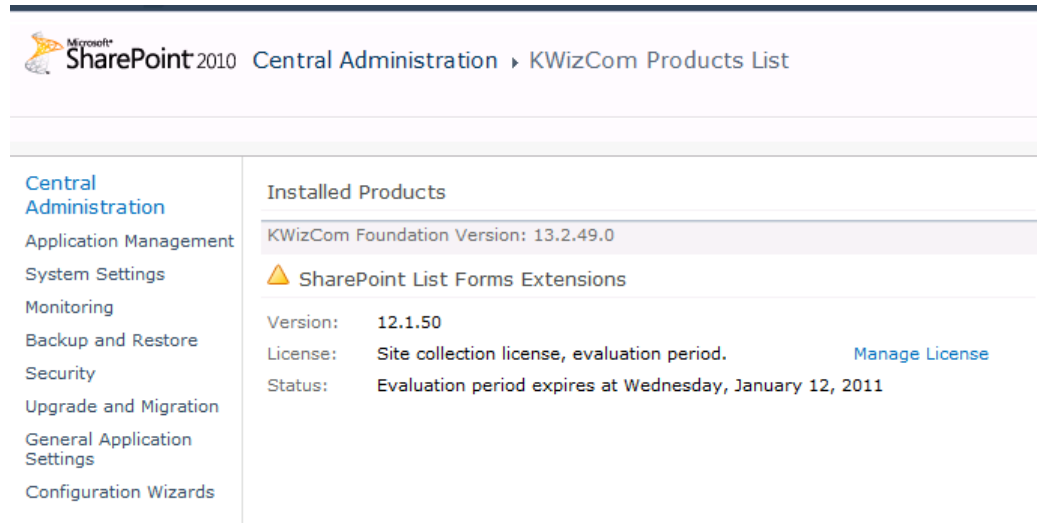
click **Start -> All Programs -> KWizCom -> KWizCom Mobile ->  Activate SharePoint Mobile Extensions**

SharePoint 2010/2013

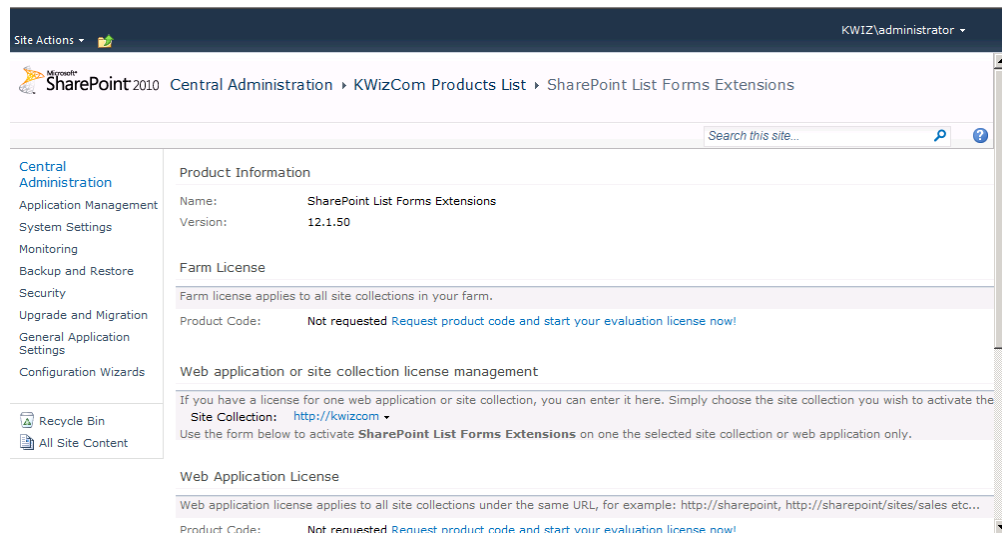
1. Order the product on the KWizCom website – www.KWizCom.com, or contact our sales team at sales@kwizcom.com.
2. After the order was made, you can activate your installed evaluation version. Activation is done by the following steps:
 - a. Open SharePoint Central Admin. On the main “Central Administration” page, you will see the “KWizCom Features Administration” icon:



