

SmartSights Mobile App

Overview

XLReporter's web portal can be accessed from the new SmartSights Mobile App on any Android or iOS device. The following describes what needs to be set up on the XLReporter installation to make this happen.

Requirements

In order to access an **XLReporter** site with the SmartSights mobile app, the **XLReporter** site must be:

- Installed as the **Distributed Edition**. This means Windows Internet Information Services (IIS) must be enabled. For more information, see the Web Portal setup documentation.
- Communication to the SmartSights Edge Gateway somewhere on the network
- Be licensed with a subscription license for **Pro** or **Ultimate**.

Please note that each mobile user counts as one user against the client user license count of the system.

Register Mobile Gateway

As part of your XLReporter or SmartBundle purchase, you are provided with an account that allows you to access the SmartSights Cloud Services. Each Gateway account is unique to an XLReporter installation, do not attempt to reuse an existing Gateway account.

Set Password

As part of the account, you are provided with a temporary password. To set your own password, open your web browser and navigate to:

<https://login.microsoftonline.com>

Enter the account information provided to you then enter a new password.

You are also prompted to enter a phone number or email address that will be used for password recovery. Once complete, your password is set for the account.

SmartSights Edge Gateway

Please note that this section only applies to standalone XLReporter users who do not have the SmartSights Edge Gateway installed on their network.

Choose the Edition



Full Product

Local Edition

Distributed Edition

Install SmartSights Edge Gateway for Mobile App

Distributed Client

Windows Client

SmartSights Edge Gateway

For Email Distribution

For Mobile App

The SmartSights Edge Gateway must be installed on a system that is network accessible from where the XLReporter system and must have access to the internet. If the system where XLReporter is installed has direct internet access, the SmartSights Edge Gateway can be installed on the same system. To do so, when installing the **Distributed Edition** of XLReporter, check **Install SmartSights Edge Gateway for Mobile App**.

To install the SmartSights Edge Gateway by itself, start up the XLReporter installation media. If XLReporter is already installed, select the **Modify** option. For **Edition**, under **SmartSights Edge Gateway**, select **For Mobile App**.

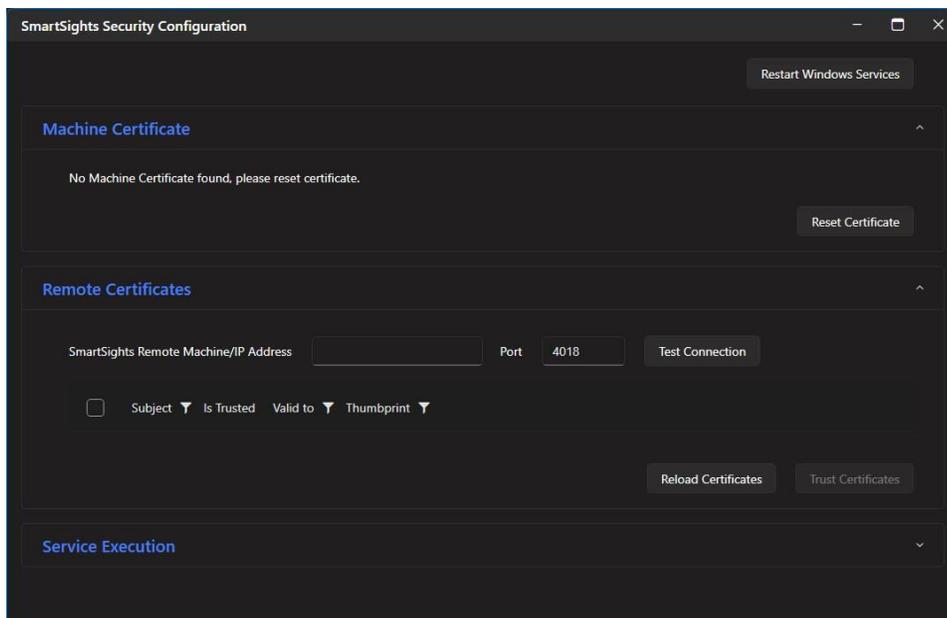
Note, the SmartSights Edge Gateway requires .NET 6.0 to be installed. If not detected, this installation will install it for you but this may require a reboot of the system.

