SharePlus™

POWERED BY INFRAGISTICS

User Guide

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SharePlus™ 4.1 - User Guide 2.2

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How to Use this Guide

This guide was formatted with the reader in mind, including not only illustrative images and diagrams but also elements like notes and links, in order to highlight/redirect to relevant information.

Note/Tip…

Notes include information that needs to be highlighted.

Tips provide the reader with handy details on specific features/functionalities.

About Tables	Details
Importance	Tables add value for the user by presenting complex data in a user-friendly and more readable format.

Gesture icons provide a close-to-reality representation for applications with touch-based UI.

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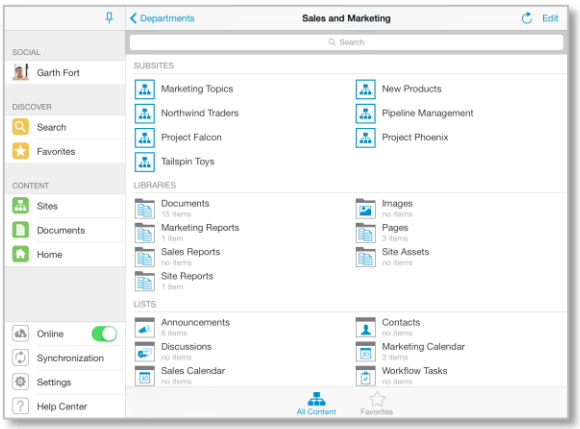
Chapter 1
Introducing SharePlus

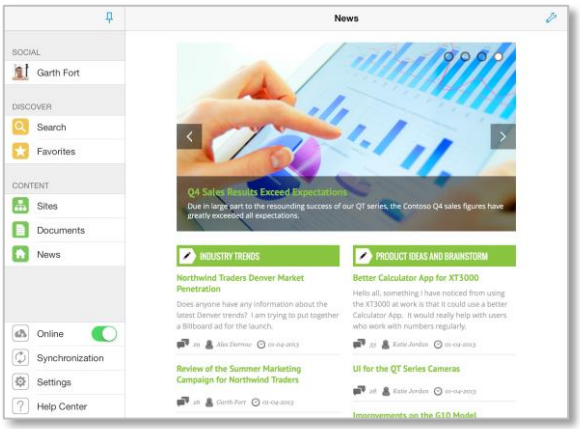
Welcome to SharePlus!

SharePlus is a native mobile application that provides online and offline, read/write access to SharePoint content like libraries, lists, and social features. SharePlus offline capabilities allows you to continue working with your SharePoint content even while offline. Changes introduced while offline are synchronized automatically with the server when the devices goes back online.

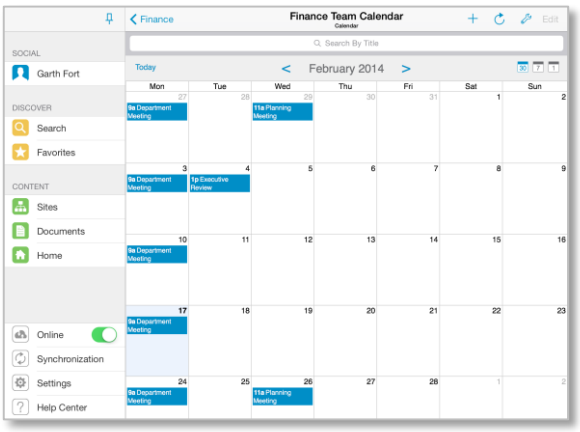
Navigate your SharePoint sites.



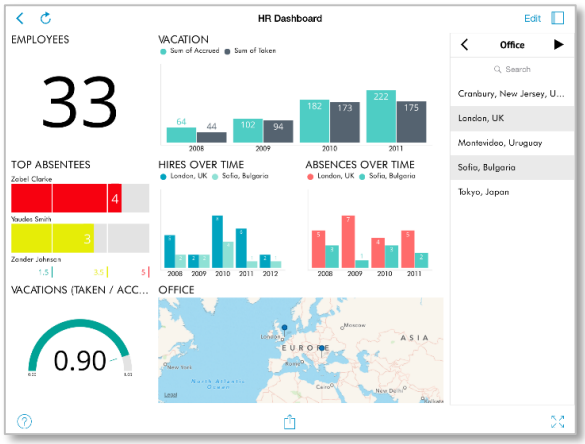
Access your content through Application Launchpads.



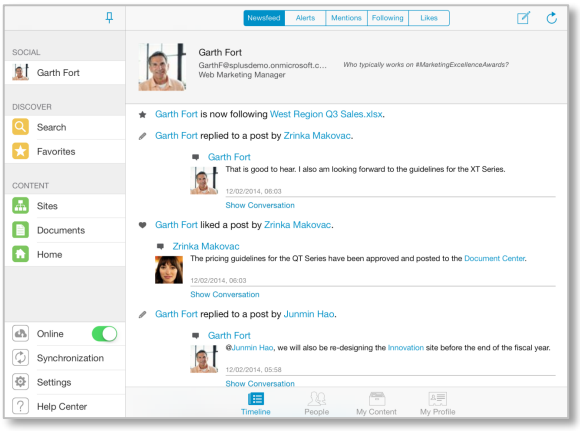
Display your List contents using rich Data Visualizations.



Create interactive ReportPlus dashboards with charts and pivot tables from SharePoint Lists and Excel files.

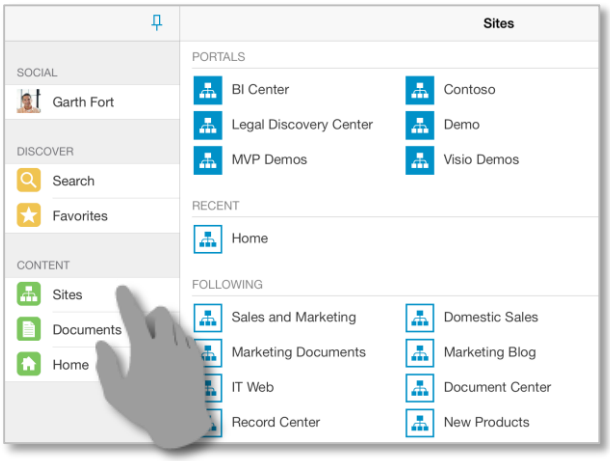


Collaborate and be in-sync with your colleagues through SharePlus social features.

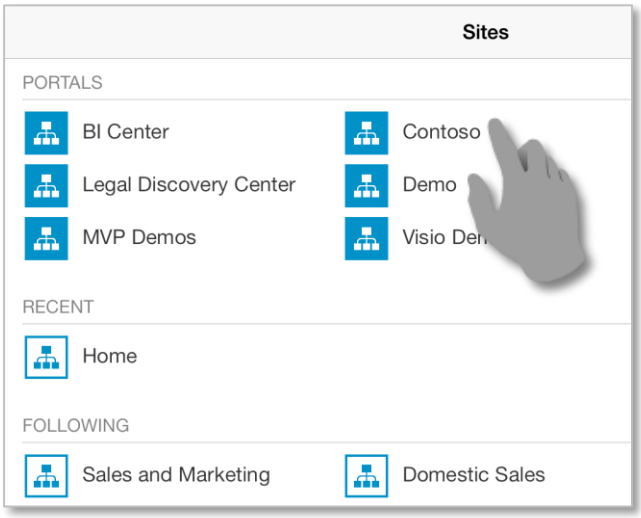


At a Glance: Browsing Content

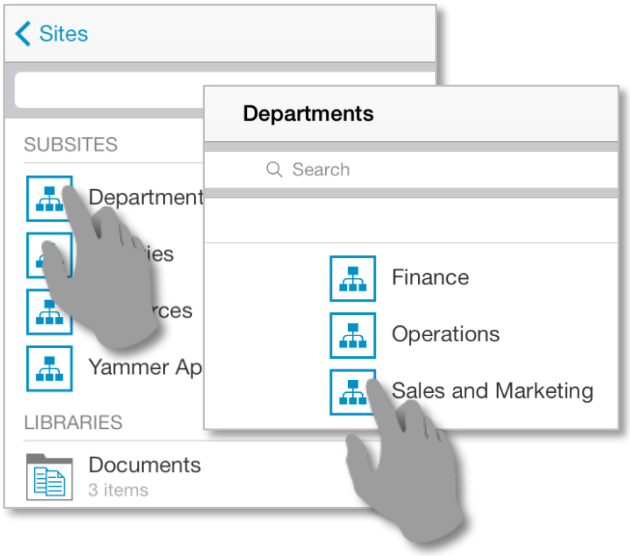
1. Access the Sites Module through the Sidebar.



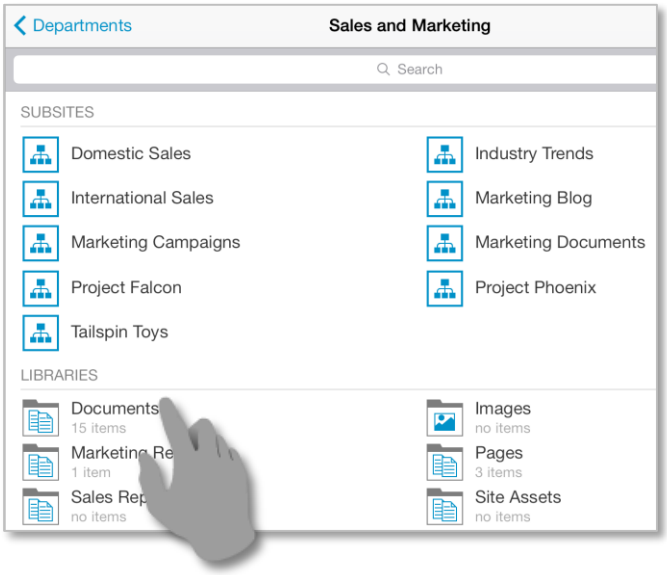
2. Enter a Portal to access its Sites, Libraries, and Lists.



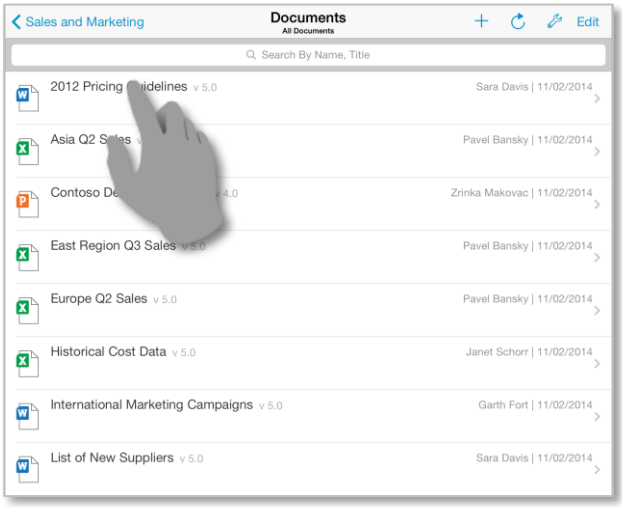
3. Navigate through the portal's sub-sites.



4. Browse a Library.



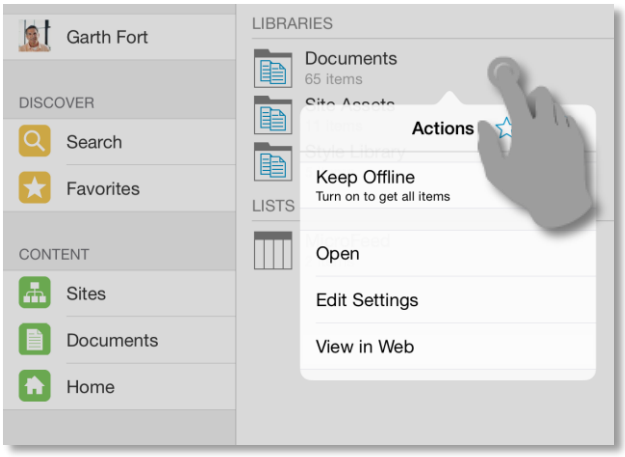
5. Open a Document.



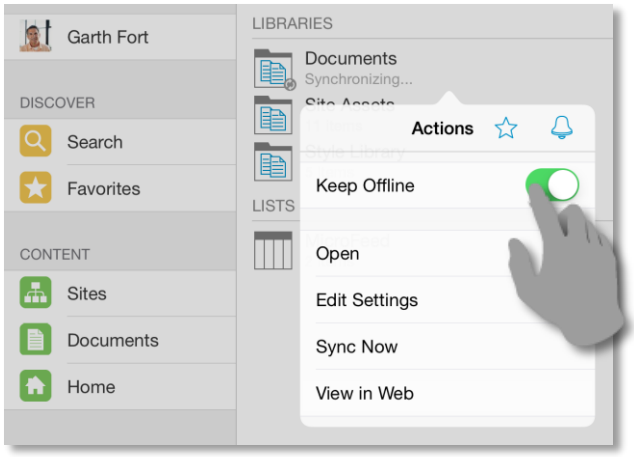
6. A SharePoint document File displayed in SharePlus.

At a Glance: Working Offline

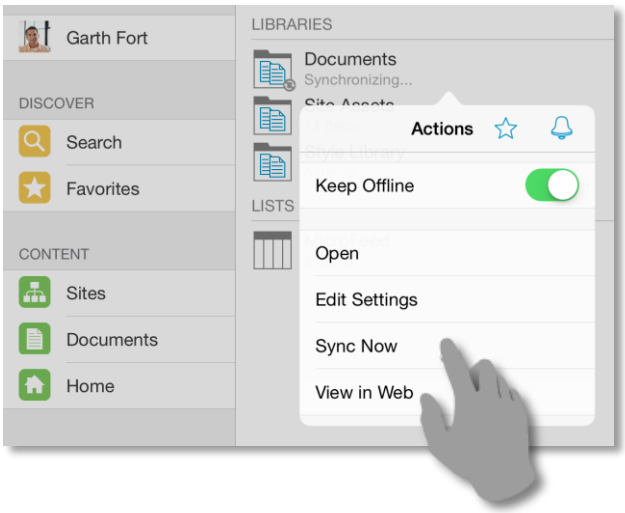
1. Tap & hold to access *Actions* menu for the list, folder, or item.



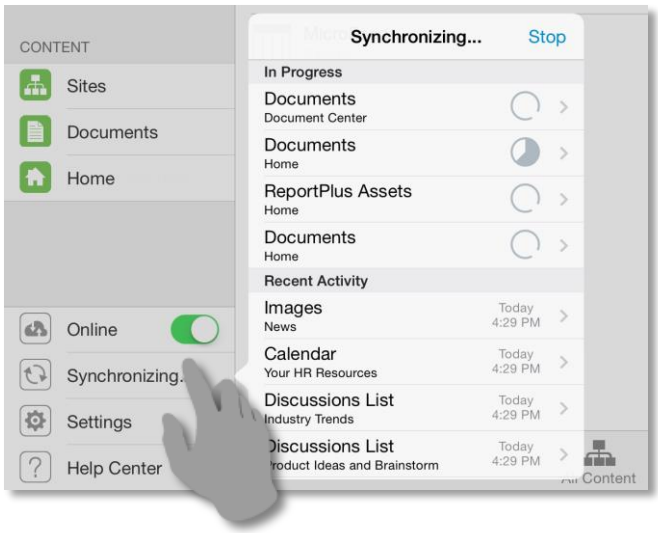
2. Select the *Keep Offline* action.



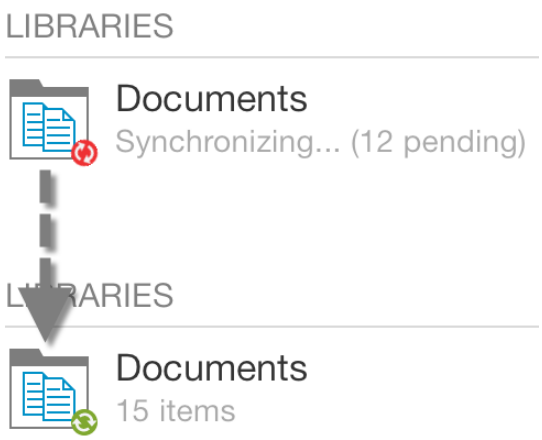
3. Wait for the Sync Process to start or trigger it yourself using *Sync Now*.



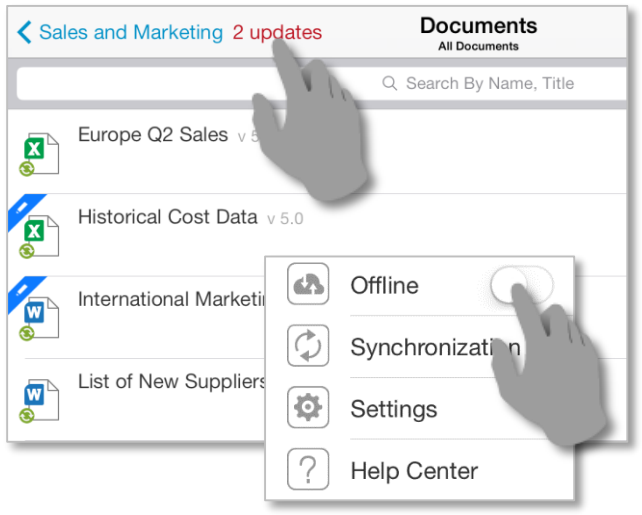
4. You are able to monitor the synchronization process if you want.



5. Once completed, the List is synchronized.



6. While offline, changes will be marked as "Pending Updates" and will be synchronized later when online.



Installing SharePlus

SharePlus is available for **iOS** and **Android** platforms and is offered in three different license models:

- Free
- Subscription
- Enterprise

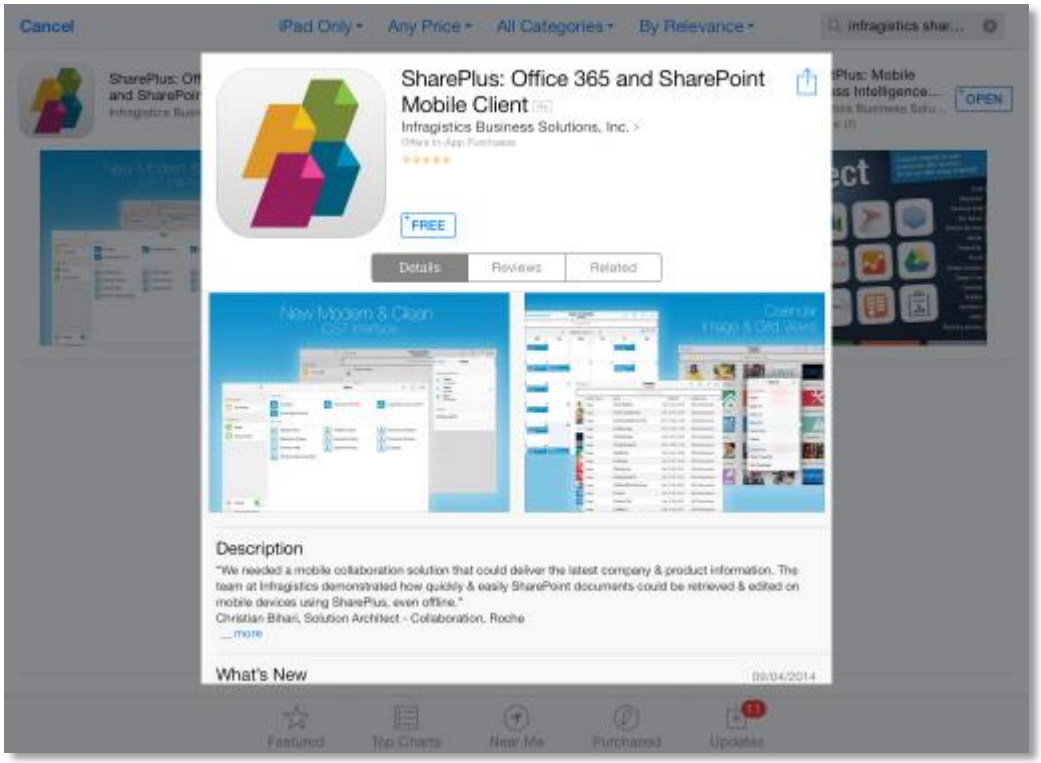
There are different options to get SharePlus and the one you should use depends on your license model.

Guide scope…

This guide refers to the SharePlus for iOS only. For other mobile platforms, please refer to the corresponding documentation.

SharePlus Free and Subscription

SharePlus Free and Subscription are downloaded directly from Apple's AppStore.



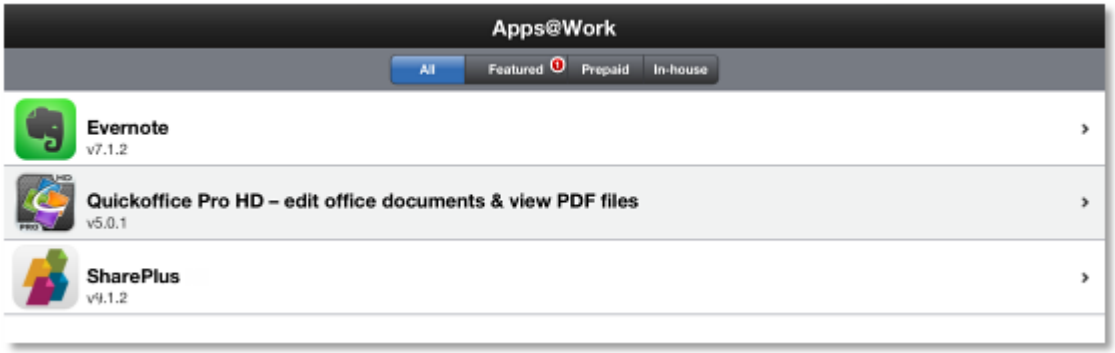
SharePlus Enterprise

Corporate versions of SharePlus can be installed from:

- A corporate **MDM Application Store**
- A **Download page on your Intranet**
- A **download link** sent to you by mail

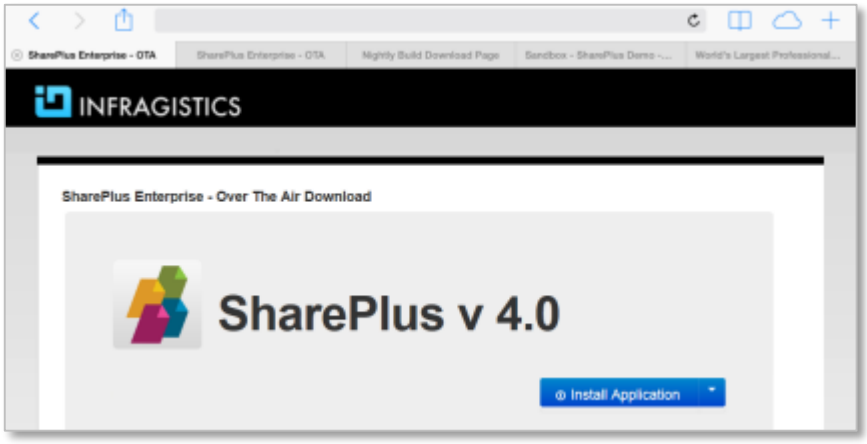
Accessing a Corporate MDM Application Store

Mobile Device Management solutions (MDM) provide a centralized location to publish business applications to be downloaded. Search your application store for SharePlus and download the application.



Accessing a Corporate download page

If your company is using a web page to distribute SharePlus, you need to navigate to the installation page on your website from your mobile device and tap the “Install Application Button”.



Getting a download link

Another commonly used installation method is to receive the download link through SMS, email, and other sources. The link will redirect you to the Corporate Download page, where you can follow the previous instructions.

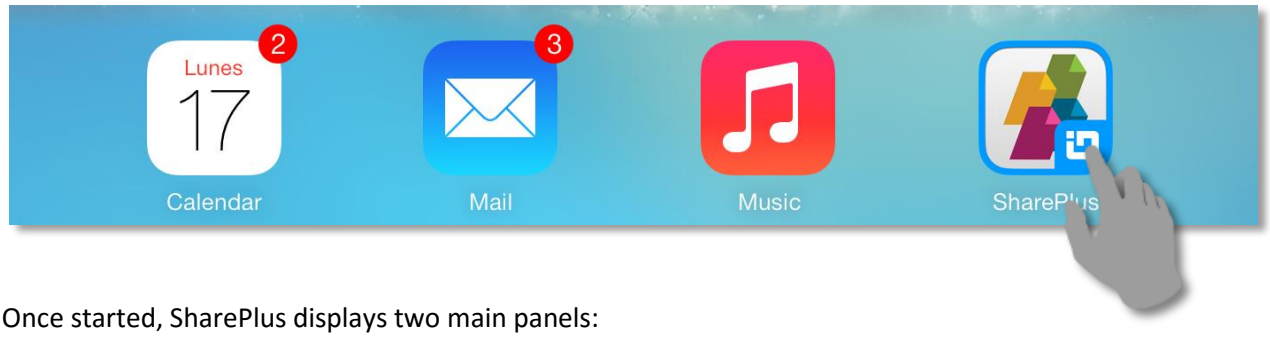
Ad-Hoc installation

The Ad-Hoc installation method is commonly used for testing purposes and involves distributing the application as a standard file and installing on a device through your Mac or PC.
For further details, please refer to SharePlus Administrator´s Guide.

Chapter 2
The SharePlus App

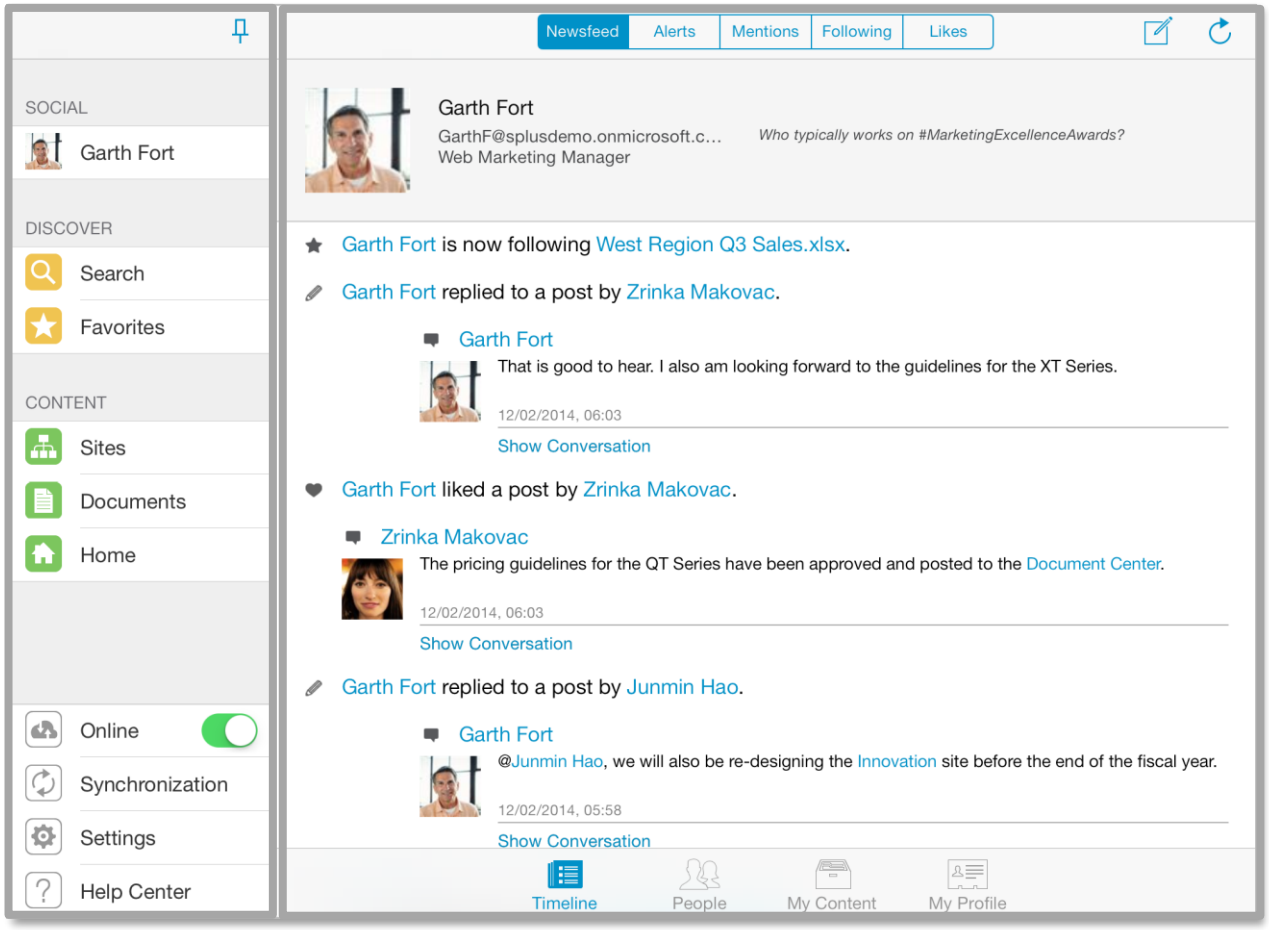
Getting Started

Once installed, SharePlus becomes available on your device's Launchpad. Tap the icon to access the app.



Once started, SharePlus displays two main panels:

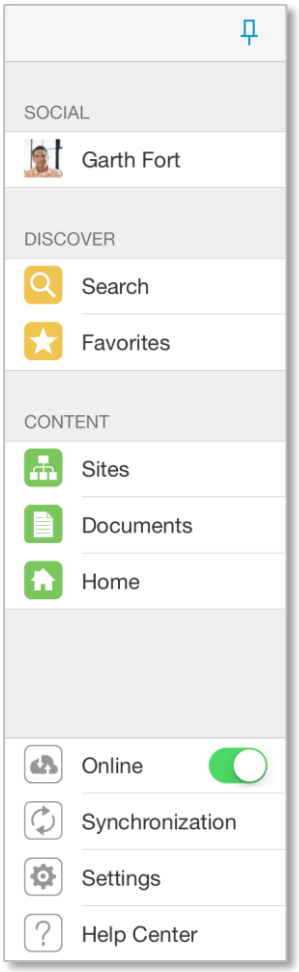
- **The SideBar** gives you access to the application's features organized in modules
- **The Application's Main Screen** or Working Surface, where selected modules and content are displayed.