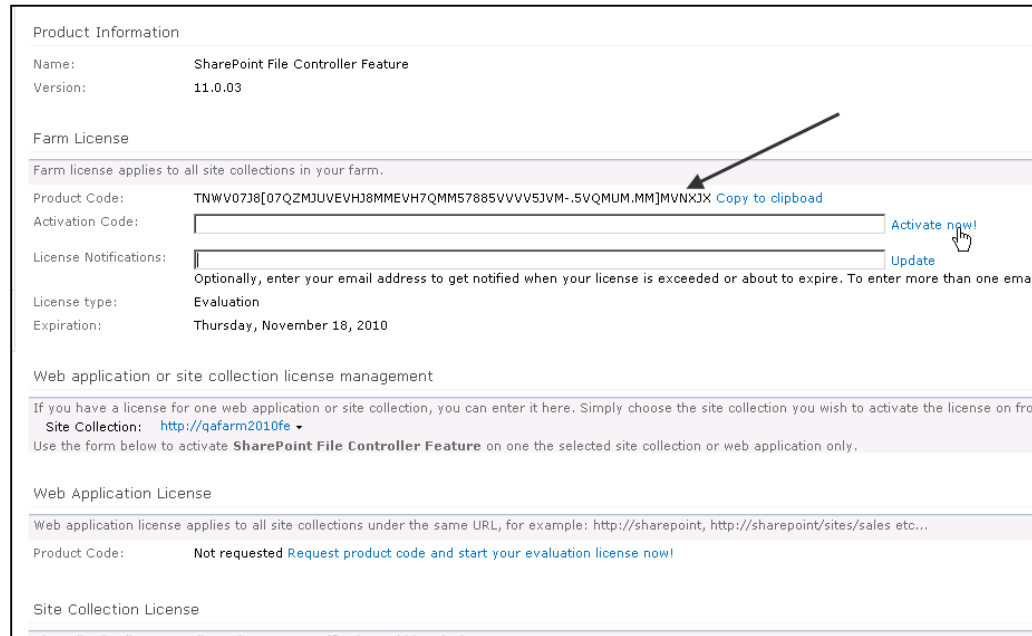
- b. Click the KWizCom Features Administration icon. You will be redirected to a page that allows you to manage all your installed KWizCom products' licenses:



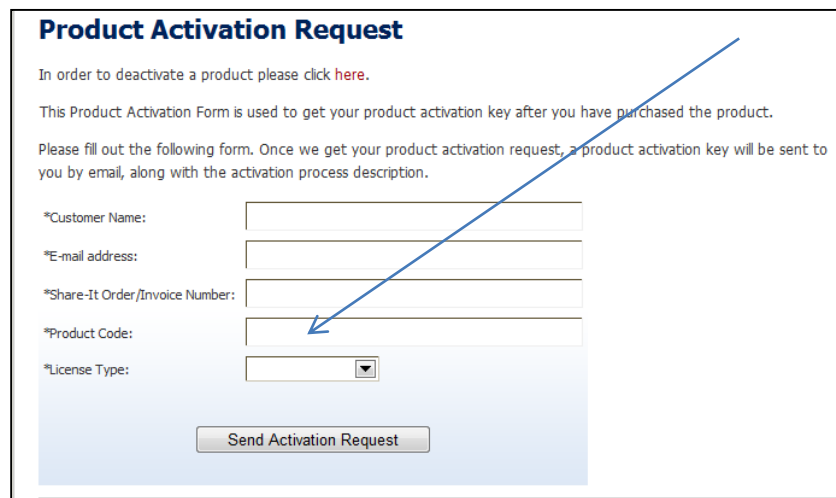
- c. Click the “Manage License” link next to the product that you wish to activate. You will be redirected to that product’s license management page:



- d. Click on the “Request product code and start your evaluation now” link, under the required license type.
A product code will be generated and displayed as in the following screenshot:

