

Mobile Entrée 2.0 Quick Start Guide

What's Changed in 2.0?

Mobile Entrée Configuration Page

The configuration screen has undergone a makeover to allow for some of the new configurable features of 2.0. The following is a list of the most notable changes.

- The config page no longer inherits the SharePoint master page
- Navigation and the Save button will always be at the top of the page
- You can resize each section on the page or collapse them completely by double-clicking the title bar of the section.
- The “Default” checkbox is gone from applications. Apps will be executed in order.
- You can reorder apps by dragging them.

App Instancing

Before 2.0, the act of activating a Mobile Application Feature would install a single instance of each Mobile App defined in the Feature. In 2.0, the activation of the Feature makes these Mobile Apps available to be instanced many times.

When you first activate Mobile Entrée on a site, you now must create an App Instance before configuring your mobile content.

App Feeds

Mobile Applications can now be configured to produce one-to-many App Feeds. An App Feed is a list of Items (using the List -> List Group -> List Item paradigm) that are requested from the Mobile Application class via a Getter property. These feeds are read-only and represent a way for Mobile Applications to surface data in a lightweight fashion to allow for the consumption of that data without having to launch the Mobile Application itself. Out of the box, App Feeds can be consumed either via the base plugin as list items on the home screen (described below) OR as an RSS Feed via http://<your site here>/_layouts/AppFeed.aspx. In either scenario, the Mobile Entrée framework will build the URL to use when clicking on the item to take the user directly into the corresponding Mobile Application with any scope variables supplied during App Feed creation.

App Feeds are part of the definition of a Mobile Application and so take advantage of App Instancing described above. Multiple instances of the same Mobile Application can produce different App Feeds if so configured/desired. Also, App Feeds introduce a new FeedStyle.xml file type to the Mobile Entrée framework which allows for extensibility in how the App Feed is consumed. Via custom FeedStyle.xml files (deployed through the new Theming architecture described below), App Feeds can be rendered in any XML format from [meFeed.aspx](#). Out of the box, a generic XML and RSS Feed Styles will be supplied.

Base Plugin

The “out-off-the-box” mobile app that Mobile Entrée comes with is now much more flexible in what it can provide to users. The Base Plugin can now provide tailored dashboards of information with drilldown data on the home screen. The configuration for these “home screen views” is very straight forward and we’ll talk about them later in this document.

Performance

Mobile Entrée 2.0 brings with it a deeply customizable platform for mobility. With this flexibility comes complexity which takes up valuable CPU. In 2.0, we have vastly improved our caching algorithms to maximize performance in 2 areas, minimizing SQL requests and compiled XSLTs. Adding a cache timeout at the site level will grant you a noticeable boost in performance.

Mobile Document Services

Mobile Entrée 2.0 includes a very powerful mobile dashboarding capability which is tightly integrated with Microsoft Excel, Excel Services, and especially powerful in SharePoint 2010. This functionality requires an Excel Add-in to be installed for the configuration of the mobile Excel views. Once configured, Excel documents will be displayed in Mobile Entrée with a menu of mobile enabled views of Excel data.

Note: Mobile charts require SharePoint 2010. Sparklines require both SharePoint and Excel 2010

Getting Started

Installation

The installation for Mobile Entrée 2.0 is virtually the same as 1.x.

Configuration

After you have installed and activated the HTTP Modules on your web application, you will need to activate the Mobile Entrée Base feature on a site, just like you did in 1.x. This will put navigation to Mobile Entrée config in the Site Actions and Site Settings menus.



Mobile Entrée
Mobile Entrée Configuration

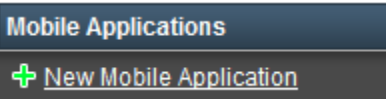
Global Config

The main thing you will want to set in global config is the cache timeout. This setting is how many seconds (on a sliding timer) to go until the cached items expire. A value of 600 is fine, which will give you a 10 minute cache timeout. Remember to click Save Settings.

