BI Office

Mobile Guide

Version 6.5

1. Overview

This document will highlight the process of turning on the mobile capabilities for BI Office. The first section covers the server-side and administrative steps. The second section covers client access.

2. Administrative Setup

I. Steps

1. In the Administrative console, under "Status" tab the application license must contain
    a. "Mobility" to use the BI Office mobile App.
    b. "Unlocked Mobility" for Mobile Browsers.
2. Under "Settings" tab, mobile - mark the checkbox's for the desired mobile devices needed.
3. In IIS, under site binding, the 'Host name' must contain a name. It cannot contain an IP. The reason is that cookies are used and they need a WEB domain to work.
4. There must be an external DNS entry for the Pyramid website if using outside the internal network.
5. Ports 80 or 443 must be exposed (open) externally when using the Pyramid or application externally.
    a. iOS requires 443 connectivity only.
6. Make sure that you can access the HTML5 site. (Example: **http://{your web URL for pyramid}/html5**) from a computer.
7. Go to **http://{your web URL for pyramid }/admin/ExtServices/PyramidService.svc** and make sure that WSDL scheme is displayed.

3. Mobile Options

II. Supported Platforms

These switches allow admins to control which mobile operating systems will be allowed to operate with their specific BI Office instance. This is useful in case an organization only sanctions certain types of devices.

III. Mobile Device Saving Mode:

"Mobile device saving mode" can be configured as to how mobile/tablet user's login credentials are to be saved:

- **Save User Name and Password:** Saves the user name and password and it does not have to be entered on every login.
- **Save Only User Name:** Saves the user name, and the user will have to enter their password on each login attempt.
- **Don't Save:** Does not save the user's credentials they will have to be entered with each login.

Note: This applies to all BI Office mobile users, this option can't be set for each user individually.

IV. Mobile Device List:

This option lets you manage which devices can or can't login. By default, the switch is disabled, and all devices will work with the system (pending user authentication). To enable the option to manage logins, check "Device Id Check".

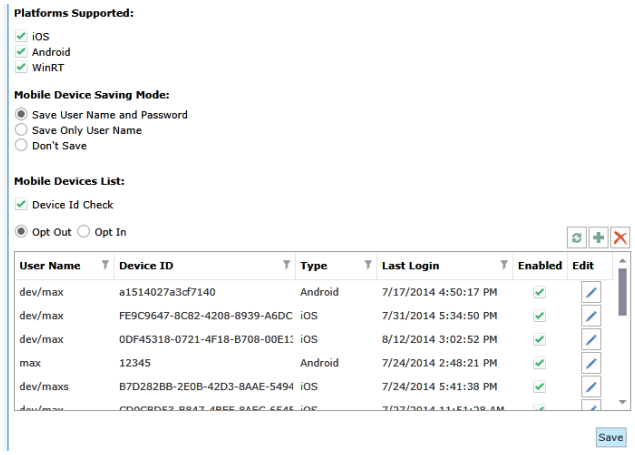
Two Factor Authentication

The device ID check triggers a pre-check of the device itself before the user authenticates with the credentials. This double check process, of both the device and the user's credentials, represents a two-factor authentication model.

Once enabled, two additional settings are provided: "Opt Out" and "Opt In".

Opt Out:

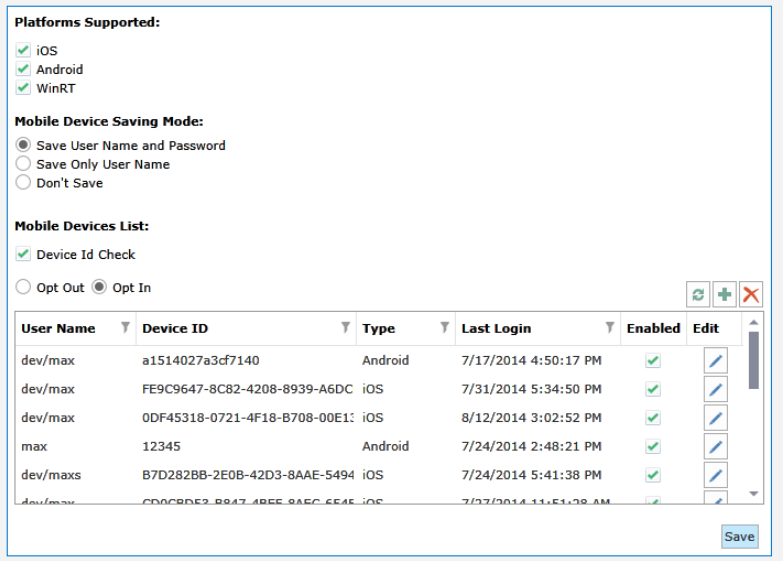
All devices can login by default, and it keeps a log of every login. Admins then have an ability to block specific devices. Blocking a device can be done by unchecking the "Enabled" box next to the user.



Opt in:

All devices are blocked by default, and it keeps a log of every login attempt. Admins then have an ability to enable specific devices.

Allowing a device to log in can be done by checking the “Enabled” box next to the user.



4. Security

When the user clicks the "Login" button in the native app on their mobile, the mobile app will do the following:

- Check if the mobile operating system is supported.
- Check if the device ID is allowed (if the admin, “Device Id check” is enabled).
- Authenticate the user using their credentials.

5. Client Download, Install & Setup

1) Search for the Pyramid application on ITunes or Play Store searching for “BI Office”
2) Download the application and install it.
3) Open the BI Office application and tap on “settings”
4) Enter the active directory username and password, domain name and Pyramid website address
5) After all the user and site information have been entered and verified as correct. Tap on “OK”
6) Tap on the “Login” button to sign into the Pyramid application.
7) The first interface the user see is “Recent Items”
8) To open the menu, tap on the Menu Icon button (three lines)
9) From the menu the user can choose to open different Pyramid folders, sign out and other options.

6. Troubleshooting

If a user cannot login:

1. Try the Pyramid URL in a browser on the device, the user should get a login prompt, if they cannot reach the site, check that the Pyramid site is exposed externally and that there is an internet connection on the device.
2. Check that the correct settings have been set in BI Office application.
   in the application, go to settings and make sure that the Site URL starts with http:// (or https)
3. In the mobile application make sure that the user has filled out the correct username and password, as well as the correct domain.