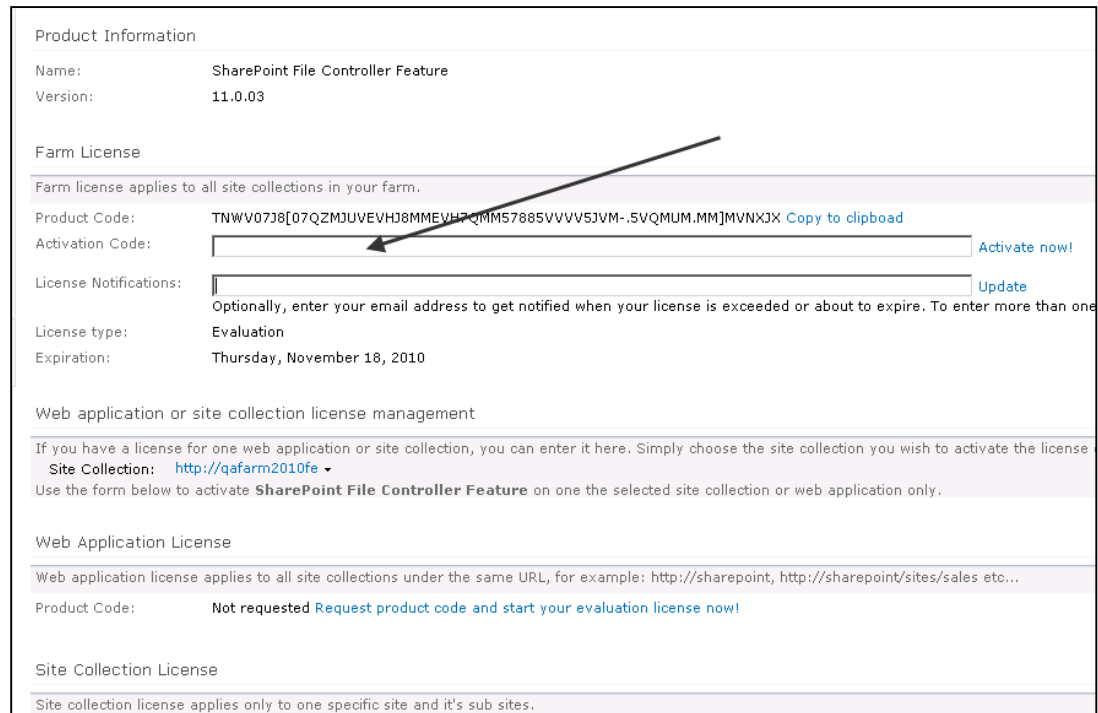


- e. Copy the product code.
- f. Browse the *Product Activation Request* page on KWizCom’s web site: <http://www.kwizcom.com/ProductReg>.



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.



Product Information

Name: SharePoint File Controller Feature
Version: 11.0.03

Farm License

Farm license applies to all site collections in your farm.

Product Code: TNWV07J8[07QZMJUVEVHJ8MMEVHPQMM57885VVVV5JVM-.5VQMUM.MM]MVNXJX [Copy to clipboard](#)

Activation Code: [Activate now!](#)

License Notifications: [Update](#)

Optionally, enter your email address to get notified when your license is exceeded or about to expire. To enter more than one email address, separate each address with a comma.

License type: Evaluation
Expiration: Thursday, November 18, 2010

Web application or site collection license management

If you have a license for one web application or site collection, you can enter it here. Simply choose the site collection you wish to activate the license for.

Site Collection: <http://qafarm2010fe>

Use the form below to activate **SharePoint File Controller Feature** on one the selected site collection or web application only.

Web Application License

Web application license applies to all site collections under the same URL, for example: http://sharepoint, http://sharepoint/sites/sales etc...

Product Code: **Not requested** [Request product code and start your evaluation license now!](#)

Site Collection License

Site collection license applies only to one specific site and it's sub sites.

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

CREATING A MOBILE INTERFACE FOR YOUR SHAREPOINT SITE

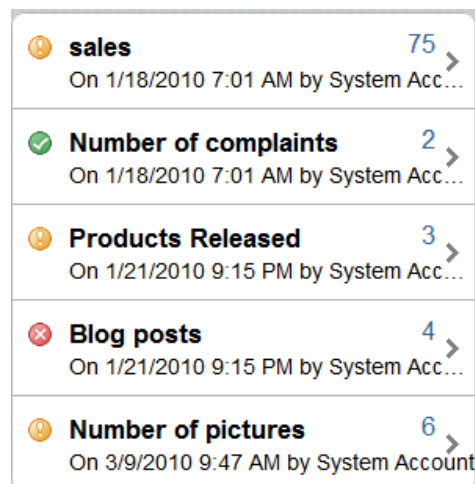
GENERAL

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.