SideBar Main Screen

The SideBar

SharePlus features are organized in modules that are always available for quick access in the SideBar.



Social Hub – Connect with colleagues, keep track of important items and activities.

Search – Perform powerful searches across all your SharePoint sites

Favorites – Quickly access your sub-sites, lists, and/or items.

Sites Hub – Access SharePoint Sites and its content

Documents – Find and organize your documents, access Local Files and your personal storage on the server (MySite/OneDrive).
Home – Open your personalized module (Application Home).

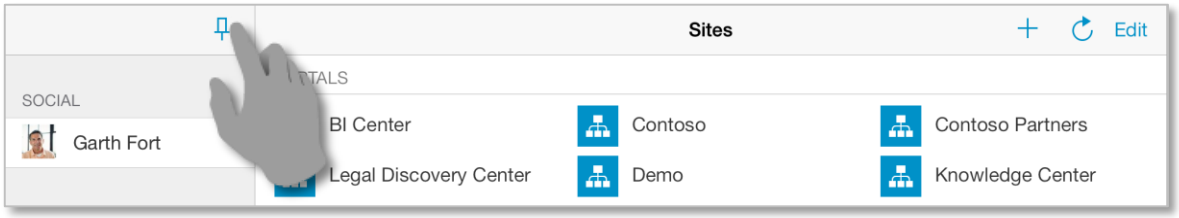
Online/Offline toggle – Switch SharePlus to the online/offline mode.

Synchronization – Access and monitor information when synchronizing data.

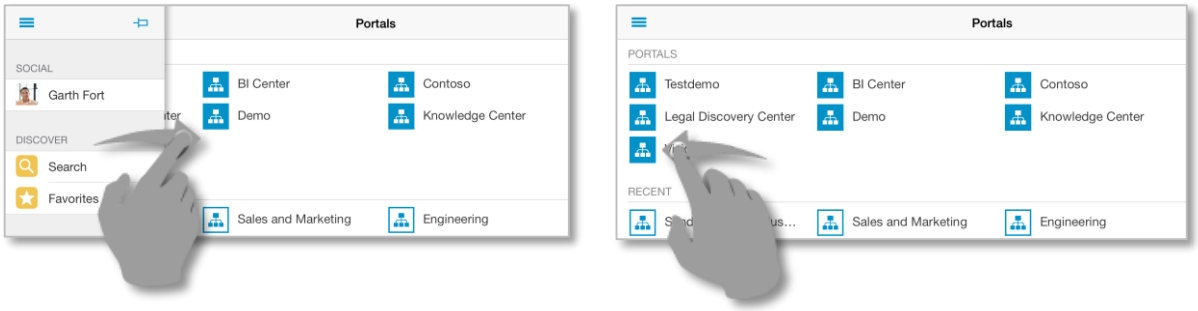
Settings – Access global settings of SharePlus.

Help Center – Access SharePlus help.

You can auto-hide the SideBar by switching from fixed to collapsible mode.



Display or hide the SideBar by using swipe gestures.

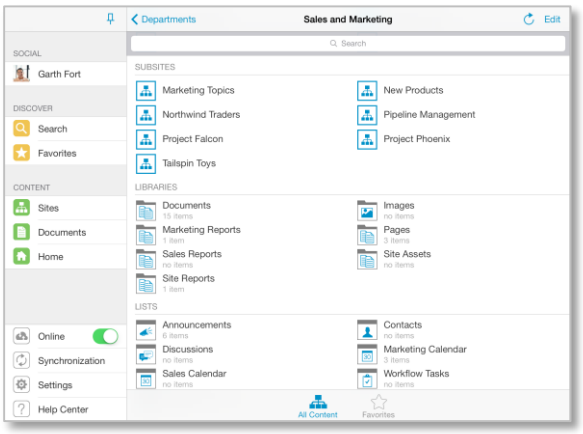


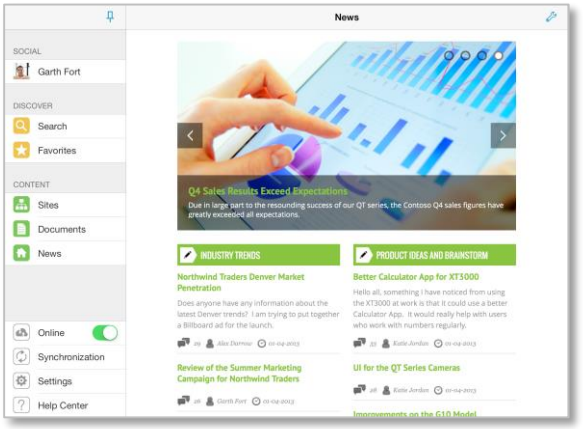
Custom Modules

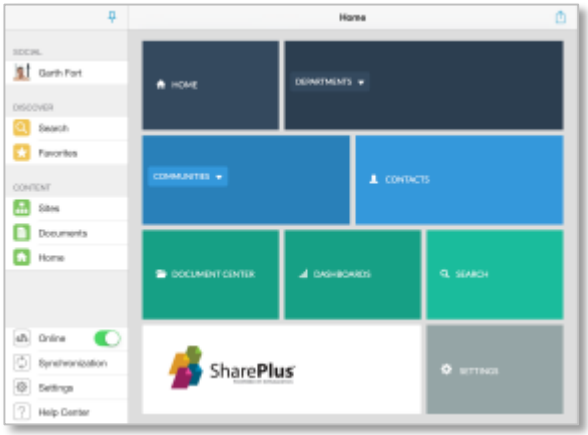
Additional modules can be included on the SideBar to display custom content. These modules allow a wide range of possibilities, as any type of content supported by SharePlus Previewer can be displayed.

The Main Screen

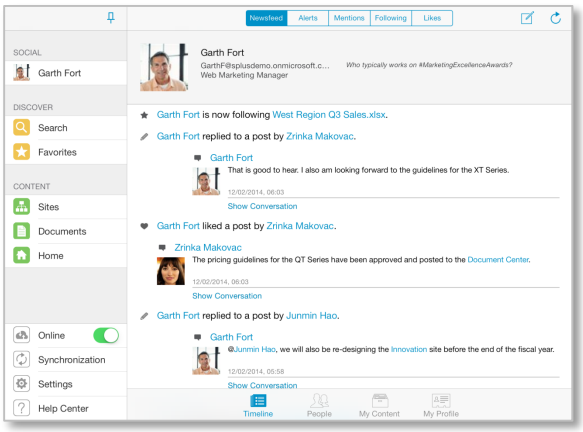
SharePlus Main Screen or “Working Surface” is the application area where the currently selected SideBar module displays its content. Here you can find a wide range of possibilities that include content from Search, Sites, custom Launchpads, etc. When SharePlus starts a module is displayed by default, this module can be changed by a SharePlus administrator.

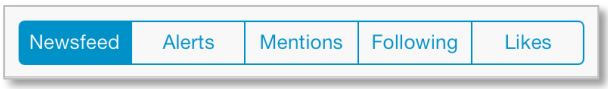




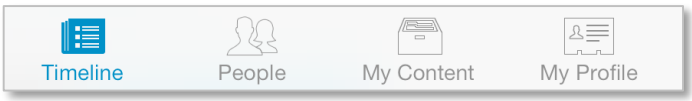


The Bottom bar includes the available sections for each module, as shown with the *Social* module below. The Timeline section from this module includes several sub-sections displayed in the Top bar.





Top bar



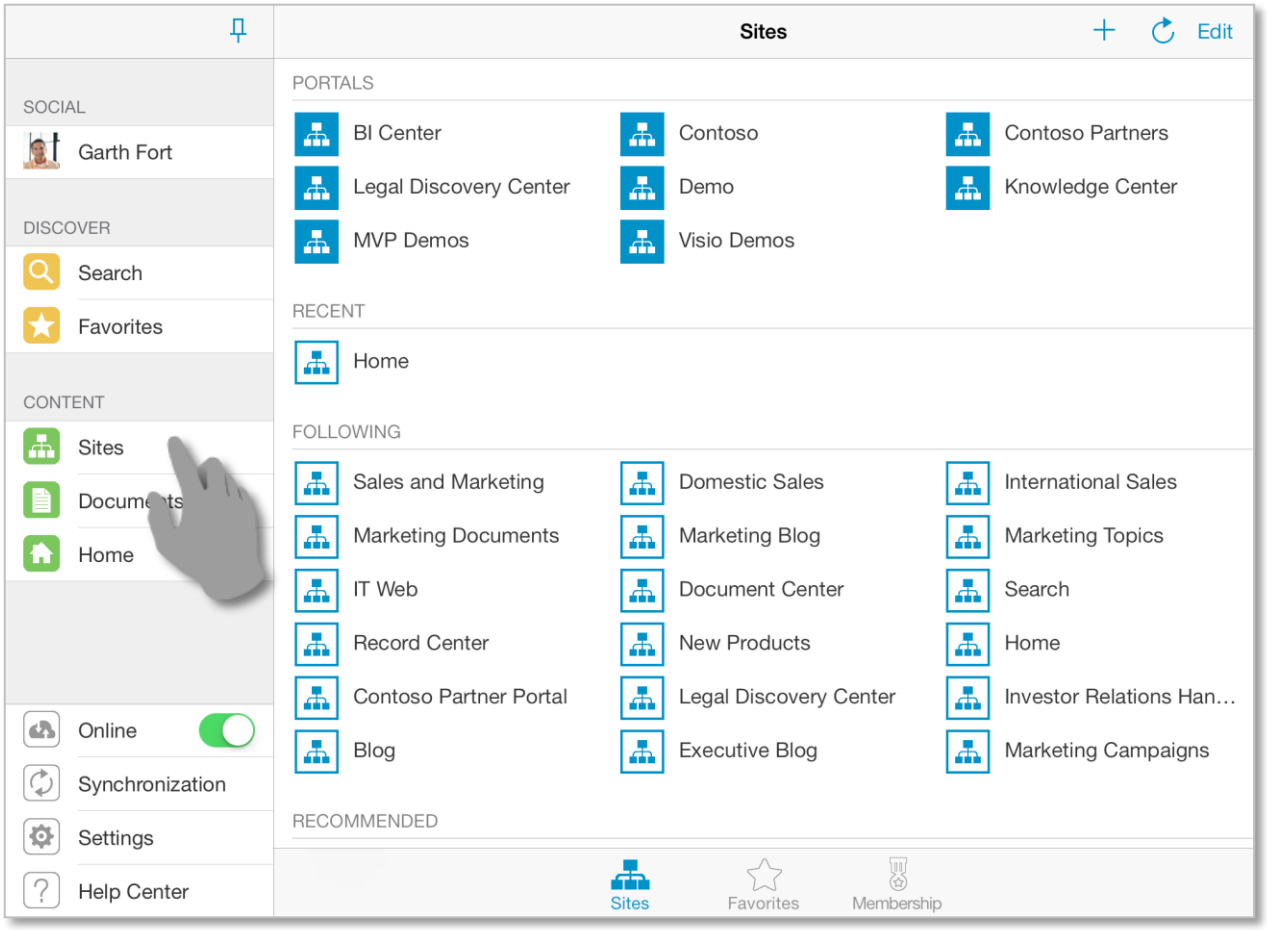
Bottom bar

Module sections

The available sections for the Modules depend on the SharePoint Server version used (2013 or 2010/2007) and the availability of social features.

The Sites Module

This Module gives you access to your SharePoint Sites and contents. Sites are displayed in an organized list view, including Portals, Recent, Following, and Recommended.



Recent and Favorites

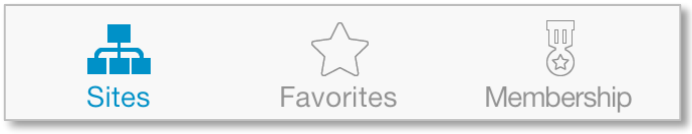
Recent accessed sites will be automatically populated to give you quick access to the content you are working on. All the sites tagged for quick access are available in the bottom bar (Favorites).

Enterprise Features

For **SharePlus Enterprise** versions working with **SharePoint 2013** server, you can get recommendations on sites and documents that may be relevant to you. The portal suggestions are included on the SharePlus list view under the *Recommended* section.

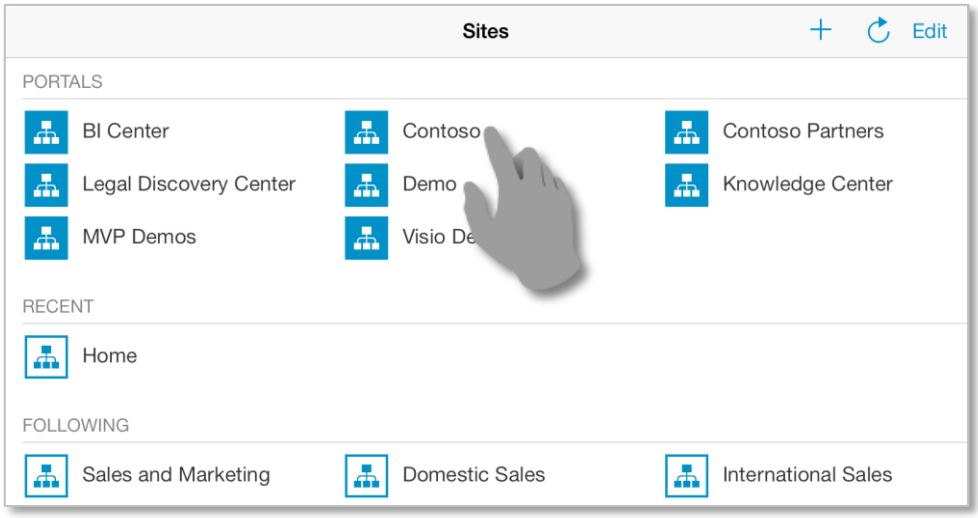
Following and Membership

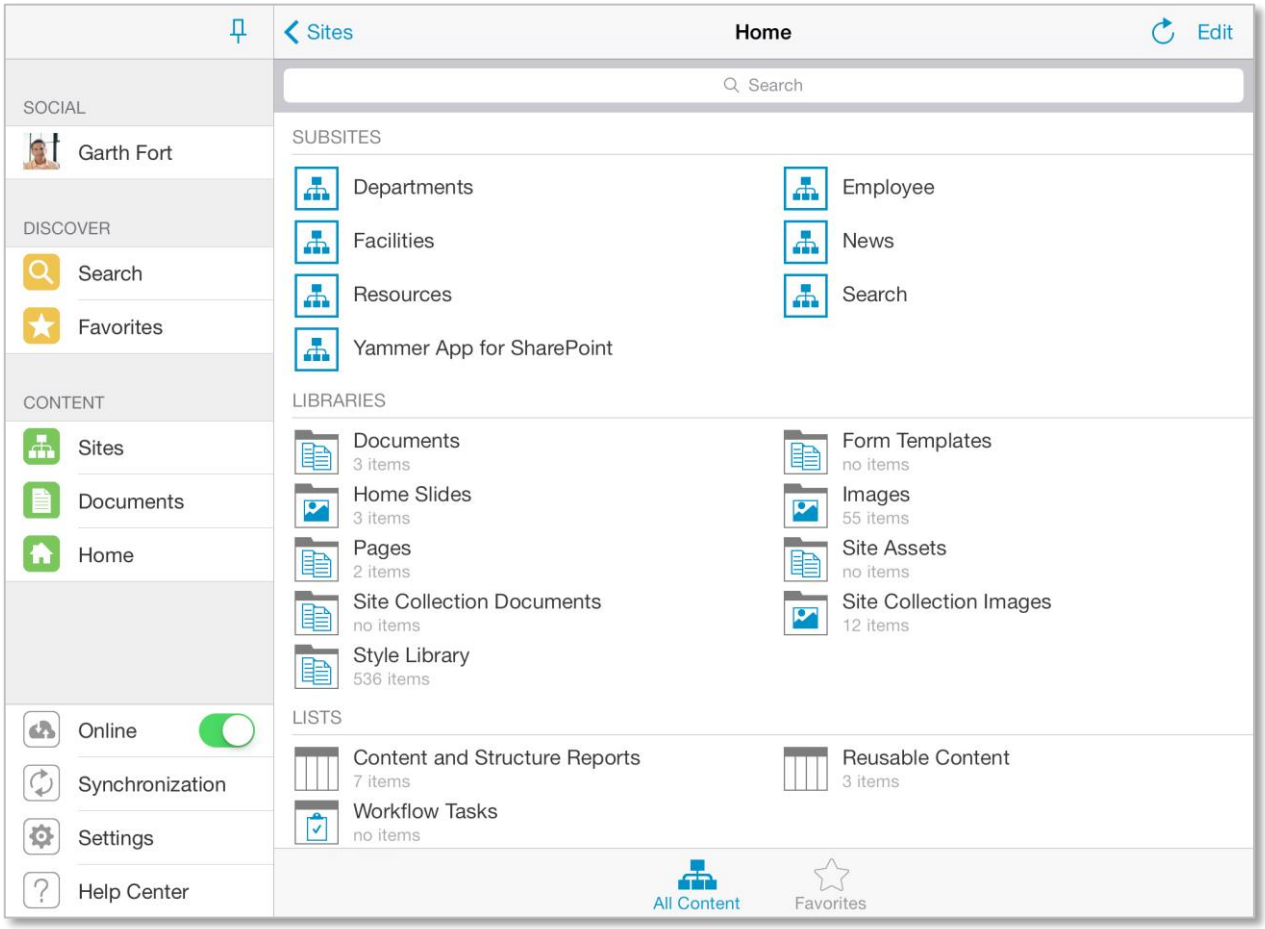
Using the *Following* section you can track the sites you are following on your SharePoint 2013 portal. Like Favorites, the Sites that you are member of (Membership) can be accessed through the bottom bar.



SharePoint Sites

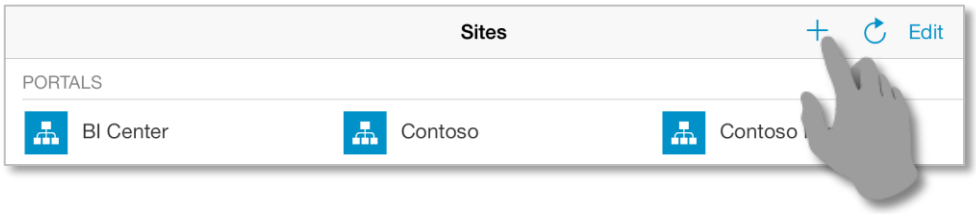
Tapping on a Portal or a site, you can browse its sub-sites, libraries, and lists.





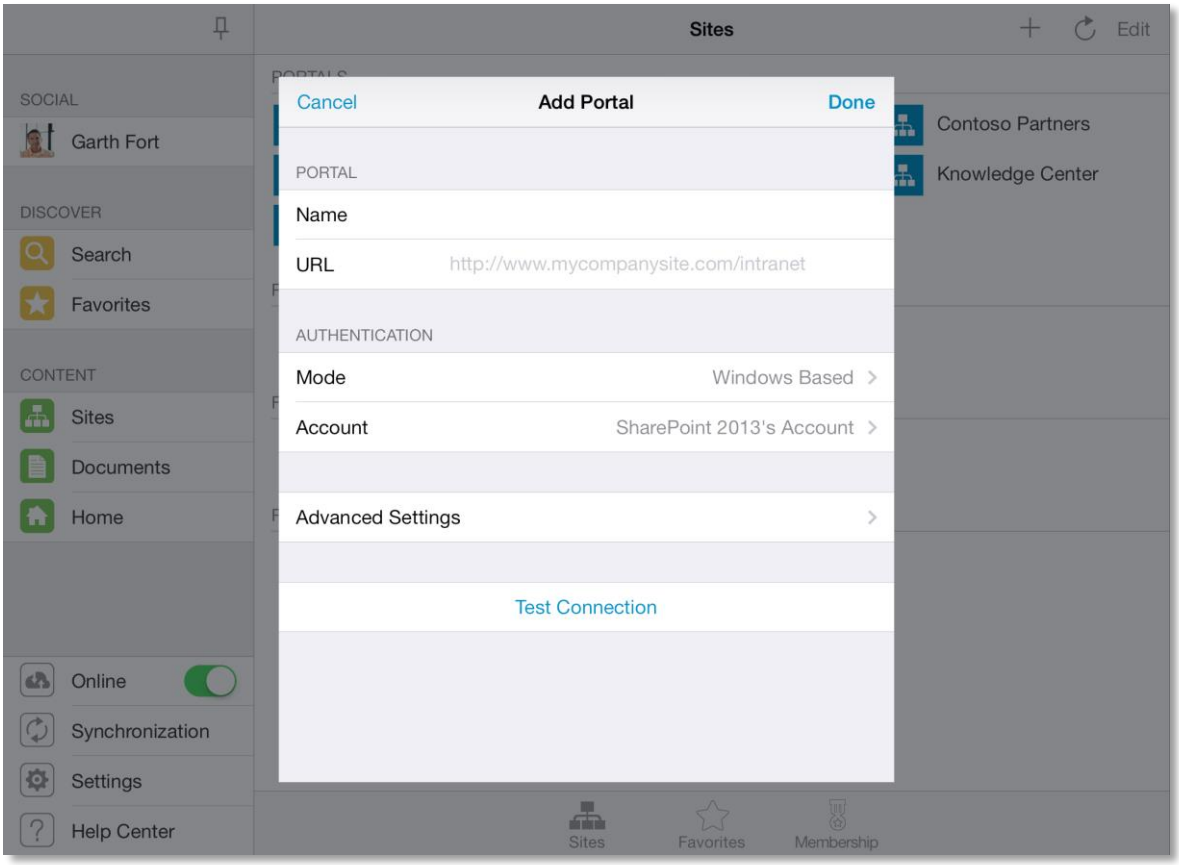
Setting up a new Connection

SharePlus Enterprise is typically pre-configured to give you access to your company Portals. However, if the site you need is not listed in the app, you can manually add it by opening the Sites module and then tapping the "+" button.



To set up a new connection you need to provide:

- The **URL** where the SharePoint Site is located.
- The **Authentication Mode**
- An **Account** to connect to the SharePoint server.



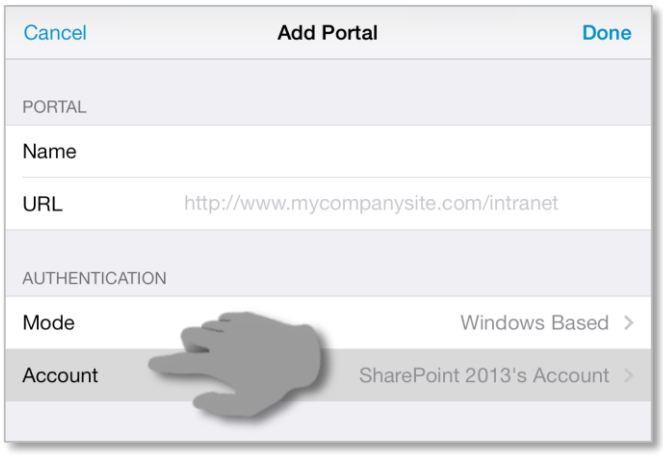
Authentication Mode

Windows Integrated Authentication is selected by default, but Office 365, Forms-based authentication, Web Login, and other authentication methods are also supported.

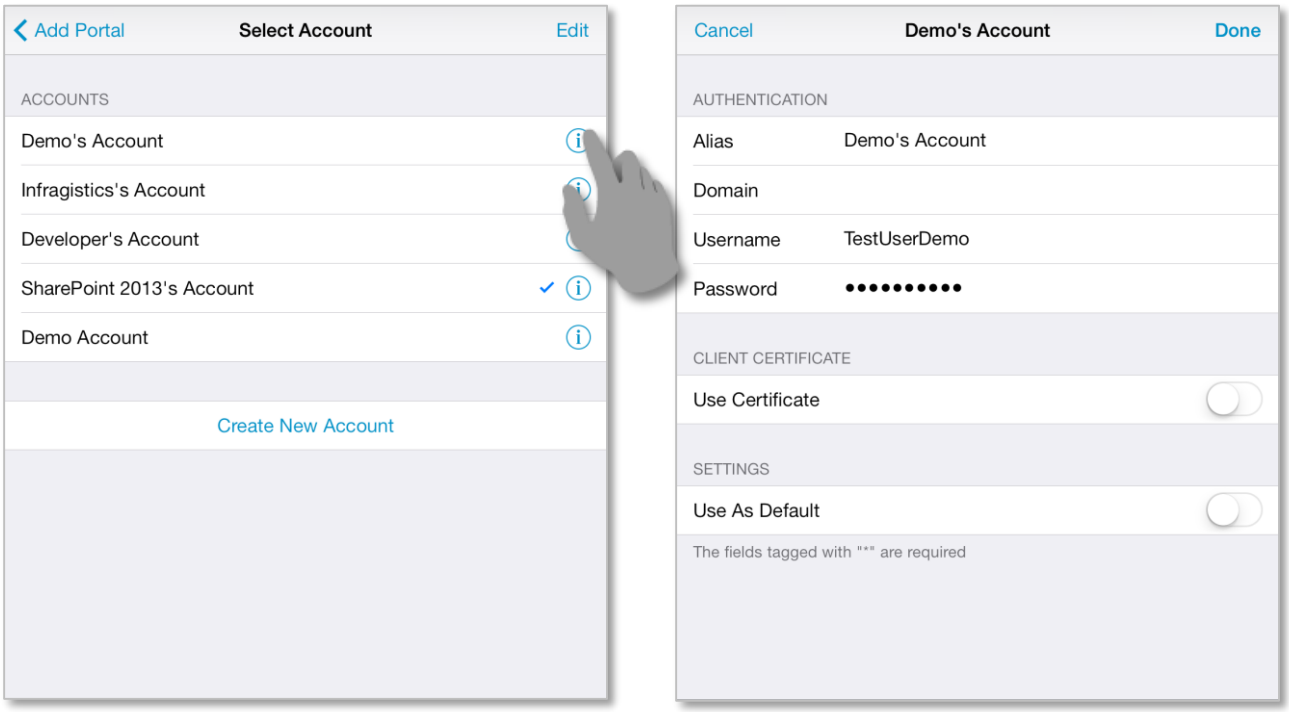
You should choose the Mode that matches the authentication method of your SharePoint portal. If you don't know which one to choose, ask your Help Desk or IT Manager. Alternatively, you can try selecting different modes until you find the right one.

User Accounts

When adding a new Site change the account or create a new one if needed.



After tapping the account, all existing accounts are displayed and you can create a new one or modify an existing one. To set up a new account you need to provide your credentials (**Username** and **Password**).



Accounts…

When configuring an account, specifying a **Domain** or using a **Client Certificate** are both optional and depend on the server configuration.

Infragistics Demo Portal

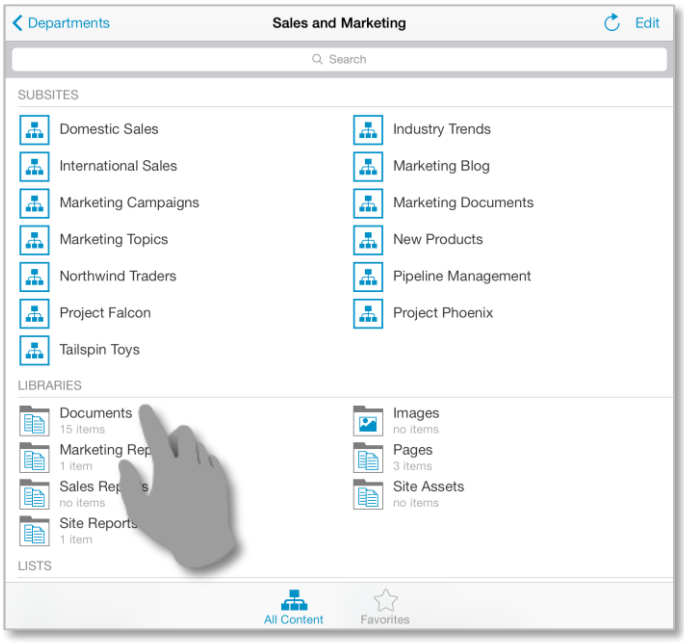
If you don't have access to any portal, please contact Infragistics to request access to our **Demo** SharePoint site.

Lists and Libraries

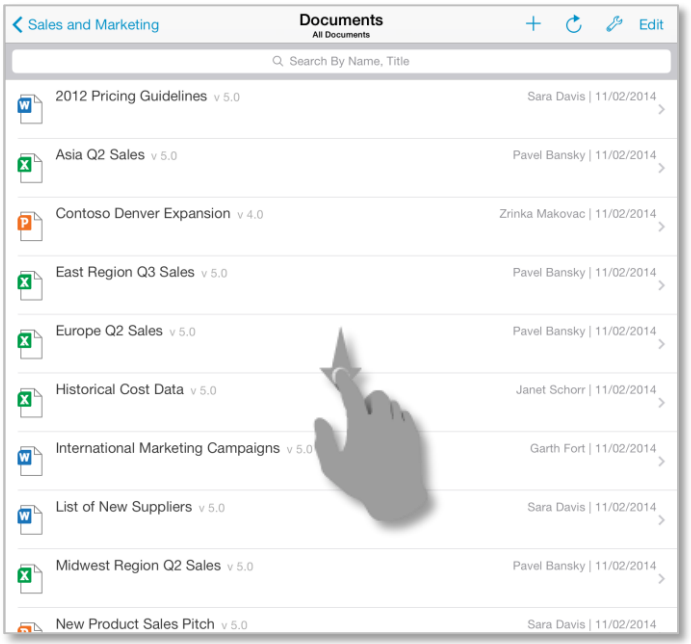
SharePlus supports all kinds of SharePoint Lists and Libraries. On the application, the List Icon indicates the List type.

