### Contents

**Chapter 1 / Getting Started** ................................................................. 1
- Welcome .......................................................................................... 1
- What’s New ...................................................................................... 2
- What Is SAS Visual Analytics App? .................................................. 6
- How Do I Use the App? .................................................................. 7
- Viewing Sample Reports .................................................................. 8
- What Does That Symbol Mean? ...................................................... 9
- Where Is the Help? ........................................................................ 9
- Data Availability and Reports ......................................................... 9
- Android Devices and the Overflow Menu ....................................... 11

**Chapter 2 / Connecting to Servers** .................................................. 13
- Connecting to Servers .................................................................... 13
- Securing Reports and Data ............................................................. 18
- Limiting Data Use on Your Device .................................................. 20

**Chapter 3 / Adding and Updating Reports** ........................................ 23
- Adding Reports ................................................................................ 23
- Updating Reports Automatically ...................................................... 24
- Updating Reports on Demand ......................................................... 25
- Responding to Notifications ........................................................... 26

**Chapter 4 / Reviewing Your Reports** ................................................ 29
- Viewing My Reports ......................................................................... 30
- Identifying Your Favorite Reports ................................................... 30
- Tracking Recent Reports ................................................................. 31
- View Collections ........................................................................... 32
- Locate Details about a Report ......................................................... 33
- Remove a Report ........................................................................... 34
- Searching Reports ........................................................................ 34
- Sorting Reports ............................................................................. 36
- Selecting Multiple Reports ............................................................. 37

**Chapter 5 / Viewing Reports** ............................................................. 39
- Viewing Reports and Objects .......................................................... 39
- Receiving Alerts about Data Criteria .............................................. 42
- Using Best-fit Layout for Reports ................................................... 42

**Chapter 6 / Navigating Report Features** .......................................... 45
- Viewing Data ................................................................................ 46
- Filtering Data ................................................................................ 48
- Linking to Other Data or Information ............................................. 51
- Drilling Into Data Hierarchies ......................................................... 52
- Exploring Data By Using Geographic Mapping Services ................ 54

**Chapter 7 / Sharing Reports** .............................................................. 61
- Sending Reports to Others .............................................................. 61
- Receive a Report Link ..................................................................... 62
- Present Your Screen to Others ....................................................... 62
- Sharing an Object Image from the Report Viewer ......................... 63
Annotating a Report Page or Object ................................................................. 63
Printing Reports ..................................................................................... 65

Chapter 8 / Troubleshooting SAS Visual Analytics App ................................................. 67
Problems in My Reports, Recent, Favorites, or Collections ........................................ 67
Problems in Add Reports or Search .................................................................. 69
Problems in the Report Viewer ....................................................................... 70
Cannot Email or Share Reports ...................................................................... 73
App Fails to Respond or Displays Unexpected Behavior ........................................ 73

Chapter 9 / Technical Information ........................................................................ 75
URIs and Capabilities That Affect the Mobile App ................................................. 75
Password Storage on Devices ......................................................................... 76

Chapter 10 / Getting Help ..................................................................................... 77
Ways to Get More Help .................................................................................. 77
Give Feedback .............................................................................................. 77
Get Information about SAS Products ................................................................ 77
User Interface Help ....................................................................................... 78
Welcome

Getting Started

How Do I Use the App?
Check out the new features.

Use TalkBack? Learn the specialized accessibility actions for the app.
Common Tasks

View Reports
Add a Server Connection
Add a Report
“Search Reports”

What Else Can I Do?

Tasks available while adding a report
Tasks available while viewing a report
Managing My Reports
Managing favorite reports
Managing recent reports
Managing a collection of reports

Troubleshooting

“Troubleshooting SAS Visual Analytics App”
“URIs and Capabilities That Affect the Mobile App”
“Getting Help”

What’s New

What’s New in Release 8.34

SAS Visual Analytics App 8.34 for Android provides the following enhancements and fixes.

The Subscriptions View Has Been Renamed

The Subscriptions view is now called My Reports.

Additionally, labels in the app have changed to be easier to understand. “Subscribe” is now “Add.” “Unsubscribe” is now “Remove.”

