

# **User's Guide**

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SharePlus<sup>™</sup> 4.6 – User's Guide 3.4

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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-base



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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.

	Ф	< Sites	Legal Discovery Center	💍 Edit
	AL		Q, Search	
	Garth Fort	SUBSITES Case-CT77A11 Case-FD951A88 Case-TM3X122 Northwind Traders	Case-FD124R59 Case-TM1A934 Case-TM444	
	Sites Documents News	LIBRARIES Documents no heres Images Ste Collection Documents Style Library di terres	Form Templates no Banns Pages I Name Site Collection Images no Banns	
а Ф Ф	Online C Synchronization Settings	LISTS Content and Structure Reports T items Workflow Tasks no items	Reusable Content	
?	Help Center		Al Context Factors	

Navigate your SharePoint sites.

Access content within SharePlus Mobile Workspaces.

=	Executive	l
Bradley Maren		Search Q
Service Requests	Appointment Calendar	Service Manuals
3M 3M	20 Emloyee Picnic	Aerial Lift Fall Protection Over Water in Shipyards (Quick Card)
None International Control of the Internation	Bagels with the CEO	Controlling Electrical Hazards
		Electrical Safety (Quick Card)
Select a Site	Bagels with the CEO 5:00 AM / Employee Kitchen	Fall Prevention Training Guide - A >
ALL>	ALL >>	ALL 20
Issues	Ideas and Brainstorming	Customer Stats
East entrance door sensors not working	FAQs for QT Series > + 2 ± 0am Fan = 2013 01 04	ACADA
AC not working in the 2nd floor library	Broken App on G20 Phones	
Problems in Building 5 Roof >	# 4 1 Sara Daris = 2013-01-04	
QT3001 Test Project in Need of Approval	XT3001 Major Bug Report: Syncing	Access the latest reports >
ALL>	ALL>	
	News ZT3001 Research Proposal in the Works!	

Finance Team Calendar + 🖒 🖉 Ed 무 < All Results February, 2016 Garth Fort Q Search + Favorite 📩 Sites Docur News Conline C () Synchr Settings ? Help Ce Year Month Week Day

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



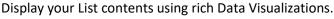
SharePlus 4.6

User Guide



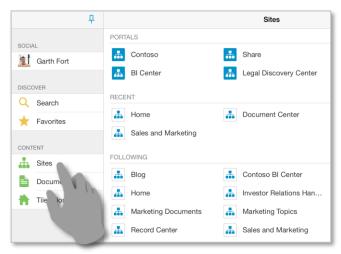
Collaborate and be in-sync with your colleagues through SharePlus social features.





### At a Glance: Browsing Content

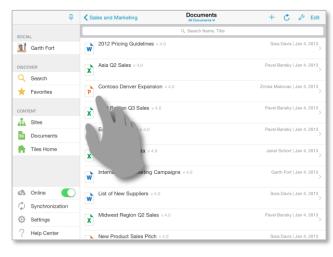
**1.** Access the <u>Sites</u> Module through the Sidebar.



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

SUBSITES Contracts	odes
LIB D.ی. Assets الهد.	Departments
Images         no items         Site Assets         no items	Image: Finance       Image: Finance         Image: Operations       Image: Finance         Image: Sales a       Image: Finance

#### 5. Open a **Document**.



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

	Sites
PORTALS	
BI Center	🚠 Contoso
Legal Discovery Center	🚠 Demo
MVP Demos	Kisio Dei
RECENT	
Home	
FOLLOWING	
Sales and Marketing	Domestic Sales

#### 4. Browse a Library.

Departments	Sales and Marketing
	Q. Search
UBSITES	
Domestic Sales	Industry Trends
Linternational Sales	Arketing Blog
Aarketing Campaigns	Arketing Documents
Marketing Topics	Rew Products
Northwind Traders	Pipeline Management
Project Falcon	Project Phoenix
Tailspin Toys	
IBRARIES	
Documents 16 items	Images no items
Marketing Re	Pages 1 item
Sales Ret ts	Site Assets

**6.** A SharePoint document <u>File</u> displayed in SharePlus.





### At a Glance: Working Offline

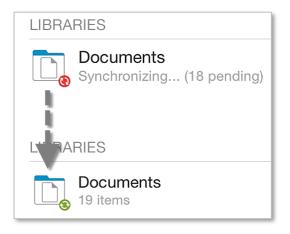
**1.** Tap & hold to access *Actions* menu for the list, folder, or item.

Garth Fort	SUBSITES
1812	Actions 🟠 🔔
DISCOVER	
Q Search	LIBRARIES 1 o ms
★ Favorites	Digita no item Open
CONTENT	Image no item Edit Settings
Sites	Site A no item View in Web
Documents	LISTS
Tiles Home	Announcements 6 items
	Discussions 5 items

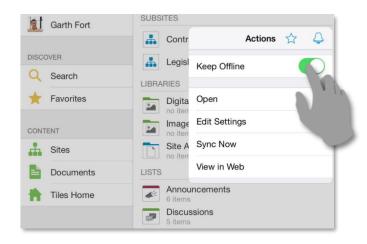
**3.** Wait for the Sync Process to start or trigger it yourself using *Sync Now*.

Garth Fort	SUBSITES
107510	Contr Actions ☆ 🗘
DISCOVER	Legisl Koop Offling
Q Search	LIBRARIES
★ Favorites	Digita Open
CONTENT	Edit Settings
Sites	Site A Sync Now
bocuments	LISTS View in Web
Tiles Home	Announcements 6 items
	Discussions 5 items

**5.** Once completed, the List is synchronized.



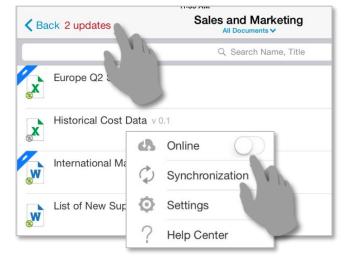
#### **2.** Select the *Keep Offline* action.



# **4.** You can monitor the synchronization process if you want.

олт	ENT	Synchronizing	S	top
	Sites	In Progress		
	Documents	Workflow Tasks	$\bigcirc$	>
		Documents	$\bigcirc$	>
1	Tiles Home	Site Assets Construction	$\bigcirc$	>
		Safety Manuals Construction	$\bigcirc$	>
		Reports	$\bigcirc$	>
2	Online	Manuals & Procedures Construction	$\bigcirc$	>
)	Synchronizing	Equipment Construction	$\bigcirc$	>
2	Settings	Documents Construction	$\bigcirc$	>
)	Help Cente	Blueprints	$\cap$	

**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.

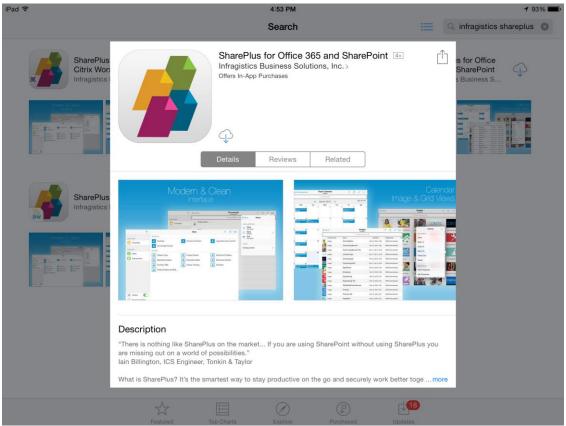


#### Guide scope...

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.

All Featured <sup>O</sup> Prepaid In-house	
<b>V</b> 7.1.2	>
Quickoffice Pro HD – edit office documents & view PDF files	,
SharePlus v9.1.2	>

#### 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 <u>from your mobile device</u> and tap the "Install Application Button".

く > 🖞 📒				◦ 🖽 🗅 +
SharePlus Enterprise - OTA	SharePlus Enterprise - 013.	Nightly Build Download Page	Sandbox - SharePlus Demo	World's Largest Protessional
🛄 INFRAGI	ISTICS			
SharePlus Enter;	orise - Over The Air Downi	oad		_
4	Share	Plus v 4	.0	
			@ Install Application	-

#### **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.

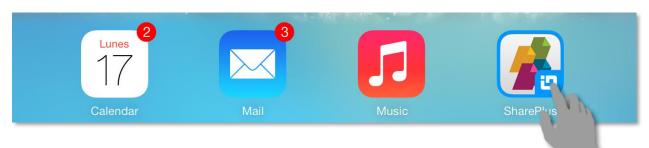


# Chapter 2 The SharePlus App



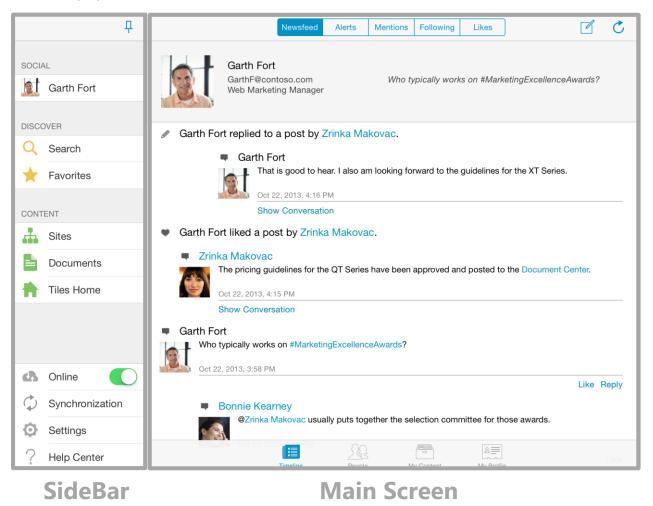
# **Getting Started**

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



Once started, SharePlus displays two main panels:

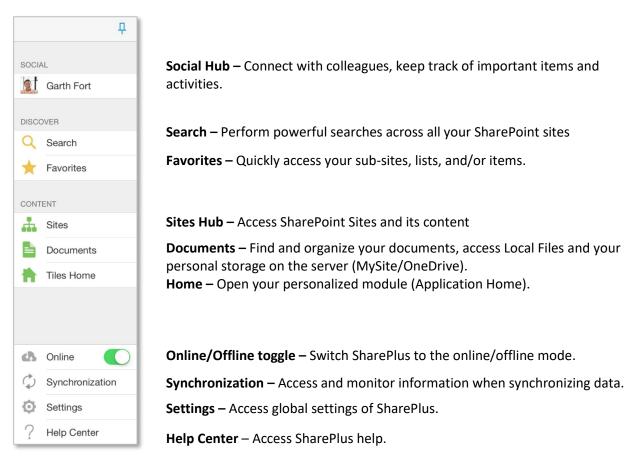
- The SideBar gives you access to the application's features organized in modules
- **The Application's Main Screen** or Working Surface, where selected modules and content are displayed.