	Asset and Picture Libraries		Document and Form Libraries
	Announcements		Calendar
	Contacts		Custom Lists
	Tasks		Team Discussion

To access a list, navigate to the parent site and tap on the list.



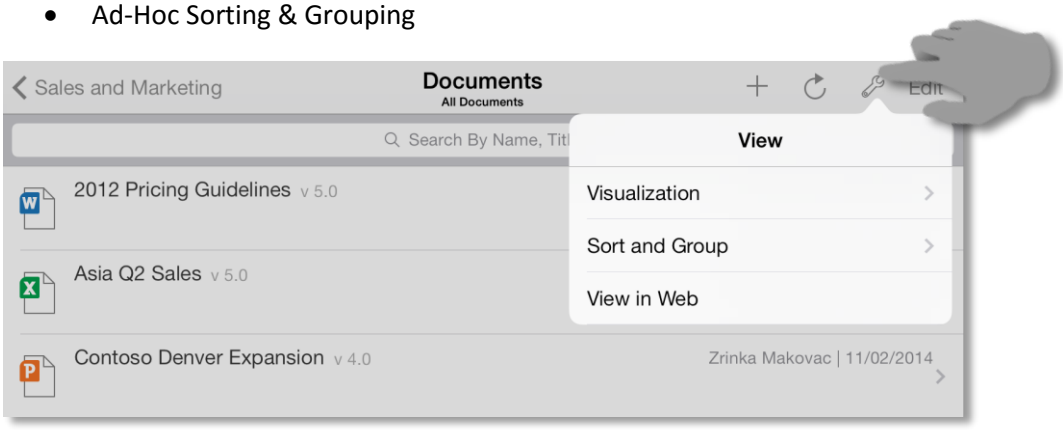
Once in a list or library, you can scroll up and down to navigate through all the list´s items.



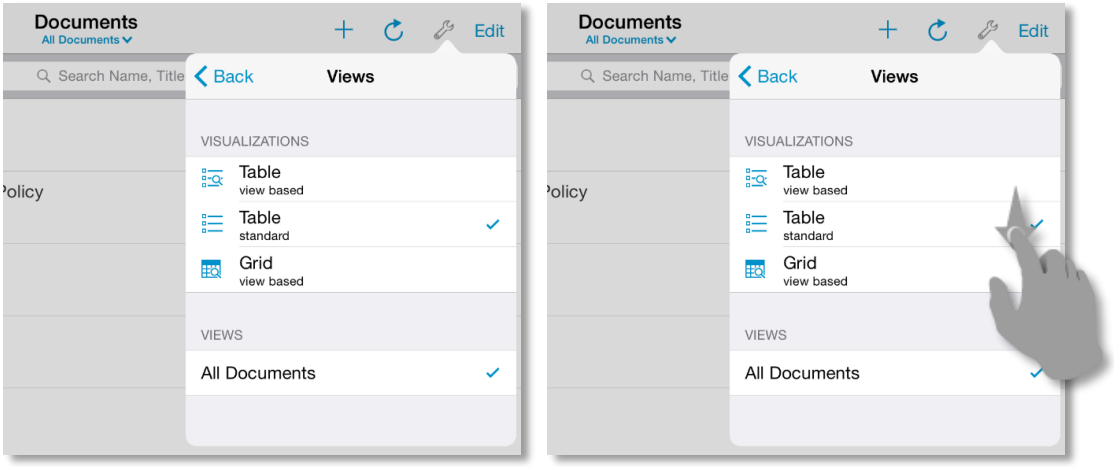
List Display Settings

You can control how SharePoint Lists are displayed by configuring the following settings:

- SharePlus List Visualizations
- SharePoint List Views
- Ad-Hoc Sorting & Grouping



Tap *Visualization* to access SharePlus List Visualizations (VISUALIZATIONS) and SharePoint List Views (VIEWS). Scroll up and down to navigate through all available settings.

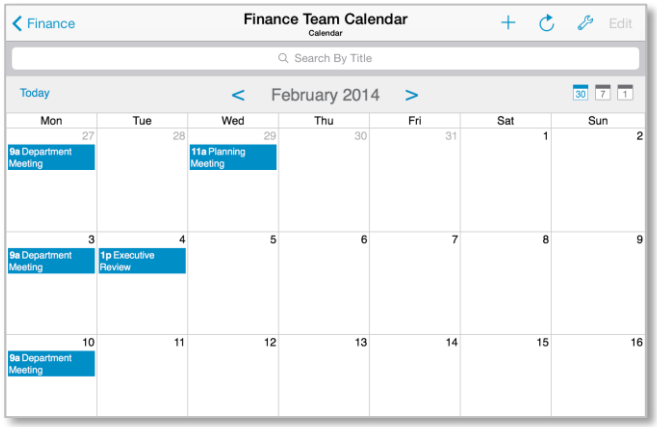


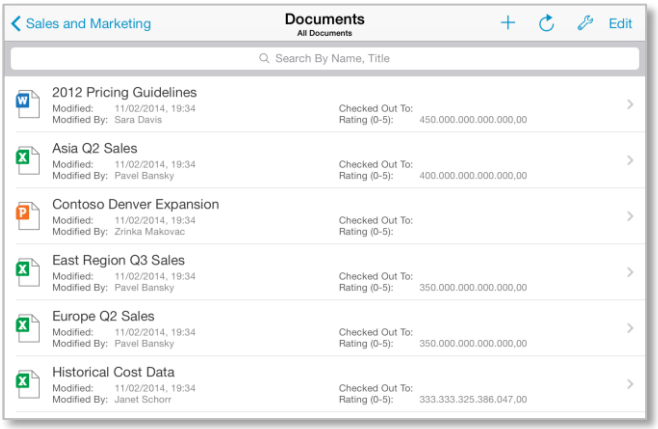
List Views

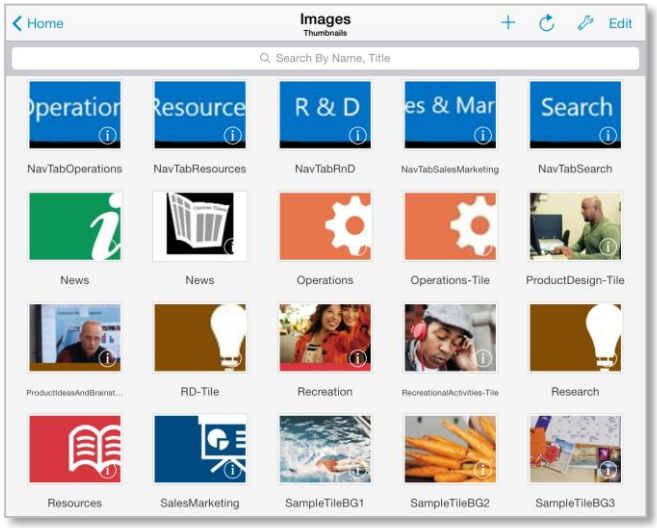
SharePoint List Views are pre-defined configurations created on the server to organize and filter the items of a list, depending on the needs of different SharePoint groups of users.
To choose a List View tap *Visualization* and select among the *Views* you have access to.

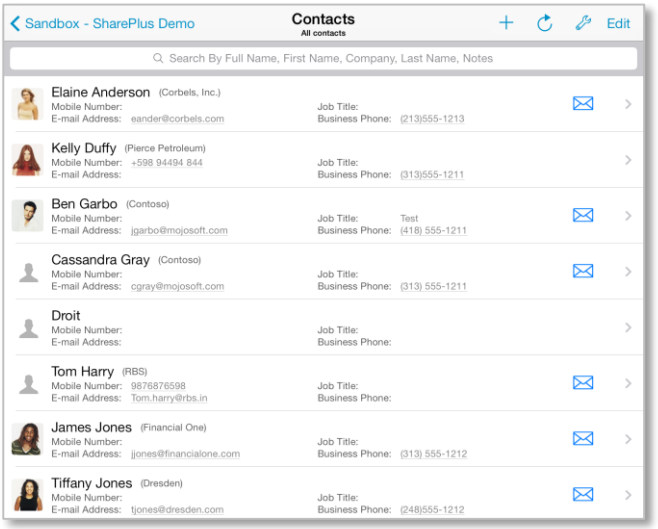
List Visualizations

The layout of the Lists can be adjusted using List Visualizations, e.g. table, grid, calendar view. The default and available Visualizations depend on the list type and settings, e.g., the *Calendar compact* Visualization is only available for Calendar lists.



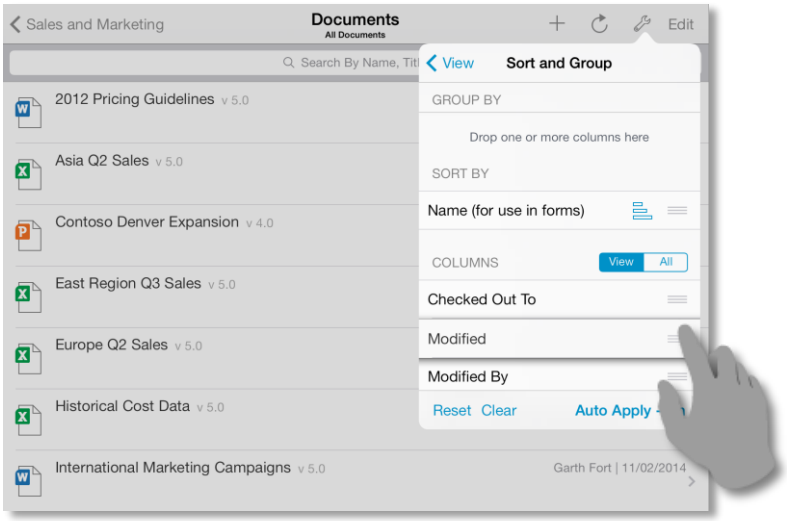






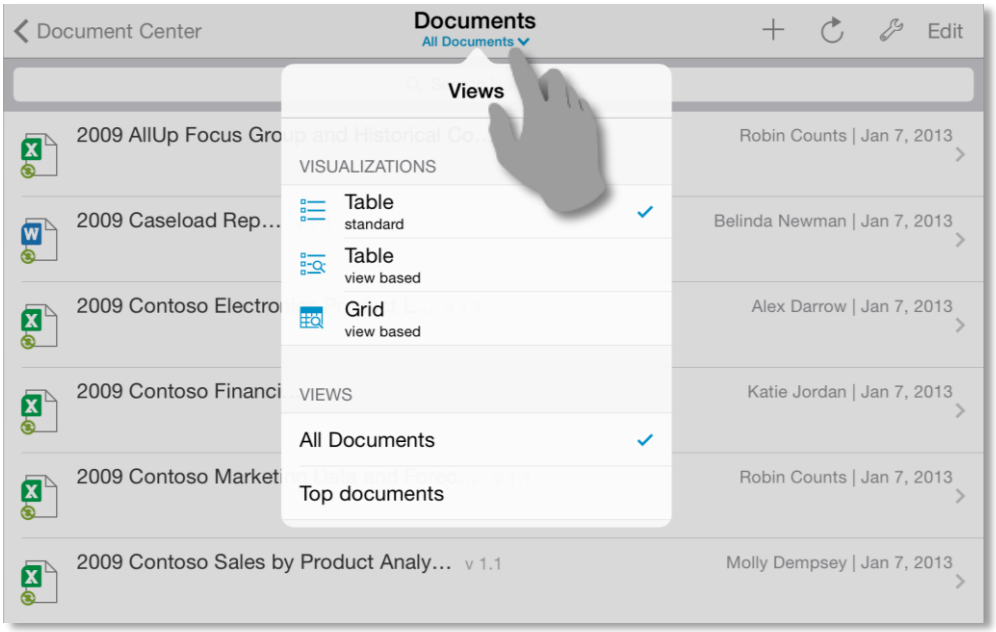
Ad-Hoc Sorting & Grouping

Once you enter the sort and group settings, you will find there are different buttons and actions available. You can specify group by criteria by dragging List columns to the **Group By** section or sort criteria by dragging columns to the **Sort By** section.



Quick Access

You can easily switch the SharePoint List Views and SharePlus Visualizations by tapping the view name to open the Views selector under the list/library name.



Items and Documents

SharePlus fully supports SharePoint content types, including SharePoint default types and custom content types you may create. These content types are represented with different icons depending on their type.

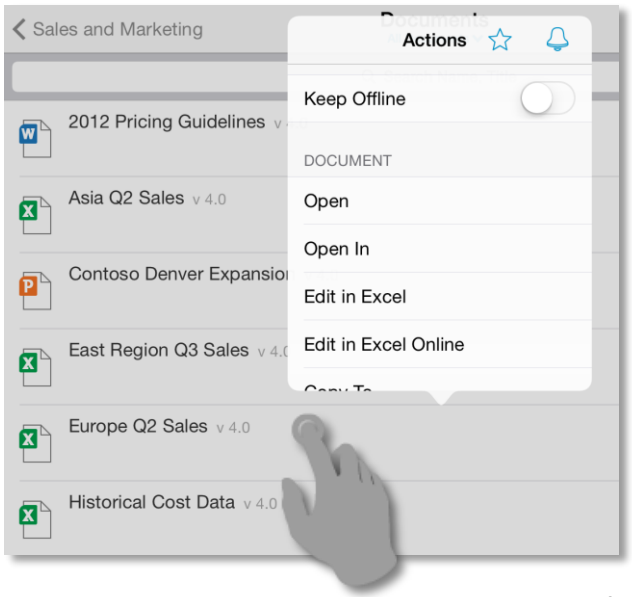
Common items and documents are:

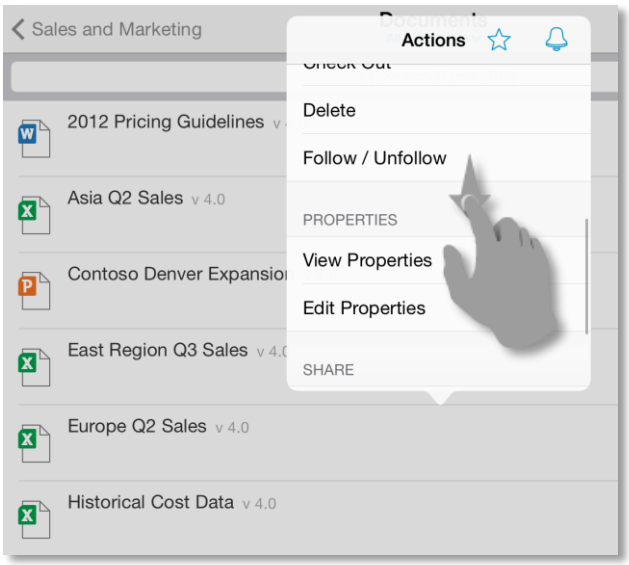
	Word documents		Excel documents
	PDF documents		Image documents
	ZIP documents		PowerPoint documents
	ReportPlus dashboards		Custom items
	Task items		Calendar event items

Actions

Tapping over an item executes the default action. Depending on the item type and your configuration, it can display the item's properties or directly preview the document.

If you **tap & hold** instead, a menu with all the available actions is displayed.

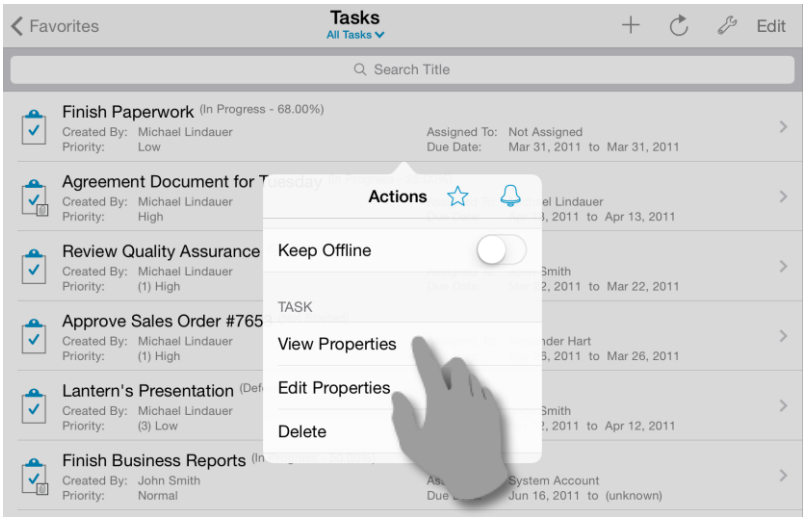




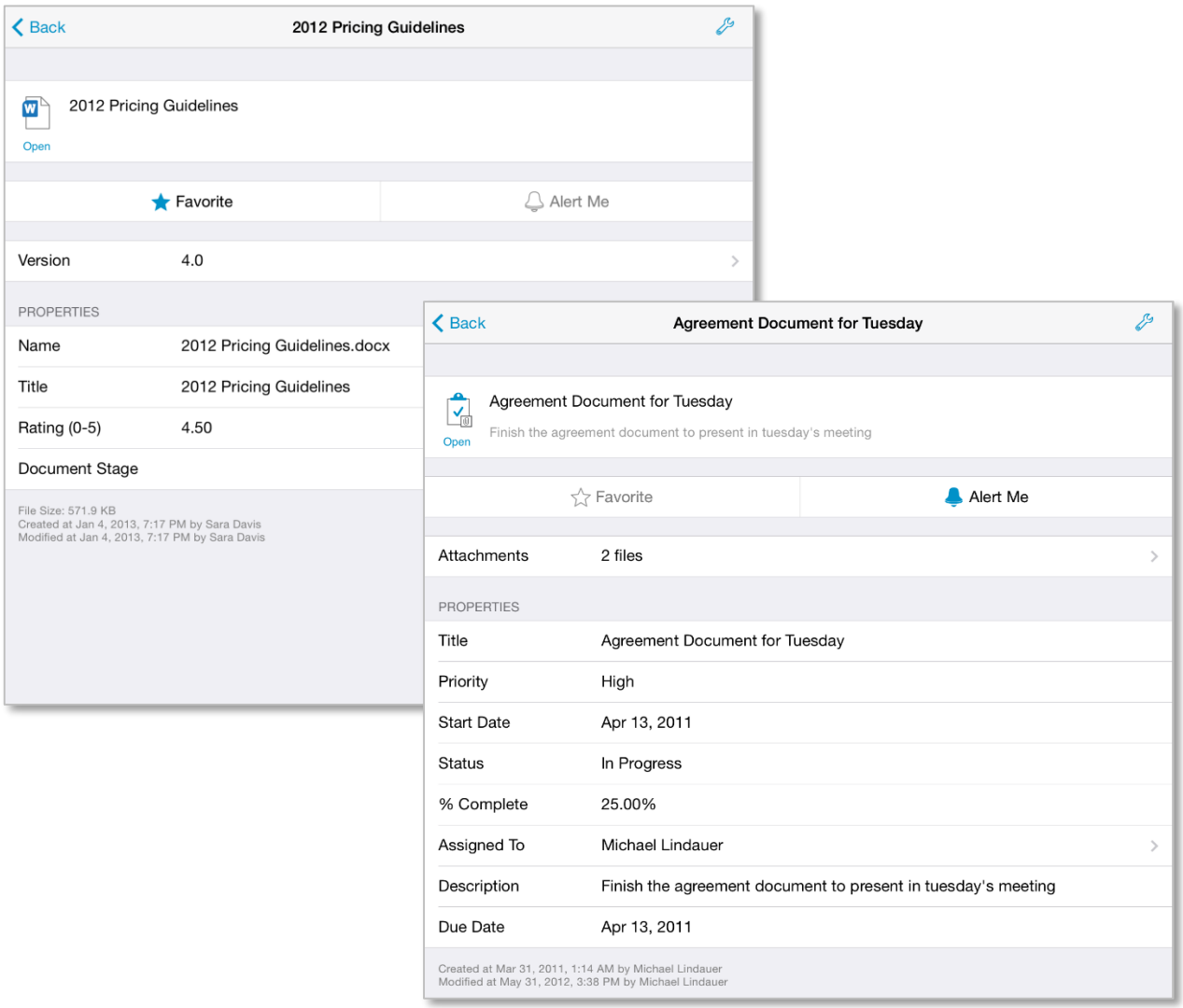
SharePlus centralizes all possible actions to be performed over any content, including sites, webs, lists, and items. Once the menu is displayed, scroll the list up and down to navigate through all the available actions for that type of content.

Item Properties

Access the properties of an item or document through the Actions menu.

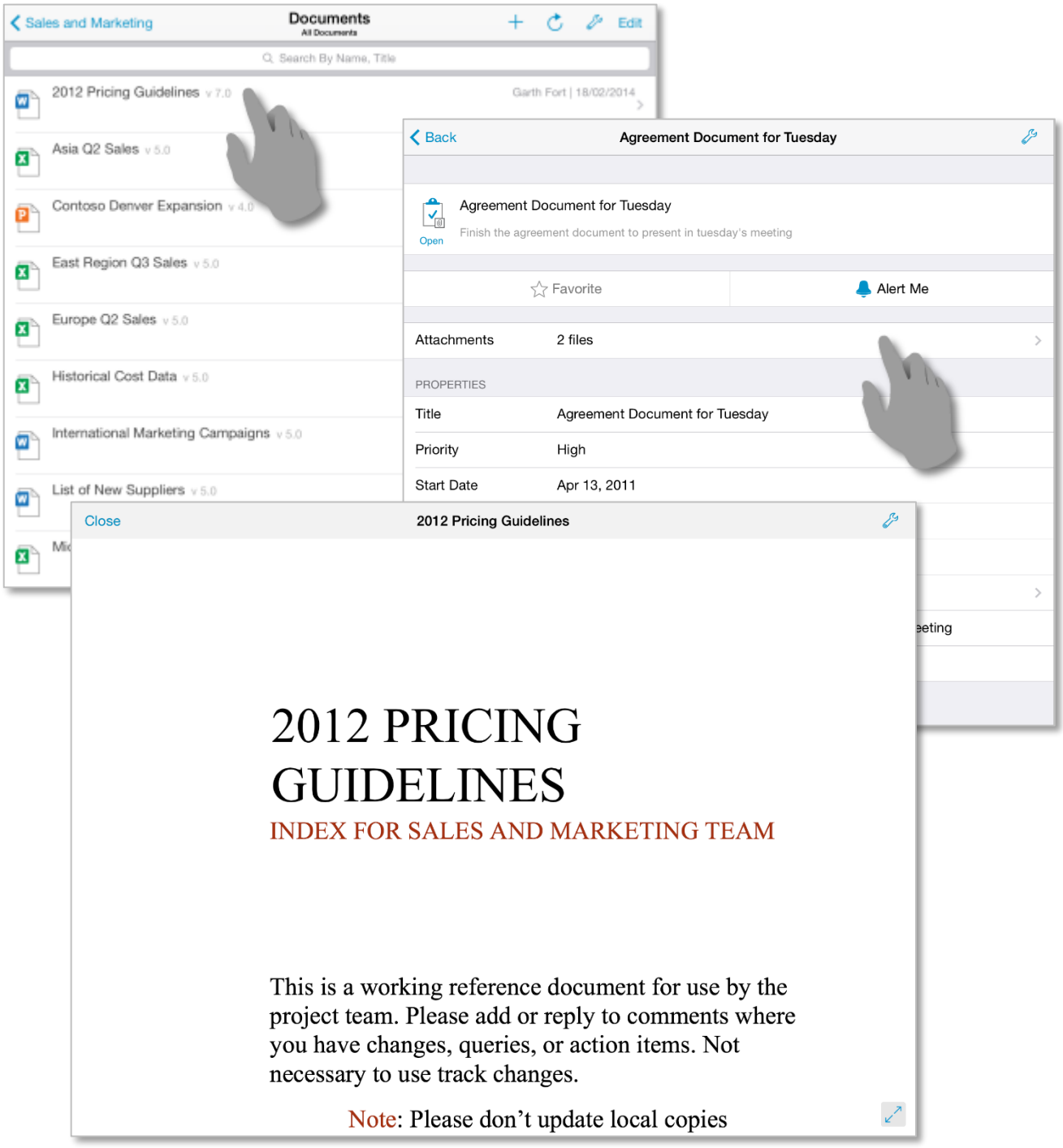


The item's properties are displayed on screen along with the *Favorite* and *Alert Me* SharePlus options.



Browsing Files

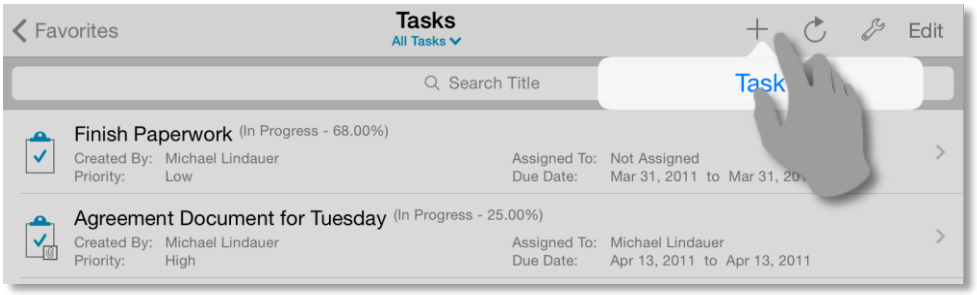
When working with Documents, you can open the file just by tapping the cell. For Items, first access the properties and then tap the *Attachments* button. A popover will display the available file attachments for the item.

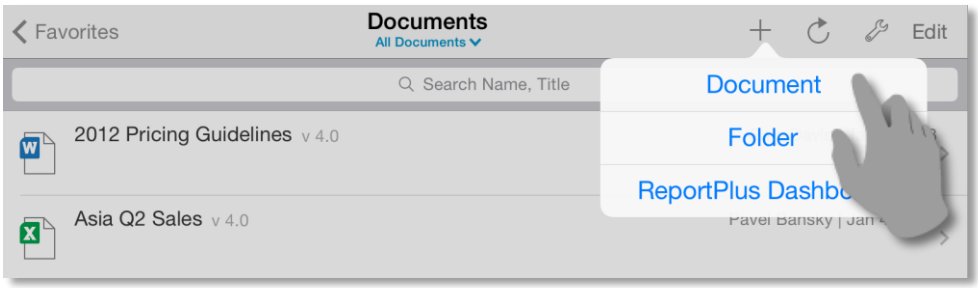


Adding/Editing Items

Adding a new item/document

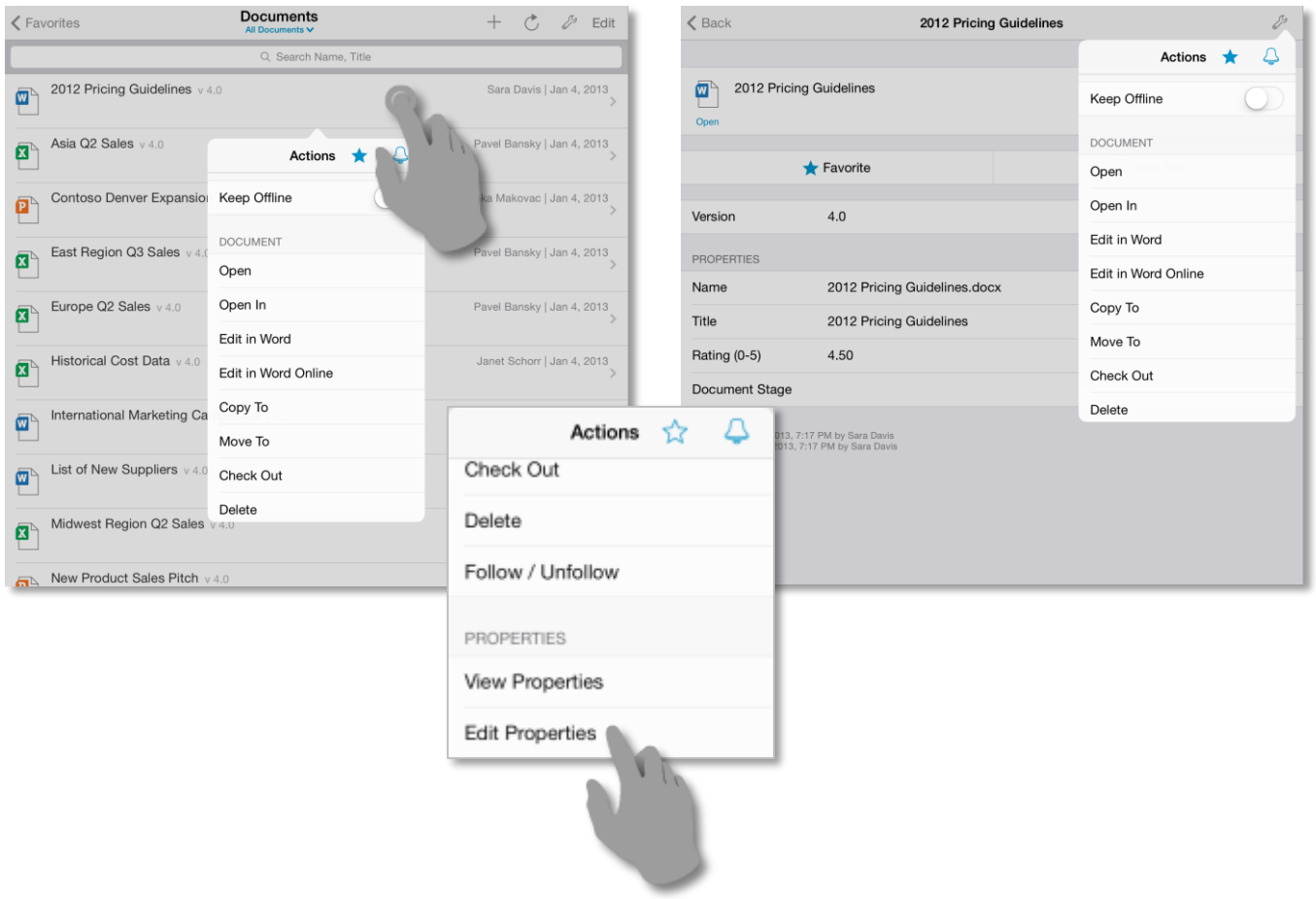
You can create new items (documents, tasks, calendar events, etc.) for libraries or lists as shown below.





