Installing
the Mobile Client

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Publication Information

Release: 3.2.1

Publication date: January 2015

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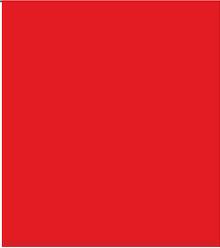
The Mobile Client provides secure, reliable mobile access to your Client Relationship Management information when using mobile devices with internet browsers that support HTML5 and CSS3.

This document provides instructions for installing the Mobile Client in an environment where Saleslogix version 8.0 or 8.1 is already installed.

- Use this document if an earlier version of the Mobile Client is not already installed.

- To upgrade an existing installation of Mobile, see the document called *Upgrading the Mobile Client.pdf*.

Prerequisites

Before installing the Mobile Client, 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.

- Have a Web Server with a valid Secured Sockets Layer (SSL) security certificate installed. This can be the Web Server where you deployed your SLX Client portal.

- Have a successfully-deployed SData portal. This means that the following IIS settings have already been configured to use SData:

    - Enable basic authentication.

    - Disable Windows Integration Authentication.

    If these settings are not in place, see the Application Architect help file topic called "Configuring the SData and Process Host Portal".

    You can confirm that SData is set up correctly by typing the following URL into your browser: http://<servername>/sdata/$system/adapters. Enter the user credentials of the user that SData is configured under (for example, Admin). The adapters page should load and list the available feeds.

    For information about troubleshooting your SData portal deployment, see the Application Architect help topic called "Configuring the SData and Process Host Portals". There is a version of the topic available for Windows 2003 and another for Windows 2008.

- Determine if your installation will include Windows Authentication. If so, and you have not already configured Windows Authentication on the SData portal, follow the steps in the Administrator help topic called "Configuring Windows Authentication for Windows Server". There is a version of the topic available for Windows 2003 and another for Windows 2008.

- Understand the the Mobile Client installation 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.
- 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.

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Installing the Mobile Client

<div style="text-align: right">**1**</div>

This chapter describes the process for installing the Mobile Client.

The order for the process is:

1. Install the Mobile Client bundle
2. Deploy the Mobile Client portal
3. Define the default document
4. Send the Mobile portal URL to your users

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 1.

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 redeploy your 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 **IIS** and select **Add Portal(s)**.

5. Select **SLXMobile**, and then click **OK.**

6. Do not make changes to the Precompile options as they do not apply to this type of portal.

7. Click **Save**.

8. Deploy the Mobile Portal: right-click **Mobile Portal**, and then click **Deploy**.

9. Deploy the **SData portal**:

    a. Expand **Core Portals**, **Deployment Targets**, **IIS**.

    b. Right-click **SData** and then click **Deploy Portal**.

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**.

Sending the Mobile Portal URL to Users

Send the Mobile portal URL to mobile users through email. Your users click the URL or type it into a compatible browser on a desktop computer, mobile device, or tablet computer. Any Core product (Windows or Web Client) user can access CRM information from his or her compatible mobile device by clicking the portal link. No specific user configuration is needed.

For security purposes, make sure you set up SSL encryption on the server and access the client using HTTPS. An example URL is: https://YourSlxWebServer/SlxMobile.

> The browser may ask users if it is OK to store data on their computer for offline use. This is expected, as the mobile application is cached on the computer for improved performance. After the application has been cached, the user can quickly move from screen to screen because only data needs to be transferred over the wire from the SData portal.

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**.