Application Config

The first step to configuring your mobile applications is to add app instances of them. Follow these steps to create an App Instance:

1. Under Mobile Applications, click New Mobile Application



- You will be able to pick the mobile application and give it a title and description. The list of available applications depends on the mobile app features you have activated on the site.

New Mobile Application

SharePoint Mobile Entrée
 Mobile Document Services App Feed Instance.

Application Title
Mobile Home Page

Application Description
Entree Sharepoint Base Plugin Description

Save Cancel

- Once created, you will notice some familiar properties under the Properties & Targeting section.
- You can modify the application icon by clicking on it. This is the icon that will be shown in the list of applications. Application developers can provide their own icons that either add to this list or replace it.

Base Plugin Config

The Base Plugin has a number of new configuration options. Sections on the home screen can be renamed and reordered. Home Screen Views can be added to provide instant insight into drilldown data. To add a Home Screen View, do the following:

- Select the instance of the Base Plugin you wish to modify from the Mobile Applications list
- Under the Configuration Settings, click on the Home Screen tab
- Click on the New Home Screen View button

General Search List

Home Screen

+ New Home Screen View

- You can select either an App Feed or a SharePoint list as the source for your home screen view.

New Home Screen View

SharePoint List
 Application Feed

Select List
Announcements

Select View
All items

Title
All items

Field(s) to Display
1

Row Limit
5

Save Cancel

- Once created you can drag and drop your view into the position you want it to be when the user views the home screen on their phone.



Note: The home screen configuration will show all sections even if they do not items configured to be visible.

Excel and Excel Services Integration

Mobile Entrée 2.0 includes the unique ability to select data from within an Excel document to be visible on the phone. The power of this functionality increases both with SharePoint 2010 and with Excel 2010, however basic functionality does exist for SharePoint 2007. This capability is a combination of an Excel add-on that is installed on the client computer and the use of Excel Services.

Note: You must be running SharePoint 2007/2010 Enterprise with Excel Services configured

Note: Charts can only be displayed when using SharePoint 2010

Note: Spark Lines are only supported in SharePoint 2010 and Excel 2010

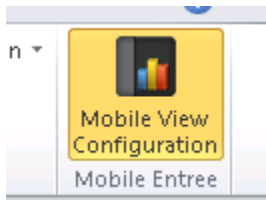
Excel Add-On Installation

The installation of the add-on is quite straight forward.

1. Download the Excel Add-in Installer
2. Launch the installer by double-clicking it.
3. The installer will install pre-requisite software if your machine needs it
4. When prompted to allow the installation of the add-on, click Install

Using the Add-On

Once installed, you will find the add-on under the “Insert” tab in Excel.



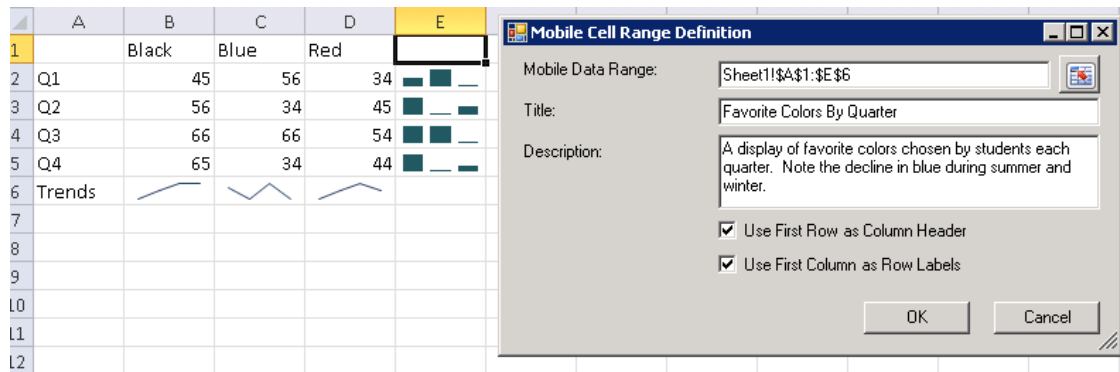
Clicking on Mobile View Configuration will open up the mobile config task pane. There are 3 types of mobile view you can create.