Security Configuration

If the gateway is not installed on the same machine as **XLReporter**, a trust must be established between both machines to make the connection possible. Launch the **SmartSights SCU** on both machines (this can be launched from the gateway installation on finish) and follow the prompts to establish trust.

SmartSights SCU

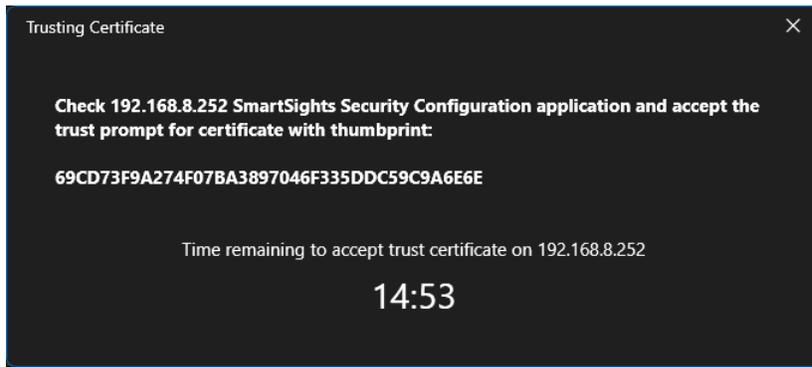
On each machine, open the **SmartSights Security Configuration** from the **SmartSights** group in the Start menu.



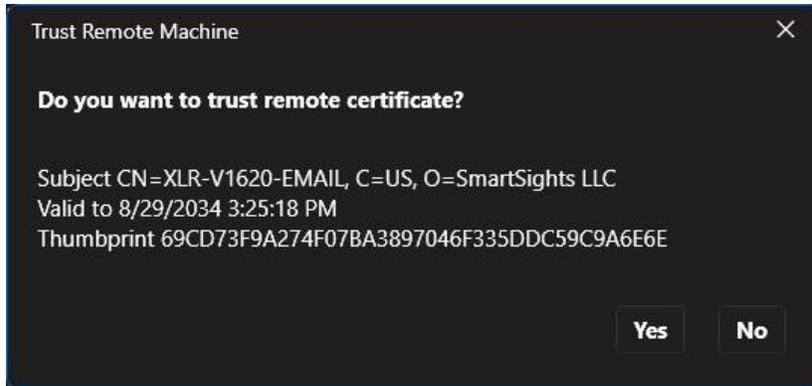
If no **Machine Certificate** is detected, select **Reset Certificate**.

Under **Remote Certificates**, enter the **Machine/IPAddress**. Change the **Port** if needed.

Click **Test Connection**. If the connection succeeds, you should see the following prompt:

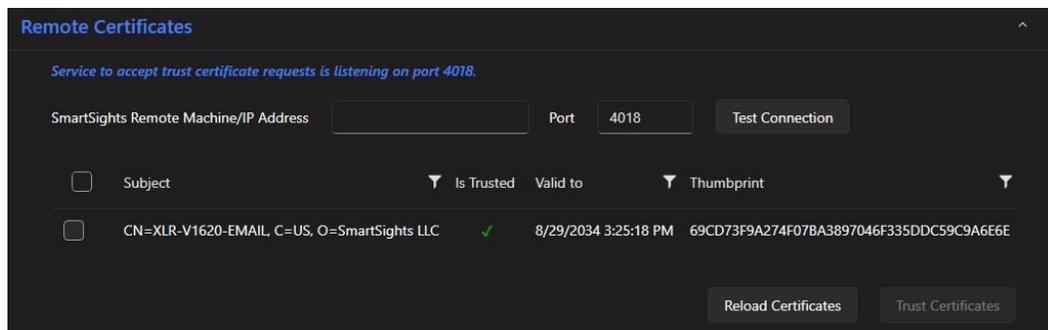


Go to the other machine and select **Yes** to trust the remote certificate.