New Support in Report Viewer for Features at the Object Level

When you are in the report viewer, you can now perform the following actions on objects:

- annotate the selected object
- print the selected object
- share the selected object with other users
Support for Keyboard Accessibility

Keyboard accessibility is supported in My Reports, Recent, Favorites, and collections. In addition, keyboard accessibility is supported in the report viewer when working with report-level objects and their data.

New Feature for Pinning an Object to My Reports

Support has been added for this new and experimental feature. If you have an object that you use frequently and want to access quickly, you can pin the object to My Reports.

In the report viewer, select the object. In the toolbar at the bottom of the report viewer, tap the pin button. An object tile is added to My Reports in the Pinned Objects section.

Tapping a pinned object’s tile maximizes the object. You can open the object’s report, share the object image with another user, or remove the pinned object from My Reports.

Support for SAS Visual Analytics 7.5

The application now provides seamless support for SAS Visual Analytics 8.3, 8.2, 8.1, 7.5, 7.4, and 7.3 servers.

What’s New in Release 8.33

SAS Visual Analytics App 8.33 for Android provides the following enhancements and fixes.

Changes to How Report Viewer Features are Accessed

The tray feature was removed in this release. Access to the features that were available in the tray has been changed.

How to Access Report-Related and Object-Related Information and Options

Access to report and object features is now available in a toolbar that appears at the bottom of the report viewer. Functionality that is available in the toolbar includes:

- ability to move through report pages
- ability to view report details, such as author, creation and modified dates, and report server and path
- ability to view alerts and comments
- ability to view object details
- ability to maximize an object
- ability to search, pan, and zoom in a map
- ability to drill up in a hierarchy or drill to a specific member in a hierarchy

How to Access Data-Related Information and Options

To view data information and options, tap a data point on an object. For example, tap a bar in a bar chart. A window appears that provides details about the selected data point and, if applicable, one or more interaction buttons. Depending on the object, you can perform the following tasks:

- Tap ⬅ to link to other pages in the report, to other reports, and to external locations. For information, see “Linking to Other Data or Information” on page 51.
- Tap ⬇ to drill into a data hierarchy. For information, see “Navigate a Data Hierarchy” on page 53.

**TIP** If all the buttons are not visible in the window, drag left to scroll.
Tap to select the map area around a data point. For information, see “Exploring Data By Using Geographic Mapping Services” on page 54.

The table also provides the ability to sort tables, and to expand crosstab tables.

Overflow Menu
The Overflow menu remains unchanged. The menu continues to provide access to the features that enable you to perform the following functions:

- update the report
- annotate the report
- share the report
- add the report to your list or favorites, or remove the report from your list of favorites
- share your screen with other users
- use the magnifier tool
- print the report
- display help

What’s New in Release 8.32
SAS Visual Analytics App 8.32 for Android provides the following enhancements and fixes.

Multiple Element Selection for Interactive Check Box List Filters
When you select values for an interactive check box list filter, a filter control appears in the filter control bar. You can tap the filter control to display a drop-down list in which you can clear one or more of the selected items.

Improvements to the Display Rules Feature
Depending on how a report is designed, display rules can now contain images or colored icons.

Improvements to the Add a Server Connection Feature
The following changes were made to the add connection feature:

- The add connection screens have been updated.
- Messages no longer appear in separate windows.
- The logon screen provides the ability to show or hide the user password by using .

What’s New in Release 8.31
SAS Visual Analytics App 8.31 for Android provides the following enhancements and fixes.

Feature Relocated to the Tray
Rank information, which was available in the Information view, has moved to the tray.

New Show Summary Feature
The Show Summary feature displays a text summary about a selected report, and enables you to listen to the summary. The report summary is created by the report designer.
If a report summary is available, you can access the summary in the following locations:

- the report tile in the **Subscriptions** view
- the **Overflow** menu in the report viewer

When you access Show Summary, a Summary window displays the report summary text. Controls in the window enable you to play the recording of the summary or pause it. You can also move the recording back or forward by 10 seconds.

**Note:** When you play the recording of the summary, a SAS Visual Analytics icon appears in the notifications bar. You can access the summary controls by expanding the notifications tray.

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**What’s New in Release 8.3**

SAS Visual Analytics App 8.3 for Android provides the following enhancements and fixes.