## The SideBar

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



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

	다. Cepartments	Legal	💍 Edit
SOCIAL	N IL	Q Search	
Garth Fort	ITES		
	Contracts	Counsel	

Display or hide the SideBar by using swipe gestures.

= +			■ Sites					
SOCIAL			PORT					
Garth Fort	Share	🚠 Demo		Contoso		Share	at.	Demo
DISCOVER	IG Construction			Legal Discovery Center	<b>.</b>	IG Construction		
Q Search			RECE					
★ Favorites	Domestic Sales	Document Center		Hor	#	Domestic Sales	*	Document Center
			_					
	5							

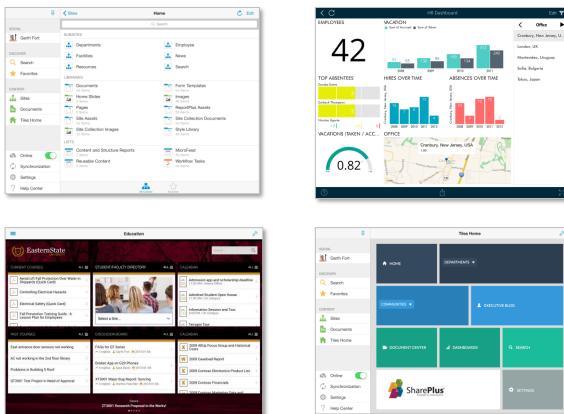
#### **Custom Modules**

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 SharePlus Mobile Workspaces, 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.

SOCIAL Garth Fort	Newsteel         Aterts         Meritions         Following         Likes         C           Gardin Fort Gardin Fort Web Manketing Manager         Who typically works on #MarketingEncellenceAlwards?         Who typically works on #MarketingEncellenceAlwards?		Newsfeed	Alerts	Mentions	Following	Likes
DISCOVER O Search Favorites CONTENT	Carth Fort replied to a post by Zrinka Makovac.  Carth Fort  Carth Fort  Carth 2, 2013, 419 PM  Chart 2, 2013, 419  Chart 2, 2014, 419  Chart 2, 2014, 419  C				Top ba	ľ	
Sites Documents	Garth Fort liked a post by Zrinka Makovac.     Zrinka Makovac     The pricing guidelines for the OT Series have been approved and posted to the Document Center.     The pricing guidelines for the OT Series have been approved and posted to the Document Center.	_					
Tiles Home	Constraints Const		Timeline	People	e My	Content	A My Profile
Contine     Synchronization     Settings     Help Center	Like Repy   Bonnie Kaarney  Crista Makrose usualty puts together the selection committee for those awards.    Committee for the selection comm			Вс	ottom	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.

	Р		Sites	+ 💍 Edit
SOCIA		PORTALS		
SOCIA	Garth Fort	击 Contoso	🚠 Share	🚠 Demo
	Gardin off	击 Bl Center	Legal Discovery Center	IG Construction
DISCO	DVER			
Q	Search	RECENT		
*	Favorites	Home	Document Center	🚠 Finance
		Sales and Marketing		
CONT	ENT	FOLLOWING		
a de la comencia de l	Sites			
	Docume	Blog	Contoso BI Center	Document Center
	Tiles	Home	Investor Relations Han	Arketing Campaigns
		Arketing Documents	Arketing Topics	Rew Products
		Record Center	Sales and Marketing	La Search
		RECOMMENDED		
<b>c</b> B	Online			
$\Diamond$	Synchronization	IT Web		
Ø	Settings			
?	Help Center		Sites Favorites Membership	

#### **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.

	Sites	+ 🖒 Edit
PORTALS		
Contoso	🚠 Share 🔒	Demo
BI Center	Legal Discovery Center	IG Construction
Home Sales and Marketing	Document Center	Finance
FOLLOWING		
Blog	Contoso BI Center	Document Center

	<del>Р</del>	Compartments	Legal		C	Edit
SOCI	A		Q Search			
	Garth Fort	SUBSITES				
in the second		Contracts		Counsel		
DISCO		Legislative Codes	æ	Proposals		
Q	Search	LIBRARIES				
*	Favorites	Digital Assets		Documents 19 items		
CONT	ENT	no items		Pages 1 item		
4	Sites	Site Assets				
	Documents	LISTS				
	Tiles Home	Announcements 6 items		Contacts no items		
		<b>Discussions</b> 5 items		Issues no items		
		Legal Reference Links		Legal Team Calendar		
ø	Online	Workflow Tasks				
$\Diamond$	Synchronization					
Ø	Settings					
?	Help Center		All Content Favorit	tes		



#### 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.

Р		Site	S	+ 🖒 Edit
SOCIAL	Cancel	Add Portal	Done	
Garth Fort			*	Demo
_	Name		.*.	IG Construction
DISCOVER	F	· · · / / · · · · · · · · · · · · · · ·		
Q Search	- URL ht	tp://www.mycompanysite.com/in	tranet 🖁	Home
Tavorites	AUTHENTICATION			
CONTENT	Mode	V	Vindows Based >	
Sites	Account	S	hare's Account >	
Documents			ň.	Document Center
Tiles Home	Advanced Setti	ngs	> 👪	Marketing Campaigns
			*	New Products
		Test Connection	<b></b>	Search
Conline				
Synchronization				
Settings				
? Help Center		Sites Favori	tes Membership	

#### **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.

Cancel	Add Portal	Done
PORTAL		
Name		
URL	http://www.mycompanysite.com/intra	net
AUTHENTICA	TION	
Mode	Win	dows Based >
Account	Shar	re's Account >

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**).

Add Portal         Select Account	Edit	-	Cancel	Add Account	Done
ACCOUNTS			AUTHENTICATI	ION	
Demo's Account	i		Alias	Demo's Account	
Infragistics's Account	T	1	Domain		
Developer's Account			Username	TestUserDemo	
SharePoint 2013's Account	✓ (Ì)		Password	••••••	
Demo Account	i		CLIENT CERTIF	FICATE	
Create New Account			Use Certifica	ate	$\bigcirc$
			SETTINGS		
			Use As Defa	ault	$\bigcirc$



#### 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 <u>contact Infragistics</u> to request access to our **Demo** SharePoint site.

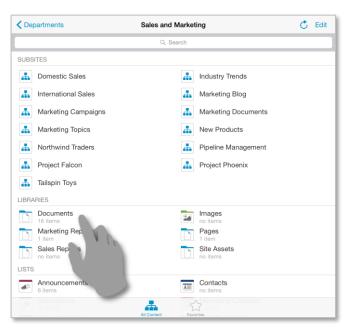
## **Lists and Libraries**

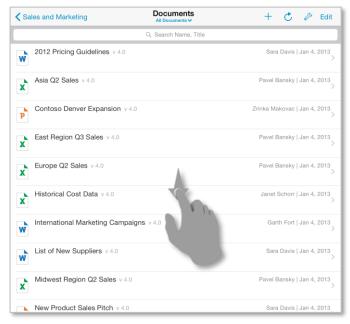
SharePlus supports all kinds of SharePoint <u>Lists</u> and <u>Libraries</u>. On the application, the List Icon indicates the List type.

Asset and Picture Libraries		Document and Form Libraries
Announcements	28	Calendar
Contacts		Custom Lists
Tasks	F	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

Sales and Marketing	Documents All Documents V	S +	Ean
	Q Search Name, Title	View	
2012 Pricing Guidelines v 4.0		Views	>
		Sort and Group	>
Asia Q2 Sales v 4.0		View in Web	
Contoso Denver Expansion v 4.0	)		

Tap *Views* to access SharePlus List Visualizations and SharePoint List Views. Scroll up and down to navigate through all available settings.

Documents All Documents V		+	Ç	8	Edit	Documents All Documents ✓		+ C	& Edit
Q Search Name, Title	Back	Views				Q Search Name, Title	Back	Views	
	VISUALIZATIONS						VISUALIZATIONS		
Policy	Table					Policy	Table		4
	Table standard				~		Table standard		~
	Grid view based						Grid view based		
	VIEWS						VIEWS		
	All Documents				~		All Documents	;	~

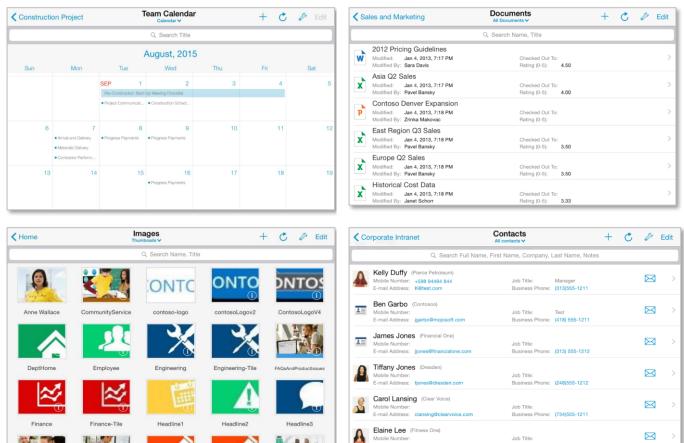
**List Views** 

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 *Views* 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.



mail Address: elee@

2

Rick Loftus (Star Financial)

fobile Number: -mail Address: rloftus@star.com

#### **Ad-Hoc Sorting & Grouping**

Legal

Legal-Tile

InformationTech

IndustryTrends

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.