Go back to the original machine and also select **Yes** to trust the remote certificate.

Now each machine should show a trusted remote certificate.



Windows Firewall

If the connection fails and the Windows firewall is enabled, an inbound firewall rule needs to be created on both machines.

To create an inbound rule:

- Open the **Windows Firewall**. Typically, the easiest way to do this is by typing *Firewall* into the search bar at the bottom left of Windows.
- Click **Advanced Settings**
- Right-click **Inbound Rules** and select **New Rule**.
- For the rule type select **Port** and click **Next**.
- Apply the rule to **TCP**.
- For port, select **Specific local ports** and specify the port number used previously in the **SmartSights SCU** and click **Next**.
- Leave **Allow the connection** selected and click **Next**.
- Apply the rule for every network type required and click **Next**.
- Give the rule a **Name** and click **Finish**.

Once the rules have been created, repeat the steps above to trust the remote certificates on each machine.

Mobile Gateway Account

SmartSights provides you with a mobile gateway account for each XLReporter license. Each XLReporter license requires a unique mobile gateway account.

The account is provided with a temporary password. Instructions are provided to you on how to set this password for your account. This must be done before the Mobile Gateway for XLReporter can be configured.

Connecting to the Web Portal

By default, the web portal is set up to port 80. If you have set up the web portal on a different port, you must update the configuration to reflect this.

Under the **XLReporter** install folder (*C:\XLReporter* by default), go to the *bin* subfolder and open *xlrMobileService.json* in a text editor like **Notepad**.

```
{
  "LogName": "SmartSights",
  "LogSource": "XLR Mobile",
  "LoggingFlags": "Default",
  "LogSinks": "Default",
  "environment": "qa",
  "CloudHost": "https://smartsights-cloud-api-qa.azurewebsites.net/",
  "RuntimeKeyRefreshInDays": 90.0,
  "ValidationRefreshRateInMinutes": 1440,
  "LocalAPIURL": "http://localhost:1111"
}
```

Change the *LocalAPIURL* setting to reflect the URL where the web portal is configured to run.

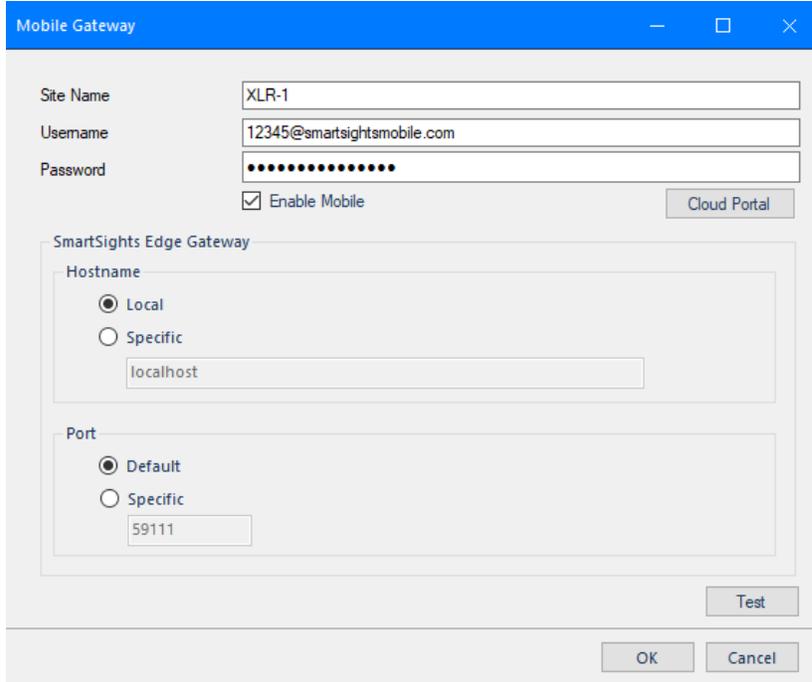
User Accounts

In order to access the **XLReporter** site, the active **XLReporter** project must have user accounts enabled. Open **User Accounts** from the **Project Explorer**, on the right-side **Tools** menu under the **Security** section.