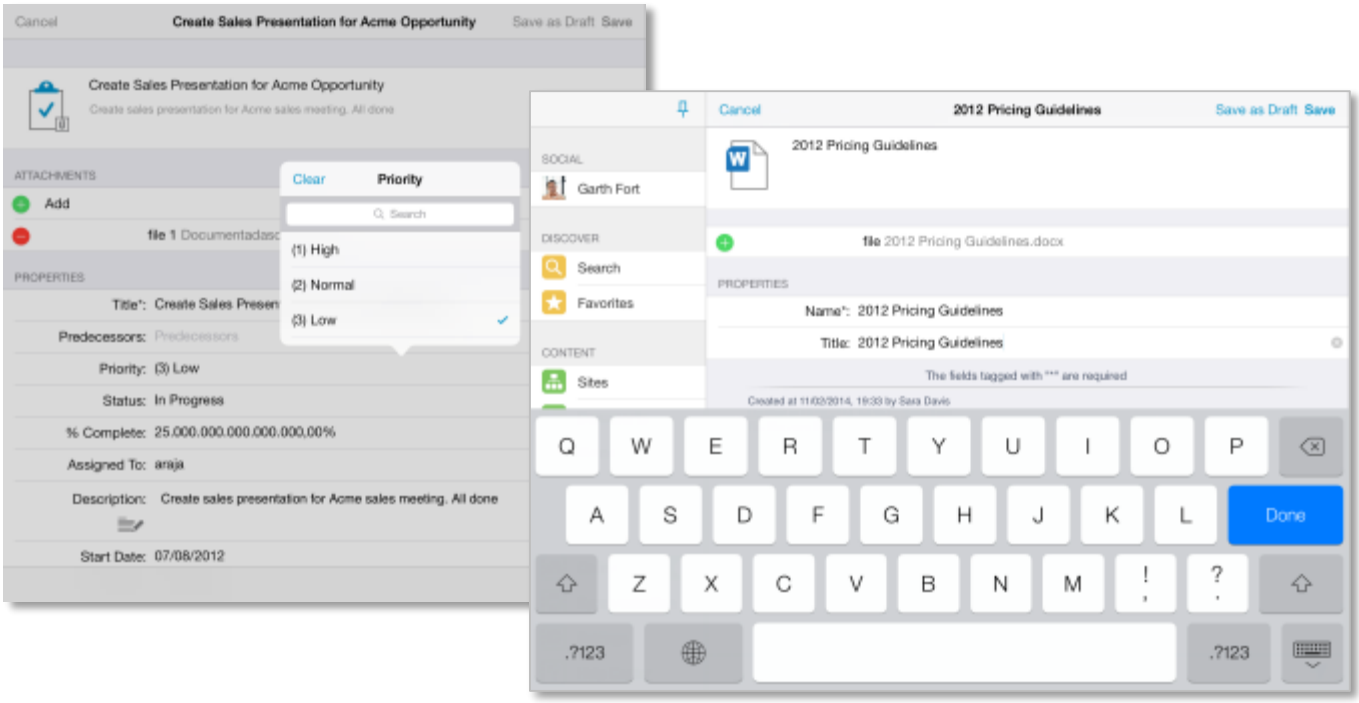
Editing item properties

Open the actions menu and then choose *Edit Properties* to enter the edit mode.



Working with properties

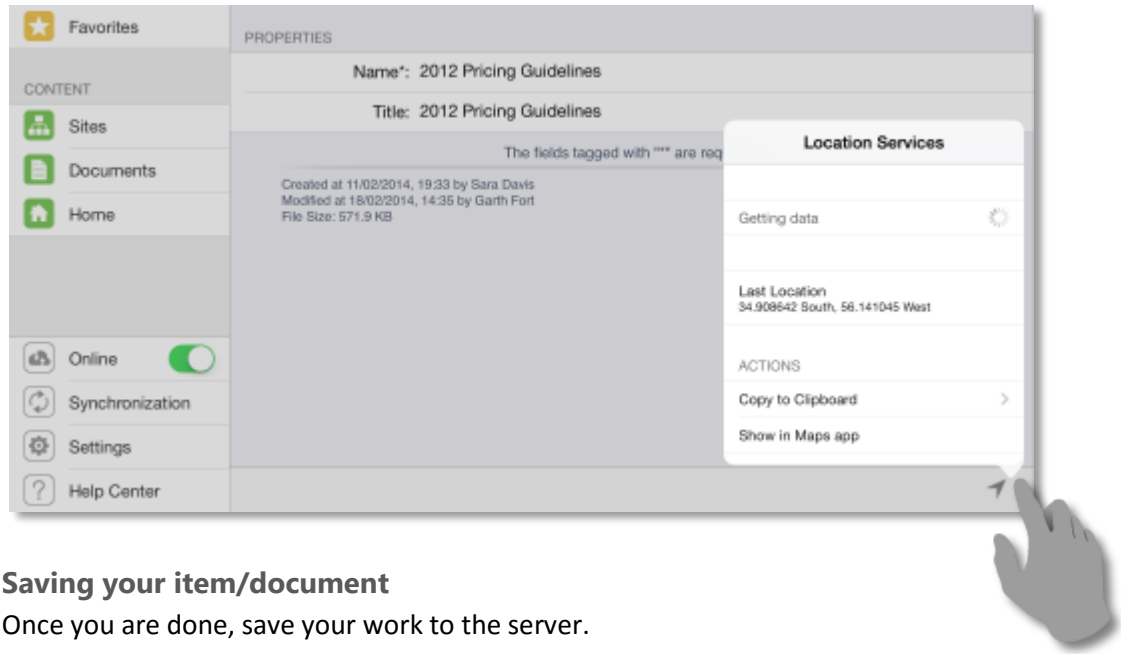
Fill in or make changes to the properties of the item or document.



SharePlus supports all standard SharePoint field types, e.g., single/multiple lines of text, lookup, calculated, date.

Location Services

You can use Location Services (when available) to include your location data with the other properties.



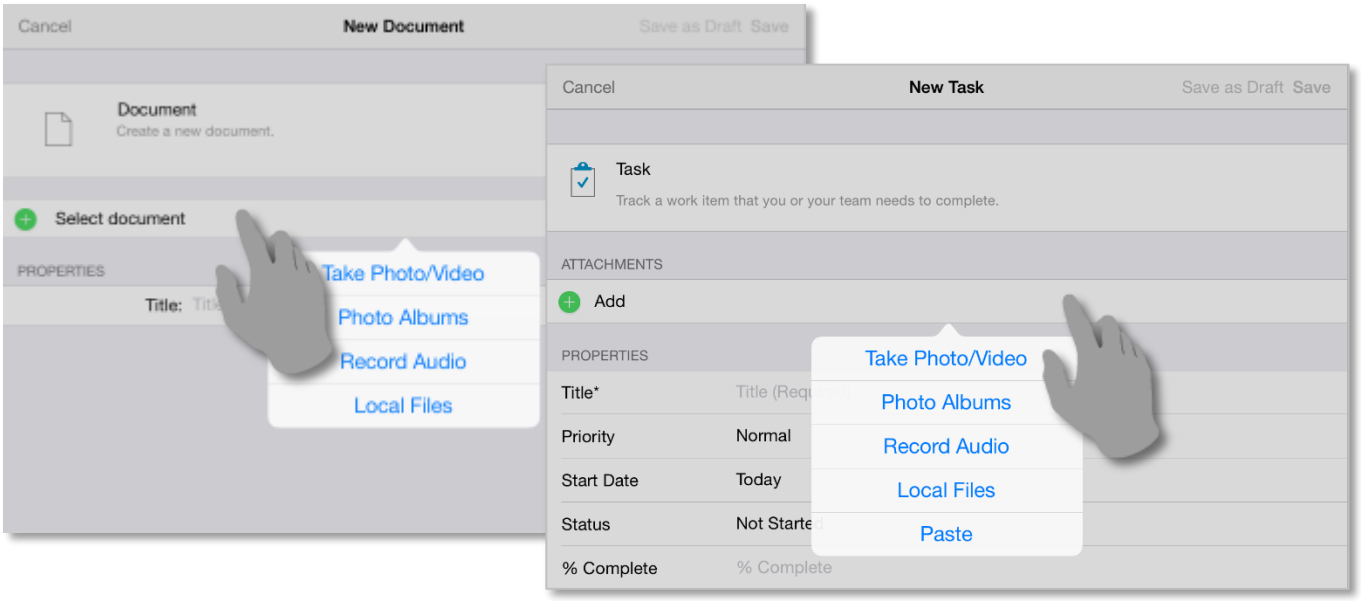
Saving your item/document

Once you are done, save your work to the server.

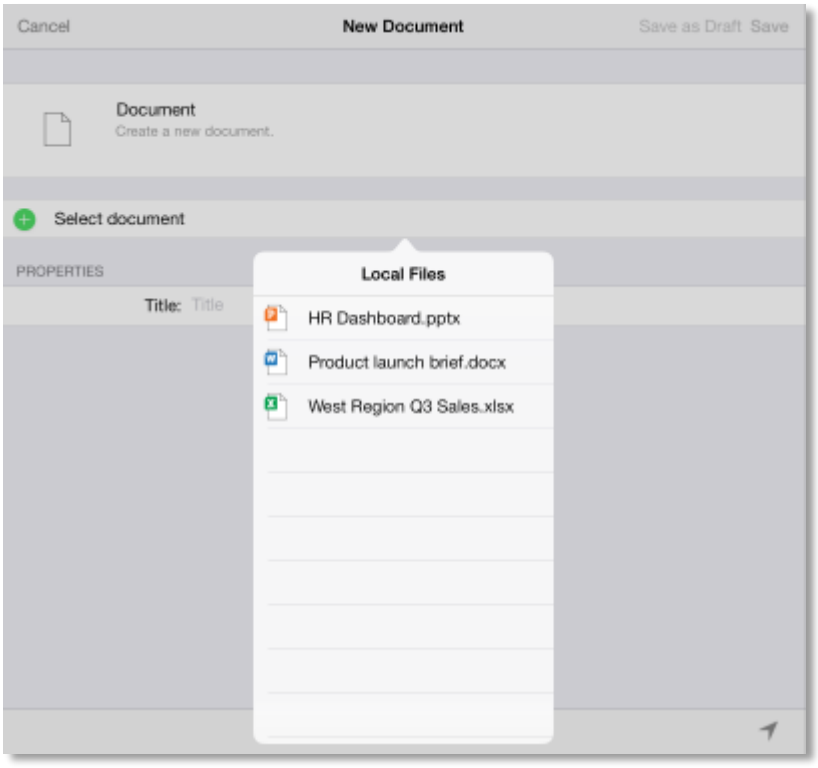
SharePlus features two save options: *Save* and *Save as Draft*. The *Save as Draft* option is useful when you want to work on a local copy without uploading changes to the SharePoint server.

Adding/Attaching a new File

You can add a new file as the attachment for an Item or as the file for a new Document.



When selecting the file to be added/attached, you can search the *Local Files*, pictures from the Camera Roll, or even create the file on-the-fly by taking a picture or recording video/audio.



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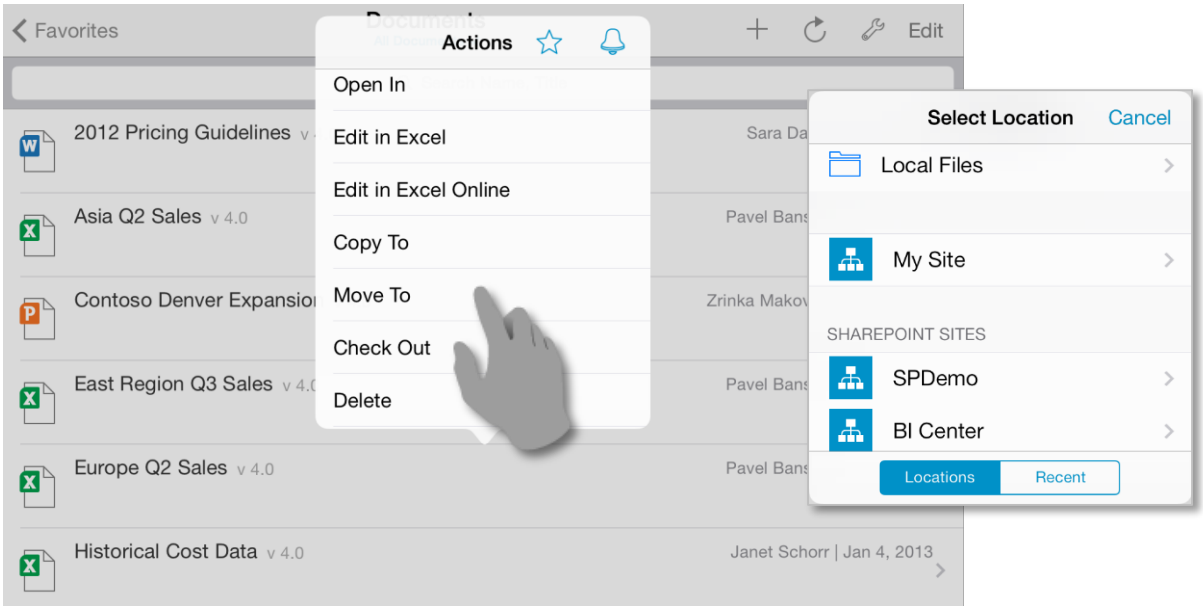
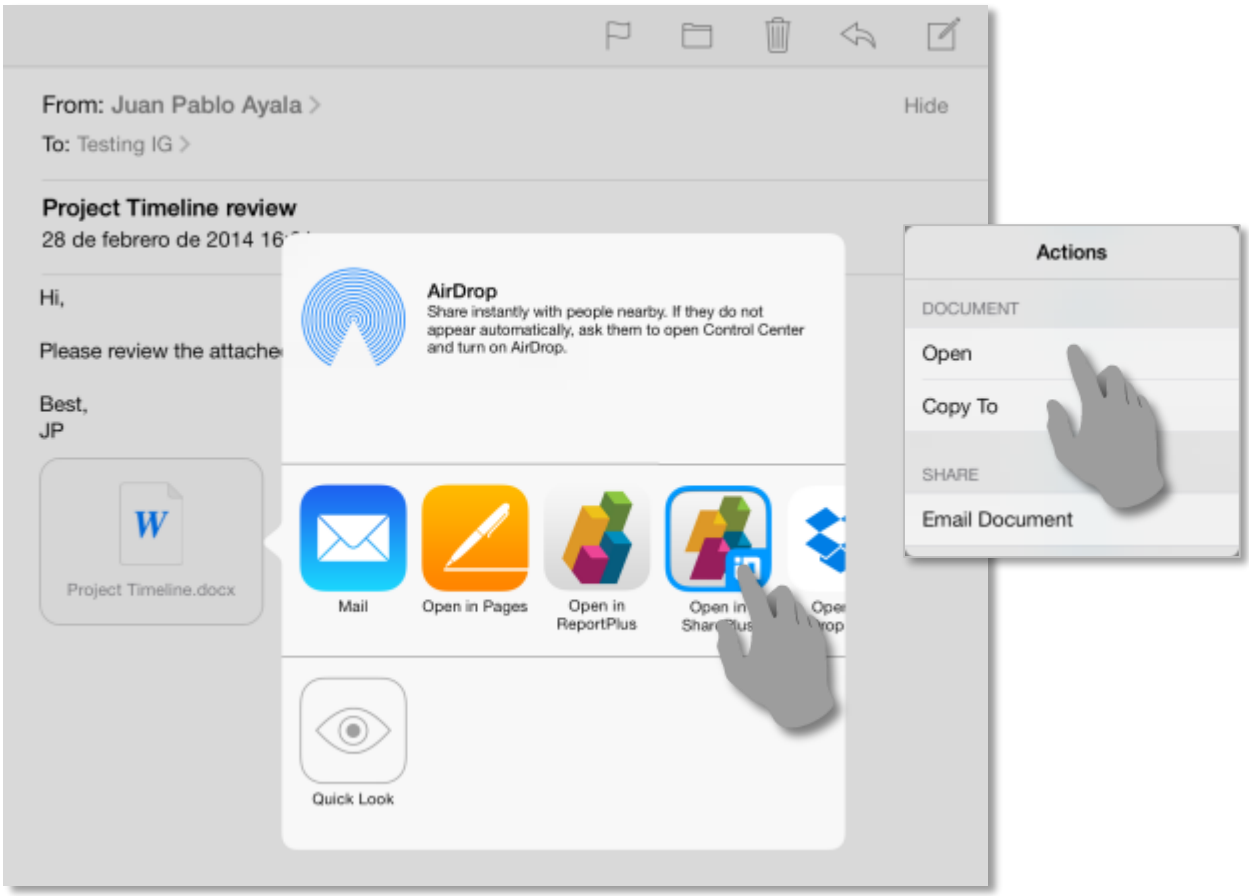
Copying a File to a SharePoint location or Local Files

You can use the *Copy To* feature to copy a file (document or attachment) to Local Files or upload the file to any SharePoint location you have access to.



Opening a File from an external application

With SharePlus, you can process an incoming Open In to either open the file within the application, or use the *Copy To* feature.



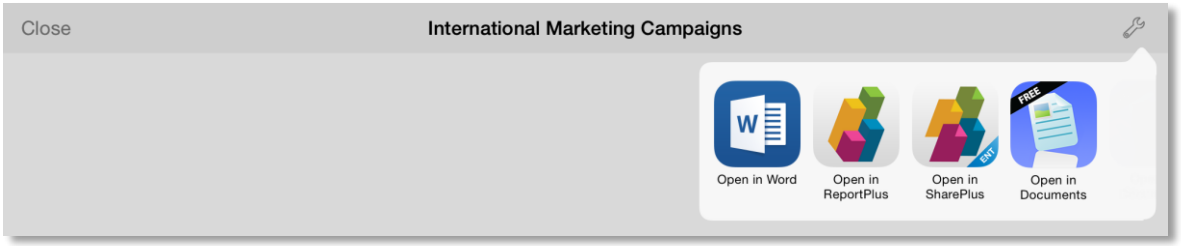
Editing a File

SharePlus relies on 3rd party apps to edit documents. You may use any app that supports incoming and outgoing Open In. That being said, using Microsoft Office for iPad you can save your work straight to the SharePoint server.

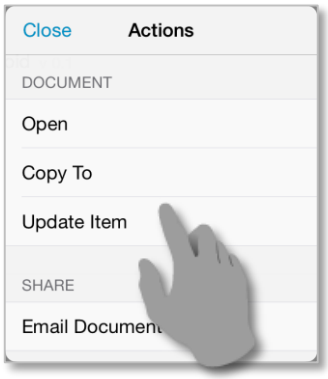
To edit a file using **Office for iPad**, first open the file and then choose *Edit in Word*.

Office for iPad will ask you for SharePoint credentials to access the document. Once you provide them, the document is changed directly on the server and it will be automatically updated in SharePlus.

To edit a file in **any editor**, open the file, choose *Open In* and then select your preferred editor.

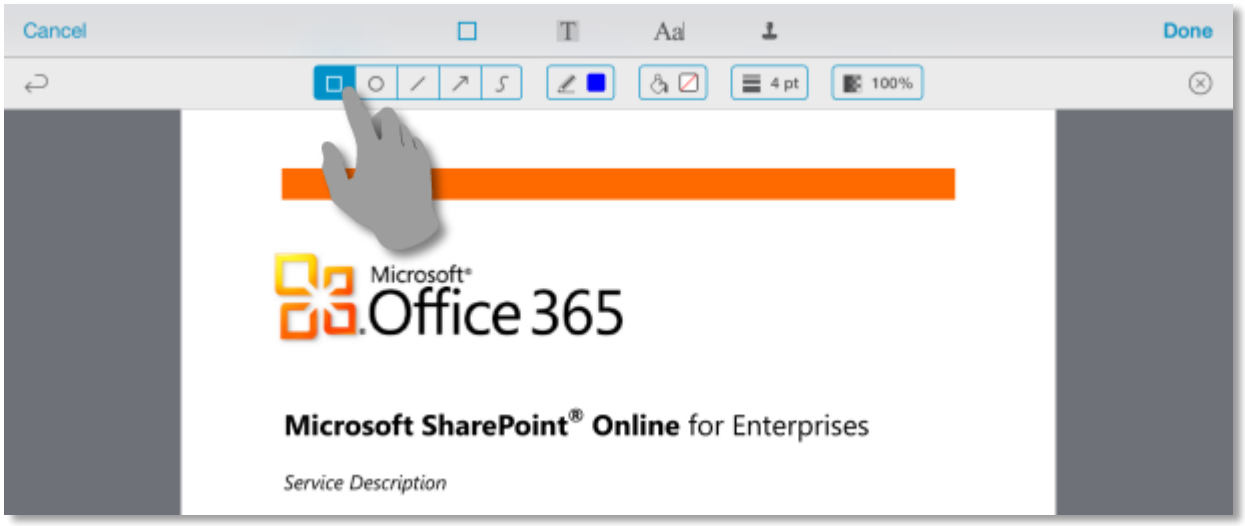


Tap an icon, the selected editor will be invoked and you can edit the file as usual. Once finished, just use "Open In" again to send the edited file back to SharePlus choose *Update Item* and then *Save*.

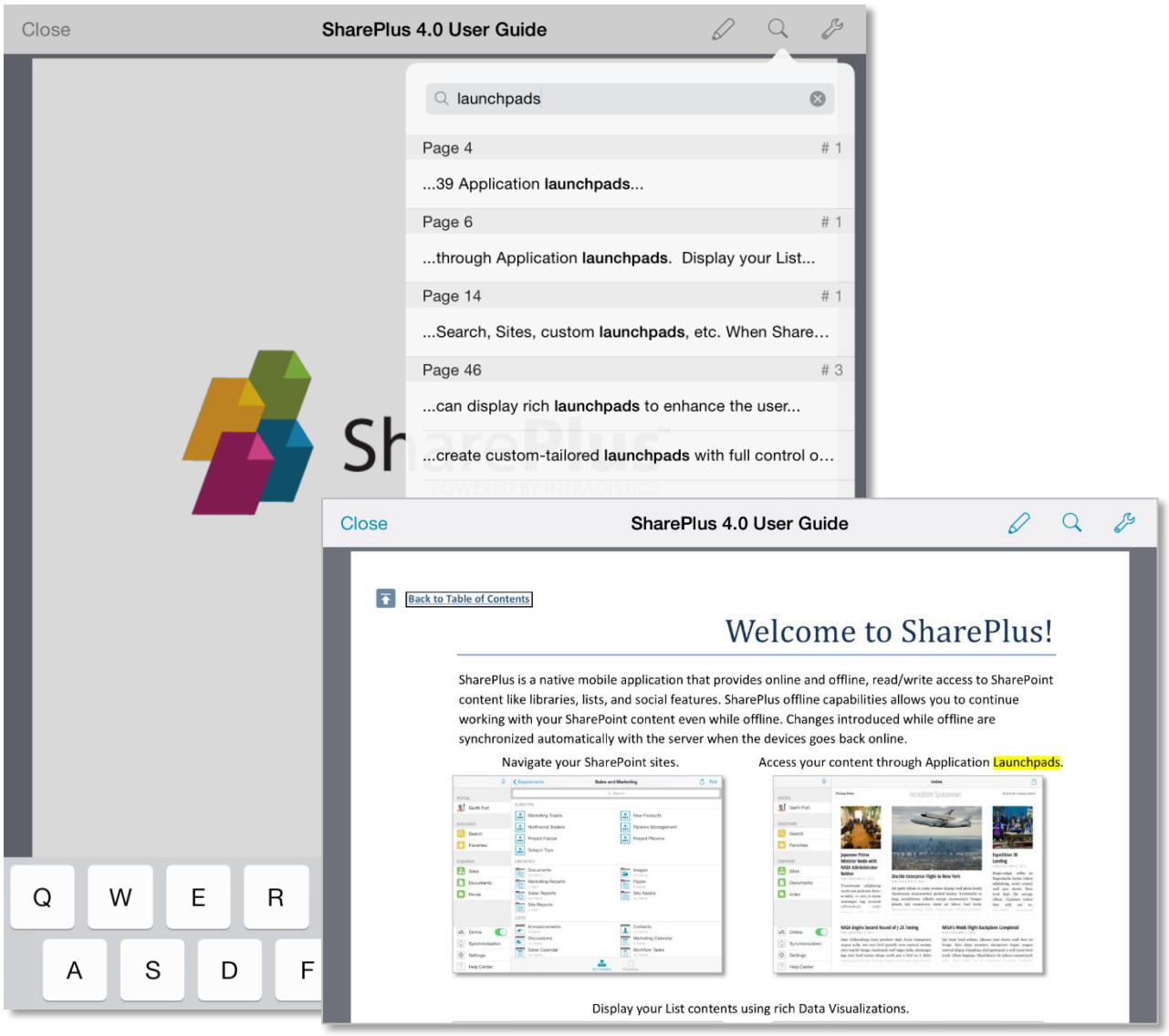


PDF Annotations

SharePlus provides PDF annotation tools that allows you to annotate PDF documents and fill PDF forms without leaving the application.

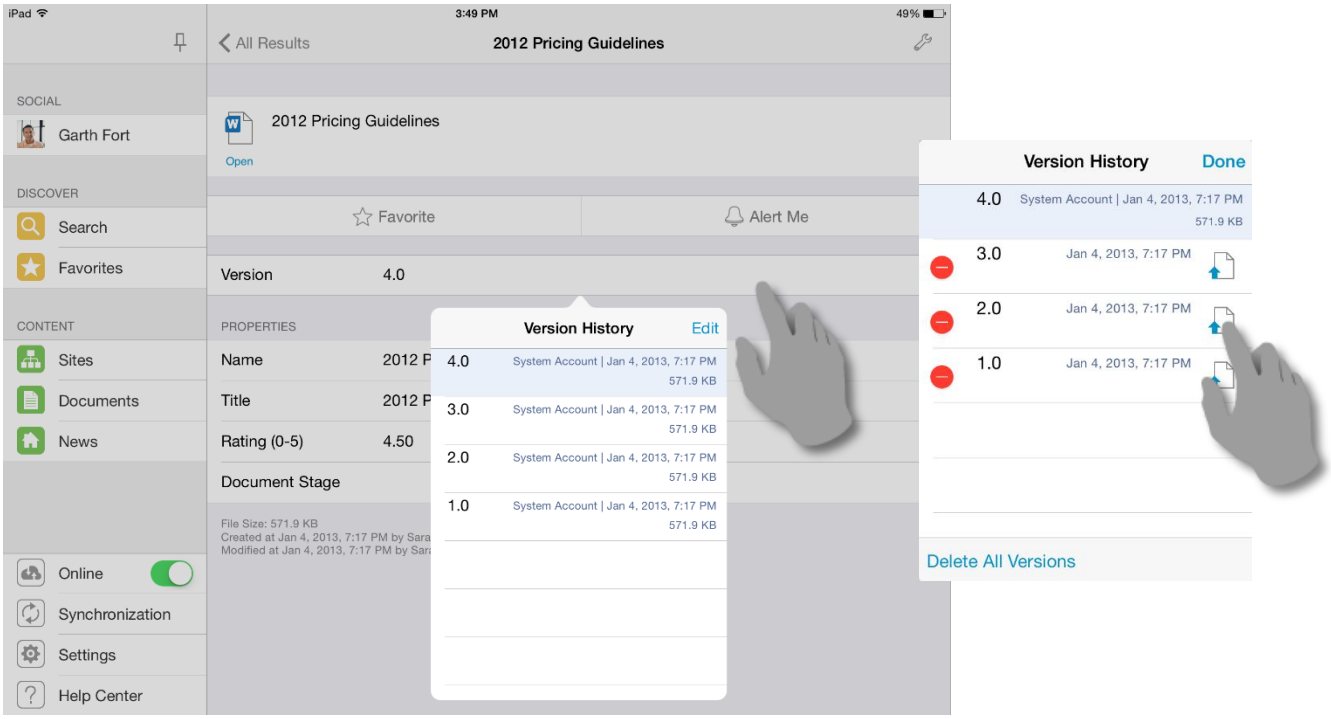


In addition, you can perform a search within a PDF file, browse the results by page and navigate to the page you want.