1. Mobile Cell Range : This is a selection of cells that you wish to be displayed on the mobile device as a table. If the range includes spark lines, they will be rendered as well.
2. Mobile Chart : This is a chart selected by name that you wish to be displayed on the mobile device.
3. Mobile Dashboard : This is a grouping of Charts and Ranges that will all be displayed on one screen.

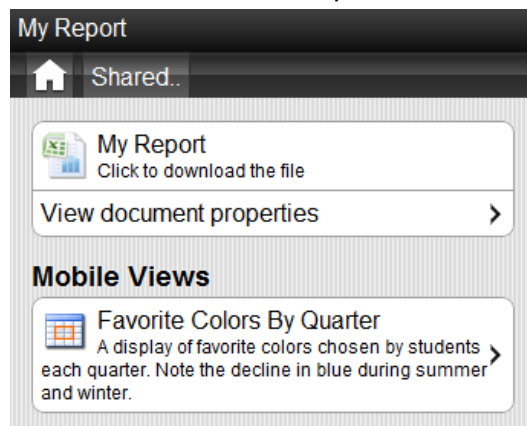
Configuring a Mobile Cell Range

1. Open the Mobile View Config task pane.
2. Click on “New Mobile Cell Range”
3. Under Mobile Data Range, click the button to the right to be able to select the range of cells.

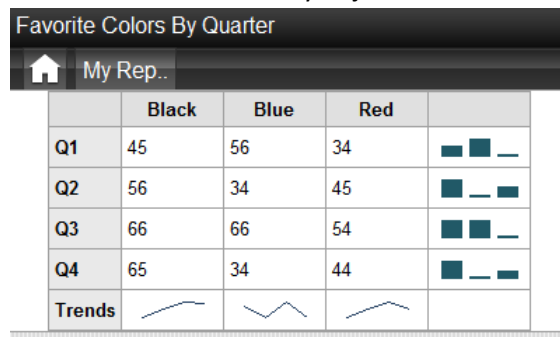
- Fill in the other fields as they will be used when displaying navigation to this mobile view.



- Click OK and then save the document to a document library in SharePoint.
- Make sure you have that document library visible in your Mobile Entrée config.
- Browse to the document library on your mobile device or browser (Safari) with mobile user agent.
- Click on the document and you will notice it takes you to a new screen.



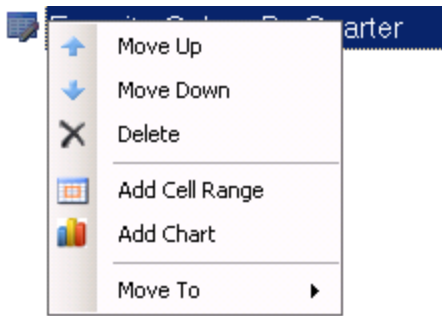
- Click on the mobile view you just created



Configuring Other Mobile Views

Configuring mobile charts is very similar to cell ranges. The main difference is that you select the charts by name from a dropdown. The maximum width property is the width you would like the chart image to be rendered at. This will be scaled down by CSS to fit the phone, but the maximum is to allow you to render chart images at higher resolution and be able to zoom in on them from the mobile browser.

A mobile dashboard is just a grouping of charts and cell ranges. You can move a cell range or chart into a dashboard by right-click -> Move To. You can also create ranges and charts in dashboards by right clicking on the dashboard.

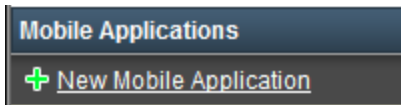


Surfacing Mobile Views to the Home Screen

Out-of-the-box, we provide a mobile application that will facilitate adding your mobile Excel views to the home screen of your mobile applications. To achieve this, the application is designed to provide an app feed of the Excel data. This mobile application is not meant to be used like other applications, it's only purpose is to provide an app feed.

To add an Excel mobile view to your home screen, browse to the Mobile Entrée Configuration page and follow these instructions.

