



Upgrading the Mobile Client

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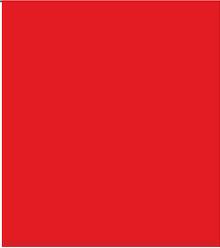
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Introduction



The Mobile Client provides secure, reliable mobile access to your Client Relationship Management information when using mobile devices with internet browsers that support HTML5 and CSS3.

This document provides instructions for upgrading an existing installation of the Mobile Client.

- Use this document if you have an earlier version of the Mobile Client installed.
- If your installation has not previously included the the Mobile Client see the document called *Installing the Mobile Client.pdf*.

What's New in this Release



Saleslogix is now Infor CRM. Look for the new branding in future releases of Saleslogix.

All references to the CRM Core product, CRM Clients, Web Client, LAN Client, Administrator, and database refer to Saleslogix versions between 8.0 and 8.1 update 03 unless otherwise specified.

This release contains the following enhancements:

- Visual enhancements: New styling and color scheme reflect Infor's branding.
- Group list enhancements:
 - New layout configuration
 - Users can choose the number of fields visible from the group list view.
 - Columns in the group list view enable large cards and large groups to be easier to read.
 - New text label colors improve discoverability of the information that matters to you.
 - Improved Group List User Interface: The Lookup feature is now located in the header bar.
 - New "relative" date format in the fields enables the date to display as "today" or "in two weeks" instead of in the standard mm/dd/yyyy date format.
 - Currency format setting in the LAN/Web Client now enables displaying currency values in green.
- Detail view enhancements:
 - Coloration makes the Detail view Quick Actions easy to discover and read.
 - Flattened Detail tab reduces the number of visible fields. The non-essential detailed information has moved to the "More Details" tab and is collapsed by default.
 - Re-introduced the popular Collapsible tabs feature.
 - The Related Items user interface now contains "count" icons.

Prerequisites

Before installing this Mobile Client upgrade, you must:

- Ensure you meet the system requirements. See the *Compatibility Guide* for the hardware and software required.
- Ensure the version of Saleslogix installed is 8.0 or 8.1 and that it has a functioning Web environment. (This is required even if your Saleslogix implementation is Windows Client only.) See the *Saleslogix Implementation Guide* for information on setting up a functioning Web environment.
- Ensure the version of the Mobile Client already installed is 11R1, 1.1, or later.
 - In 11R1, 1.1, and later, users access the Mobile Client from a browser not from an application installed on the device.
- Understand the requirements for upgrading customizations.
- Understand the Mobile Client upgrade process. Read this document and develop a plan before proceeding. Understanding the content of the release and planning your installation are key to success.

What You Need to Know

This document assumes you:

- Have a working knowledge of Microsoft Windows operating systems.
- Understand the client/server computing environment, especially networking strategies for network and remote users.
- Have a strong working knowledge of IIS, Web deployments, and Mobile technology.

Additional Resources

Additional resources and documentation are available on the Customer and Partner portal web sites and Help is available in each application.

Other documents that you might find helpful include:

- The *Compatibility Guide*: outlines the hardware and software currently recommended for each version of the core product and clients.
- *Installing the Mobile Client* - This guide walks through the steps necessary to install and configure the Mobile Client Portal. This document is included in the `Mobile_v3_2_1_for_8_0_and_8_1.zip` file along with the product.
- The *Application Architect* Online Help: contains information about building and deploying portals.
- The `developer.saleslogix.com/argos` web site contains information about customizing the Mobile Client.
- The `argos_sample.zip`. Use this file as an example of how to create, save, and apply customizations using recommended practices. This file is available from <https://github.com/Saleslogix/argos-sdk/wiki/Upgrading-1.x-to-2.0>.

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at www.infor.com/inforxtreme.

If we update this document after the product release, we will post the new version on this website. We recommend that you check this website periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

This chapter describes the process for upgrading your Mobile Client installation.

The order for the process is:

1. Save any mobile customizations
2. Install the Mobile Client bundle
3. Deploy the updated the Mobile Client portal
4. If necessary, convert and then re-apply customizations
5. Define the default document
6. Clear the browser cache on user mobile devices

Preparing to Upgrade the Mobile Platform

Before beginning the upgrade, ensure you meet the system requirements as these may have changed. Refer to the Compatibility Guide available at the customer and partner portal sites.

Saving Mobile Customizations



- Before upgrading the existing Mobile portal, you must save any changes you have made directly in the portal SupportFiles, either to a bundle or onto your local file system. This includes changes to out-of-the-box views or classes, any views or JavaScript files you have added, and any changes to configuration or content.
 - Failure to save these changes will cause them to be lost. After this version of the bundle is applied, you can manually re-apply your customizations.
- We strongly recommend that you make all of your mobile customizations in a customization module, outside of the core product. This will control upgrading costs by limiting the amount of manual merge work necessary in future upgrades.

Installing the Mobile Bundle

Install Mobile on the same server as the SData portal. This is typically the location where the Application Architect is installed. Install the bundle using the Application Architect. Mobile adds a “SlxMobile” portal to the Application Architect Project Explorer under the Portal Manager.

Before beginning this section...