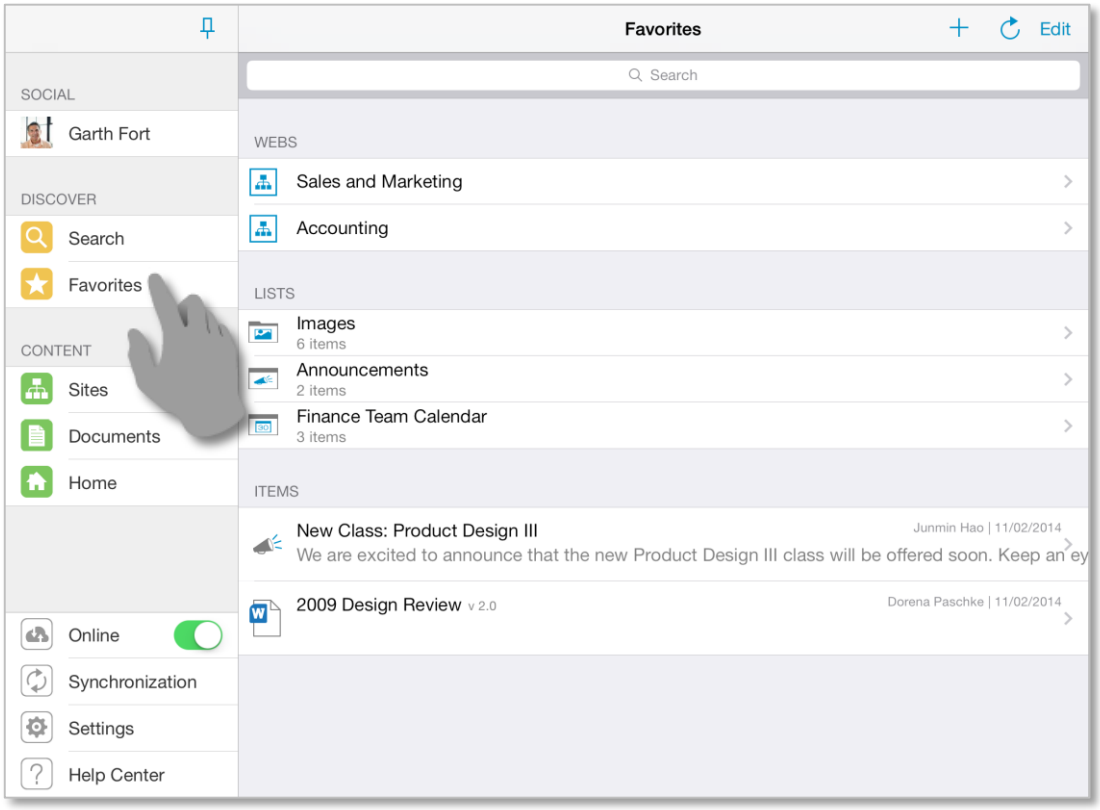
File Versions

SharePlus supports lists and document libraries with version control enabled. You can keep a history, track changes, and restore previous versions if needed.

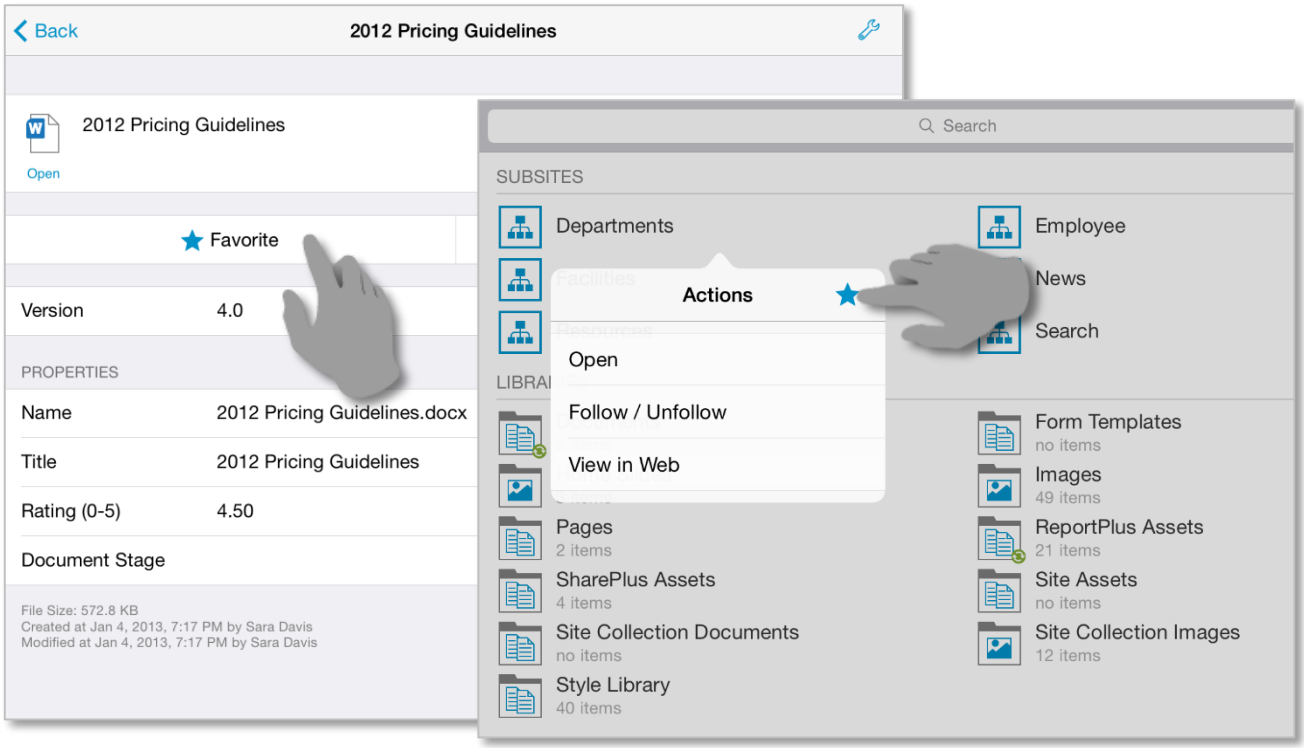


The Favorites Module

The “Favorites” Module gives you quick access to all your Favorite content displayed in an organized list view by category.



To mark an item, list, or site as Favorite, just tap the “Star” icon on its properties.



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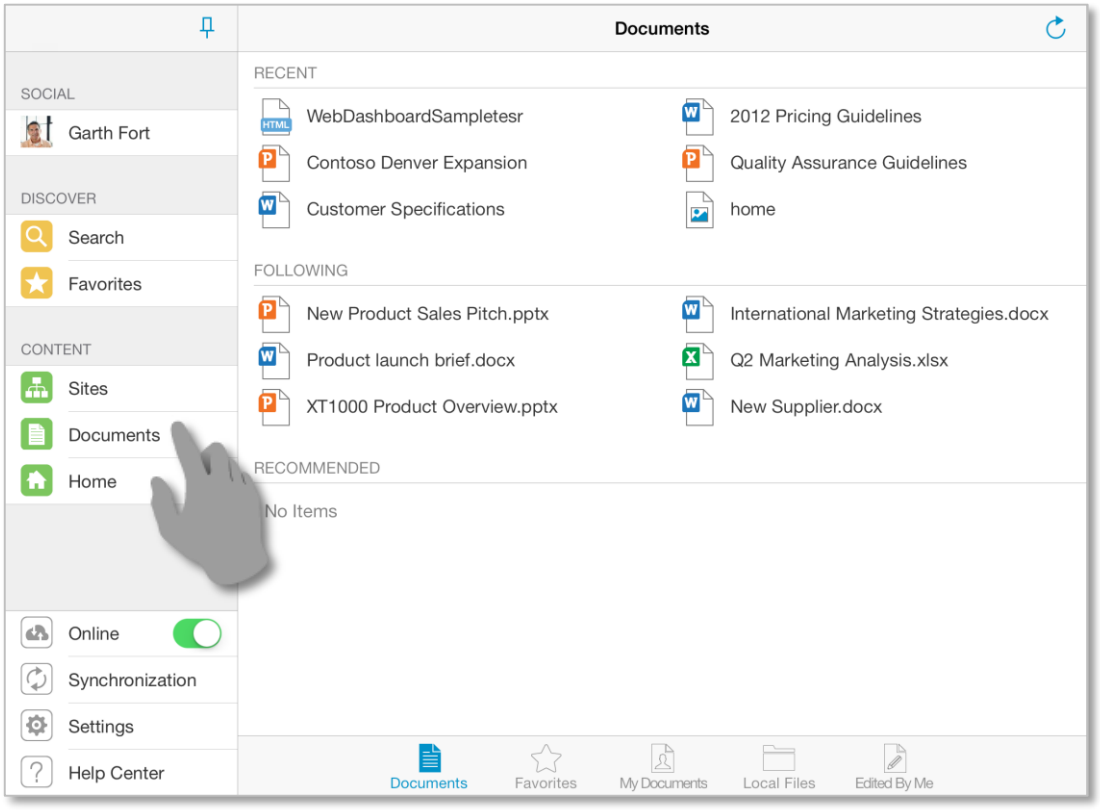
The Documents Module

This module was created to facilitate access to all your relevant documents. Like the *Sites* module, you can find documents marked as favorites, recommended by the server and recently opened documents.



Your files can be accessed from your personal storage on the server (MySite content or OneDrive) or a private local storage on the device (Local Files). By activating Wi-Fi Sharing you can share the documents stored in the Local Files section across the network.

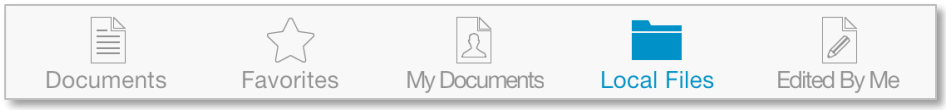
The *Documents* Module on SharePlus is divided in five sections:

- **Documents –** The *Documents* tab displays the recent and recommended documents along with the documents you follow. Recommended documents are available only in SharePlus Enterprise.
- **Favorites –** The *Favorites* tab displays all your favorite documents (this tab only shows documents, excluding sub-sites or lists).
- **My Documents –** The *My Documents* tab displays your personal storage on the server.
- **Edited By Me –** Here you can find all the documents recently edited by you.
- **Local Files –** The Local Files tab functionalities are detailed below.

Features availability…

The *My Documents* section is accessible when social features are enabled on the server. Following and Recommended documents require SharePoint 2013 and SharePlus Enterprise to be displayed.

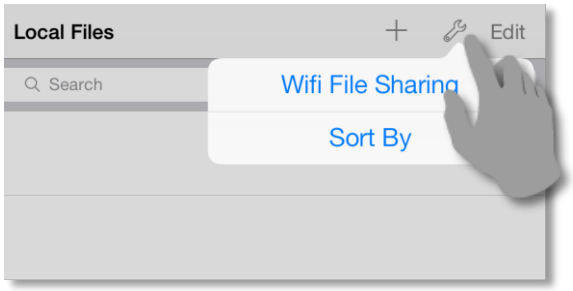
Local Files

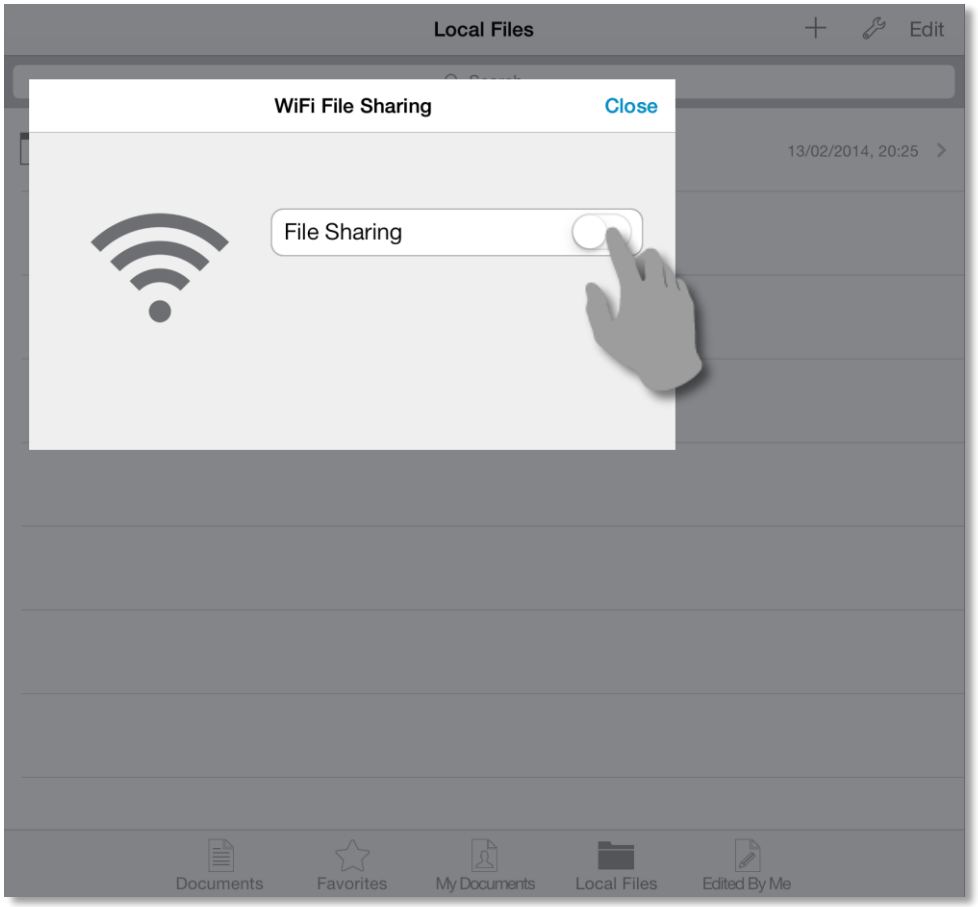


The *Local Files* tab gives you access to an isolated and secure storage on your device. This storage is not synchronized with the server and can be used to store personal files. From Local Files you are able to upload files to the SharePoint server or share them via the Wi-Fi network.

File Sharing

Share files from Local Files with others through the Wi-Fi network. It is as simple as connecting your device to the network and enabling File Sharing in SharePlus. Once the address is displayed on screen, input that address in a web browser connected to the same network.





SharePlus Offline

SharePlus provides the ability to keep information locally in your device, allowing you to access information even when there is no connection to SharePoint. This means that you could, for example, open and edit a document stored in SharePoint when out visiting a client, regardless of the client's location or his network connectivity.

Configuring Offline

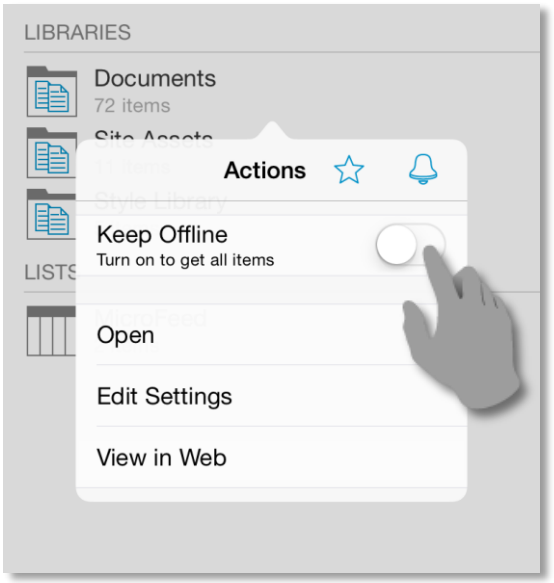
To optimize both performance and disk storage capacity, your content is not available by default while offline. In order to navigate your information while disconnected, you must turn on the Offline Support capability for the content you want.
Choose between two different sync modes: *Per Item* and *View Based*.

Per Item Mode (default)

Using this mode SharePlus synchronizes **only the content marked to be synchronized**.
You can activate it **per item**, **per folder**, or **choosing the entire list** as well.

How to Enable/Disable

1. **Tap & hold** over an item, a folder, or the whole list to access their *Actions*.
2. Then, just **turn on/off** the *Keep Offline* switch.



Keeping a List or Folder Offline…

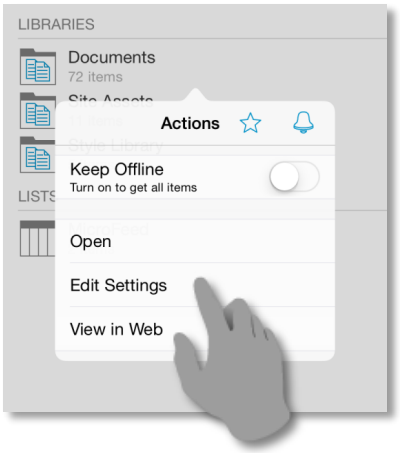
The turning on/off the Keep Offline switch for a list or folder, you get to configure the offline behavior of all their items. This means that items or sub folders inside lose all their previous offline settings if any.

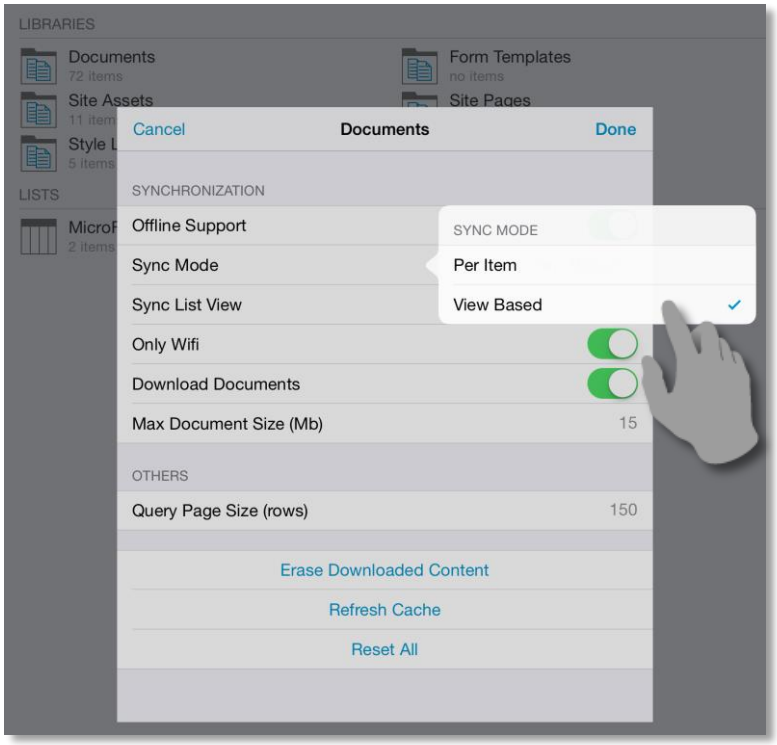
View Based Mode

This mode synchronizes **all the list items based on a SharePoint List View** like *All Documents*, *All Items*, or *By Author*. For example, you could synchronize your list based on a view showing the items modified on the last seven days. This way only those items will be cached in SharePlus, not all the list contents.

How to Enable/Disable

1. **Tap & hold** over a list to access its *Actions*.
2. Then, choose *Edit Settings* to open the List Settings.
3. **Turn on/off** the *Offline Support* switch and **change** the default Sync Mode to *View Based.*
4. Finally, **select** the SharePoint List View to be used.





Complete list of Offline Settings

Besides the Sync Mode, there are several offline settings available to configure the offline behavior:

Setting	Description
Offline Support	Enable/disable offline browsing for a list.
Sync Mode	Choose between *Per Item* and *View Based sync* modes.
Sync List View (only View Based)	Choose a SharePoint List View definition to drive the View Based synchronization
Only Wifi	Configure the synchronization to run only when a wireless network connection is available.
Download Documents	Disable to synchronize only the item properties (metadata), not the actual document files.
Max Document size	Filter the downloaded documents by size, synchronizing only documents with less size than the specified value.
Query Page Size	Specify the number of items per page that are requested from the server.

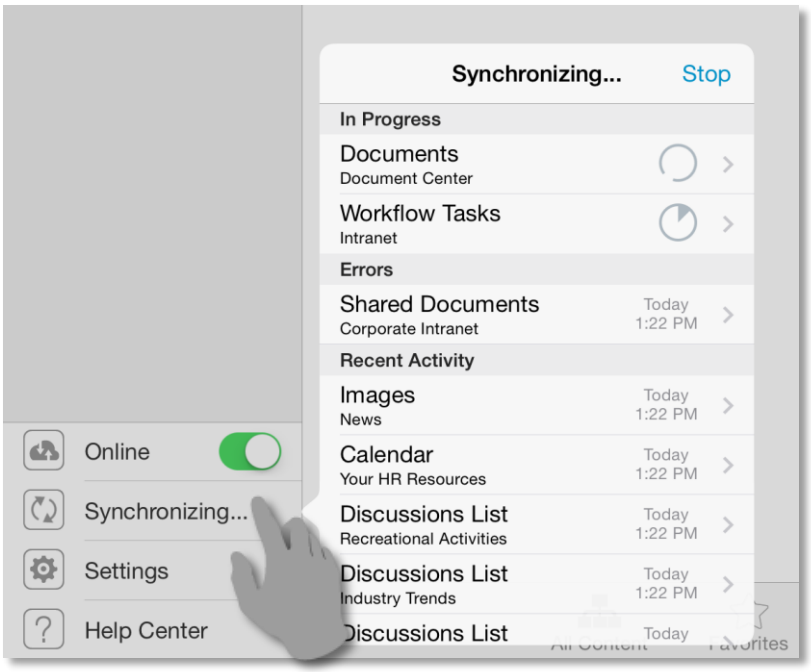
Triggering the Synchronization process

You can wait for the Synchronization process to start or trigger it yourself using *Sync Now.*

Automatic Sync

The Synchronization process is activated when there are lists with offline support enabled and the device is idle for a fixed number of seconds. The frequency in which the process is triggered can be modified, for further details refer to the Advanced Settings in Chapter 3: SharePlus Configuration.

Open *Synchronization* from the SideBar menu to start and also monitor the synchronization process.

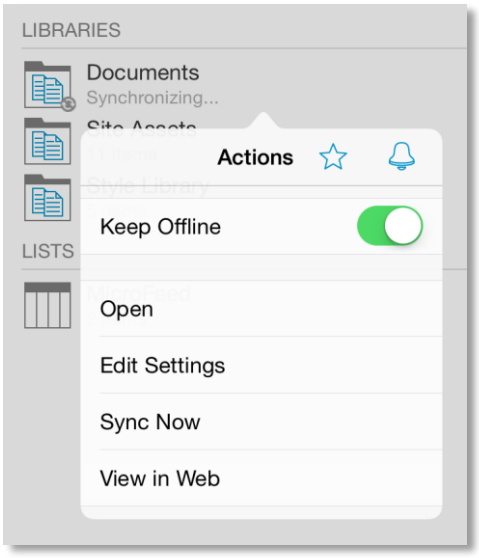


Once the process is finished, all the list contents will be cached locally.

Sync Now

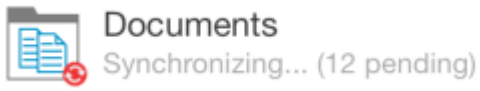
You can trigger the synchronization for a list for both sync modes, *Per Item* or *View Based*.

1. **Tap & hold** over a list to access its *Actions*.
2. Then, choose *Sync Now* to start the sync process.

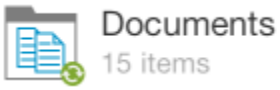


Synchronization status icons

Once the process is triggered, the list will go through the synchronization process.

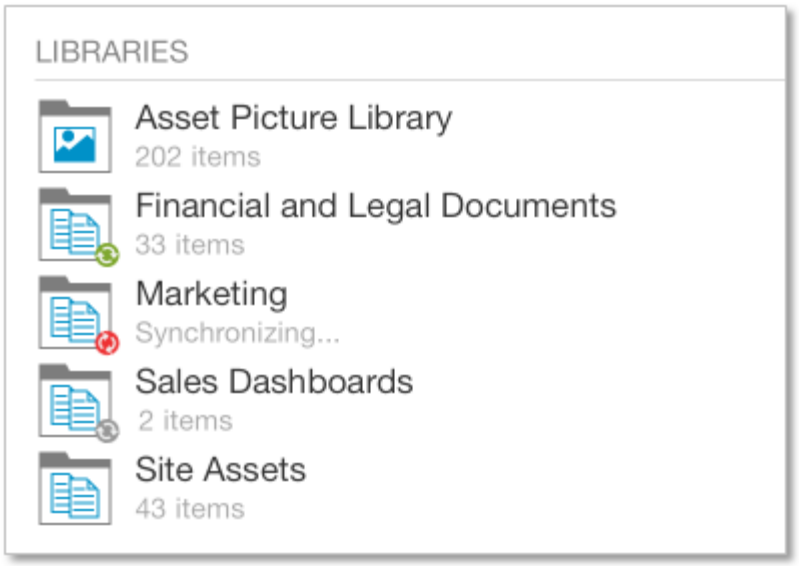


Once the process is successfully completed, the list is synchronized and the sync status icon turns green.



The sync status icons are used to illustrate different states when having Offline Support enabled.

- **Grey icon** - A list or item is not yet synchronized.
- **Red icon** - A list is being synchronized or has pending changes.
- **Green icon** - A list or item is fully synchronized with the SharePoint server.



File size...

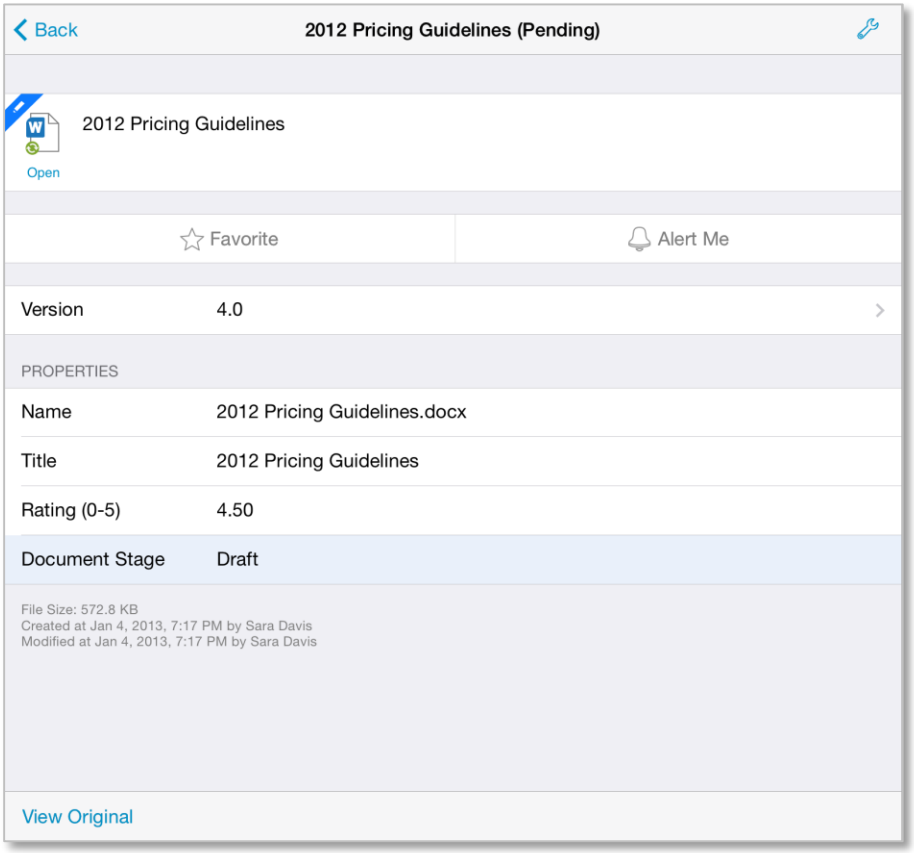
A document bigger in size than the Max Document Size setting (15 Mb by default) won't be synchronized. As a consequence, the sync status icon will remain in color red to notify the document's status.

Going Offline

When switching the application to the Offline mode, you can only access the content that is already synchronized.

Editing content Offline

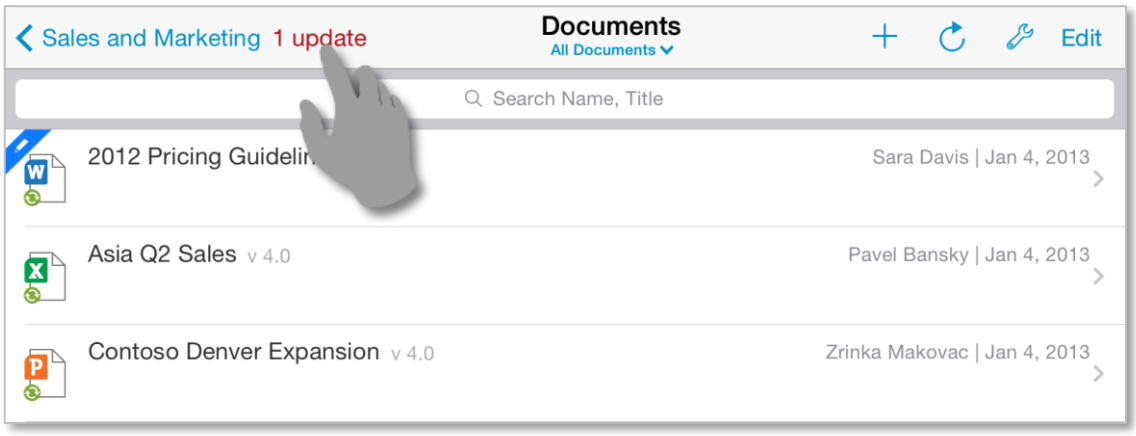
When working offline, all the content changes will be kept locally and marked as Pending Updates. These updates will later be uploaded to the server when back online.