MarketingTopics

Sales and Marketing				+ & .	🖉 Edit
	Q :	Search Name, Title	•	nd Group	ere
W 2012 Pricing Gui Modified: Jan 4, 20 Modified By: Sara Dav	13, 7:17 PM	Checked Rating (0-	Name (for use in f	orms)	8 =
Asia Q2 Sales Modified: Jan 4, 20 Modified By: Pavel Ba	13, 7:17 PM nsky	Checked Rating (0-	COLUMNS	View	All
P Contoso Denver Modified: Jan 4, 20 Modified By: Zrinka M	13, 7:18 PM	Checked	Checked Out To Modified		=
East Region Q3 S Modified: Jan 4, 20 Modified By: Pavel Ba	13, 7:18 PM		Modified By		
	13, 7:18 PM	Checked	Name (linked to d	ocument with Auto Ap	
Modified By: Pavel Ba Historical Cost D Modified: Jan 4, 20 Modified By: Janet Sc	ata 13, 7:18 PM	Rating (0- Checked O Rating (0-5)	ut To:	Auto Aj	> >
	keting Campaigns 13, 7:19 PM t	Checked O Rating (0-5)			>



Business Phone: (310) 555-1212

Job Title: Business Phone: (734)555-1212  $\bowtie$ 

#### **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.

All Results	Documents All Items V	+ 🖒 🖉 Edit
	Views	
2011 Q1 Financial	VISUALIZATIONS	System Account   Apr 3, 2015 >
2011 Q2 Financial	Table view based	Kari Furse   Jan 4, 2013
W	Table view view view view view view view vie	· · · · · · · · · · · · · · · · · · ·
2011 Q3 Financial	Grid view based	Kari Furse   Jan 4, 2013 >
Cloud and On-Pre	VIEWS	Garth Fort   Jan 4, 2013 >
	All Documents	
Contoso Benefit P	All Items 🗸	Belinda Newman   Jan 4, 2013 >
P Contoso Informatio	on Security Policy v 1.1	David Longmuir   Jan 4, 2013 >



### **Items and Documents**

SharePlus fully supports SharePoint <u>content types</u>, 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:

W	Word documents	X	Excel documents
~	PDF documents		Image documents
ZIP	ZIP documents	Ρ	PowerPoint documents
	ReportPlus dashboards		Custom items
Ĩ√	Task items	28	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.

Sales and Marketing	Actions 🕁 📮	Sales and Marketing     Ac	tions 🟠 📮
	Keep Offline	Follow / Unfollo	w
2012 Pricing Guidelines Modified: Jan 4, 2013, 7:17 PM Modified By: Sara Davis	DOCUMENT	2012 Pricing Guidelines Modified: Jan 4, 2013, 7:17 PM Modified By: Sara Davis PROPERTIES	
Asia Q2 Sales Modified: Jan 4, 2013, 7:17 PM	Preview	Asia Q2 Sales Modified: Jan 4, 2013, 7:17 PM	
Modified By: Pavel Bansky Contoso Denver Expansio	Edit in Excel	Modified By: Pavel Bansky Edit Properties Contoso Denver Expansio Modified: Jan 4, 2013, 7:18 PM	
P Modified: Jan 4, 2013, 7:18 PM Modified By: Zrinka Makovac	Edit in Excel Online	Modified By: Zrinka Makovac EXPORT & SHARE	
East Region Q3 Sales Modified: Jan 4, 2013, 7:18 PM Modified By: Pavel Bansky	Open In	East Region Q3 Sales Modified: Jan 4, 2013, 7:18 PM Modified By: Pavel Bansky	Hanny (0-0). 0.00
Europe Q2 Sales Modified: Jan 4, 2013, 7:18 PM Modified By: Pavel Bansky	Checked Out To: Rating (0-5): 3.50	Europe Q2 Sales Modified: Jan 4, 2013, 7:18 PM Modified By: Pavel Bansky	Checked Out To: Rating (0-5): 3.50
Historical Cost Data Modified: Jan 4, 2013, 7:18 PM Modified By: Janet Schorr	Checked Out To: Rating (0-5): 3.33	Historical Cost Data Modified: Jan 4, 2013, 7:18 PM Modified By: Janet Schorr	Checked Out To: Rating (0-5): 3.33

SharePlus centralizes all possible ...ons 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.

< Intr	ranet	Tasks All Tasks 🗸	+ (	🛃 🧬 Edit
		Q Search Title		
2	Finish Paperwork (In Progress Created By: Michael Lindauer Priority: Low	Assigned To:	Not Assigned Mar 31, 2011 to Mar 31, 2011	>
Î	Agreement Document for 7 Created By: Michael Lindauer Priority: High	Actions 🟠 🤅	el Lindauer 3, 2011 to Apr 13, 2011	>
Î	Review Quality Assurance Created By: Michael Lindauer	Keep Offline	Bmith	>
	Priority: (1) High Approve Sales Order #765	TASK	2, 2011 to Mar 22, 2011	
✓	Created By: Michael Lindauer Priority: (1) High	View Properties	nder Hart 3, 2011 to Mar 26, 2011	>
Î	Lantern's Presentation (Defence	Edit Properties	Smith	>
	Priority: (3) Low	Delete	2, 2011 to Apr 12, 2011	
Î	Finish Business Reports (In Created By: John Smith Priority: Normal		System Account Jun 16, 2011 to (unknown)	>

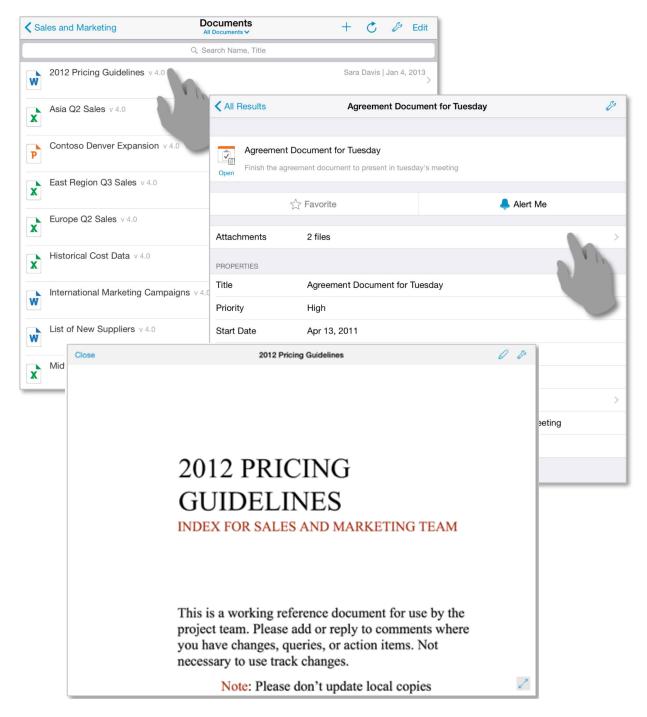
The item's properties are displayed on screen along with the *Favorite* and *Alert Me* SharePlus options.

K Back	2012 Pricing	Guidelines	6	r,	
2012 Pricing C Preview	Guidelines				
*	Favorite	2	Alert Me		
Version	4.0	All Results	Agreement Docur	nent for Tuesday	G
PROPERTIES					
Name	2012 Pricing Guidelines.docx	Agreement Do	ocument for Tuesday		
Title	2012 Pricing Guidelines	Open Finish the agreer	nent document to present in tuesda	ıy's meeting	
Rating (0-5)	4.50	<u></u>	Favorite	🜲 Alert Me	
Document Stage		Attachments	2 files		>
File Size: 571.9 KB Created at Jan 4, 2013, 7:17 Modified at Jan 4, 2013, 7:17		PROPERTIES			
		Title	Agreement Document for Tu	lesday	
		Priority	High		
		Start Date	Apr 13, 2011		
		Status	In Progress		
		% Complete	25.00%		
		Assigned To	Michael Lindauer		>
		Description	Finish the agreement docum	nent to present in tuesday's meeting	
		Due Date	Apr 13, 2011		
		Created at Mar 31, 2011, 1:1 Modified at May 31, 2012, 3:			



#### **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.

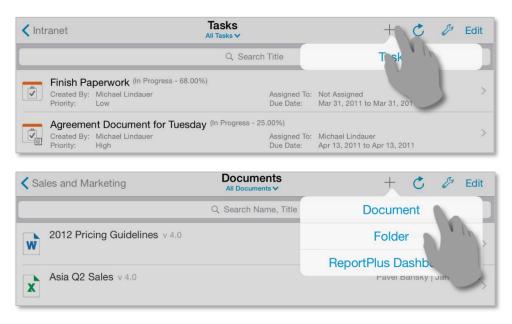




#### **Adding/Editing Items**

#### 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.

K Sales and Marketing	All Documents	+ 🖒 🖉 Edit	< Back	2012 Pricin	g Guidelines		G
	Q Search Name, Title					Actions	* 4
2012 Pricing Guidelines v 4	s.o	Sara Davis   Jan 4, 2013	Proview 2012 Pr	ricing Guidelines		Keep Offline	$\bigcirc$
Asia Q2 Sales v 4.0	Actions ★	Pavel Bansky   Jan 4, 2013 >		★ Favorite		DOCUMENT Preview	
P Contoso Denver Expansion	Keep Offline	a Makovac   Jan 4, 2013 >	Version	4.0		Edit in Word	
East Region Q3 Sales v 4.0	DOCUMENT Preview	Pavel Bansky   Jan 4, 2013 >	PROPERTIES			Edit in Word Online Open In	
Europe Q2 Sales v 4.0	Edit in Word	Pavel Bansky   Jan 4, 2013	Name	2012 Pricing Guidelines.do	cx	Check Out	
	Edit in Word Online	´	Title	2012 Pricing Guidelines		Delete	
Historical Cost Data v 4.0	Open In	Janet Schorr   Jan 4, 2013	Rating (0-5)	4.50		Follow / Unfollow	
International Marketing Ca	Check Out		Document Sta	ge		PROPERTIES	
	Delete	Actions	☆ 🗘	13, 7:17 PM by Sara Davis 13, 7:17 PM by Sara Davis			
List of New Suppliers v 4.0	Follow / Unfollow	Check Out					
Midwest Region Q2 Sales	V 4.00PERTIES	Delete					
		Follow / Unfollow					
		PROPERTIES					
		View Properties					
		Edit Properties		J			



#### Working with properties

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

m	les Presentation for Acm	e Opportunity			ф	Cancel		2012 F	Pricing Guidelines		Save as I	Draft <b>Save</b>
Create sales	s presentation for Acme sales	Clear Sta	rt Date	SOCIAL								
ATTACHMENTS				Gart	n Fort	w 2012 I	Pricing Guideline	es				
🕀 Add		June July	5	DISCOVER								
File 1	Installation of XT10		7	Q Sear	ch	🕂 File	2012 F	Pricing Guideline	es.docx			
PROPERTIES		September October	8	+ Favo		PROPERTIES						
Task Name*	Create Sales Prese					Name*	2012 F	ricing Guideline	es			
Start Date	Aug 7, 2012					Title	2012 F	ricing Guideline	es			
Due Date	Jan 12, 2013								_		-	_
Assigned To	Garth Fort			Q	W	E R	т	Y	υI	0	Р	$\mathbf{x}$
% Complete	2.00%											
Description	Create sales prese	ntation for Acme sale	s meeting	A	S	D	FG	H	J	K L		Done
Predecessors	Create draft propos	sal for MojoSoft		+	Z	х с	V	в	N M	!	?	+

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.