**New Product Name**

The name SAS Mobile BI has been changed to SAS Visual Analytics App. The new name reinforces the relationship between this product and SAS Visual Analytics.

**New Tray Feature in the Report Viewer**

The report viewer features a new tray that replaces the context menus and **Information** view that were used in earlier releases.

**How to Use the Tray**

The following slideshow describes how to use the tray on Android devices.

[View the slideshow in SAS Help Center.](#)

**Functionality and Information Relocated to the Tray**

The following functionality, which was available in context menus, has moved to the tray:

- ability to move through the pages in a report
- ability to link to other pages in a report, to other reports, and to external locations
- ability to navigate through hierarchies by using the drill tool
- ability to sort tables and graphs
- ability to expand crosstab tables
- ability to pan or zoom in a map
- ability to identify data points on a map by distance, drive distance, and drive time
- ability to view data about a selected data point in a report

The following information, which was available in the **Information** view, has moved to the tray:

- report details, such as author, creation and modified dates, and report server and path
- details about a selected object
- information about filters, display rules, alerts, and comments
- details about selected data points
- link information for a target report or location

In addition, you can perform the following actions in the tray:
New Magnifier Tool

View the slideshow in SAS Help Center.

A new magnifier tool makes it easy to view data in a report. To access the magnifier, select Show Magnifier in the Overflow menu in the report viewer. A magnifying glass lens appears in the report area. You can move the lens over the report. When the crosshairs at the center of the lens are placed above a data point, the information for that data point appears in a context menu. You can tap the lens to display the data view in the tray. The lens remains active until you select Hide Magnifier in the Overflow menu.

New Sample Reports

This release also provides new sample reports, and a new sample server connection.

Support for the Latest Versions of SAS Visual Analytics

The application provides seamless support for SAS Visual Analytics 8.3, 8.2, 8.1, 7.4, and 7.3 servers.

Enhancements and Fixes

What Is SAS Visual Analytics App?

SAS Visual Analytics App

SAS Visual Analytics App is a companion application to “SAS Visual Analytics”. It is a free mobile app that enables users to view the reports that are created in SAS Visual Analytics, and to share insights with anyone, anywhere.

Using SAS Visual Analytics App, you can view and share charts and reports on Apple, Android, or Windows devices. These include iPads, iPhones, Android tablets and smartphones, and Windows 10 tablets and personal computers. For device support information, see the SAS Visual Analytics App page in the applicable store:

- Apple App store
- Google Play
- Microsoft Windows store

With SAS Visual Analytics App you can do the following tasks:

- download charts and reports from your organization servers
- view charts and reports in standard or expanded mode
view and make comments about charts and reports

SAS Visual Analytics App supports viewing reports even when your device is offline. See “Local Data Availability and Offline Reports”

Note: SAS also provides a free software development kit (SDK) that enables organizations to modify SAS Visual Analytics App to display a different logo and name. If your organization takes advantage of the SDK, you might see a name other than SAS Visual Analytics App when you access this application.

Throughout this Help, when you see the name SAS Visual Analytics, we are referring to the application in which the reports are created. When you see the generic term "the mobile app", we are referring to this companion app, in which you can view and share those reports.

SAS Visual Analytics

SAS Visual Analytics leverages SAS high-performance analytic technologies and empowers organizations to explore huge volumes of data quickly to identify patterns, trends, and opportunities for further analysis. The highly visual, drag-and-drop data interface of SAS Visual Analytics, combined with the high-speed analytical servers, accelerate analytic computations and enable organizations to derive value from massive amounts of data. This creates an unprecedented ability to solve difficult problems, improve business performance, predict future performance, and mitigate risk rapidly and confidently. Users can quickly create reports or dashboards, which can be viewed on a mobile device or on the web.

How Do I Use the App?

1 Contact your SAS administrator for the following information:
   - the user ID and password to use
   - the server to use for the server connection
   - the port to specify for the server connection
   - whether the server is a secure connection
   - any instructions that your organization might have for using SAS Visual Analytics App

   **TIP** Sometimes an organization does not require security credentials. If your SAS administrator says you do not need a user ID, then you are accessing the server as a guest.