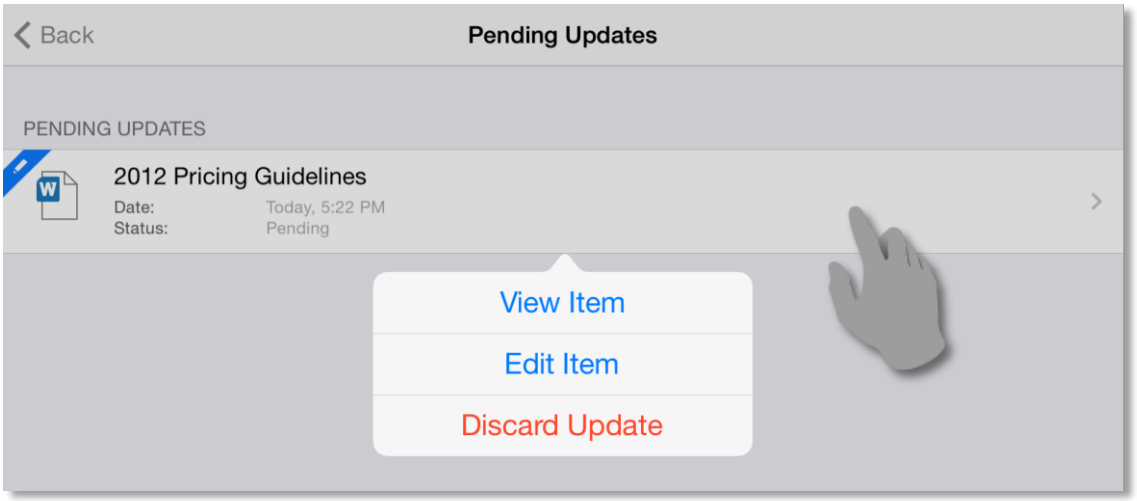


Item with Pending Updates.

You can access the original item through this button.

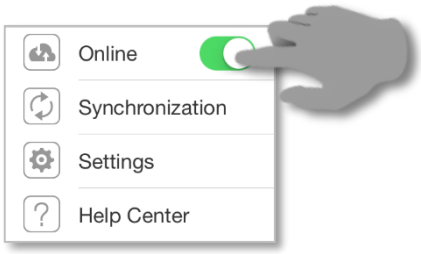
You can access the Pending Updates for a list and choose to further edit the item or discard the changes.





Going Online and Synchronizing

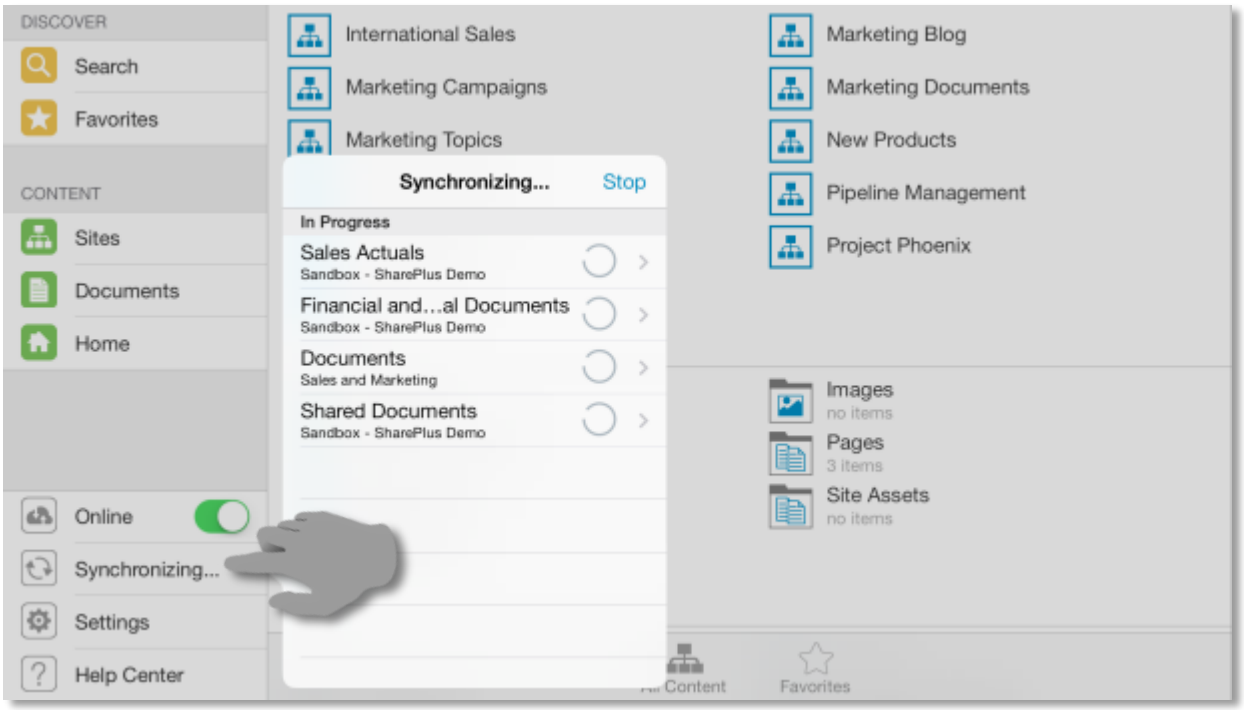
Switch the application to the *Online* mode to start the synchronization process.



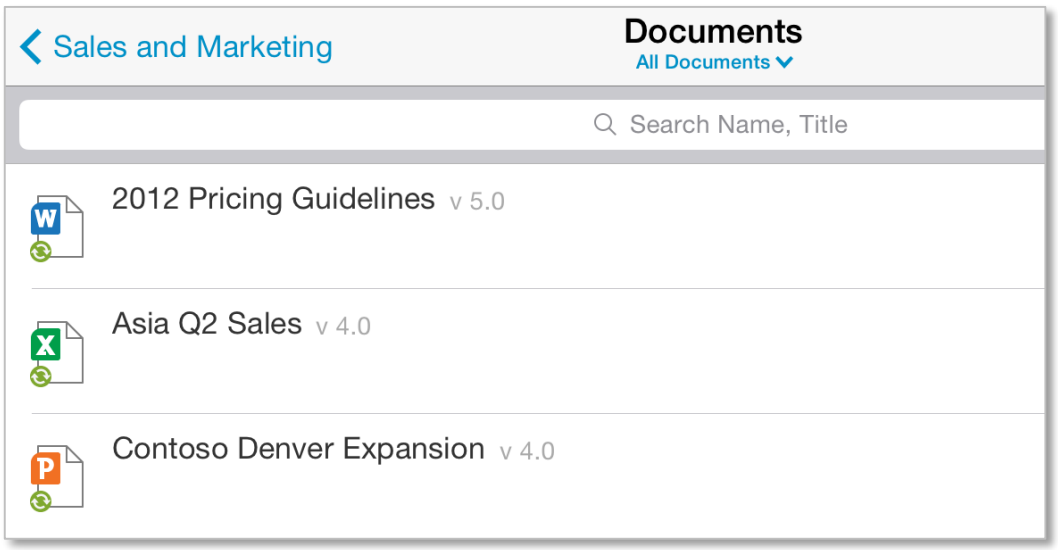
Online/Offline switch…

When the Online switch is turn on (Online mode), SharePlus automatically switches between the Online and Offline modes depending on the network connectivity.

Open Synchronization from the SideBar menu to access the synchronization process details.

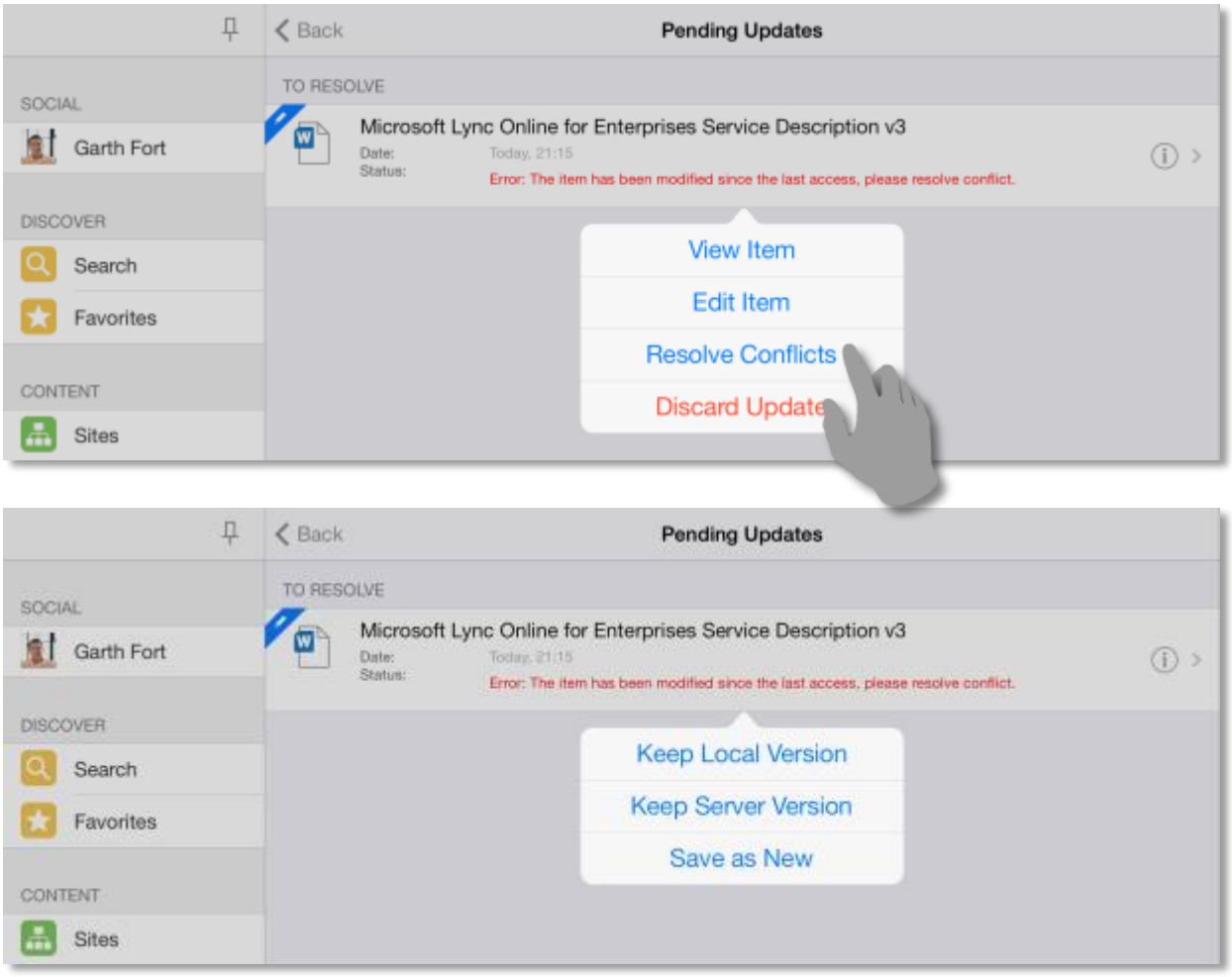


Changes made offline are synchronized back to the server and all sync status icons turn green. Items with conflicts that need to be resolved will be displayed as Pending Updates for the list.



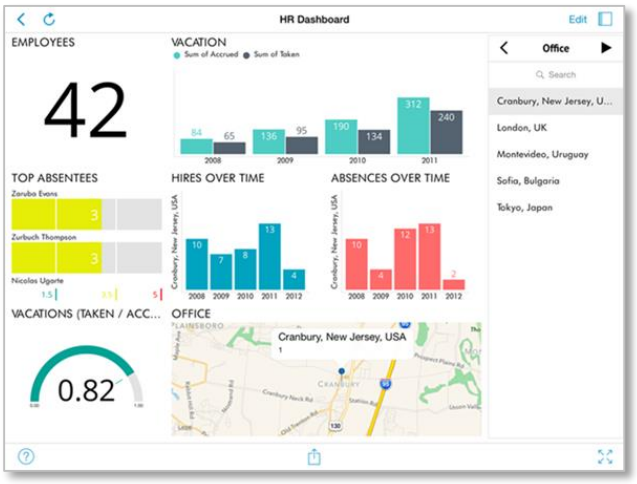
Conflict Resolution

When synchronizing changes back to the server you may encounter conflicts, for example, when two or more users edit an item at the same time. SharePlus resolution engine helps you decide how you want to proceed in those cases.

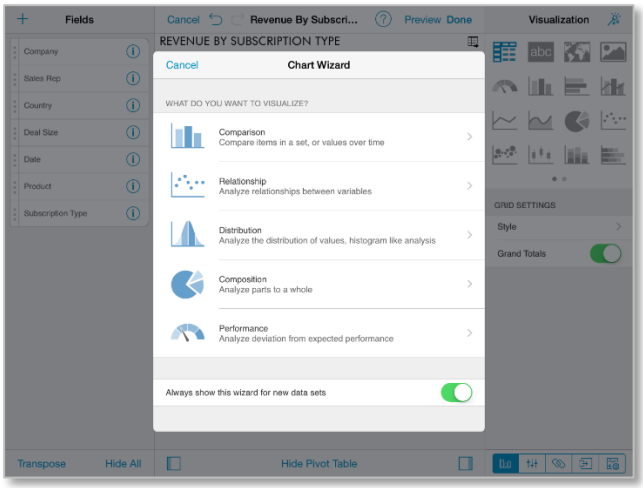


ReportPlus Integration

Use data visualization to communicate insight by creating dashboards that consume SharePoint data. SharePlus integrates the ReportPlus interactive, easy-to-use, and fast dashboard and reporting experience.



The Visualization options include grid, text, trend line, map, gauge, chart, and financial chart views.

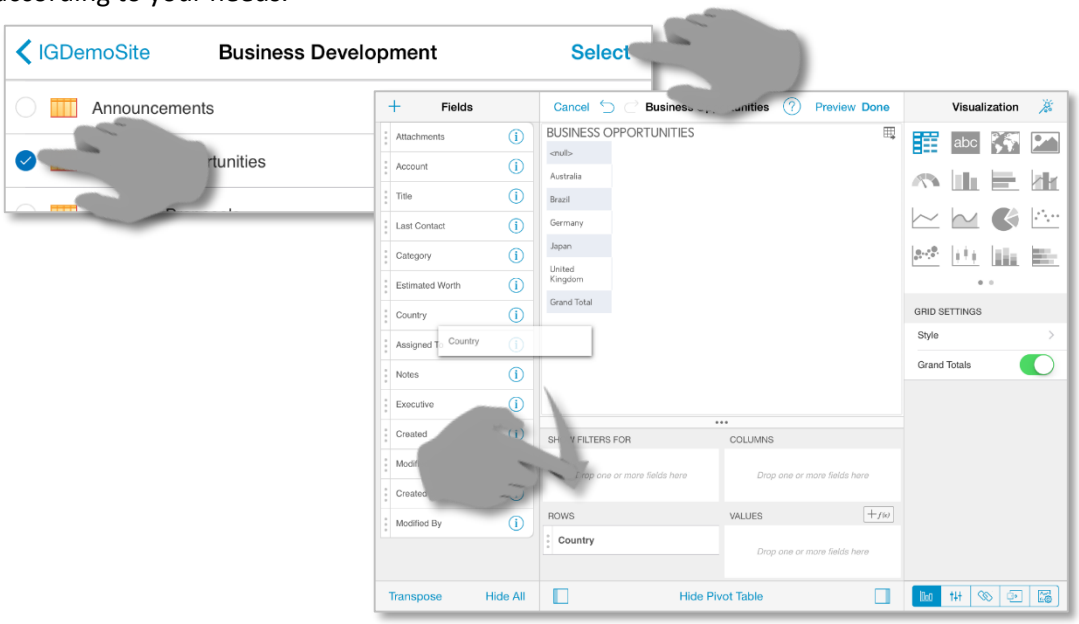


Working with SharePlus Enterprise you are no limited to SharePoint content only, you can connect to more than 20 different enterprise data sources, including Analysis Services, SQL databases, Dropbox, Google Drive, and more. For further details refer to **ReportPlus Enterprise Features** in SharePlus Enterprise.

Working with Pivot Tables

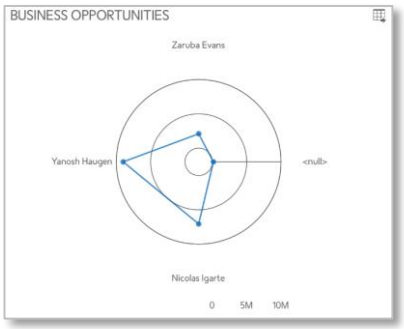
You are able to connect to data sources like lists and documents, including calendars, contacts, images, Excel files. Data from SharePoint lists and Excel files allows you to apply many different Visualizations. Pivot Tables are very powerful data summarization tools that help you analyze data.

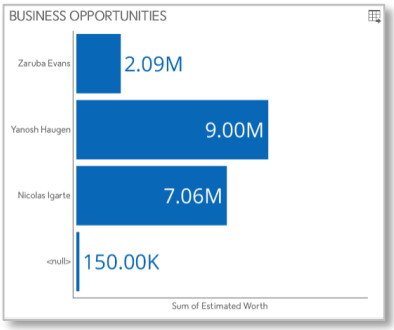
To create a pivot table, just select your data and use the **Pivot Table Editor** to slice-and-dice data according to your needs.

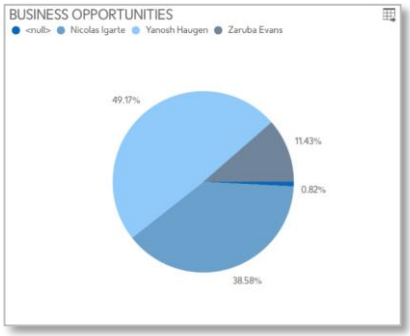


Customizing the Visualizations

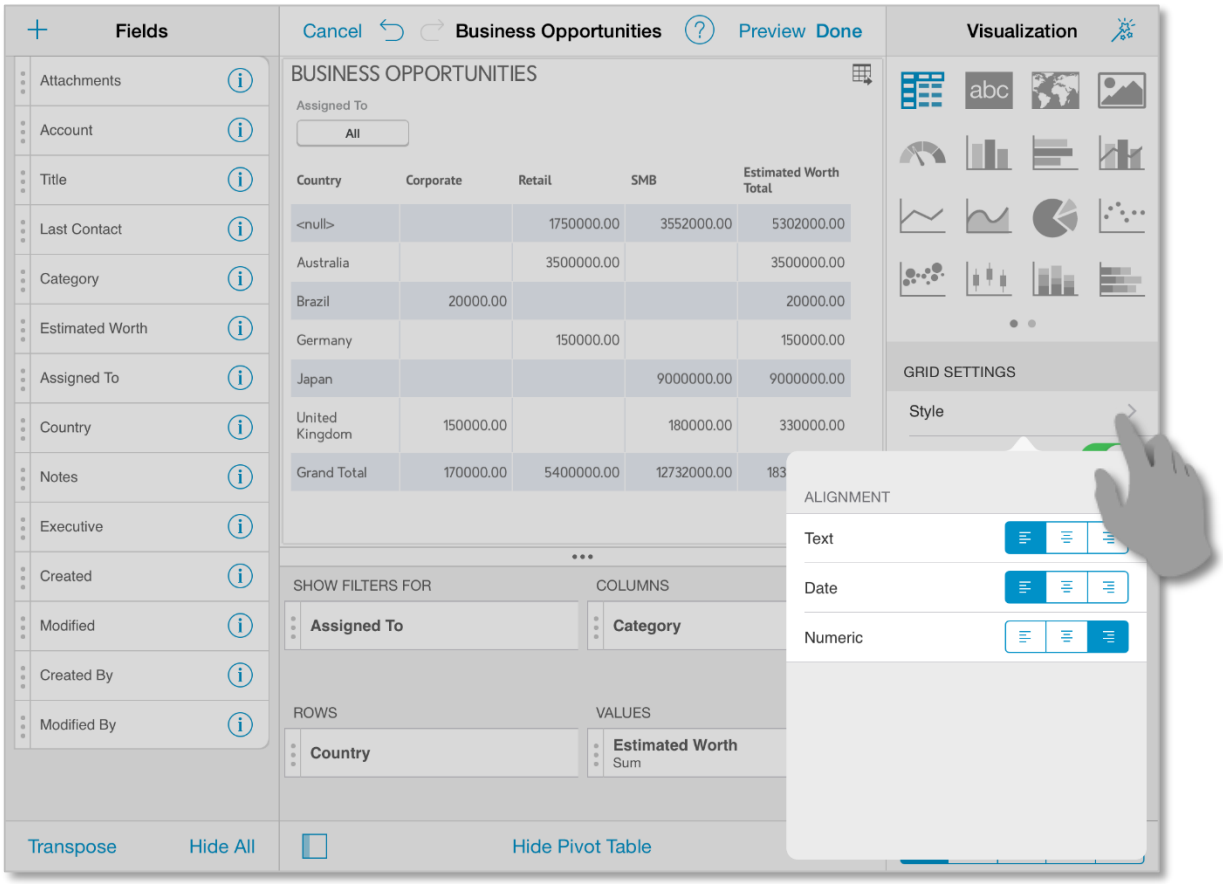
When building your visualizations you can choose between the default Grid and a large number of visualization types like Linear Gauges, Maps, Pie Charts, Candlestick Charts, etc.







In addition, you can adjust the text's alignment through the Grid Settings and add a *Grand* Totals field by toggling the "Grand Totals" option on/off.



Chapter 3
Security

SharePlus Security

SharePlus provides secure access to SharePoint sites from mobile devices. To fortify data security, core security features have been built into the product at each layer.

Data-at-Rest Security

SharePlus offers two features to ensure that data is secure on a user's device:

- iOS Data Protection
- Secure Data Wipe (SharePlus Enterprise only)

iOS Data Protection

SharePlus employs Apple's iOS Data Protection feature to keep application data secure. This native iOS feature enhances the built-in hardware AES 256-bit encryption by protecting the encryption keys with a user's passcode. This provides an additional layer of protection for application data such as cached documents and user configuration information.

Channel Security

SharePlus communicates with the SharePoint Server by accessing out-of-the-box SharePoint Web Services over the network.

Virtual Private Network (VPN)

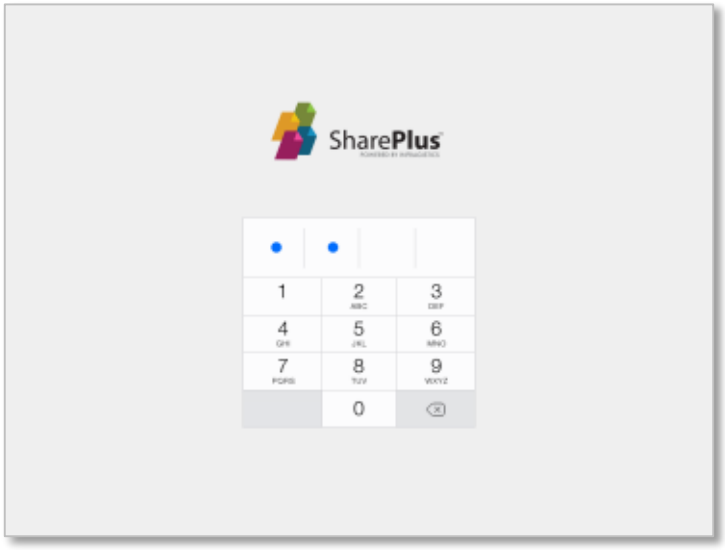
SharePlus supports VPN connectivity either through the built-in iOS VPN support or through 3rd party VPN client applications. For details about setting up a VPN on your device refer to: iOS: Setting up VPN. SharePlus Enterprise versions can tunnel the connection through a dedicated VPN provided by an MDM (Mobile Device Management) solution. A per-app VPN, securely and transparently routes all the SharePlus network traffic.

Secure Sockets Layer (SSL)

Secure Sockets Layer (SSL) is a cryptographic protocol used to facilitate secure communication over the Internet. To access a site using Secure Sockets, just use an "HTTPS" URL when configuring your site.

Passcode Lock

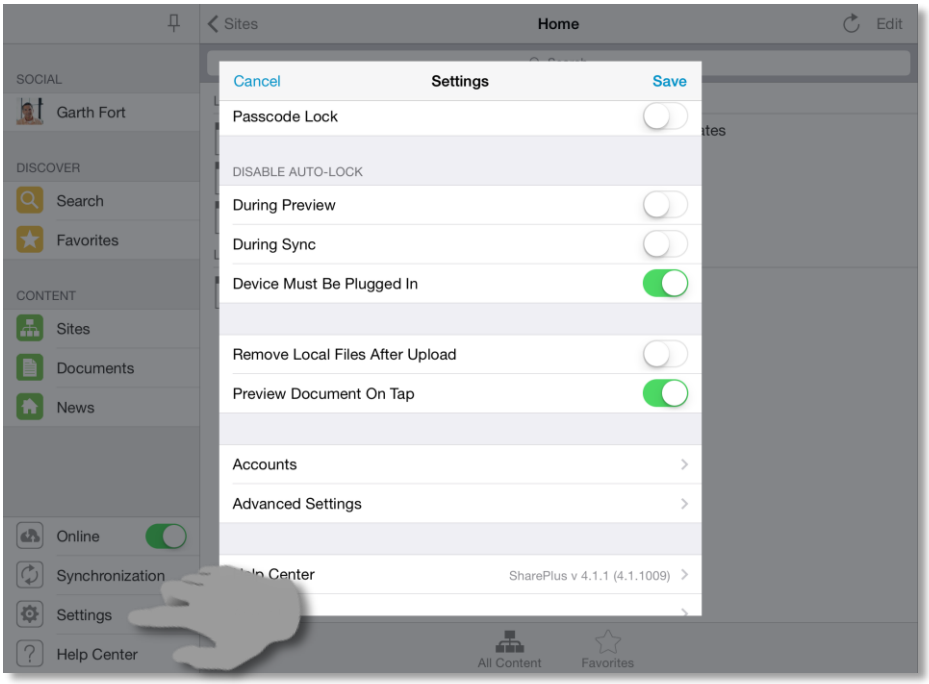
SharePlus provides an optional Passcode Lock, which automatically activates when the app goes to background or after a configurable amount of idle time.
With SharePlus Enterprise, administrators can configure a secure data wipe to be triggered by failed passcode entry attempts. For more details refer to **Advanced Security** in Advanced Enterprise Features.



Chapter 4
Configuration

Application Settings

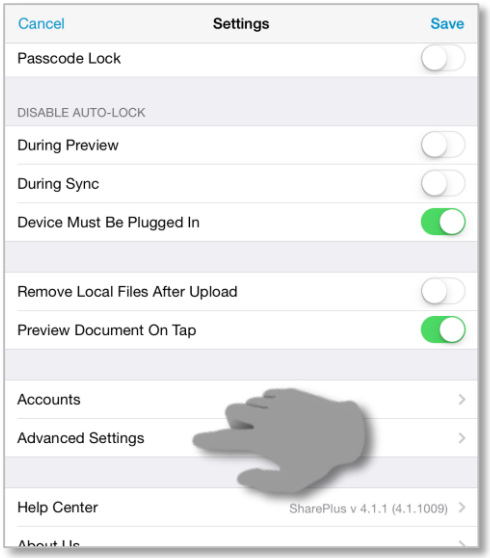
A subset of SharePlus settings can be manually adjusted accessing the *Settings* module on the Sidebar.

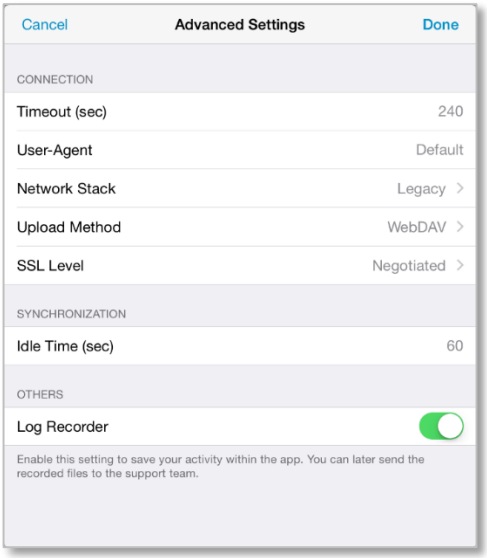


Application Configuration…

SharePlus also enables IT Managers to centrally manage the application's behavior using several mechanisms that include using a local configuration file, remote files (one or more) stored on SharePoint or any web server, through MDM Servers, and even generating personalized configuration on-the-fly. For further details refer to SharePlus Administrator Guide.

Manual configuration settings include, among others, the Passcode Lock settings and the Advanced Settings (connection timeout and synchronization idle time) as shown below.



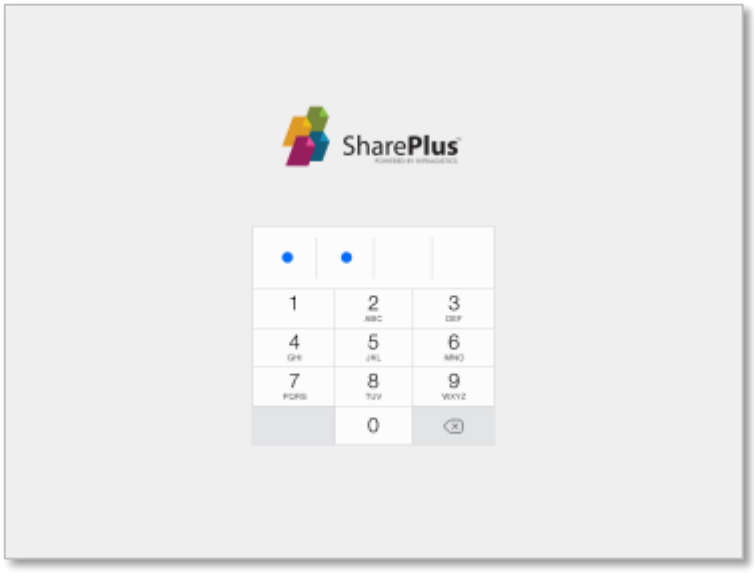


The two following settings specify general behavior of the application:

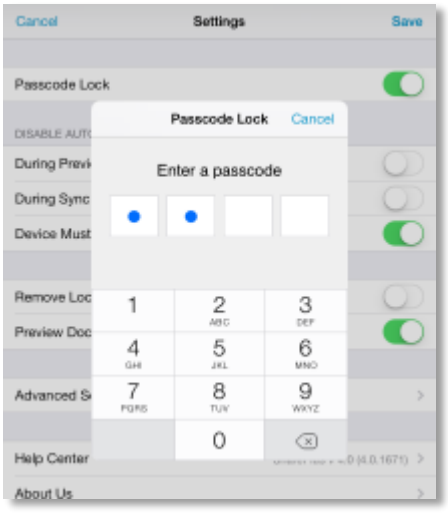
- **Remove Local Files After Upload –** This setting allows you to automatically remove the local copy of a file after it has been uploaded.
- **Preview Document On Tap –** You can enable document preview as the default action when tapping a document. Document details are still available on a different view.