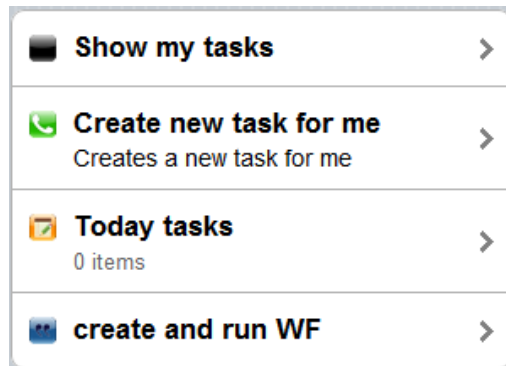
MOBILE INTERFACE TERMINOLOGY

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

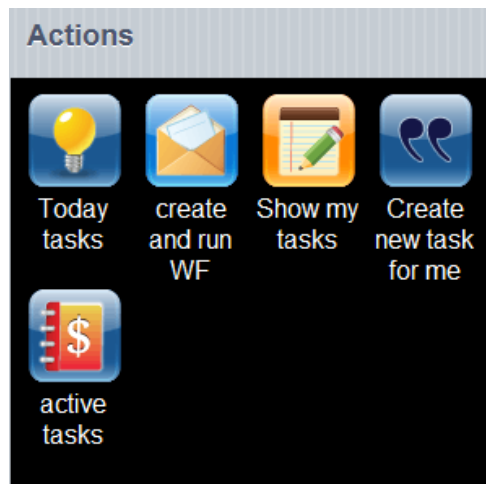
- **Mobile solution** – a solution consists of the mobile interface produced for a SharePoint site.
- **Mobile pages** – Every mobile solution includes mobile pages. Each page is accessible via URL.
- **Page parts** – Every mobile page includes one or more page parts (same as a SharePoint web part pages 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):



- **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).

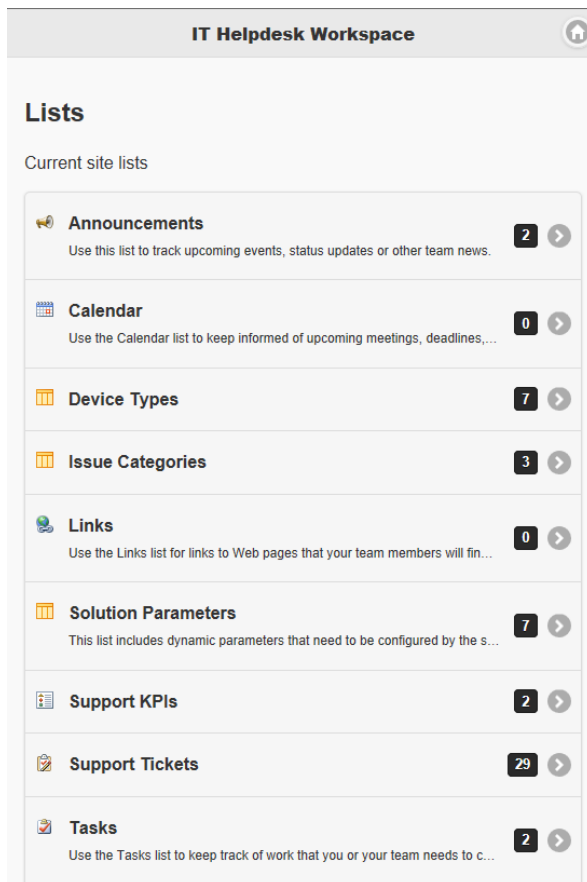


DEFAULT BEHAVIOUR AFTER ACTIVATING THE MOBILE FEATURE

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.