2 You can now add a connection to the server.

   **TIP** If you are accessing the server as a guest, be sure to select Log on as guest when you add the server connection.

3 After you add a server connection, you can add reports to My Reports.

4 After you have added a report, tap that report to open it.

   **TIP**
   - The report viewer provides many features, including the ability to annotate a screen capture and share your screen with others. To learn more, see “Viewing Reports” and “Sharing Reports”.
   - Depending on how a report is designed, a report can provide the same functionality that you use in SAS Visual Analytics. To learn more, see “Navigating Report Features”.
Use the sample reports to see what you can do with SAS Visual Analytics App. See “Viewing Sample Reports”.

Viewing Sample Reports

The app provides many sample reports. By viewing these sample reports, you can explore the features that SAS Visual Analytics reports can provide on your device. Additional sample reports are located on the SAS Demo Server. You must have internet access to download samples from this server.

View Sample Reports

When you first open the app, some sample reports are available in My Reports. Sample reports do not support some of the app’s features. For example, sample reports do not appear in Recent. For more information, see “Guest Connection to a Server”.

Remove Sample Reports

You can remove sample reports from your device at any time. Removal can be useful when you need to free storage space on your device. See “Remove a Report”.

TIP You can always add sample reports from the SAS Demo Server again. See “Add a Report”.

Remove SAS Demo Server

You can remove the SAS Demo Server connection. Removing the connection removes all of its reports.

To remove the connection:

1 In My Reports, Favorites, Recent, or a collection, tap ...
2 Tap Settings.
3 Under General, tap Remove sample connection and reports.

TIP You can also remove the SAS Demo Server connection from Add Reports. See “Remove a Server Connection”.

Restore Sample Reports

If you removed the connection to the SAS Demo Server, you cannot access sample reports. To access sample reports again, restore the connection to the SAS Demo Server:

1 In My Reports, Favorites, Recent, or a collection, tap ...
2 Tap Settings.
3 Under General, tap Restore sample connection and reports.
What Does That Symbol Mean?

The app uses symbols to quickly communicate states and other information.

- ✔️ indicates that you have added the report.
- ✔️ indicates that you have selected a report. See “Selecting Multiple Reports”.
- ★ indicates that the report is a favorite. See “Identifying Your Favorite Reports”.
- 🔐 indicates a secure server connection in the All Connections list.
- 🌐 indicates that the report uses remote data. See “Remote Data Availability and Report Security”.

Where Is the Help?

If you have located the SAS Visual Analytics App Help by using an internet search, know that you can also open the Help while in the app.

In My Reports, Recent, Favorites, or a collection:
- Tap to open the navigation drawer and then tap Help.

  **TIP** You might have to scroll down to locate this selection.

In the report viewer:
- Tap and then tap Help.

The Help opens in your web browser. If your device supports a multitasking view, you can view the app and Help at the same time.

To return to SAS Visual Analytics App, tap ↵.

Data Availability and Reports

Where Data Can Be Located

Data used by your reports can be in one of two locations:

- **Local data** is stored on your device.
- **Remote data** is stored on the server and exists on your device only while the report is open and the device is connected to a Wi-Fi or cellular network.

Local Data Availability and Offline Reports

When you add a report, a set of files is downloaded to your device. Some of the files contain the report data. The amount of data that is downloaded depends on the complexity and volume of the data that is used in the report.
For example, if the report contains a hierarchy into which you can drill five levels, only three levels of data might be downloaded initially. How much data is initially downloaded is controlled by your SAS administrator.

Using the same example, you can drill down to a hierarchy level that requires data that is not yet downloaded. The app connects to the server to download the requested data. If your device is not connected to a network, the app cannot download more data from the server. The report is *offline*. Depending on how the report is designed, an offline report might continue to work as designed or some of its functionality might change because the report is offline. In the example of a hierarchy, you cannot view the data in the next level until the app has a network connection.

Network connection failures might happen for the following reasons:

- Your organization’s network is unavailable due to a technical issue.
- Your device cannot access a cellular, wi-fi, or other type of network.
- A security measure prevents your device from accessing the network or the server.

**Note:** For detailed information about offline functionality and settings that SAS administrators can use to adjust offline support, see the documentation on the [SAS Visual Analytics App Product web page](https://example.com).