Passcode Lock

SharePlus provides an optional Passcode Lock. When opening the application with Passcode Lock enabled, you are prompted to enter a four digit code. The lock is automatically activated when the application goes to background or after a configurable amount of idle time.



When you enable the Passcode Lock, SharePlus prompts you to introduce the new passcode.



The auto-lock feature can be disabled under particular circumstances:

- **During Preview, During Sync –** Prevent the device from locking itself while previewing docs and/or during the sync process.
- **Device Must Be Plugged In –** Enables the other two auto-lock options when the device is plugged in.

Advanced Settings

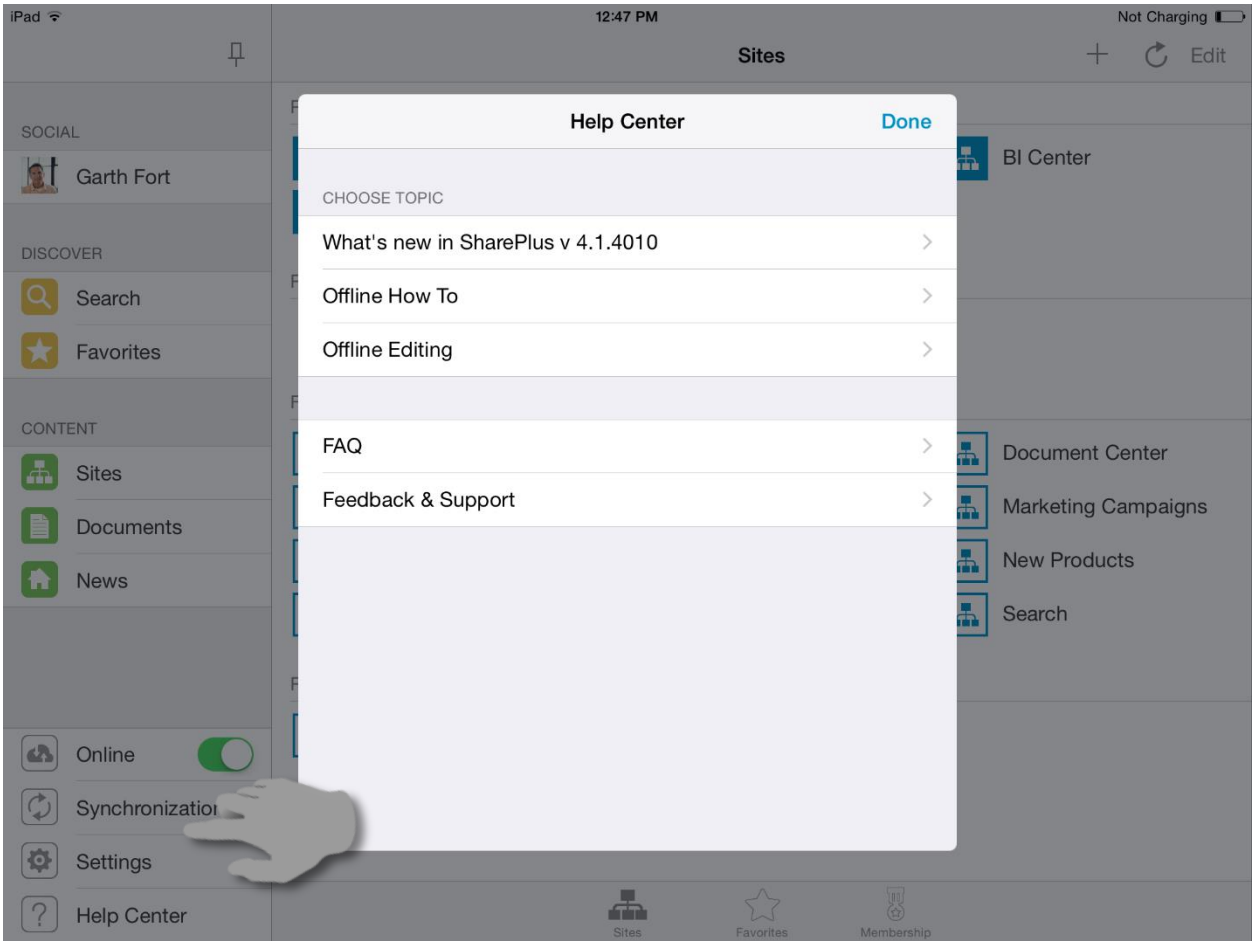
These settings include:

- **Timeout –** You can set the amount of time (in seconds) that SharePlus will try to connect using a network. If there's no response within this time, the application will stop trying and give a *Connection timeout* error.
- **User-Agent –** SharePlus user agent. If empty the standard agent is used**.**
- **Network Stack** – You can choose between different networking APIs, according to your needs.
- **Upload Method** – Configure the method used to upload files by choosing between PUT and POST. The PUT method is used by default
- **Idle Time –** Frequency in which the Background synchronization process is triggered, in seconds.
- **Log Recorder –** You can enable or disable the Log Recorder to record your activity within the app and store all application's requests and also the server's responses. In addition, you are able to send the generated files to the support team.

Chapter 5
Support

Getting Support

You can access the In-App Help Documentation by tapping *Help Center* on the Sidebar.
This help documentation consists on a few relevant topics about SharePlus Offline and it also includes a link to SharePlus iOS FAQ. The FAQ includes a list of tips and FAQs that answer most common questions.



SharePlus support model depends on your license model (Free, Subscription, and Enterprise).

SharePlus Enterprise Support

Enterprise users can request support by contacting the company's internal Help Desk or IT support department. In addition, Enterprise versions are already configured to send an email directly to the company's support department.

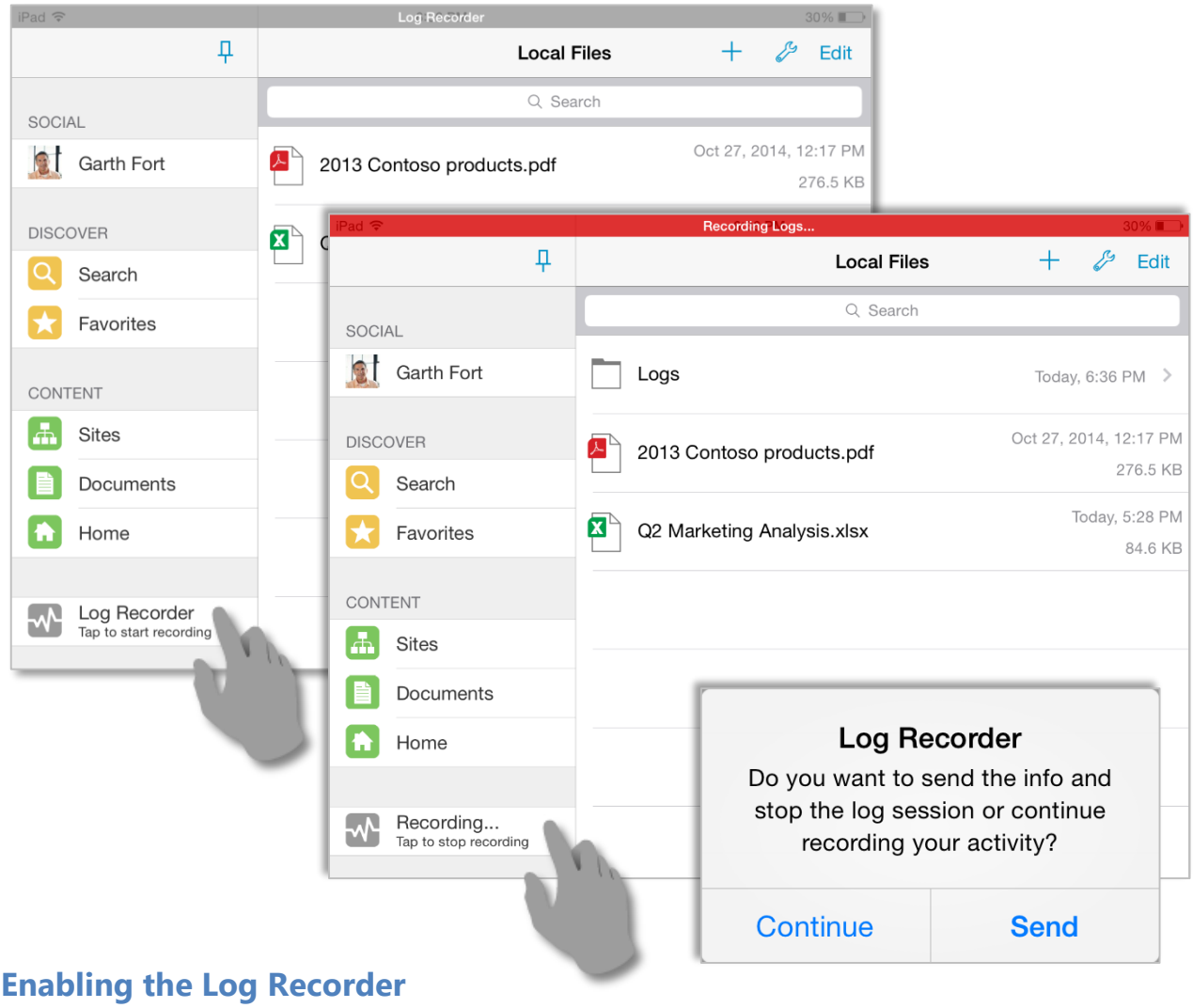
SharePlus Free and Subscription Support

Free and Subscription users can access a wide number of resources to get the answers they need:

- Enterprise Mobility – Follow this link to access blogs and user forums in our site, Ask questions in our Forums and get insights from our community of experts and power users. Blogs help you find out more about SharePlus possibilities.
- Videos – Check out our quick and easy-to-follow videos for helpful tips and tricks.

Troubleshooting errors with SharePlus

When you need to troubleshoot a SharePlus issue, the Support Team needs technical information in order to help you. SharePlus Log Recorder can be used to keep track of all the app requests and sever responses. Then, that information can be used to find a solution to the app issues.



Enabling the Log Recorder

While enabled, the Log Recorder will be displayed in SharePlus and you can use it to record your activity within the app. To **enable** this feature just **go to** *Settings* > *Advanced Settings* and **turn ON** *Log Recorder*.

You can choose between **two different approaches** to generate and send app Logs:

1. Generate app logs only and manually send those logs.
2. Generate video and app logs and automatically send everything.

Below you can find details about the second method, which allows you to send all your activity within the app (logs and video) automatically.

Generating app Logs and video for the Support Team

Once the Log Recorder is enabled, you just need to:

1. **Start** the Log Recorder.
2. **Reproduce** the issue you want to troubleshoot.
3. **Stop** the Log Recorder and choose **Send**.

You can easily start or stop the Log Recorder by tapping the new section displayed on the SideBar as shown in the images above.

Sending the app Logs to the Support Team

Once you reproduced your issue within SharePlus and generated app Logs, you need to send them to the Support Team. How to send the app Logs depends on the license model:

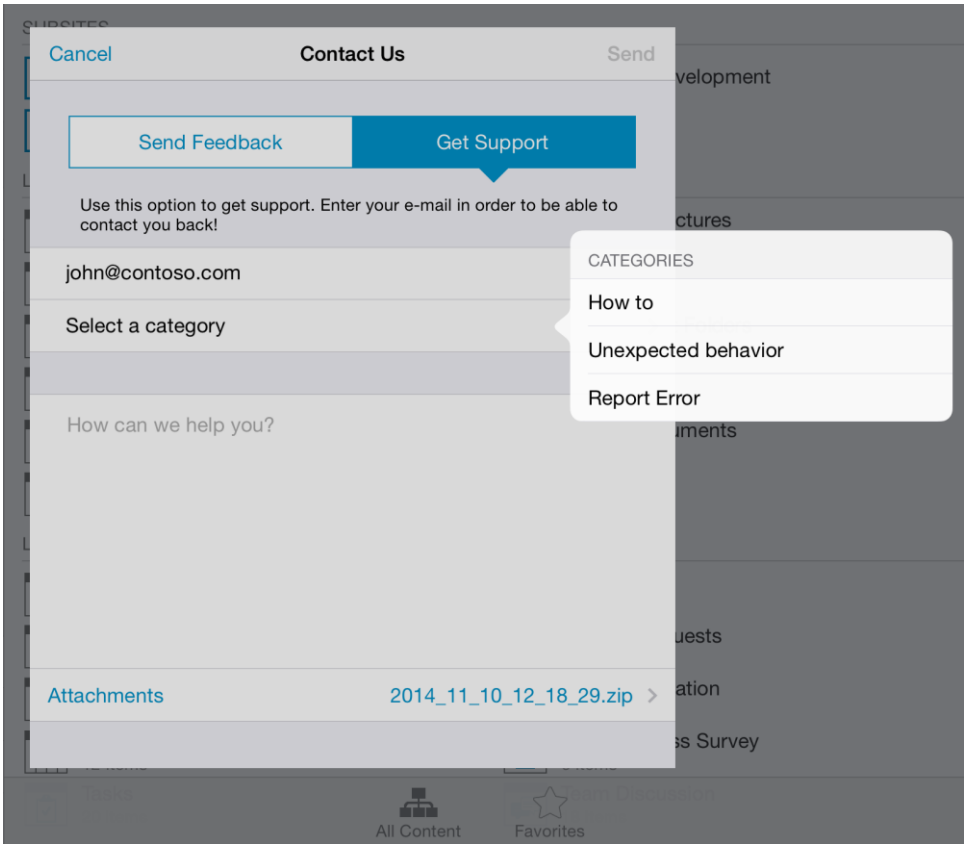
Enterprise (email)

Enterprise users are prompted to **send an email** with the app Logs attached to either the IT Helpdesk or Managers. With this information, they can contact the Infragistics Support Team. SharePlus Enterprise has priority support for the reported issues.

Free and Subscription (in-app)

Once you choose Send, **a form within SharePlus** is displayed with the app Logs already attached. You just need to:

1. Select the *category*
2. Tap *Send* to create the new ticket.



Chapter 6
SharePlus Enterprise

SharePlus Enterprise Features

SharePlus Enterprise version is designed to take advantage of SharePlus as an extensible and flexible platform suited for creating high quality mobile solutions. It provides a rich set of features that allow customizing both the app and the end user experience in order to enhance productivity and maximize security and governance.

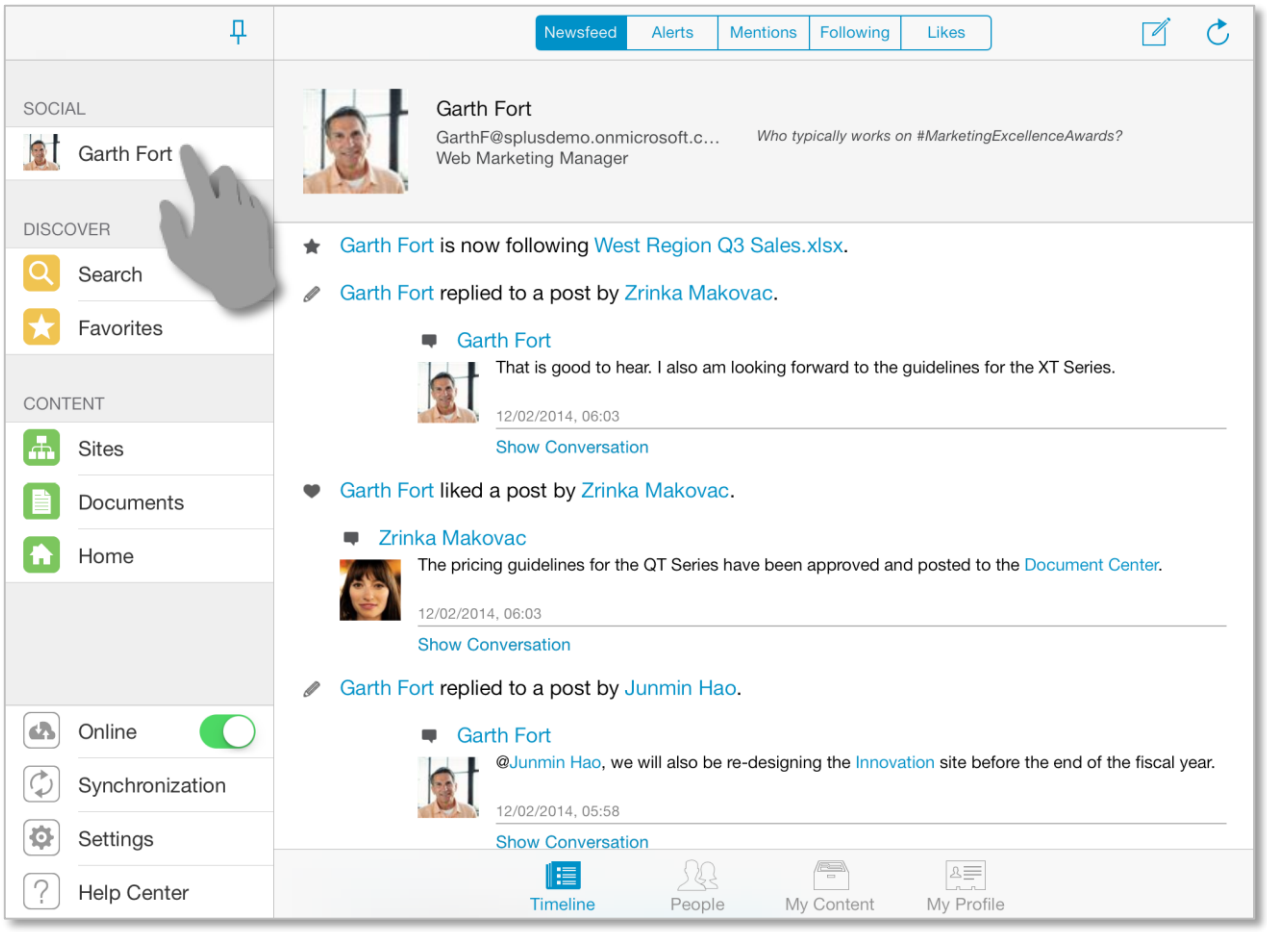
SharePlus Enterprise features are described in the following sections:

- The Social Module
- The Search Module
- Application Launchpads
- ReportPlus Enterprise Features
- Customizing the SharePlus Interface
- Advanced Enterprise Features

Back to Table of Contents

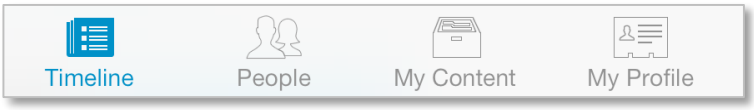
The Social Module

Social collaboration has been reorganized and greatly enhanced through SharePlus new *Social* Module, providing a centralized and feature-rich User Experience (UX) for SharePoint 2013 social features.



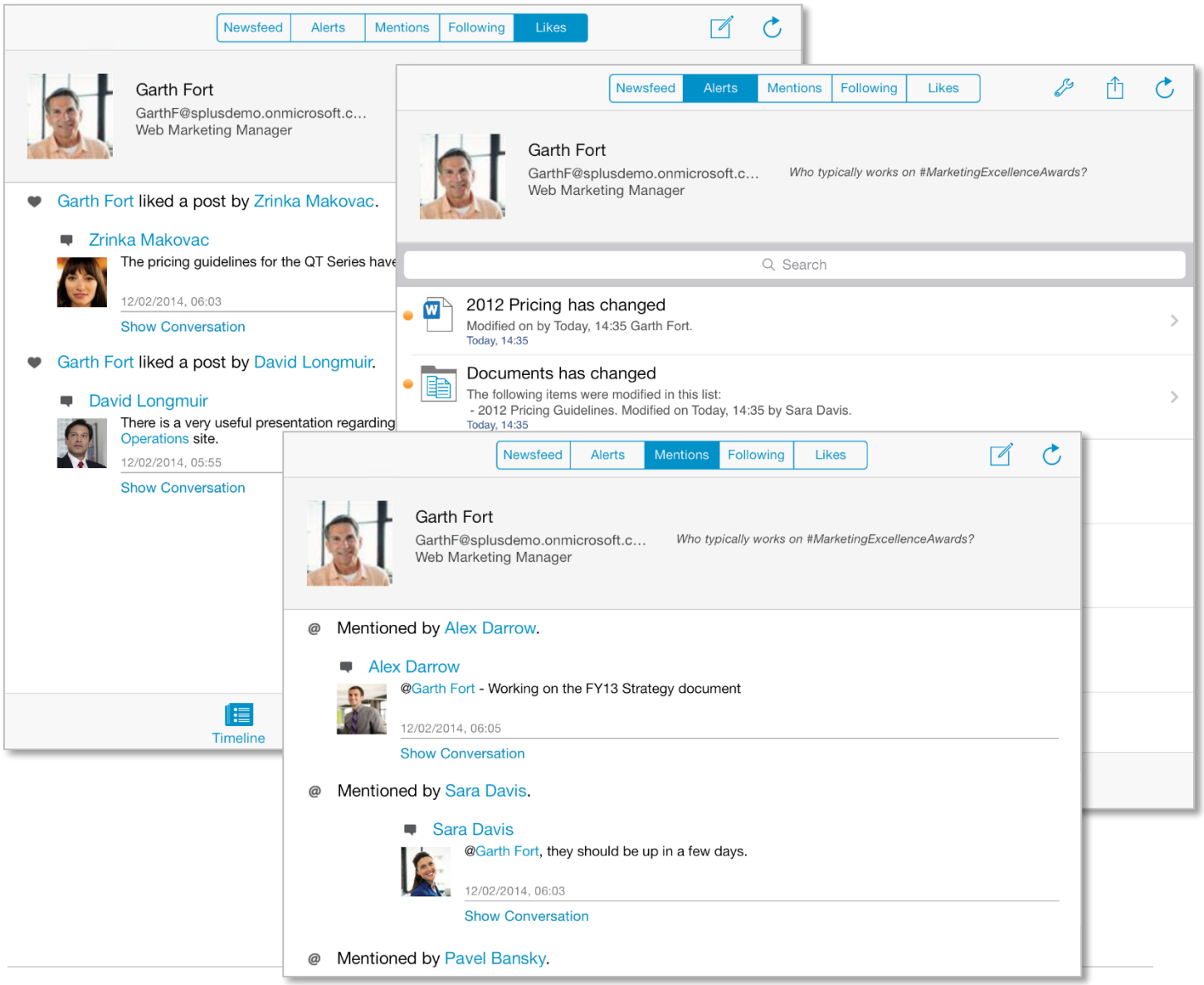
The *Social* Module lets you share your ideas, as well as discover and keep track of your colleagues and their work. You can connect with people, start conversations, and also access their content and activity feed. Your SharePoint personal storage (My Content) is available in this module, including both your public and private document libraries. The Module is divided in four sections: *Timeline*, *People*, *My Content* and *My Profile*.

Timeline



The *Timeline* tab provides you access to the following sections:

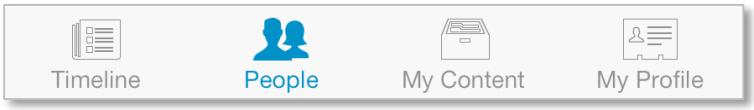
- **Newsfeed –** Includes public posts and other people's activities. Besides creating new posts, or mark items you *like*, you can also start conversations with colleagues here.
- **Alerts –** Displays all the recent notifications on resources that were modified. SharePlus allows you to keep close track of important resources by marking them with the *Alert Me* option.
- **Mentions –** Gives quick access to all the posts in which you've been mentioned.
- **Following –** Displays posts from the people and content you are following.
- **Likes –** The Likes tab includes all the posts you have "liked".



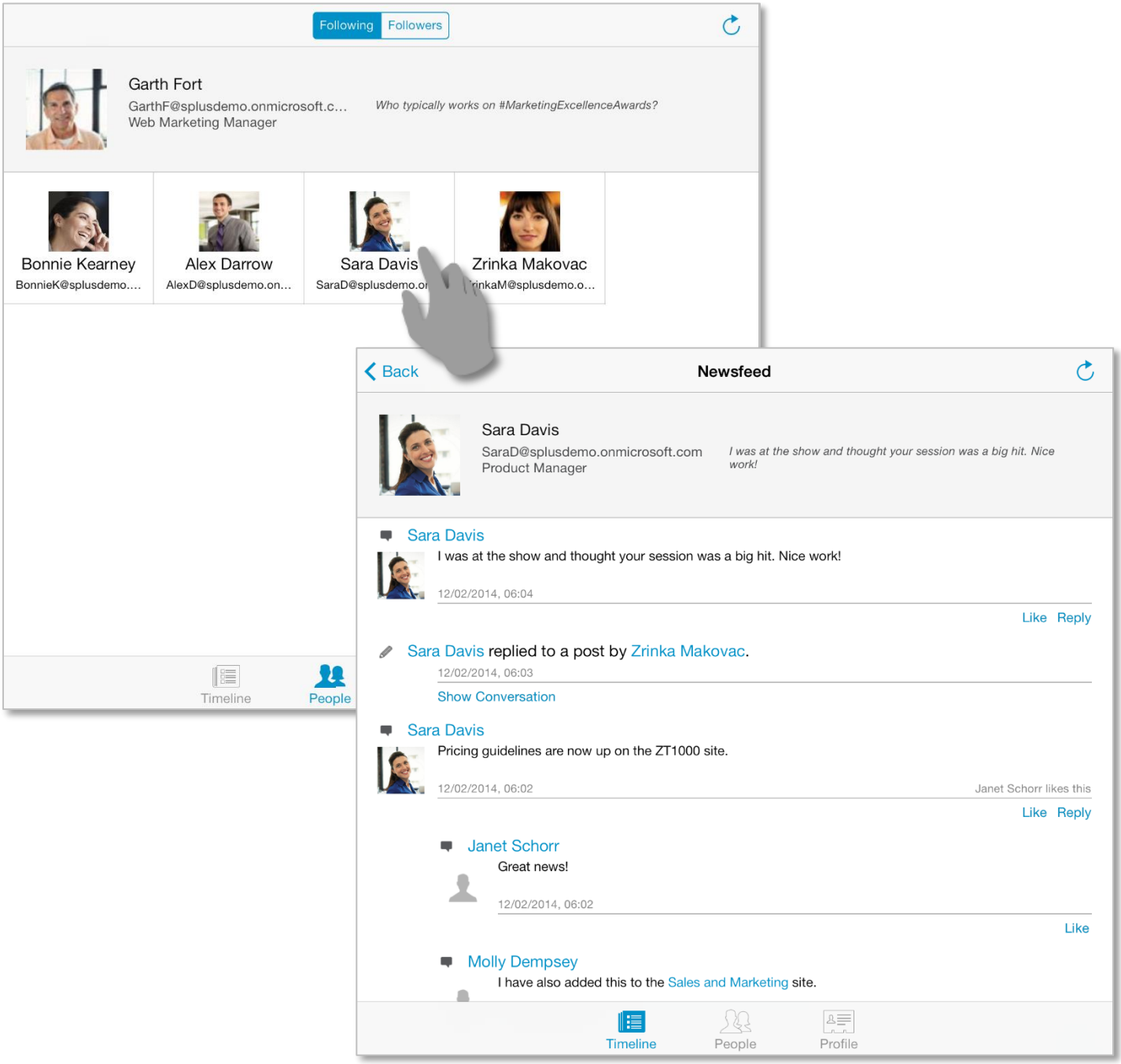
Timeline availability…

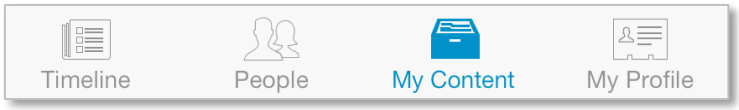
Timeline sections require SharePoint 2013 to be displayed in SharePlus. Alerts is the only exception and is always available in the Timeline.

People

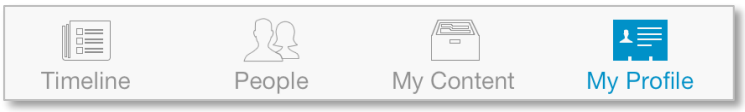


The *People* tab displays the list of people that you are following and the ones following you. In this section you are able to connect with people, access their content and activity feed and also start conversations with them.