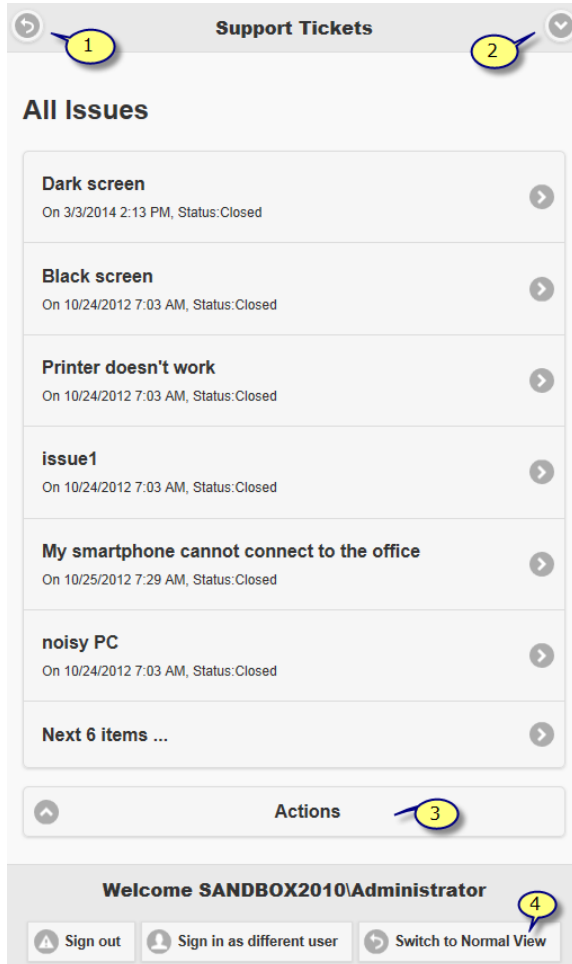
Once you browse your SharePoint site using a mobile device, you'll get the following default mobile display:



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

* If you have *KWizCom Forms Enterprise edition* installed, then you will be able to use them in the default mobile view (Enhanced forms, custom menus/buttons in lists).

By clicking a list/library, you get to its default view:



The list view page includes the following controls:

- (1) “Back” button – gets you back to the previous page
- (2) Actions top menu – clicking this icon will display all available actions.
- (3) Actions bottom button – same as the top Actions menu
- (4) Switch to Normal view – switches the display to web view

CONFIGURING YOUR MOBILE SOLUTION

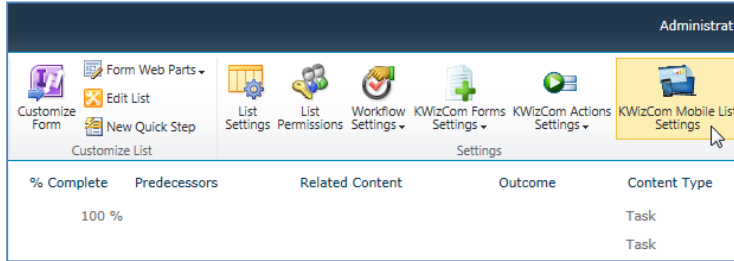
You can configure your mobile SharePoint solution in 2 levels:

- **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.

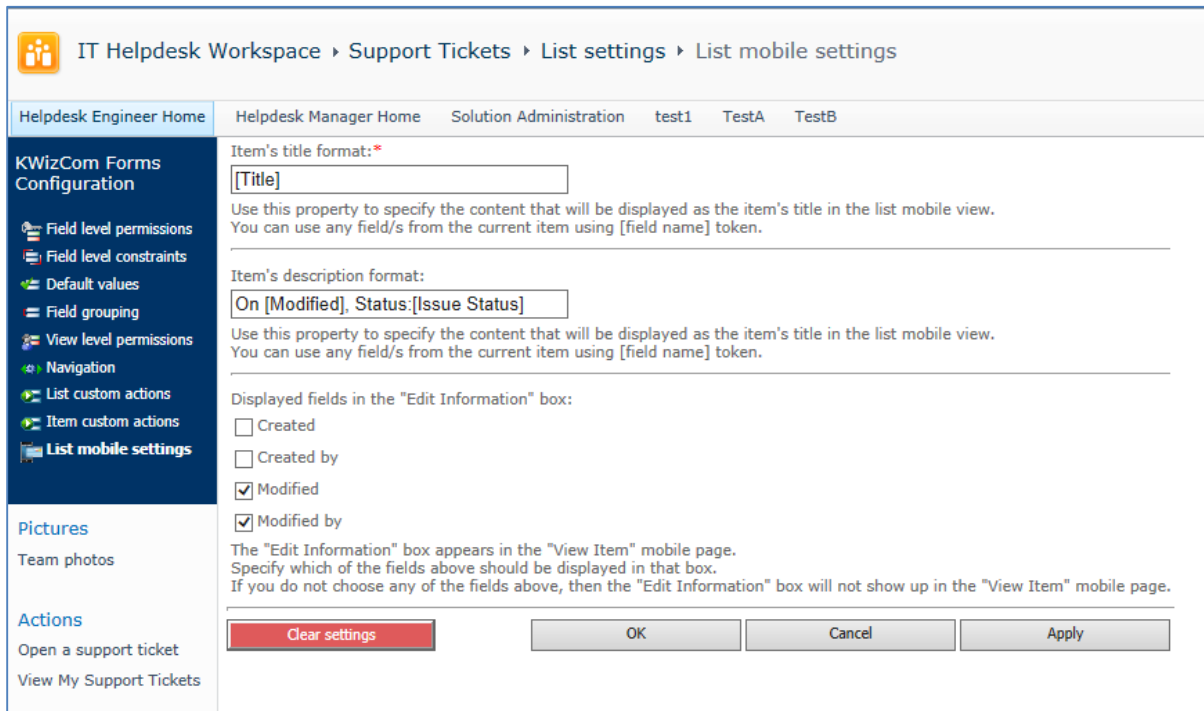
The following sections describe the various configuration settings available at the List and Site levels.