TENT	Title	2012 Pricing Guidelines		
Sites	Document Stage	Document Stage	Location Services	
Documents	File Size: 572.8 KB			
News	Created at Jan 4, 2013, 7:1 Modified at Jan 4, 2013, 7:	7 PM by Sara Davis 17 PM by Sara Davis	Update Location	
			Current Location 34.908615 South, 56.140995 West	
🔥 Online 🛛 🌔	)		ACTIONS	
Synchronization			Copy to Clipboard	>
Settings			Show in Maps app	
? Help Center				7
ving your ite	em/documen <sup>-</sup>	t		
		ork to the server.		

### Save as Draft Save

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.

Cancel	New Document		Draft Save		
Document					
Create a new document.		Cancel		New Task	
Select document		Task			
PROPERTIES	Take Photo/Video	Track a work iter	n that you or your tean	n needs to complete.	
Title	Photo Albums	ATTACHMENTS			
	Record Audio	🕂 Add			
-	Local Files	PROPERTIES		Take Photo/Video	The second second
		Task Name*	Task Name Regi	Photo Albums	
		Start Date	Today	Record Audio	
		Due Date	Due Dat	Local Files	-
		Assigned To	Assigned To		
		% Complete			

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.

Cancel	New Document	
Create a new document.		
Select document		
PROPERTIES	Local Files	
Title Title	Logs >	
	Europe Q2 Sales.xlsx	
	Frequently Asked Questions.d	
	Historical Cost Data.xlsx	
	Installation of XT1003.docx	
	International Marketing Strate	
	fontfile	
		1



#### **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.

<b>K</b> Favorites	Documents All Documents V	+ C &	Edit
	Q Search Name, Title		Select Location Cance
2012 Pricing Guide	slines v 4.0	Sara Davis   Jan 4	Local Files >
Asia Q2 Sales v 4.0	Follow / Unfollow	Pavel Bansky   Jan 4	👬 My Site >
P Contoso Denver Es		Zrinka Makovac   Jan 4	SHAREPOINT SITES
East Region Q3 Sa	· · ·	Pavel Bansky   Jan 4	
Europe Q2 Sales v	4.0 EXPORT & SH	Pavel Bansky   Jan 4	Image: Share/Dev     >       Image: Demo     >
Historical Cost Dat	ta v 4.0 Copy To	Janet Schorr   Jan 4	Locations Recent

#### **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.

			P		Û		ľ	
From: Juan Pablo Ayala > To: Testing IG >							Hide	
Project Timeline review 28 de febrero de 2014 16								Actions
Hi, Please review the attache		AirDrop Share instantly of appear automat and turn on AirD	with people nearb ically, ask them to prop.	y. If they do r o open Contro	not ol Center		DOCUME	NT
Best, JP							Copy To	
W			4				SHARE Email Do	ocument
Project Timeline.docx	Mail	Open in Pages	Open in ReportPlus	Open in Shar("Nu		iper rop		
	Iuick Look							



#### **Editing** a File

SharePlus relies on 3<sup>rd</sup> 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*.

Close	Actions
DOCUMEN	т
Preview	
Update I	tem
EXPORT &	SHI
Сору То	
Send as	attachme



#### **PDF Annotations**

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

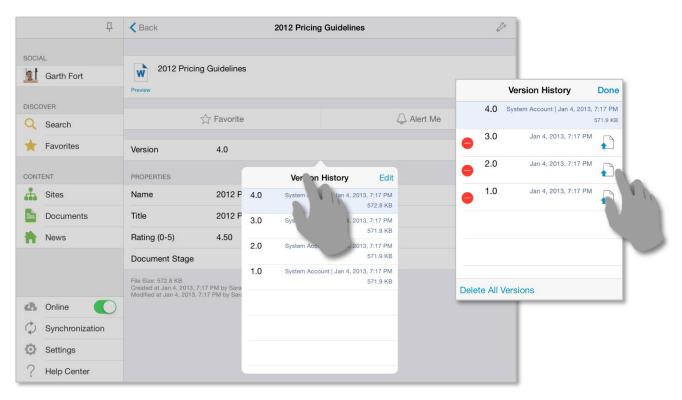


In addition, you can perform a search within a PDF file, browse the results by page and navigate to the page you want.



#### **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.

	<del></del> д	Favorites	+ 🖒 Edit
SOCIAL		Q Search	
Garth Fo	ort	SITES	
DISCOVER		Sales and Marketing	>
Q Search		Accounting	>
★ Favorite	es	LIBRARIES / LISTS	
CONTENT	11	Documents 16 items	>
🚠 Sites	ents	Location Pictures 24 items	>
News		Announcements 4 items	>
		ITEMS	
		New International Marketing Initiatives     We will be releasing a new international Marketing campaign in the coming week	Zrinka Makovac   Jan 4, 2013 s. Look for more details here.
Online     Synchro	onization	2009 Caseload Report v 1.2	Garth Fort   Mar 19, 2015 >
Settings	3		
? Help Ce	enter		

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

All Results	2012 Pricing Gu	idelines 🤣	
2012 Pricing	g Guidelines		
Preview			Q Search
	★ Favorite	SUBSITES	Employee
Version	4.0	Actions ★	Vews Search
Name	2012 Pricing Guidelines.docx	Open	Search
Title	2012 Pricing Guidelines	Follow / Unfollow	Form Templates
Rating (0-5)	4.50	View in Web	49 items
Document Stage File Size: 571.9 KB Created at Jan 4, 2013, 7 Modified at Jan 4, 2013, 7		<ul> <li>Pages 2 items</li> <li>Site Assets no items</li> <li>Site Collection Images 12 items</li> </ul>	<ul> <li>ReportPlus Assets 23 items</li> <li>Site Collection Documents no items</li> <li>Style Library 40 items</li> </ul>



# 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.

	Р	Documents	+ C
SOCIA	M	CONTENT Google Drive	
	Garth Fort	Local Files Conclusion Network Drive	
		RECENT Dropbox	
DISCO		No Items Box	
Q	Search	OneDrive for Busin	1855
*	Favorites	FOLLOWING	
CONT		International Marketing Strategies.docx P New Product Sales Pitch.pptx	
CONT	Sites	New Supplier.docx Product launch brief.docx	
	Documents	Q2 Marketing Analysis.xlsx P XT1000 Product Overview.pptx	
	News	RECOMMENDED	
		International Marketing Campaigns Marketing Campaign Effectiven	ess
		Marketing Campaign Strategies Europe XT2000 Marketing Campaign	
đ	Online		
$\Diamond$	Synchronization		
Ø	Settings		
?	Help Center	Documents Favorites Edited By Me	

Your files can be accessed from your personal cloud storages (OneDrive for Business, Google Drive and Dropbox), a private local storage on the device (Local Files), or shared locations across your network (Network Drives). 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).
- Edited By Me Here you can find all the documents recently edited by you. •



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 can 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.

Local Files	+ 🐣 Edit
Q Search	Wifi File Sharin
	Sort By

<b>〈</b> Documents	Local F	Files	+ 🖉 Edit
	WiFi File Sharing	Close	
			Feb 18, 2016, 10:23 AM 🗦
	File Sharing	9	Feb 17, 2016, 11:35 AM 17.5 KB
•			Feb 17, 2016, 4:41 PM 9.1 KB
1			Feb 18, 2016, 3:59 PM 22.7 KB
Historical Cost Da	ata.xlsx		Feb 17, 2016, 11:33 AM 17.5 KB



## **Content Sources**

SharePlus gives you access to your content sources and access to any of the files contained in them. All content sources are displayed in an organized list view under the Content section of the Documents module.

	<del>Р</del>	Documents			
SOCIAL		CONTENT			
Gart	th Fort	Local Files	OneDrive for Business		
		Mike Smith's Google Drive	Marketing Share		
DISCOVER		Tom Johnson's Dropbox	Marketing's Box		
Q Sea	rch	•			
🔶 Favo	orites	RECENT			
		No Items			
CONTENT					
Site:	s	FOLLOWING			
	uments	International Marketing Strategies.docx	New Product Sales Pitch	ı.pptx	
New	/S	Wew Supplier.docx	Product launch brief.doc	x	
		Q2 Marketing Analysis.xlsx	XT1000 Product Overvie	w.pptx	

The available content sources are:

Content Source	Туре
Вох	Cloud storage
Dropbox	Cloud storage
Google Drive	Cloud storage
OneDrive for Business	Office 365 or SharePoint Server personal cloud storage
Network Drives	Network File Sharing over the network

### Setting up a New Content Source

To configure any new Content Source, tap the "+" icon on the top right corner.