### Remote Data Availability and Report Security

#### The Remote Data Option

Depending on the security setting assigned to your user ID, the data used by a report might not exist on your device. Instead, your device must be connected to the server in order to view data in the report. If there is a break in the connection, such as a cellular dead zone, the data becomes unavailable.

**TIP** If a report uses remote data, the report tile in *My Reports* displays the cloud icon: ![cloud icon]. If a report uses local data, this icon does not appear on the tile.

#### Why Reports Use Remote Data

Your organization requires that these reports have extra security.

Your SAS administrator sets this option for the user ID that you use to access the server. When this option is set, all reports on that server use remote data.

If you have any questions about this option, contact the SAS administrator for the affected server.

#### How Remote Data Works

Each time you open a report with remote data, the app connects to the server. A progress indicator is displayed while the data is downloaded for temporary use. The report opens when the data is available on the device. The data is available only while you view the report.

After you close the report, the data is removed from the device. The image no longer appears on the report tile in *My Reports*. If you are not connected to a network and you try to open the report, it does not open.

**Note:** You might see remote data called tethering or live connection.
Android Devices and the Overflow Menu

On Android devices, the Overflow menu contains actions that cannot fit on the menu bar. When using the app, keep the following in mind:

- Depending on your device, the Overflow Menu button can be in the app’s user interface (rieving) or on the frame of the device itself. See your device documentation for the location of the Overflow menu.
- Depending on the device orientation (landscape or portrait) and the size of the device, the user interface relocates some actions into the Overflow menu.
Connecting to Servers

What Is a Server Connection?
An organization has one or more servers that contain SAS Visual Analytics reports. Most servers require that you provide security credentials before you can connect to them and access reports. In the mobile app, a server connection is saved information that includes the server address and your security credentials for a server. If your organization has more than one server, you can add connections to additional servers in the same way.

Note:
- Contact your network administrator about your organization’s requirements for mobile devices to access the network.
- Contact your SAS administrator for your user ID, password, and server information.
  Your SAS administrator can also tell you if the server requires a passcode. See “What Are Passcodes?”

Guest Connection to a Server
A guest connection does not require security credentials. A guest connection allows you to download reports that an organization makes available to the public.
Note:

- SAS Demo Server, which provides sample reports in the app, is an example of a guest connection.
- The guest connection feature is not supported by servers running SAS Visual Analytics 8.1. The feature is supported on all other releases of SAS Visual Analytics.

Typically, guest connections do not support the following features:

- Recent
- comments
- alert subscriptions

If Favorites and Favorites setting are supported with guest connections, functionality is limited:

- When a report is viewed by way of a guest connection, no user can add that report to favorites.
- The favorites shown for the guest connection are shared by all users of that connection.
- You cannot remove these favorites.

Quickly Add a Server Connection

To help a colleague quickly and easily add a server connection, email a report to them. You can email a report from SAS Visual Analytics or from the mobile app.

Here is how it works:

1. Email a report to a colleague. The email contains a link to the report.
   See “Sending Reports to Others”.

2. The recipient taps the link in the email. When the app is installed on the recipient's device, the link opens the app.

3. If the recipient does not have a connection to the required server, they are prompted to add the server connection to the Connections list.
   The recipient taps Yes.

4. If the server supports guest mode, the recipient is asked if they want to log on as a guest. If the recipient taps No, they are prompted to enter their user ID and password. If the recipient taps Yes, they proceed to the next step.

   TIP  If your server connection also requires Esri credentials, enter your user ID and password for Esri services. To learn more, see "What Are Geographic Mapping Services?"

5. The recipient is prompted to open the report. The recipient taps Yes.
   The app downloads the report and adds it to My Reports.

6. The recipient can tap the report to view it.

   If the new connection is to a passcode-protected server, the recipient must create a passcode.

Add a Server Connection

The following slideshow introduces how to add a server connection. A detailed procedure follows the slideshow.

View the slideshow in SAS Help Center.

Note:
Each organization’s network is unique. If you cannot access the SAS Visual Analytics server from your mobile device, contact the following people:

- your network administrator. Ask about your organization’s requirements that enable mobile devices to access the network.
- your SAS administrator. Ask whether your mobile device should be added to a whitelist. See “About the Whitelist”.