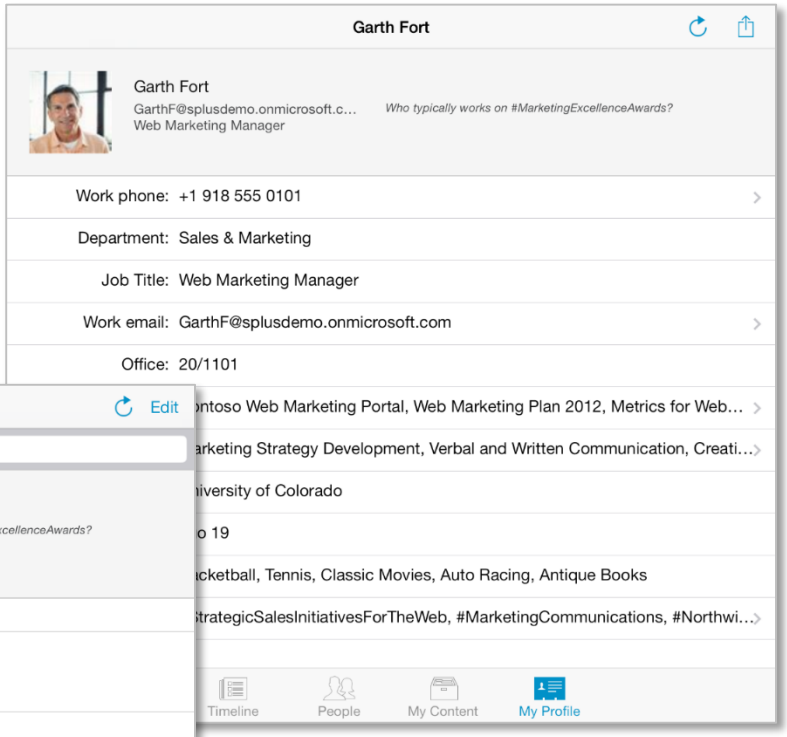


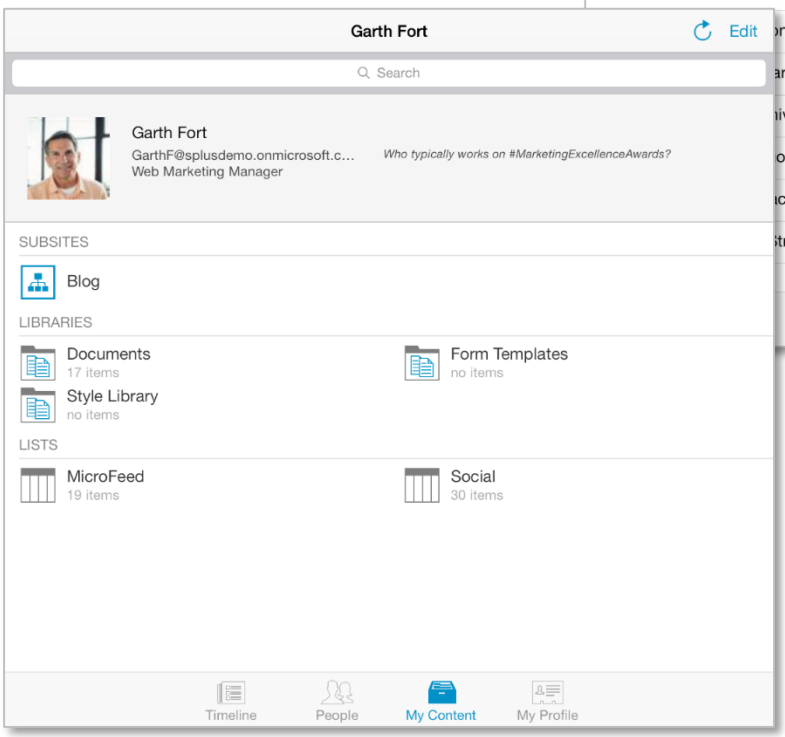


My Content and Profile



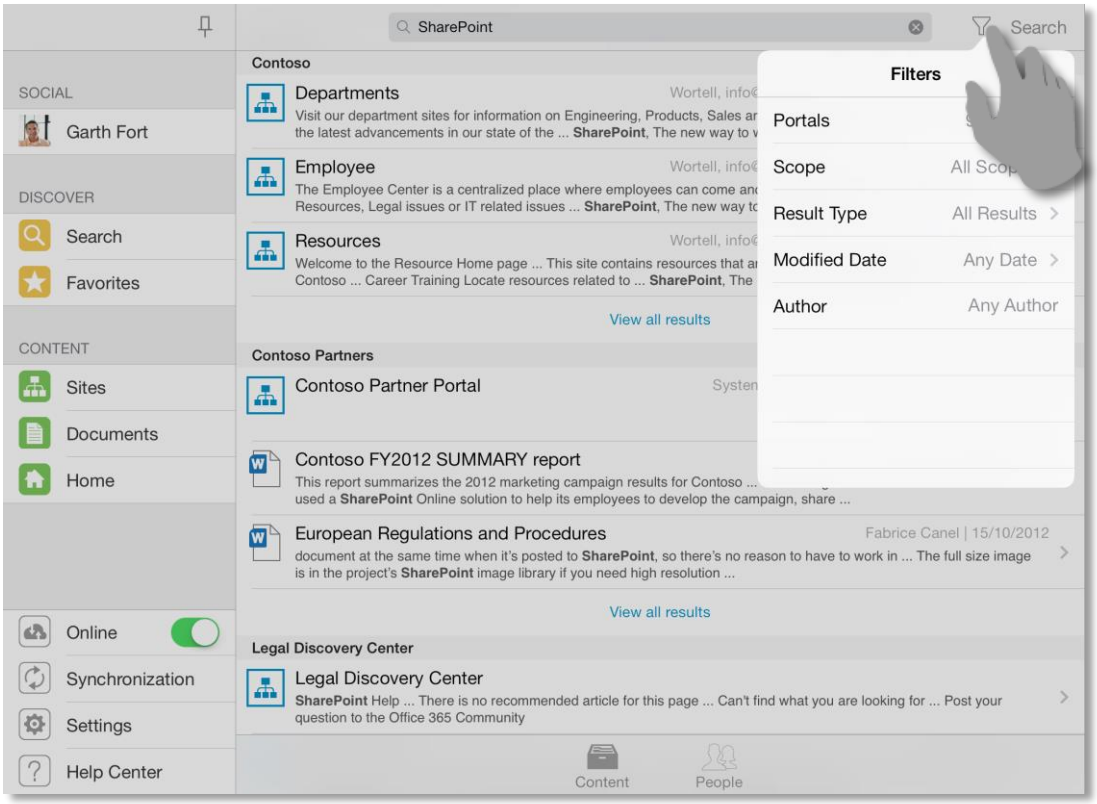
The *Social* Module gives you access to the content of your SharePoint's personal site, including both your public and private document libraries. Also, you can visualize or edit your personal information shared on your corporate social network.





The Search Module

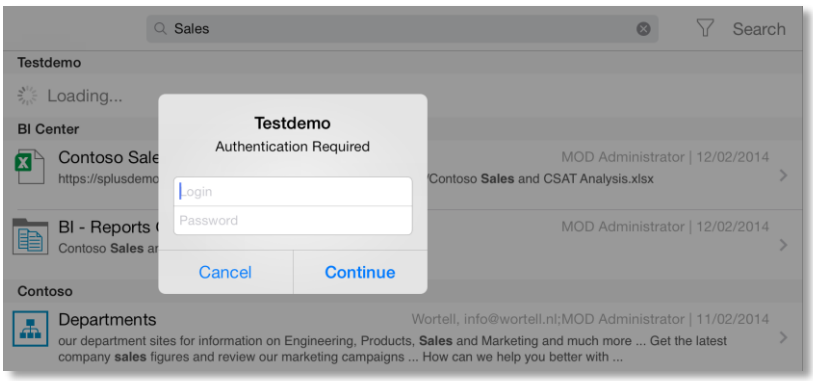
This module allows you to search server content by keyword and retrieve results from all connected portals at the same time. Filters like scope, date, result type, and author help you narrow the retrieved results which are displayed in an organized list view.



Using the search filters, you can refine the search by **scope**, **date**, **result type**, and **author**.

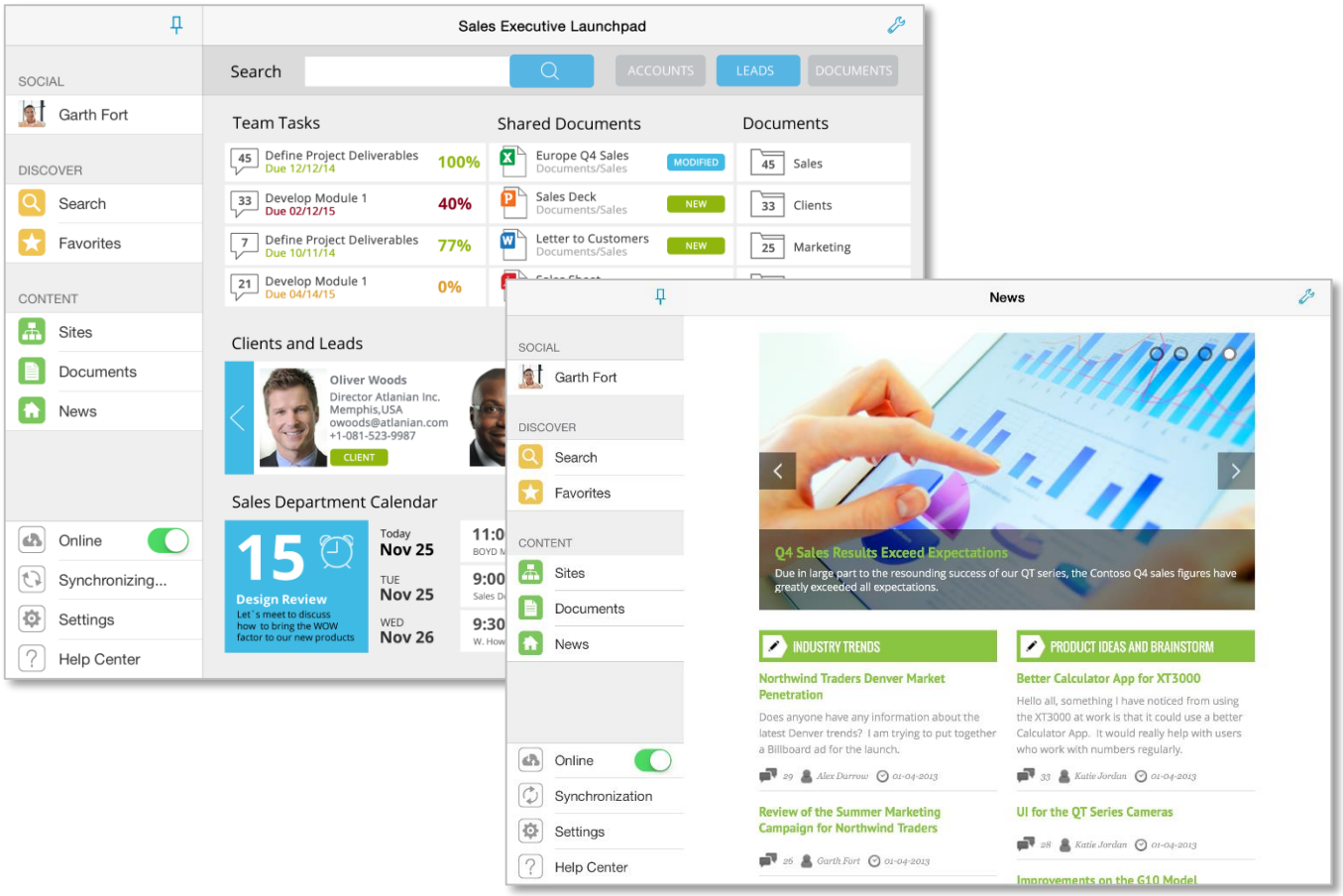
Filter	Description	Examples
Scope	Define the relevant area for the search.	This Site, All Sites, People
Result Type	Specify the expected result type.	All Results, Word Documents, PDF
Modified Date	Refine the search criteria by date	Any Modified Date, Past Week, Earlier
Author	Filter the search by author name	Any potential author name

To open unauthorized content you need to provide the required credentials.



Application Launchpads

By using web technologies like HTML, CSS and JavaScript, SharePlus can display rich launchpads to enhance the user experience. In addition, high quality interactions can be achieved by using CSS and JavaScript frameworks like JQuery.
Besides that, SharePlus provides a JavaScript API that gives access to SharePlus data, giving you the ability to present dynamic content from the server, even while offline.



Custom HTML launchpad

Building an HTML launchpad is especially powerful. When combined with SharePlus URL Schemes, you can create a custom HTML page with markup, images, CSS, and virtually any content you want to display. This launchpad can contain links to different locations in the application to navigate or open SharePoint content.

JavaScript API

A set of pre-defined API functions can be used to access the SharePlus application, retrieve data from SharePoint, and display information in your launchpad.
Working with the API allows you to create custom-tailored launchpads with full control over the layout and the launchpad behavior. This flexibility is further empowered by the possibility to present dynamic content from SharePoint like announcements, events, news, or any other content from the server.
Application Launchpads can access SharePoint data even while SharePlus is not connected to the server.

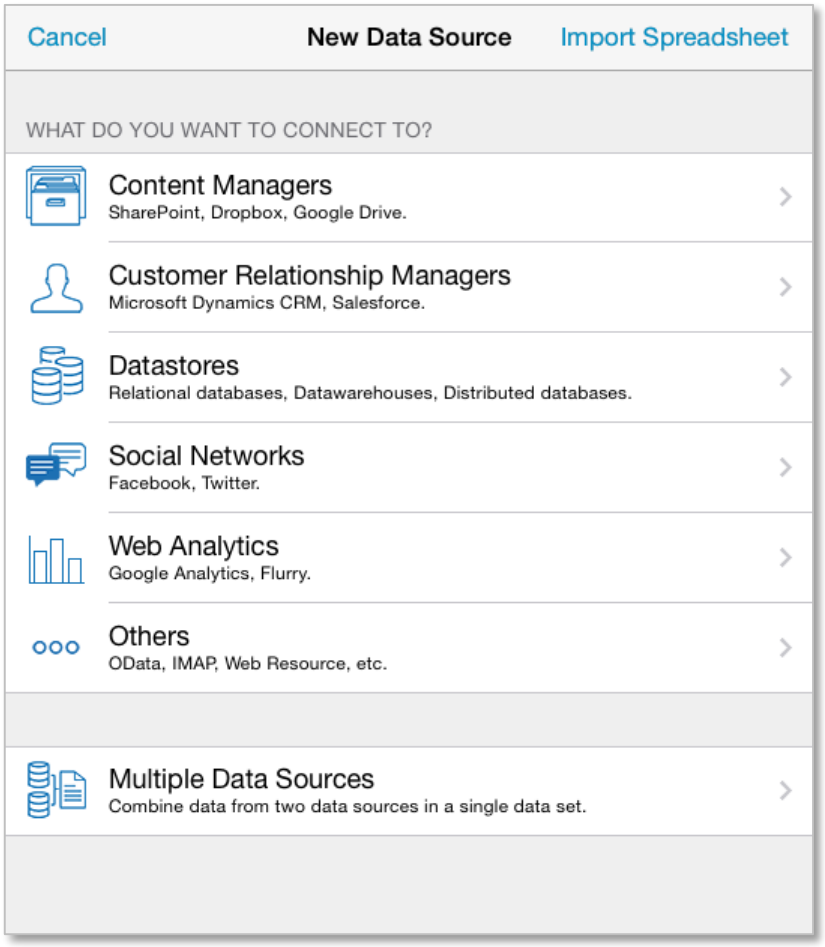
ReportPlus Enterprise Features

ReportPlus dashboards display information contained in one or more data sets. Each widget in a dashboard displays information from a specific data set, retrieved from a data source e.g.: Excel spreadsheets, SharePoint files and lists, SQL databases.

With SharePlus Enterprise versions you are not limited to SharePoint content, instead you can connect to more than 20 different enterprise data sources, including:

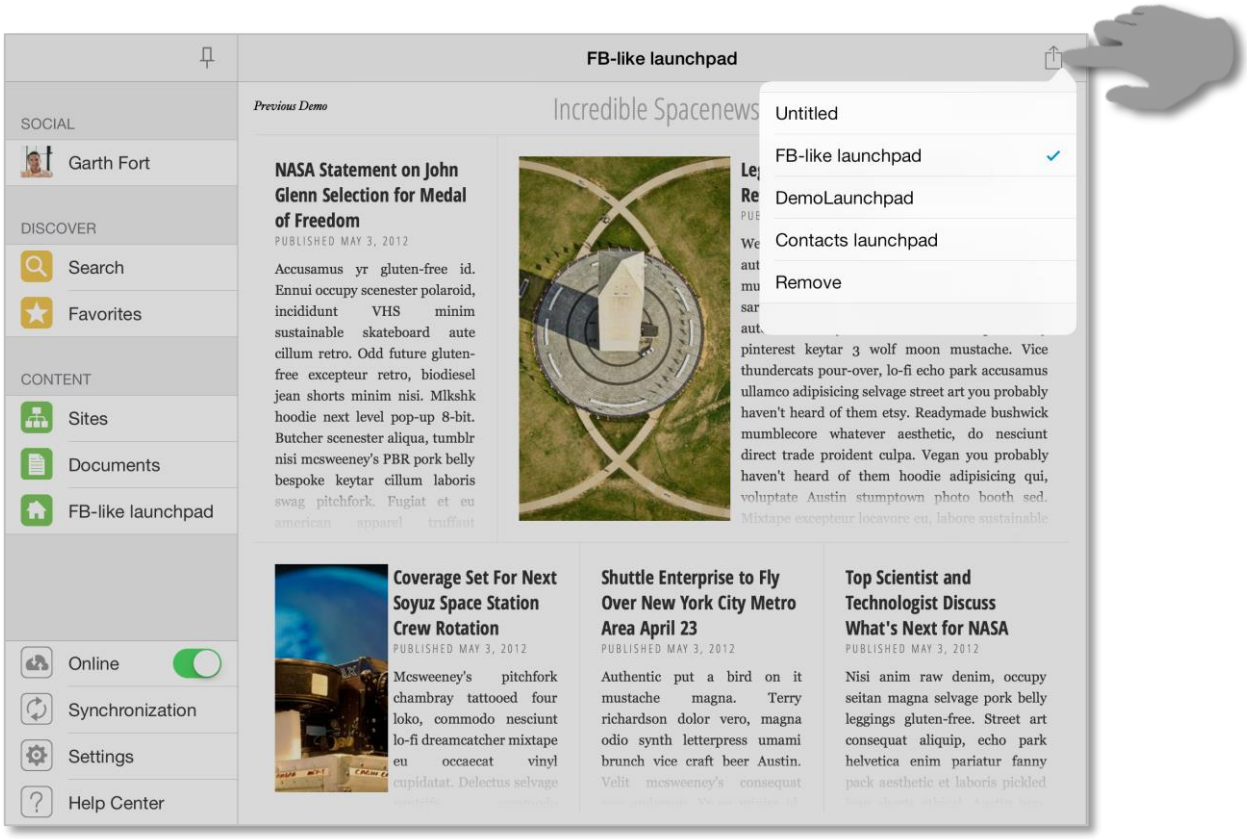
- Excel spreadsheets
- SharePoint files and lists
- Analysis Services
- SQL databases
- Reporting Services.
- Dropbox
- Google Drive

The *New Data Source wizard* guides you to configure a new connection, requesting a set of credentials with permissions to read the data.



Customizing the SharePlus Interface

When accessing a Site or the Application Home within SharePlus, the User Interface can be customized with different types of content. You can configure SharePlus to display Application Launchpads, ReportPlus dashboards, and PDF files.
In addition, you can have more than one content assigned, in those cases you are able to switch between the different content by using a selector.



Application Home

Custom content can be displayed in SharePlus when accessing the Application Home module in the SideBar. This module can be loaded by default when opening the application from scratch.

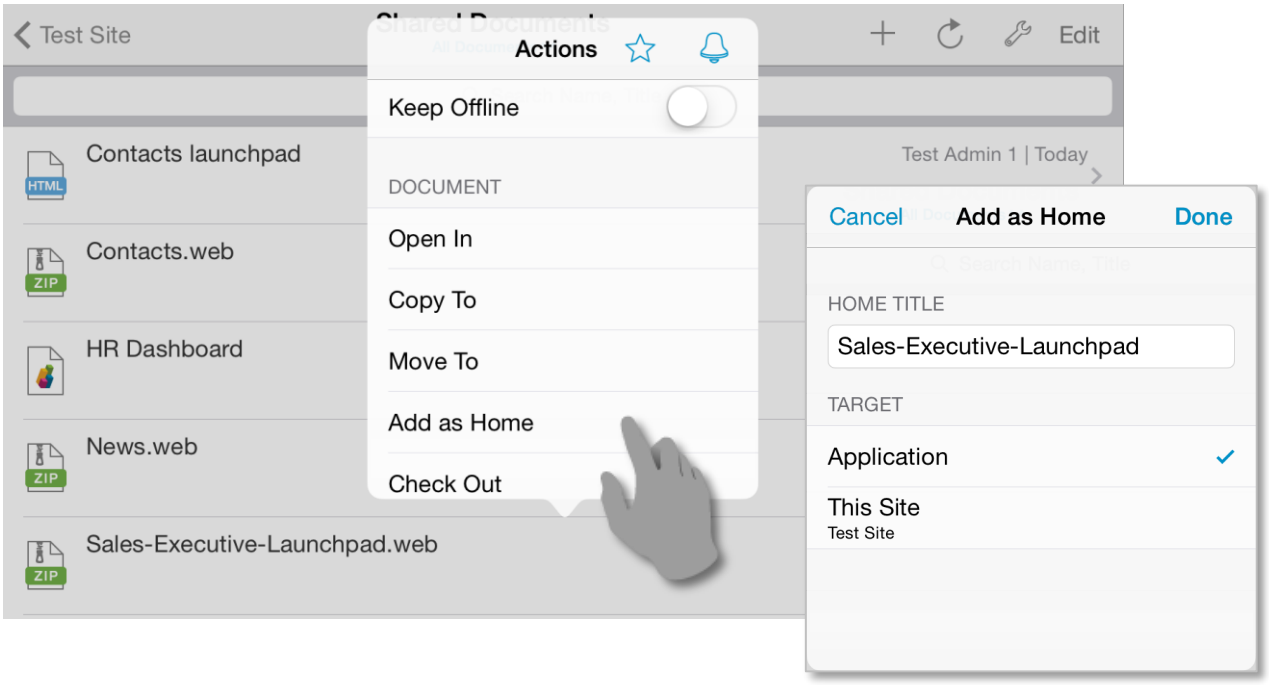
Site homes

In Enterprise versions, portals and sites can both display a personalized User Interface in SharePlus, presenting the user with a customized view for a given site. Site Home templates can be pre-configured and shared across sites, displaying different content depending on the SharePoint site's context.

Configuring SharePlus User Interface

You are able to manually configure personalized content for sites and the Application Home module through the User Interface.

Start by performing a tap & hold over an item to open the *Actions* menu and select the *Add as Home* action. Then choose between two targets, Application (Application Home module) or This Site (the site where the item is located).



SharePlus User Interface Advanced Configuration…

A personalized User Interface can be pre-configured by IT Managers to centrally manage the application's behavior.

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Advanced Enterprise Features

MDM Integration

Mobile Device Management solutions (MDM) allow enterprises to secure, monitor, and manage mobile devices. For additional information regarding Mobile Device Management, please refer to the following article: http://www.apple.com/ipad/business/it/management.html

SharePlus integrates with many 3rd party MDM solutions available in the market, including MobileIron, Citrix, and Bitzer Mobile. The level of integration depends on the capabilities of each particular MDM solution, currently you can find two Enterprise versions that greatly improve the integration with two specific MDMs:

- SharePlus for MobileIron
- SharePlus for Citrix

Advanced Configuration

SharePlus enables both end-users and IT Managers to adjust the application's behavior using two main configuration components:

- Central Application Configuration
- Per-site Configuration

Central Application Configuration

You can work with a Remote Configuration XML file published in a centralized location, on SharePoint or other server. The use of a remote configuration file, facilitates governance, allowing IT Managers to modify the default application settings on all devices centrally, without pushing a new product version. SharePlus also supports working with multiple remote configuration files, by using Dynamic Configuration or Library-Based Configuration methods.

Per-site Configuration

When browsing a site in SharePlus, all sites, lists, and libraries accessible to the user are displayed. SharePlus provides the **Per-site Configuration** method to manage the settings for sites and lists for each site independently. These settings include aspects like navigation, visualization, and offline behavior.

- **Navigation** is about the visibility and organization of sites and lists in the navigation bar.
- **Visualization** allows the configuration of the default SharePoint List View and SharePlus' native visualization for each list. You can also configure the site Home to personalize the site gateway.
- **Offline behavior** allows the configuration of default offline settings for a list.

In-App Support Tools (Feedback Email and Help URL)

SharePlus provides several in-app tools to facilitate access to support to the user. These different tools can be customized separately and are centralized in the Help Center.

Advanced Security

SharePlus Enterprise for iOS includes advanced security features that IT Managers can use to enhance the application security in the company's devices:

- Secure Data Wipe
- Application Level Security Policies
- Integration with MDM Servers

Secure Data Wipe

A SharePlus administrator can configure a secure data wipe to activate upon failed passcode entry attempts or failed attempts to authenticate to the server. Also, SharePlus integration with MDM servers includes secure data wipe configuration.
iOS achieves data wipe by securely discarding the block storage encryption key from iOS Effaceable Storage, which renders all data unreadable.

Application Level Security Policies

All enterprises frequently need to adjust application functionality based on their security rules. These rules may include restrictions over application functionality such as saving a SharePoint document locally or sharing files via the Wi-Fi Share feature. SharePlus natively supports this administrative requirements through mechanisms that will be discussed in this section.

- **Feature Trimming** - Feature trimming allows enterprise Administrators to disable and adjust SharePlus features on a global level. This may be necessary to comply with security policies or, in other cases, just to simplify the User Experience.
- **Editor Whitelisting** - Companies normally have a number of trusted (or preferred) apps suited for common tasks. You can configure this feature to limit the sharing of information within a restricted number of applications.
- **Trim Copy/Paste** - Restrict the copy and paste functionality prior to application deployment.
- **Block Screenshot Capture (iOS feature)** - An administrator can modify the user profile settings within the device to disable the iOS screenshot feature.
- **Blank the App Screen before suspending** - When an application is suspended, a screenshot is saved by iOS to quickly present the app in the last state when the app is resumed. This feature can be blocked to ensure that in-app information is never displayed without a user logged in.

Integration with MDM Servers

Mobile Device Management (MDM) software allows the secure management of mobile devices deployed across enterprises. As the "bring your own device" (BYOD) policy is spreading, security-related issues need to be addressed to avoid data breaches and other potential risks. MDM capabilities are frequently used by enterprises and, because of that, SharePlus offers integration with some of the most commonly used MDMs, including MobileIron, Citrix, and Bitzer Mobile.

Application Customization

SharePlus User Experience can be customized in several ways:

- Through application rebranding.
- Integrating launchpads (HTML, CSS, and JavaScript) into the native User Interface.

Corporate Branding

Enterprises often need a detailed control of the application's look-and-feel to meet corporate policies or match concrete solution needs. SharePlus look-and-feel can be customized during implementation, by the inclusion of customized assets and also adjusting the application's theme by configuration.

Launchpads SDK

SharePlus can integrate modern standard client-side web technologies like HTML5 and jQuery, allowing the development of rich launchpads that can offer a customized view of a given site (Site Homes) or display content for a SideBar module (Application Home). These Application Launchpads can communicate with SharePlus using S+ links or through a JavaScript API.
For further information about the Web SDK refer to **SharePlus Launchpads Developer Guide**.

Appendices

Appendix1: SharePlus Offline Notes

SharePlus provides the ability to **cache SharePoint content locally** in the device, allowing you to access information even when **not connected**. This significant advantage comes with the obvious consequence of having to synchronize your content later with the server.
Below you can find a few considerations to take into account when synchronizing content:

About the Process

The synchronization process is triggered when SharePlus is idle for more than 30 seconds, and it requests a block of list items to the SharePoint server to store them locally. After storing the block of items, if SharePlus remains idle the process continues to synchronize the rest of the list items. The frequency in which the synchronization process is triggered can be specified in the device through the *Idle time (sec)* setting located in Advanced Settings.

The process can be interrupted in particular cases

The synchronization process is suspended when:

- The user interacts with the device, to free bandwidth for navigation.
- SharePlus is sent to the background.
- The device is suspended.

Permission Changes on the server while you were Offline

While working Offline, **permission changes** in SharePoint **can't be replicated** to SharePlus at that time. However, you will get those changes later when going Online again and content is synchronized. Synchronizing your work can lead to several **conflicts** which need to be addressed, like having SharePoint permissions changed for a site, a list or even a specific document.

Structural changes on the server

The synchronization process updates all content changes from the SharePoint server. Changes in the structure, however, are not automatically updated. This is true for either online or offline scenarios. Structural changes in the SharePoint server include, for example, changing the default list View or adding/deleting a column from a list.
To **retrieve structural changes** for a list just use the *Refresh* button.

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Appendix2: Document Changelog

Version	Chapter	Section	Description
2.2	The SharePlus App	Getting Started	ReportPlus screenshots updated
		ReportPlus Integration	ReportPlus screenshots updated
2.1	Introducing SharePlus	Welcome to SharePlus!	Two images were updated.
		At a Glance: Working Offline	Section updated with the Per Item sync mode.
	The SharePlus App	SharePlus Offline	Major update with the current sync modes.
	Configuration	Application Settings	Added new advanced settings.
	Support	Getting Support	Fixes in *Troubleshooting errors with SharePlus.*
	Appendices	SharePlus Offline Notes	Section updated with the current sync modes.
2.0	The SharePlus App	Lists and Libraries	The Views selector was included in Quick Access.
		Items and Documents	Editing Files was updated with Office for iPad info.
			Added the PDF search functionality.
	Security	-	The Security chapter was added.
	Support	Getting Support	Added information about troubleshooting errors with SharePlus
	SharePlus Enterprise	-	The SharePlus Enterprise chapter was added and existing content was moved to this chapter.
	Appendices	SharePlus Offline Notes	Updated the retrieval of structural changes on the server, now using the Refresh button.
1.0.2	Introducing SharePlus	Installing SharePlus	Removed MAC from the available platforms.
1.0.1	Introducing SharePlus	Installing SharePlus	Screenshot update in SharePlus Free and Subscription.