д		Documents +	Ċ
SOCIAL	CONTENT	Google Drive	1
Garth Fort	Local Files	Con Drive for Network Drive	
	RECENT	Dropbox	
DISCOVER	No Items	Box	
C Search	FOLLOWING	OneDrive for Business	S



**Note:** OneDrive will be pre-configured if you are using Enterprise and have Social features enabled.

### **Removing a Content Source**

To remove a content source from SharePlus, tap and hold the item. Choose *Delete* from the **Actions** menu.

<b>무</b>	Docu	ments + Č
	CONTENT	
SOCIAL Garth Fort	Local Files	CneDrive for Business
	Aarketing Share	
DISCOVER		
Q Search	RECEN Actions	
★ Favorites	Open	Product launch brief
	P Delete	Q2 Marketing Analysis
CONTENT		International Marketing Strategies
Sites	Microsoft h Dnline for Enterpri	Microsoft SharePoint Online for Enterpri
Documents	SharePlus 4 ide	S+ Android User Guide

### **Browsing Files with Content Sources**

When working with content sources, you can open files by just tapping the cell as you do with the Documents module. You can also tap over an item to execute a default action; for more information, refer to Actions in the <u>Items and Documents section</u>.

#### **Action buttons/menus**

+	<b>Add</b> – will enable creating Documents, Folders, ReportPlus Dashboards and adding Photo Albums, Local Files and Folders. You can also take Photos/Videos and Record Audios.
Ċ	<b>Refresh</b> – the refresh button will let you retrieve any structural changes for your documents.
ß	<b>Settings</b> - the wrench button will let you change your View, sort and group and View documents in Web.
	OneDrive for Business also has a <i>Quick Access</i> menu which will let you access these features.
Edit	Edit– preview one or more selected documents.

The available actions, and the options within them, will be different depending on the content source you choose.



#### Box, Dropbox, Google Drive, and Network Drives

Box, Dropbox, Google Drive, and Network Drives have the same available actions, although you will see that the display for Google Drive is different.

무 <b>く</b> Documents		Cocuments	ReportPlus's Google Drive	Ċ	
SOCIAL		A My Drive		>	
Garth Fort		Shared with	th me	>	
DISCOVER		Ļ	Cocuments Engineering Team's Dropbox		+ 🖒
Q Search	SOCIAL		Sheet Pile Cell Construction - 8-18-15.pdf File Size: 63.7 KB		Jan 18, 2016 >
	DISCOVER	rth Fort	Site Dewatering 8-21-15.pdf File Size: 63.4 KB		Jan 18, 2016 >
		arch	Suspended Scaffold 8-17-15.pdf File Size: 62.3 KB		Jan 18, 2016 >
	🕇 Fav	vorites	HR Datacat vlev		Jan 18, 2016
무 <b>&lt;</b> SHARED		SHARED	Marketing Share	+ C	· · ·
SOCIAL		P Business File Size: 1	Intelligence.pptx 1 MB	Jan 12, 2016 >	
Garth For	t	File Size: 4	al Overview Android.pdf 58.7 KB	Aug 19, 2015 >	
DISCOVER Q Search		Р	Cocuments Report Plus's Box		+ C
Favorites SOCIAL			Dashboards		>
Garth Fort DISCOVER Q Search ★ Favorites			Company 360.xlsx	>	
			Education.xlsx		>
		vorites	Life expectancy males.xlsx		

Once you enter the My Drive and Starred folders, you will be able to see the same actions as in Network Drives and Dropbox. The Shared with me section will only allow you to refresh.

#### **Add Button**

By tapping the "+" icon, you will be able to:

- **Create a Document** using Local Files and your Photo Albums. You can also take photos/videos, record audios and paste any files.
- Add Folders to organize your files.

#### **Refresh Button**

By tapping the *Refresh* button, you can retrieve any structural changes.



#### **OneDrive for Business**

	<del>Т</del>	Contemporation Contemporatio Contemporation Contemporation Contemporation Cont	OneDrive for Business		+	C	B	Edit
SOCIAL			Q Search Name, Title	)				
Garth Fort		Community Service 2 items	e					>
DISCOVER		Shared with Everyc	one					>
Q Search		4 items						
★ Favorites		Ad Goals for QT Se	eries		Garth	Fort   J	an 11,	2013
CONTENT		Contoso Marketing	9 Principles		Garth	Fort   J	an 11,	2013
Sites								
Documents		FY13_Product_Stra	ategy		Garti	h Fort	Jan 7,	2013

#### Add Button

By tapping the "+" icon, you will be able to:

- **Create a Document** using Local Files and your Photo Albums. You can also take photos/videos, record audios and paste any files.
- Add Folders to organize your files.
- Add a ReportPlus Dashboard.

#### **Refresh Button**

By tapping the *Refresh* button, you can retrieve any structural changes.

#### **Settings Button**

The Settings menu will allow you to control how SharePoint Lists are displayed by configuring the following settings:

- **Views**. Tap *Views* to access SharePlus List Visualizations and SharePoint list views. Scroll up and down to navigate through all available settings.
- Ad-hoc Sorting & Grouping. You can specify group criteria by dragging List columns to the Group By section or sort criteria by dragging columns to the Sort By section.
- View in Web. View your documents using the SkyDrive Pro cloud.

#### **Edit Button**

By tapping *Edit*, you will be able to preview any files.

#### **Quick Access**

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

#### **Offline Access**

Files in the OneDrive for Business personal cloud storage can be synchronized for offline use. For more information on the offline functionality, review the <u>SharePlus Offline</u> section.



# 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.

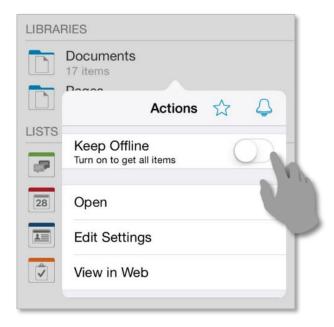
Choose between two different sync modes: Per Item and View Based.

#### 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.

LIBRA	RIES	Cancel	Documents		Done		
	Documents 17 items	SYNCHRONIZAT	TION			oduct Issues	
	Actions 🟠 📮	Offline Suppo	ort		SYNC MOD	E	
LISTS	Keep Offline	Sync Mode		Vie:	Per Item		
<b>P</b>	Turn on to get all items	Sync List Vie	W		View Bas	ed 🗸	
28	Open	Only Wifi					
_		Download Do	ocuments				
	Edit Settings	Max Document Size (Mb)			15		
Î	View in Web	OTHERS				Announcements	
		Query Page S	Size (rows)		150	Announcements	
			Erase Downloaded Content Refresh Cache				
			Reset All				
				_			

#### **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.

CONT	ENT	Synchronizing.	s	top
	Sites	In Progress		
-	Documents	Safety Manuals Construction	$\bigcirc$	>
	News	Workflow Tasks	$\bigcirc$	>
	News	Site Assets Construction	С	>
		Recent Activity		
		Reports Construction	Today 10:01 AM	>
đ	Online	Manuals & Procedures	Today 10:01 AM	>
₹2	Synchronizing	Equipment Construction	Today 10:01 AM	>
Ø	Settings	Documents	Today 10:01 AM	>
?	Help Center	lueprints	Today 10:01 AM	>

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.

LIBRARIES						
Ð	Documents Synchronizing					
	Actions 🟠 🗘					
LISTS	Keep Offline					
28	Open					
	Edit Settings					
	Sync Now					
	View in Web					



#### Synchronization status icons

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



Documents

Synchronizing... (18 pending)

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



#### Documents

19 items

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.

LIBRA	LIBRARIES						
	Asset Picture Library 208 items						
	Key Account Folders Synchronizing (6 pending)						
	Expense Reports 5 items						
	Financial and Legal Documents 32 items						



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.

			lter	m with Pendir
Back	2012 Pricing Guidelines	12	dates.	
Open 2012 Pric	ing Guidelines			
	N Favorite	4 Alert Me		W
Version	4.0		>	
PROPERTIES				i can access t
Name	2012 Pricing Guidelines.docx			ginal item thr s button.
Title	2012 Pricing Guidelines			button.
Rating (0-5)	4.50		١	/iew Origir
Document Stage	e Draft			
	i, 7:17 PM by Sara Davis 3, 7:17 PM by Sara Davis			
View Original				
view Original				



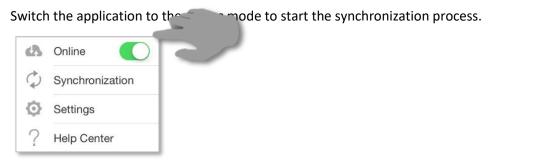
You can access the original item through this button.



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

Sales and Marketing 1 update	Documents All Documents ✓	+ 🖒 🔑 Edit
	Q Search Name, Title	
2012 Pricing Guidelin		Sara Davis   Jan 4, 2013 >
Bug List v 0.2		Pavel Bansky   Jan 4, 2013
Customer Specifications v	0.2	Zrinka Makovac   Jan 4, 2013 >
Back	Pending Updates	
ENDING UPDATES		
W 2012 Pricing Guideline Date: Today, 10: Status: Pending		Sh
	View Item	
	Edit Item	
	Discard Update	

## **Going Online and Synchronizing**





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.