Complete these steps:

1. Tap \(\text{Page} \rightarrow \) and tap My Reports.
2. Tap \(\text{Page} \rightarrow \).
3. Tap \(\text{Page} \rightarrow \) in the All Connections list.

   **TIP** The All Connections list is the left-most list in the window.
   - If the list is not on the screen, tap All Connections in the navigation path.
   - If the navigation path is too long to fit on the screen, drag right to scroll.

4. In the Server field, enter the address of the new server.
5. In the Port field, enter the port number for the new server.

   **TIP** A typical port number is 80.

6. Tap the Secure connection switch if the server requires a secure connection (SSL).

   **TIP** \(\text{Padlock}\) indicates a secure server connection in the All Connections list.

7. Tap Next to verify the connection.

   **TIP** If the connection fails, a message is displayed to help you correct the problem.

8. If the server provides guest access, the Log on as guest switch appears. If you want to access the server without providing credentials, tap this switch and skip the next step.

   **TIP** You might have to scroll the page up to view all of the fields.

9. If a server requires security credentials to access reports:
   - In the User ID field, enter your user ID.
   - In the Password field, enter your password.
   - Note: You can use the Visibility button to show or hide the password.

10. (Optional) In the Description field, customize the description for the new connection.
    - Note: If you delete the default description, you must enter a new description. The field cannot be left blank.

11. Tap Next to verify your access to the server.
    - Note: If the verification fails, a message is displayed to help you correct the problem.
If your server connection also allows you to enable Esri premium services, you can do so at this point. If Esri credentials are required, you are prompted to enter your user ID and password for Esri services. To learn more, see “What Are Geographic Mapping Services?”

12 Tap Done.

The connection is saved and the Add Connection window closes. Information about available reports is automatically downloaded and appears in Add Reports.

If the new connection is to a passcode-protected server, you are required to create a passcode.

**Change the Password for a Server Connection**

Complete these steps in Add Reports:

1. Tap **All Connections** in the navigation path.

   **Tip** If **All Connections** is not displayed because the navigation path is too long to fit on the screen, drag right to scroll the path.

2. Tap the server connection that you want to edit.

3. Tap **Edit**.

4. Tap the **Password** field and enter the new password.

5. Tap **Save** to save the update.

**Change the Description for a Server Connection**

Complete these steps in Add Reports:

1. Tap **All Connections** in the navigation path.

   **Tip** If **All Connections** is not displayed because the navigation path is too long to fit on the screen, drag right to scroll the path.

2. Tap the server connection that you want to edit.

3. Tap **Edit**.

4. Tap the **Description** field and enter the new description. The field cannot be blank.

5. Tap **Save** to save the update.

**Turn On Esri Premium Services**

To turn on Esri premium services, you must edit the connection to a server that has Esri premium services.

Complete these steps in Add Reports:

1. Tap **All Connections** in the navigation path.
If All Connections is not displayed because the navigation path is too long to fit on the screen, drag right to scroll the path.

2 Tap the server connection that you want to edit.

3 Tap 🔄.

4 Tap the Esri premium services switch.

If you are not prompted to enter your Esri credentials, the Esri services are turned on at this point. Tap Save and skip the remaining steps.

Note: This switch appears only if the Esri premium services capability is enabled for your user ID on the server. To enable the capability, contact your SAS Visual Analytics administrator.

5 If you are prompted for your Esri credentials, enter your user ID and password for the Esri premium services. These credentials might be different from those used for the server connection.

6 Tap Save.

Turn Off Esri Premium Services

To turn off Esri premium services, you must edit the connection to a server that has Esri premium services.

Complete these steps in Add Reports:

1 Tap All Connections in the navigation path.

2 Tap the server connection that you want to edit.

3 Tap 🔄.

4 Tap the Esri premium services switch.

5 Tap Save.

Remove a Server Connection

When you remove a server connection, any reports that you added from the affected server are removed from your device.