Understand the prerequisites described in [See "Prerequisites" on page 2.](#)

To install the bundle

1. Copy the **Mobile_v3_2_1_for_8_0_and_8_1.zip** to a local folder and extract the zip.
Ensure you have Write permissions to the folder where you are saving the zip file. You can check permissions on the Security tab on the folder properties. Ensure the folder path is as short as possible, as there is a 57 character limit.
2. Open the **Application Architect**.
3. In the **Project Explorer**, right-click the project, and then click **Install Bundle**.
4. Browse to the location where you extracted the **Mobile_v3_2_1_for_8_0_and_8_1.zip** and open the **Bundle** folder.
5. Select **Infor Mobile v3.2.1 for 8.0 and 8.1 VFS.zip** and then click **Open**.
6. On the **Select Bundle** screen, click **Next**.
7. On the **Select Items** screen, ensure the **Portals** option is selected.
8. Click **Next**, then click **Finish**.

Localizing Groups

If your environment has been translated into a language other than English, you must now copy the GroupLayout.resx files from the Saleslogix Client portal to the SData Integration Host portal for localized groups.



This step is not required in an English language environment.

To copy

1. Open the **Application Architect**.
2. Open the **Project Explorer** and expand the **VFS** folder.
3. Expand the **Portal Manager, Saleslogix Client, SupportFiles, App_GlobalResources**.
4. Select all the of the **GroupLayout.resx** files.
5. Right click the selected files and then click **Copy To...**
6. In the **Browse For Folder** box, click **Make New Folder**, and give the folder the intuitive name of your choice.
For example, LocalTemp.
7. Select the folder you just created and then click **OK**.
The resx files you copied will appear in the new folder.
8. In the **Portal Manager**, expand **SData Integration Host**.
9. Right-click **SupportFiles**, select **New Folder**, and name the folder **App_GlobalResources**
10. Right click on the **App_GlobalResources** folder and select **Add Existing...**

11. In the **Open** dialog, browse to the folder you created in **step 6 (LocalTemp)**, select each of the GroupLayout resx files, and then click **Add**.
The GroupLayout resx files are added to the new folder.

Deploying the Mobile Portal

You must now deploy the portal added by the bundle and, if your environment includes localization, redeploy the SData portal.

To deploy

1. In the **Application Architect**, open the **Deployment Explorer**.
2. Expand the **Deployments** node.
3. Double-click the **Mobile Portal** deployment.
4. Under **Deployment Targets**, right-click the **SLXMobile Portal**, and then click **Deploy Portal**.
A status box appears indicating status for the deployment.
5. (Localized environments only) Deploy the **SData portal**:
 - a. Expand **Core Portals**, **Deployment Targets**, **IIS**.
 - b. Right-click **SData** and then click **Deploy Portal**.

Your upgrade is now complete. If your installation did not include customizations, proceed to “See ["Defining the Default Document" below](#)”.

Converting and Re-applying Your Customizations

In the Mobile v2.0 release, JavaScript was converted to use the Dojo framework. If you will be merging customizations from versions 11R1, 1.1, or 1.2, you must convert your customizations from the EXT framework to Dojo. For instructions on completing this process, refer to “Upgrading 1.2 to 2.0” at sage.github.com/argos.



This is a breaking change. If you attempt to re-apply your customizations without converting them to use the Dojo framework, they will not function.

This does not apply when upgrading from Mobile versions 2.0 and later, as they already use the Dojo framework.

Defining the Default Document

Default documents can be a directory’s home page or an index page containing a site document directory listing. The default document for the Mobile Client portal landing page is index.html, and should have been added to the documents list on the IIS Web site by the installation. If your URL <https://YourSlxWebServer/SlxMobile> is not defaulting to call the index.aspx, you may want to define it manually.

To define the default document

1. In IIS, expand the **Web Sites** directory, and then expand the Web site where you deployed the Slx Mobile portal.
2. Right-click the **Slx Mobile Portal** virtual directory, and then click **Properties**.
3. Click the **Documents** tab.
4. Ensure the **Enable default content page** check box is selected.
5. Click **Add** to add a new document to the list.

The Add Content Document dialog box appears.

6. In the **Default Content page:** box, type the page name (**Index-nocache.aspx**), and click **OK**.
7. Click **Move Up** to move the document to the top of the list.
8. Click **Apply**, and then click **OK**.
9. Reset IIS.
 - a. Click **Start**, and then click **Run**.
 - b. Type **iisreset**, and then click **OK**.

Clearing the Mobile Device Browser Cache

Before users log into the Mobile Client, instruct them to clear their device's browser cache. For detailed steps, please refer to the browser's help on the device.

Additional Information for Windows Authentication

If your installation includes Windows Authentication, prevent delays in response time by notifying your users that they must use the fully-qualified domain name (FQDN) when they log on. For example: domainname\username.

Alternatively, you can ensure that IIS properties contain the default domain. See the Microsoft documentation for information about setting the default domain name within IIS.

Troubleshooting Localized Group Names

If your environment has been translated into a language other than English, your users may report seeing untranslated group labels.

To enable translated labels to display

1. Ensure that the SData portal has been deployed.
2. Instruct Mobile users to clear the cache on their Mobile devices.
Follow the instructions provided by the device manufacturer.
3. Instruct Mobile users to re-select their groups in Accounts, Contacts, Leads, Opportunities, and Tickets.
 - a. Open **Mobile**.
 - b. Open the **Accounts** list view, tap the right menu and in the **Groups** pane, click **Configure**.
 - c. Clear all selected groups.
 - d. Re-select the desired groups.
 - e. Open the list views for Contacts, Leads, Opportunities, and Tickets, and repeat steps **b** through **d**.