Enable user accounts by specifying an **Administrator** password. Be sure to record that password as it is required to access user account settings.

Mobile Gateway

The Mobile Gateway settings are accessed from the **Mobile Gateway** button in the dialog.



The screenshot shows a dialog box titled "Mobile Gateway" with a blue header bar. It contains the following fields and controls:

- Site Name:** Text input field containing "XLR-1".
- Username:** Text input field containing "12345@smartsightsmobile.com".
- Password:** Password input field with masked characters (dots).
- Enable Mobile:** A checked checkbox.
- Cloud Portal:** A button located to the right of the "Enable Mobile" checkbox.
- SmartSights Edge Gateway:** A section containing:
 - Hostname:** Radio buttons for "Local" (selected) and "Specific". Below "Specific" is a text input field containing "localhost".
 - Port:** Radio buttons for "Default" (selected) and "Specific". Below "Specific" is a text input field containing "59111".
- Test:** A button located at the bottom right of the "SmartSights Edge Gateway" section.
- OK:** A button at the bottom center.
- Cancel:** A button at the bottom right.

At the top, give the site a **Name** and enter the **Username** and **Password** based on the account information provided along with the account password set up in the previous section.

For **SmartSights Edge Gateway**, set the **Hostname** to the machine name or IP address where the **Edge Gateway** is installed on the network. If the **Edge Gateway** is installed on the local machine, select *Local*.

Unless the **Port** for the **Edge Gateway** has been changed manually, leave it as *Default*.

The **Test** button is provided to verify the settings and validate connectivity.

User Accounts

Once the settings are configured, any user account added/modified and set with an email address will have an invitation sent to them inviting them to use the site.

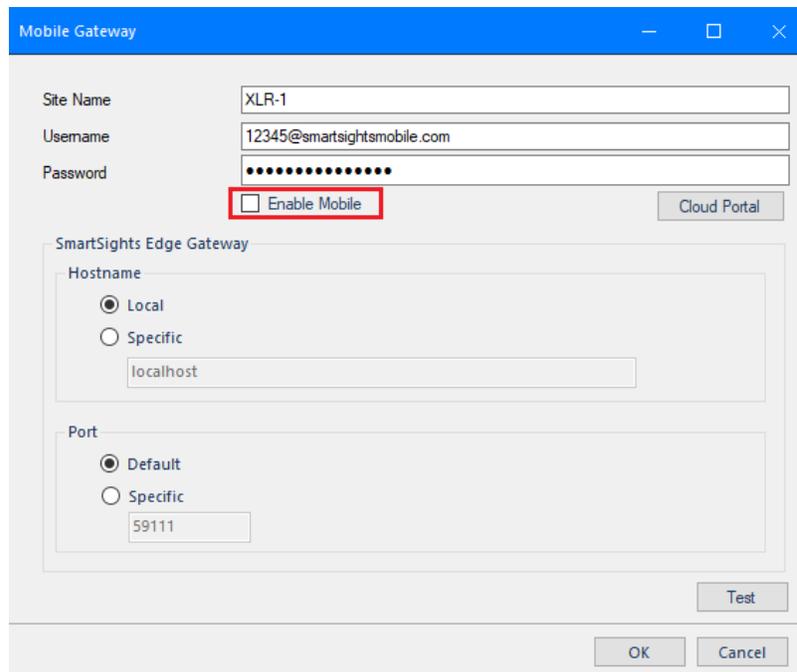
SmartSights Mobile App Login

After downloading the mobile app, launch it. You are prompted to log in with an email. Log in with an email configured for a user in the **XLReporter User Accounts**. Once logged in, you will have access to the **XLReporter** site from which you can view existing reports and generate new reports on demand from anywhere in the world.