LIST-LEVEL MOBILE SETTINGS

To start configuring your list’s mobile settings, click the “KWizCom Mobile List Settings” ribbon button:



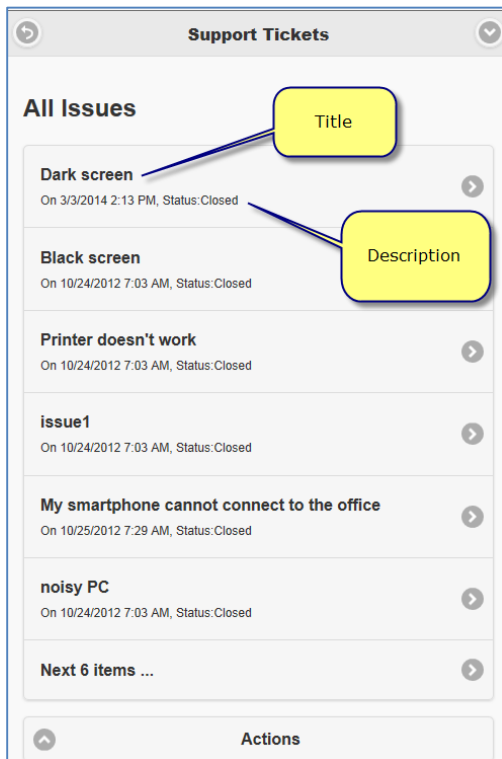
The following settings page will appear:



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.

* 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):