DISCO	OVER	International Sales			Marketing Blog
Q	Search	Marketing Campaig	ns		Marketing Documents
*	Favorites	Aarketing Topics			New Products
CONT	TENT	Synchronizing	Stop		Pipeline Management
	Sites	In Progress			
	Documents	Safety Manuals Construction	$\bigcirc$ >		Project Phoenix
	News	Workflow Tasks	$\bigcirc$ >		
	News	Site Assets Construction	$\bigcirc$ >		Images
		Recent Activity			no items
		Reports Construction	Today 10:01 AM		Pages 1 item
ch	Online	Manuals & Procedures	Today 10:01 AM		Site Assets no items
(٢)	Synchronizing		Today 10:01 AM		
Ø	Settings	Construction	Today 10:01 AM		Contacts no items
?	Help Center	Blueprints Construction	Today 10:01 AM	I Content Favo	vitan wanning Gateriolal Vites

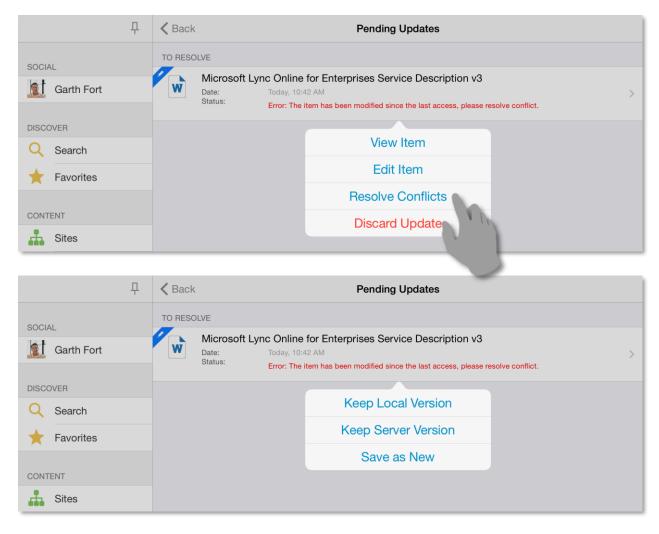
Changes made offline are synchronized back to the server and all sync status icons turn green. Items with conflicts that need to be resolved will be displayed as Pending Updates for the list.

<b>&lt;</b> Ba	ck Engineering All Documents V
	Q Search Name, Title
w	2012 Pricing Guidelines v 0.4
	Bug List v 0.2
	Customer Specifications v 0.2



#### **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.





 $\overline{\mathbf{A}}$ 

# **ReportPlus Integration**

Use data visualization to communicate insight by creating dashboards that consume SharePoint data. SharePlus integrates the <u>ReportPlus</u> 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.



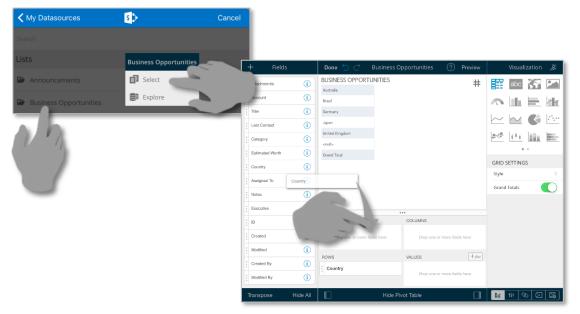
Working with SharePlus Enterprise you are not limited to SharePoint content only; you can connect to more than 20 different enterprise data sources, including Analysis Services, SQL databases, Dropbox, Google Drive, and more. For further details, refer to <u>ReportPlus Enterprise Features</u> in SharePlus Enterprise.



### **Working with Pivot Tables**

You can 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.

-	+ Fields		Done 🕤 $ ightarrow$	?	Preview		Visuali	zation	200		
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:	Category	(i)	Brazil Germany	20000.00	150000.00		2	0	$[\pm\pm\pm]$		
:	Estimated Worth	í	Japan		15000.00	900000			•	•	
:	Assigned To	i	United Kingdom	150000.00		180000	0.00 33		SETTING	S	
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:	Notes	(i)	Grand Total	170000.00	5400000.00	1273200	ALIGNMEN	r			
:	Executive	i		•••			Text			E E	=
*	ID	i	SHOW FILTERS FOR		COLUMNS		Date				
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+ Fields		Done 🕤 $ ightarrow$	Business Op	portunities	? Pre	eview		Visual	ization	1	
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Notes	(i)										
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Created	i	Assigned To		Category							
. Modified	i										1
Created By	i	ROWS		VALUES Estimated W	orth	+ f(x)					
Modified By	í			Sum							
Transpose	Hide All		Hide Pivo	ot Table			0.0	t <del>11</del> 9	\$ <del>5</del>	₩.	



# 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 3<sup>rd</sup> party VPN client applications. For details about setting up a VPN on your device refer to: <u>iOS: Setting up VPN</u>. 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)

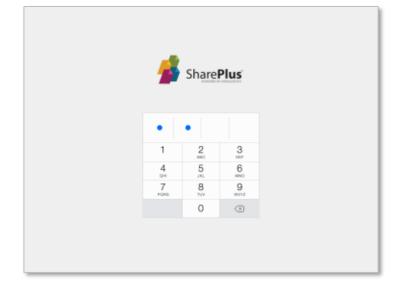
Secure Sockets Layer (SSL) is a cryptographic protocol used to facilitate secure communication over the Internet. To access a site using Secure Sockets, just use an "HTTPS" URL when configuring your site.



### 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 <u>Advanced Security</u> in Advanced Enterprise Features.



#### **Touch ID**

When configuring the Passcode Lock in SharePlus Enterprise, you can also enable the native iOS Touch ID as an additional security layer. You will need to <u>set up Touch ID on your device</u> first, where you can enroll up to five fingerprints.

Settings	Done	
Passcode Lock		
Change Passcode	>	
Idle Time	15 min >	-
Enable Touch ID	$\bigcirc$	
DISABLE AUTO-LOCK		Touch ID for "SharePlus" Please authenticate to unlock
During Preview	$\bigcirc$	
During Sync	$\bigcirc$	Cancel
Device Must Be Plugged In		
Remove Local Files After Upload	$\bigcirc$	
Preview Document On Tap		

Once Touch ID has been set up, you will see the following message upon opening SharePlus. You can still use the Passcode you had set up in SharePlus by canceling and entering the code.



# Chapter 4 Configuration



# **Application Settings**

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

무		Sit	es	+ 🖒 Edit
SOCIAL	Cancel	Settings	Save	
Garth Fort				SP Demo
	Passcode Lock			BI Center
DISCOVER				
Q Search	DISABLE AUTO-LOCK			
Tavorites	During Preview		0	Madatian Descente
CONTENT	During Sync		0	
Sites	Device Must Be P	lugged In		Sales and Marketing
-			<b></b>	Industry Trends
Documents	Remove Local File	es After Upload		
news	Preview Documen	t On Tap		
				Document Center
	Accounts		>	
🚯 Online	Advanced Setting	s	>	Marketing Campaigns
() Synchronization				New Products
	er	SharePli	us v.4.2.11 (4.2.11) >	Search
O Settings				
? Help Center		Sites Favo	() Intes Membership	



#### 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.

Cancel	Settings	5	Save
Passcode Lock		C	$\sum$
DISABLE AUTO-LOCK			
During Preview		C	$\mathbb{D}$
During Sync		C	$\mathbb{D}$
Device Must Be Plugged In			$\bigcirc$
Remove Local Files After Upl	oad	C	$\mathbb{D}$
Preview Document On Tap			$\bigcirc$
Accounts	-		>
Advanced Settings		$\sim$	>
Help Center	Share	Plus v 4.2.11 (4.2.1	1) >

Cancel	Advanced Settings	Done
CONNECTION		
Timeout (sec)		240
User-Agent		Default
Network Stack		Legacy >
Upload Method		WebDAV >
SSL Level		Negotiated >
SYNCHRONIZATION		
Idle Time (sec)		60
OTHERS		
Log Recorder		
Enable this setting to save recorded files to the suppo	your activity within the app. You ca rt team.	an later send the

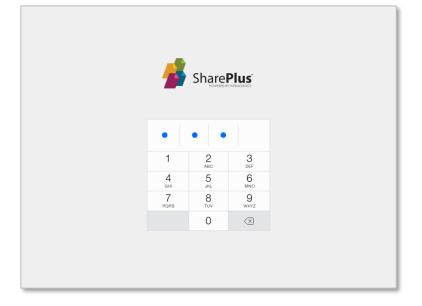


The two following settings specify general behavior of the application:

- **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.

		Settings		Save
Passcode Loc	k			
DISABLE AUTC	I	Passcode Loci	k Cancel	
During Prev	En	iter a passco	de	$\bigcirc$
During Sync	•	•		$\bigcirc$
Device Mus	-	-		
Remove Loc		0	0	
Preview Doc	1	2 <sup>ABC</sup>	3 DEF	
Pieview Doc	<b>4</b> <sub>GHI</sub>	5 JKL	6 MNO	
Accounts	7 PORS	8 TUV	9 <sub>wxyz</sub>	>
Advanced S		0	$\langle \times \rangle$	>
Help Center			SharePlus v 4.2	

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.



#### Touch ID

The native iOS Touch ID feature is also available in SharePlus as an additional security layer. When the option is enabled, SharePlus will ask you to re-enter the Passcode you set up first to confirm:

		Settings		Done
Passcode Loc	k			
Change Pas		Passcode Loci	c Cancel	>
Idle Time	Ent		odo	15 min >
Enable Touc	Ente	er your passo	oue	
DISABLE AUTC				
During Prev				$\bigcirc$
During Sync	1	2 <sup>ABC</sup>	3 Def	$\bigcirc$
Device Mus	4 GHI	5 JKL	6 <sup>MNO</sup>	
	7	8	9	
Remove Loc	PQRS	O TUV	9 wxyz	$\bigcirc$
Preview Doc		0	$\langle \times \rangle$	

As with the Passcode Lock, Touch ID is automatically activated when SharePlus goes to background, after a configurable amount of idle time, or whenever the application is opened.