Decommissioning an XLReporter Site

Disable Mobile in User Settings

From the **Project Explorer**, under **Security**, open **User Accounts**. Provide the XLReporter **Admin** account. Select **Mobile Gateway**.

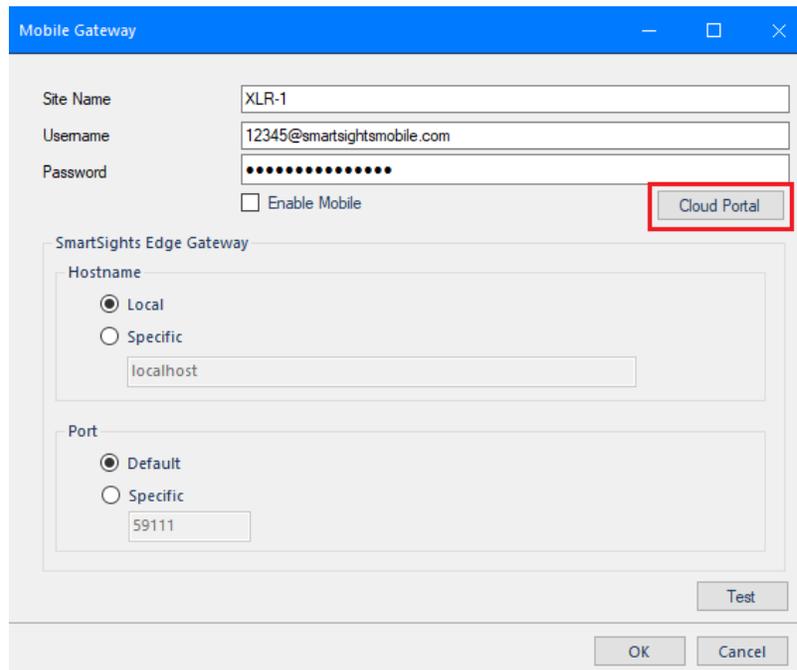


The screenshot shows the 'Mobile Gateway' configuration window. At the top, there are fields for 'Site Name' (XLR-1), 'Username' (12345@smartsightsmobile.com), and 'Password' (masked with dots). Below these is an unchecked checkbox labeled 'Enable Mobile', which is highlighted with a red rectangular box. To the right of this checkbox is a 'Cloud Portal' button. The main section is titled 'SmartSights Edge Gateway' and contains two sub-sections: 'Hostname' and 'Port'. Under 'Hostname', the 'Local' radio button is selected, and the text 'localhost' is entered in the adjacent field. Under 'Port', the 'Default' radio button is selected, and the number '59111' is entered in the adjacent field. At the bottom right of the main section is a 'Test' button. At the very bottom of the window are 'OK' and 'Cancel' buttons.

Uncheck **Enable Mobile**.

Remove the Site from the Cloud

XLReporter Machine Online



This screenshot is identical to the one above, showing the 'Mobile Gateway' configuration window. The 'Enable Mobile' checkbox is still unchecked. However, the 'Cloud Portal' button is now highlighted with a red rectangular box, indicating it is the next step in the process.

Click the **Cloud Portal** button. This opens a web browser to the cloud portal site.

Log in with the account you were provided with and delete the site.

Return to the **Mobile Gateway** dialog and click **OK** to complete decommissioning.

XLReporter Machine Offline

Before proceeding, click **OK** to the **Mobile Gateway** dialog and close **User Accounts** on the XLReporter machine.

Open a web browser and navigate to:

<https://smartsights-cloud-api.azurewebsites.net/>

Log in with the account you were provided with and delete the site.

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