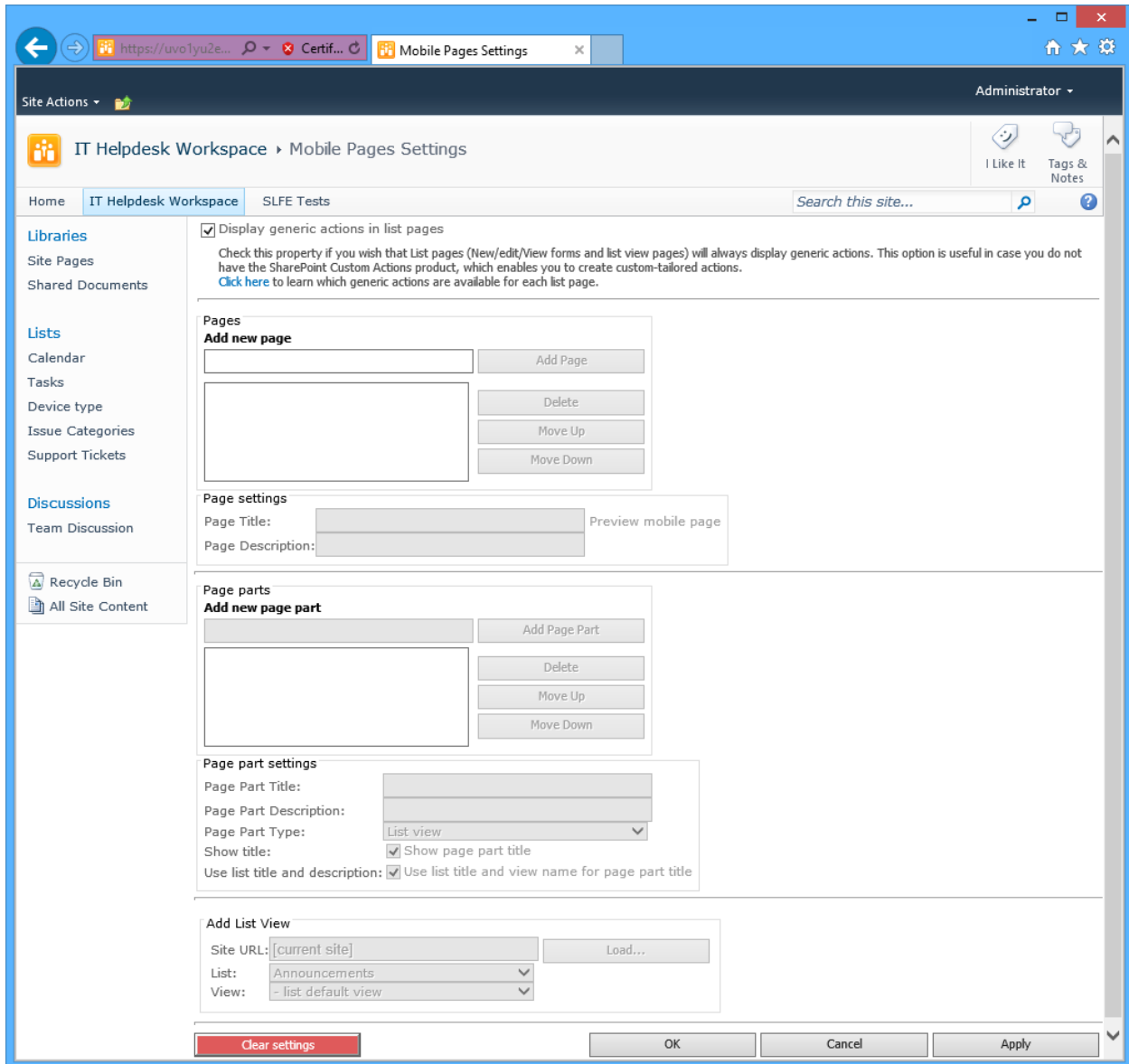
** In the item's mobile view page you can see at the bottom part, the "Edit Information" box:

The screenshot shows a mobile application interface for an issue titled "Printer doesn't work". The issue is in a "Closed" status, with a closing date of 3/22/2012. The resolution provided is "i plugged the printer to the power socket". It is assigned to "SANDBOX2010\hd-eng1". Below these details is an "Edit information" section, which is highlighted with a red box and a red arrow pointing to it from the resolution text. This section shows the issue was modified on 10/24/2012 at 7:03 AM by "SANDBOX2010\Administrator". At the bottom of the screen is an "Actions" button.

Field	Value
Issue Status	Closed
Issue Closing Date	3/22/2012
Resolution	i plugged the printer to the power socket
Assigned To	SANDBOX2010\hd-eng1
Edit information	
Modified	10/24/2012 7:03 AM
Modified By	SANDBOX2010\Administrator

SITE-LEVEL MOBILE SETTINGS

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



The following table describes the page’s various properties.