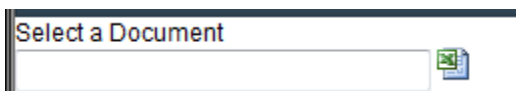
1. Under Mobile Applications, click New Mobile Application



2. Choose the Mobile Document Services App Feed Instance application, give it a title and a description.

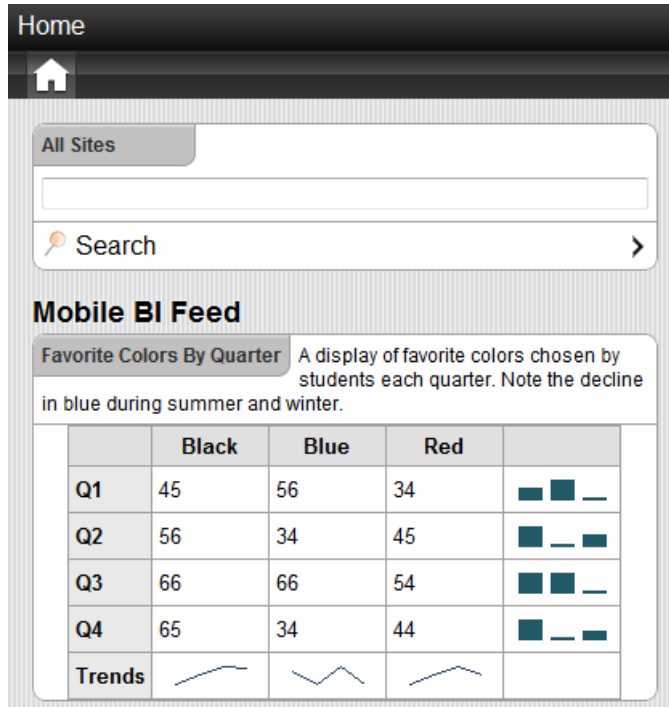
A screenshot of a 'New Mobile Application Instance' form. The form has a dark blue header with the text 'New Mobile Application Instance'. Below the header, there are two radio button options: 'Mobile Entrée Base' and 'Mobile Document Services App Feed Instance.', with the second option selected. Below the radio buttons, there are two text input fields: 'Application Title' and 'Application Description'. The 'Application Title' field contains the text 'Mobile Document Services App Feed Instance.' and the 'Application Description' field contains the text 'Use this application to create app feeds to Mobile BI Documents.'

3. Once Created scroll to the Configuration Settings section.
4. You first need to pick the document to use that has mobile views configured. Click the Excel document icon next to the "Select a Document" field



5. Once selected the "Select and Item" dropdown will be filled with the mobile views that are configured in the Excel document. Pick the mobile view you would like to use.
6. Click Save settings. Now it's time to add this Excel data to the home screen.
7. Click on the instance of the base plugin you wish to add this Excel data to it's home screen
8. Under Configuration Settings, Click the "Home Screen" tab.
9. Click "New Home Screen View"
10. Select "Application Feed" as the type and select the app feed we configured.
11. Fill out the other fields and click Save
12. Click Save Settings

13. Browse to the site using your mobile device or browser with mobile user agent to see the Excel Data rendered on the home screen.



Mobile Entrée Themes

Themes are a new and easy way to provide a consistent look and feel across your Mobile Entrée installation. Themes are an extension to the existing UserAgenMapping/ListStyle system. You can register a theme (UA Mappings, ListStyles, CSS, Images, JS) at either the Site Collection or Web level and all mobile applications will inherit its properties. The order of operations goes like this:

Base (Out-of-the-box) UA Mapping, ListStyles, CSS, JS and Images.

Site Collection Theme resources are merged in and will replace resources based on their name attribute

Web-scoped Theme resources are merged in and will replace resources based on their name attribute

Application resources are merged in and will replace resources based on their name attribute

The net result is much more control in customization. Themes will affect both the Base plugin and custom applications. Theme registration is very simple and we will provide an example project for you to see how this is done.

Basically, a theme is a solution that deploys resource files and includes features with feature-receivers that will register and unregister the theme on activate/deactivate.