#### **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 can 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.

	Д			Sites		+ 💍 Edit
SOCIAL		Settings	Help Center			
121	Garth Fort				*	SP Demo
1019/05-200029 <sup>4</sup>		CHOOSE TOPIC				BI Center
DISCOVE	ER	What's new in Share	ePlus v 4.2.11		>	
Qs	Search	Offline How To			>	
🔺 F	avorites	Offline Editing			>	_
					*	Marketing Documents
CONTEN		FAQ			> 👪	Sales and Marketing
	Sites	Feedback & Suppor	t		> 👪	Industry Trends
	Documents					
N N	lews					
					**	Document Center
						Marketing Campaigns
C C	Dnline					New Products
🗘 s	Synchronization					Search
Ø s	Settings	-				
? н	lelp Center		Sites			

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:

- <u>Enterprise Mobility</u> 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.
- <u>Videos</u> 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.

iPad 🔶	12				Log Rec	order			1	99%	1		
	<b>₽</b>	<b>&lt;</b> D	ocur	nents		Local Files	i	+	G	Edit			
SOCI	AL					Q Search							
	Garth Fort	w	Fre	quently Asked Questic	ns.doc	x		Feb 18	, 2016,	3:59 PM 22.7 KB			
DISCO	OVER	x	His	iPad 🗢 💥			Recording Logs						/ 99% 💼
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*	Favorites	W	Ins	SOCIAL	Ŵ	Frequently Asked	୍ୟ ହ Questions.docx	earcn			Feb 18	, 2016	5, 3:59 PM 22.7 KB
CONT	TENT			DISCOVER	x	Historical Cost Da	ta.xlsx				Feb 17,	2016,	11:33 AM
÷.	Sites		-	Q Search									17.5 KB
	Documents			+ Favorites	W	Installation of XT10	003.docx				Feb 18	, 2016	, 3:58 PM 22.7 KB
ħ	News												
~~	Log Recorder Tap to start recording			Documents			r		_			-	
		1	1	h News				g Rec					
				Recording Tap to stop recording	1		Do you wan stop the log recordi		on o	r conti			
							Continue			Sen	d		

#### **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.

ſ	Cancel	Cor	ntact Us	Send	
S				_	
l		Send Feedback	Get Support		ıds
		s option to get support. E you back!	nter your e-mail in order to be a	able to	og ocuments
l	john@co	ontoso.com			
l	Select a	category		>	ts
ł					nagement
	How ca	n we help you?			inix
L	Attachme	nts	2016_02_22_12_31	_26.zip >	
	6 items	asiona	All Content Favorite	o items Aarketing C	alendar



# 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.

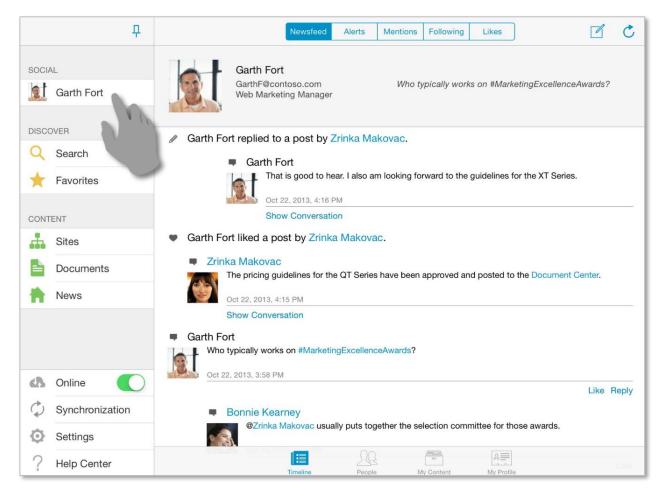
SharePlus Enterprise features are described in the following sections:

- The Social Module
- The Search Module
- SharePlus Mobile Workspaces
- <u>ReportPlus Enterprise Features</u>
- <u>Customizing the SharePlus Interface</u>
- <u>Nintex Integration</u>
- Advanced Enterprise Features



# 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 <u>SharePoint 2013 social features</u>.



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**

Timeline	

My Content এ≣

My Profile

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.

People

Likes - The Likes tab includes all the posts you have "liked". •

Newsfe	Alerts Mentions Following Likes	
Garth Fort GarthF@contoso.cor Web Marketing Mana	ger Garth Fort	C
<ul> <li>Garth Fort liked a post by Zi</li> <li>Zrinka Makovac</li> <li>The pricing guidelines for</li> </ul>	inka Web Marketing Manager	
Oct 22, 2013, 4:15 PM Show Conversation	2012 Pricing has changed Modified on by Today, 14:35 Garth Fort.	
<ul> <li>Garth Fort liked a post by Sa</li> <li>Sara Davis</li> <li>@Garth Fort</li> <li>@Garth Fort</li> </ul>	Today, 14:35	
<ul> <li>Jan 4, 2013, Show Conv</li> <li>Garth Fort liked a post by 3</li> <li>Zrinka Makovac</li> <li>The pricing guidelines</li> </ul>	Garth Fort GarthF@contoso.com Web Marketing Manager Who typically works on #MarketingExcellenceAwards?	
Jan 4, 2013, 5:27 AM Show Conversation	<ul> <li>Mentioned by Sara Davis.</li> <li>Sara Davis</li> <li>@Garth Fort, they should be up in a few days.</li> </ul>	
Robin Counts	Oct 22, 2013, 4:17 PM     Show Conversation      Mentioned by Bonnie Kearney.	
	Bonnie Kearney     Hey, @Garth Fort. It is in a legal review now.     Oct 22, 2013, 3:40 PM     Show Conversation	
	@ Mentioned by Molly Dempsey.	

Timeline availability...

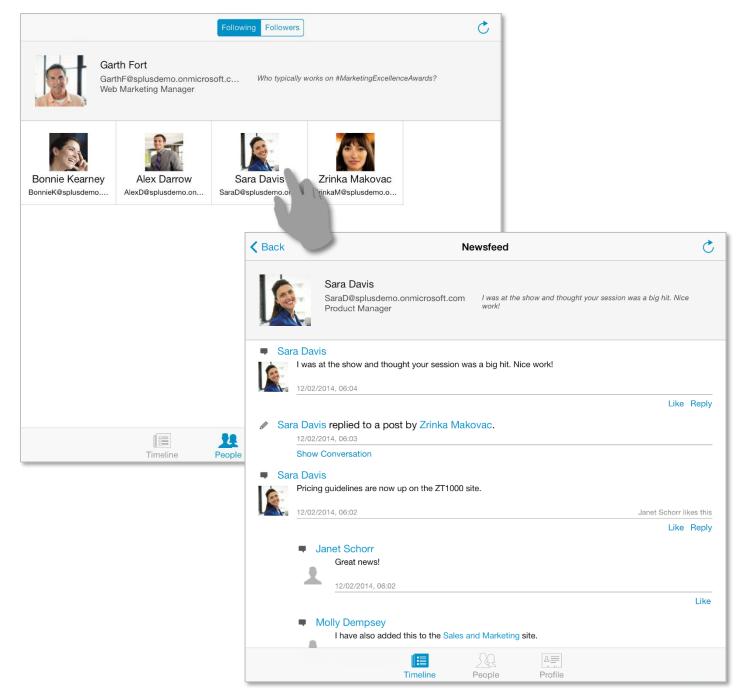
Timeline sections require SharePoint 2013 to be displayed in SharePlus. Alerts is the only exception and is always available in the Timeline.





	11		2
Timeline	People	My Content	My Profile

The *People* tab displays the list of people that you are following and the ones following you. In this section you can 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.

		Garth Fort	Ċ 🖞
	Garth Fort GarthF@splusdemo.onmicrosc Web Marketing Manager	ft.c Who typically works on #MarketingExcellenceAwards?	
	Work phone: +1 918 555 0101		>
	Department: Sales & Marketing		
	Job Title: Web Marketing Mar	nager	
	Work email: GarthF@splusdemc	.onmicrosoft.com	>
	Office: 20/1101		
My Content	💍 Edit	iting Portal, Web Marketing Plan 2012, Metrics f	for Web >
Q Search		Development, Verbal and Written Communicatio	on, Creati>
Garth Fort		do	
	works on #MarketingExcellenceAwards?		
		Classic Movies, Auto Racing, Antique Books	
SUBSITES		ativesForTheWeb, #MarketingCommunications,	#Northwi>
Blog LIBRARIES		People My Content My Profile	
	rm Templates		
Style Library no items	Items		
LISTS			
	<b>cial</b> items		
Timeline People My Content	A Profile		



# 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.

	무		Q SharePoint			$\otimes$	Search
		Contoso				Filters	ply
SOCIA	Garth Fort	This report s	Electronics Prospectus 2012 summarizes the 2010 marketing camp used a SharePoint Online solution to	paign results for Contos	Portals		Pe
DISCO	WER	This report s	Electronics 2012 marketing summarizes the 2011 marketing camp used a SharePoint Online solution to	aign results for Contos	Scope Result Type		All All Results
Q ★	Search Favorites	document a	nal Marketing Strategies the same time when it's posted to SI ect's SharePoint image library if you		Modified Date		Any Date >
				View all results	Author		Any Author
CONT	ENT	SP Demo					
	Sites Documents	SharePoint	4 - All Documents Demo After their properties are fille y or folder according to rules created				
ħ	Construction	SharePoint	<ol> <li>All Documents</li> <li>Demo After their properties are fille y or folder according to rules created</li> </ol>			tically move	d to the >
		SharePoint	3 - All Documents Demo After their properties are fill y or folder according to rules created			tically move	d to the
a	Online			View all results			
¢,	Synchronization	Share/Dev					
ø	Settings	The followin	nt 2013 Services Specificati g are the specification of calls and re- u have to provide the X-RequestDiges	sponse available in Share			
?	Help Center	SharePoi Site Actions	nt Protocols - All Documen	People	I Like II Taos & J	Notes Our	ility >

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.

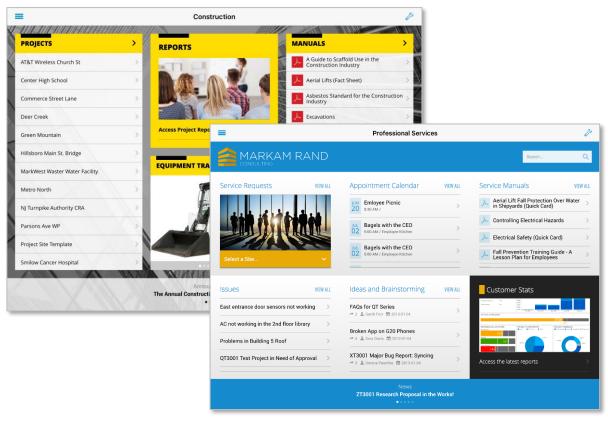
	Sales		© 7 se	earch
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P ZT1000 Sales The right connect few key points	ion inspires brand loya	Ity It's time to break new	Garth Fort;Robin Counts   Oct 14, 2 ground Chloe - can you add in a slide or two with	
		AN EVER Toby Nixon	Garth Fort;Sara Davis   Oct 14, 2	
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	Login			
🖙 Loading	Password			
Share/Dev				
	e is a Sales Process M	Continue Manual? Have you read	Feb 19, 2 he Sales Process Manual? How much did you	



# SharePlus Mobile Workspaces

By using web technologies like HTML, CSS and JavaScript, SharePlus can display rich mobile workspaces 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 Mobile Workspace**

Building a HTML mobile workspaces 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 page 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 mobile workspaces.