Property	Description
Display generic actions in list pages	<p>Checking this property will display in all list pages (list views and list forms) generic actions (buttons). These actions enable navigating between list views, deleting a list item, editing a list item etc.</p> <p>This option is needed when you are using the mobile Extensions Feature without the SharePoint List Custom Actions, which enables you to create custom list/item menus for your custom mobile application.</p>
Available Pages	<p>Shows the mobiles pages you have created.</p> <p>The 1st page in the list is the default mobile page of the site.</p>
Add new page	To add a new mobile page, fill its name in the textbox and click the “Add Page” button.
Page Title	Enter the page title as it will appear on the mobile page’s top area.
Preview mobile page	Click this link to preview your mobile page.
Page Description	The page description will appear just below the title.
Page Parts	<p>Every mobile page contains page parts (yes...just like a SharePoint web part page includes web parts).</p> <p>The page parts appear one below another, according to the order in this list.</p>
Add new page part	To add a new mobile page part to the current selected page, fill its name in the textbox and click the “Add Page Part” button.
Page part title	Enter the page part’s title as it will appear on the mobile page, above the page part.
Page Part Description	The page part’s description will appear just below the page part title.
Page Part Type	<p>A page part can be of one of the following types:</p> <ul style="list-style-type: none"> • 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. • Actions List – This type of page part displays action buttons in a vertical layout.

	<ul style="list-style-type: none"> • Actions Grid - This type of page part displays action buttons in a matrix layout (3 in a row).
Show Title	Check this property to display the page part's title above the page part.
Use list title and description	Check this property to use list title and view name for page part title
Site Url	Enter the URL of the SharePoint site in which the target list is located. You can also use the token [current site]. After you have typed the site url, click the "Load" button.
List	Select the list that you wish to display or display its actions.
View	When "List View" page part type is selected, select the view that you wish to display.
Actions	When "Actions List" or "Actions Grid" page part type is selected, select a list action available for the selected list. These actions include the out-of-the-box list actions such as "go to My Tasks view", or a custom action that you can create in case you have the KWizCom Forms Enterprise edition deployed.
Selected actions	When "Actions list" or "Actions grid" page part type is selected, this grid is used to add actions that will be displayed in the selected page part. For the selected action you need to setup the following properties:
Action icon url	For every action you need to provide a url (which means you 1 st have to save this icon in some library). You can use some existing images by clicking the "Choose..." link.
Action name	The name of the action, which will be displayed as the button's caption.
Action description	The description will be displayed just below the action's icon.
Action url	If you are not using a list action, you can enter a url of a SharePoint page (List view, new item or edit item page). You will need to copy the exact url and paste it to this field.
Add	Click this button to add an action.

TESTING YOUR MOBILE SOLUTION

After you have created a solution that includes a mobile pages/s, each contains page parts, you can easily check your solution by simply clicking the “**Preview mobile page**” link, next to the page title field in the mobile settings page.

This will open the page in its mobile layout. Best thing would be to open each page by using Safari browser and by minimizing it to its minimum width – this will give you very similar result to what you will get in iPhone.

In order to check your mobile solutions in other smartphones, simply use the appropriate smartphone simulator, such as Research in motion’s BlackBerry’s simulator:



FAQ

WHAT DOES THE KWIZCOM MOBILE FEATURE DO?

It allows you to create a SharePoint mobile solution for smartphones. By using a wizard, you can create custom pages that include page parts. These page parts display list view, or can include actions.

CAN I DISPLAY “NEW/EDIT” LIST FORMS?

Yes you can. You can also display any list view. You will need to copy the exact page’s url into the mobile settings page.

CAN I CUSTOMIZE THESE LIST FORMS?

In order to be able to customize list forms, you should use KWizCom Forms (KWizCom Mobile is part of KWizCom Forms Enterprise edition). This solution enables you to customize the SharePoint list forms without any development. These customization include field level permissions, Field validation rules, Field grouping, Field constraints and more. All these capabilities enable you to implement rich and powerful forms without any need for development or usage of additional solutions such as InfoPath / Forms server.

KWizCom Forms and the KWizCom Mobile work together in a way that enables you to display customized SharePoint list forms also in your mobile solution.

CAN I CREATE CUSTOMIZED ACTIONS?

The KWizCom Mobile feature enables you to use the “generic” list actions, which allow you to call any list view page or the New/edit list forms.

If you want to create custom actions/menus (for example: an action that performs several actions, or an action that initiates a workflow), you can do it by using KWizCom Forms Enterprise edition.

DO I NEED TO INSTALL ANYTHING ON THE USERS’ SMARTPHONES?

No. KWizCom Mobile Feature is a server solution.

IS THE SOLUTION AVAILABLE ALSO ON SHAREPOINT 2013?

Yes. The solution is available for SharePoint 2007, SharePoint 2010 and SharePoint 2013.