Working with the API allows you to create custom-tailored mobile workspaces with full control over layout and 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. Your mobile workspaces can access SharePoint data even while the app is not connected to the server.



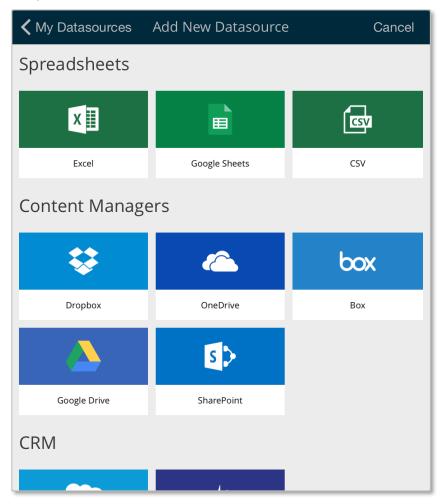
# ReportPlus Enterprise Features

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.

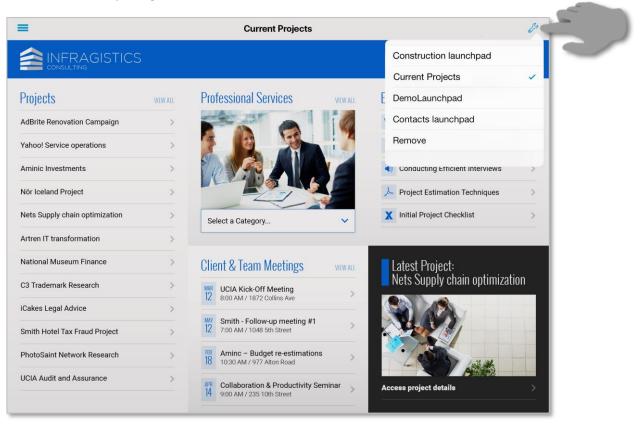




# **Customizing the SharePlus Interface**

When accessing a Site or the Application Home within SharePlus, the User Interface can be customized with different types of content. You can configure the app to display SharePlus Mobile Workspaces, ReportPlus dashboards, and PDF files.

In addition, you can have more than one content assigned, in those cases you can 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 can 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).

Test Site	Actions $\dot{\Box}$	+ ¢	C Edit
test folder 2 items	Keep Offline		>
02-04-2015	Open In	Test Admin 1	Cancel Add as Home Done
Contacts launchpad	Add as Home Check Out	Test Admin 1	HOME TITLE Sales-Executive-Launchpad
Contacts.web	Delete	Test Admin 1	TARGET
			Application 🗸
			This Site Test Site

SharePlus User Interface Advanced Configuration...

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



# Nintex Integration

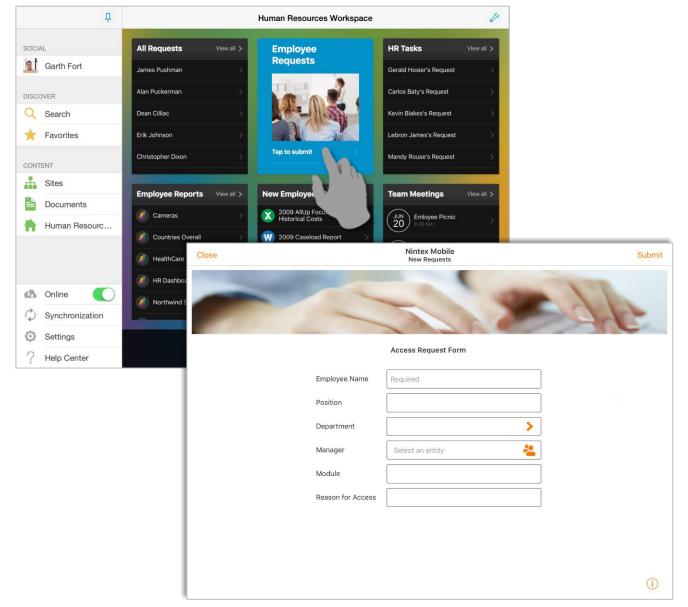
SharePlus integrates with Nintex in two different ways:

- Through the Nintex widget included in SharePlus Mobile Workspaces, which can interact with the Nintex Mobile application.
- With Nintex forms and tasks embedded inside SharePlus.

### Working with Mobile Workspaces and Nintex Mobile

The Nintex Mobile application is designed for mobile devices and can be used to visualize and save forms, respond to tasks, saving the information to the server.

With SharePlus' MobileWorkspace Generator you can get your own custom mobile workspace that includes a Nintex-specific widget. This widget allows you to communicate with the Nintex Mobile app and work even while offline.





### Working with Forms and Tasks embedded in SharePlus

With SharePlus' support for Nintex On-Premises and Nintex for Office365, you can view and complete your forms within SharePlus, saving your information to a new item in SharePoint.

If there are any workflows associated with your SharePoint lists, you will also be able to handle them within the application.

<del></del> Р	Cancel	New Item	Save		
SOCIAL	(6) repairsquad	Telephone: (5	Repair Squad gton Street. East Rutherford, NJ. 07073 5) 922-731 or Pax: (555) 708-9886 all: Infr@repairsquad.com		
DISCOVER Search Favorites	Repair Order #	Employee Name Date			
CONTENT	Client Name		Cancel	New Item	Save
Documents	Time Slot	SOCIAL	333 × 66 ×	ernState UNIVERSITY dies Admission Form	
		Q     Search       ★     Favorites	Please fill in the following form to		
		CONTENT Sites Documents News	Contact Phone Please select the career you are Career Accounting Time Range (11:00-16:00	) interested in, and let us know what your availability is.	

SharePlus supports both Nintex Forms and Workflows for Office365 and Nintex for SharePoint (On-Premise). For more information on the integration, refer to the IT Administrator Guide.

#### **Working with Forms**

If you have any forms integrated into a SharePoint list, you will be able to use SharePlus to view, enter information and save it to your SharePoint site. There is no need for any configuration on SharePlus' side; simply navigate to your list, tap "+" and create a new item.

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222141		Q Search Title	Item	
SOCIAL Garth Fort	Bula Suman Attachments: Contact Phone: 8	Career: 308-708-6545 Time Ra	Accounting nge: 11:00-16:00	>
DISCOVER	Margaret Krie Attachments: Contact Phone: 8	Career:	International Business nge: 11:00-16:00	>
<ul> <li>Search</li> <li>Favorites</li> </ul>	Attachments: Contact Phone: 8	Career:	Corporate Communications nge: 11:00-16:00	>
CONTENT				
Sites				

For example, if your Nintex form had a dropdown menu, you will see it in the native SharePlus visualization when you select an option:



	Ļ	Cancel		Save
			Literary Translation	
SOCIAL		Este Ea	Notary Public	
Garth	Fort	43.3 × 82.62	Public Opinions	
DISCOVER		Undergraduate	Public Translation	
Q Search	h	Please fill in the following	Systems Engineering	<ul> <li>Image: A set of the set of the</li></ul>
🔶 Favori	ites	Complete Name Harvey C	Teaching	
CONTENT		Contact Phone 555-818-	Technical-Scientific Translation	
A Sites		Please select the career y	Telematics Engineering	availability is.
		Career	Engineering	
Docur	ments	Time Range	5:00	
h News				

### Working with Workflows

In addition to forms, SharePlus also supports workflows. If your workflow has a task associated to it, SharePlus will display the task completion options natively.

	무	Cancel	Gerald Hosier's Request	Complete Save as Draft Save
SOCIA				Approved
	Garth Fort		sier's Request st has been submitted. Please approve or deny	Rejected
DISCO	OVER	ATTACHMENTS		
Q	Search	🔒 Add		
*	Favorites	PROPERTIES		
CONT	ENT	Task Name*	Gerald Hosier's Request	
	Sites	Start Date	Start Date	
	Documents	Due Date	Due Date	
	News	Assigned To	Test Administrator	
		% Complete	0.00%	
đ	Online	Description	A new request has been submitted. Please ap	oprove or deny

There are differences in how workflows are displayed in Nintex Office365 and Nintex On-Premises within SharePlus. For more detailed information, refer to the IT Administration Guide.



# **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: <u>http://www.apple.com/ipad/business/it/management.html</u>

SharePlus integrates with many 3<sup>rd</sup> party MDM solutions available in the market, including <u>MobileIron</u>, <u>Citrix</u>, and <u>Bitzer Mobile</u>. 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
- <u>SharePlus for Citrix</u>

## **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 these 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, AirWatch, and Bitzer Mobile.



# **Application Customization**

SharePlus User Experience can be customized in several ways:

- Through application rebranding.
- Integrating SharePlus Mobile Workspaces (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.

#### **SharePlus SDK**

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



# Appendices

Appendix 1: SharePlus Offline Notes Appendix 2: Document Changelog



# Appendix 1: 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.



# Appendix 2: Document Changelog

Version	Chapter	Section	Description
3.4	The SharePlus App	Documents Module	Added OneDrive for Business offline support.
	Security	SharePlus Security	Added information about Touch ID.
	Configuration	Application Settings	
3.3.1	The SharePlus App	Content Sources	Added documentation on Box content provide
		ReportPlus Integration	Modified screenshots to reflect the new
	SharePlus Enterprise	ReportPlus Enterprise Features	ReportPlus interface.
3.3	SharePlus Enterprise	Nintex Integration	Added the Nintex Integration section.
3.2	-	-	The term "Launchpad" is outdated, now we use "SharePlus Mobile Workspace".
3.1	All chapters	All sections	Updated all screenshots to reflect new icons.
3.0	The SharePlus App	Content Sources	Added the Content Sources section.
2.2	The SharePlus App	Catting the task	
		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.