Complete these steps in Add Reports:

1 Tap All Connections in the navigation path.

2 Tap the server connection that you want to edit.

3 Tap 🔄.

4 Scroll to the bottom and tap Remove connection.
Securing Reports and Data

Locking the App with the Passcode Feature

What Are Passcodes?
SAS Visual Analytics App provides a passcode feature that locks the app after a period of inactivity. There are two types of passcodes:

required passcode
A *required passcode* is a passcode that is required by a server connection. When you connect to a secure server, it requires that you create a passcode. An organization uses a required passcode to secure its reports.

You are prompted to create or enter a required passcode at these times:
- when you connect to a passcode-secured server for the first time
- when you are connected to a secure server and the app has been inactive for a length of time

Note: When you create a required passcode but later remove the server connection that required the passcode, the passcode functionality still applies and locks the app after a period of inactivity. However, the passcode is now optional. You can remove an optional passcode.

optional passcode
An *optional passcode* is a passcode that you choose to use to lock the app. You can remove the passcode at any time.

You enter an optional passcode at these times:
- when you create the passcode
- when the app has been inactive for 5 minutes

How the Passcode Feature Locks the App
Whether required or optional passcodes are used, the app is locked after a period of inactivity or after a number of failed attempts to enter the passcode. Depending on the type of passcode in effect, the time of inactivity or number of passcode attempts you are permitted differs.

required passcode
- When the app is inactive for 15 minutes, the app is locked. The system administrator of the secure server can change this value.
- Permits a specific number of attempts. The system administrator of the secure server can change this value.
- When you exceed the number of attempts, the app is locked for 15 minutes. The system administrator of the secure server can change this value.

optional passcode
When the app is inactive for 5 minutes, the app is locked.

Permits 10 attempts.

When you exceed the number of attempts, the app is locked for 15 minutes. The system administrator of the affected server can change this value.

With either passcode type, you can enter your passcode again after the lock-out expires.

If you then exceed the allowed number of passcode attempts a second time, the app removes all SAS Visual Analytics App reports, data, and server connections from your device. The app is reset to its default settings.

If you forget your passcode, you must delete and re-install the app on your device.

Create a Required Passcode

When you create a connection to a passcode-secured server, you must create a passcode.

After you save the connection, the Create Passcode window appears.

1. Enter a four-digit passcode that you can remember.
   You are prompted to enter the passcode again.

2. Enter your passcode a second time. A setup complete message appears.
   If your first and second try do not match, the app displays a message and you can enter the passcode again.

3. Tap Done.

When the passcode that you entered is verified, the passcode is saved.

If you close the window without creating a passcode, you can still navigate to the reports on the server. However, if you attempt to add a report, the app requires that you create a passcode first.

Create an Optional Passcode

Complete these steps:

1. In My Reports, Recent, Favorites, or a collection, tap to open the navigation drawer.

2. Tap Settings.

3. Tap the Passcode switch.
   You are prompted to create a passcode.

4. Enter a four-digit passcode that you can remember.

5. Enter your passcode a second time.
   If your first and second try do not match, the app displays a message and you can enter the passcode again.

When the passcode that you entered is verified, the passcode is saved.

Change a Passcode

Complete these steps:

1. In My Reports, Recent, Favorites, or a collection, tap to open the navigation drawer.

2. Tap Settings.

3. Tap Change Passcode.
The Verify Passcode window appears.

4 Enter your current passcode.

5 Enter a new four-digit passcode.

6 To verify the passcode, enter the new passcode a second time.

When the passcode that you entered is verified, the passcode is saved.

**Remove an Optional Passcode**

Complete these steps:

1 In My Reports, Recent, Favorites, or a collection, tap  to open the navigation drawer.

2 Tap Settings.

3 Tap the Passcode switch.

   The Enter Passcode window appears.

4 Enter your current passcode to verify your identity and remove the passcode.

You can create an optional passcode at any time. See “Create an Optional Passcode”.

**About the Whitelist**

SAS Visual Analytics App provides a whitelist feature that an organization can use to secure its servers. If your device ID is not on the whitelist, you cannot access the server.

When you connect to a secure server for the first time, a whitelist message appears if your device ID is not on the whitelist. A subsequent message provides the option to email an access request to your SAS administrator. The email contains information that your administrator requires to give you access to the server.

Note: You must know the email address of your administrator in order to send the email.

**Limiting Data Use on Your Device**

**About Data Use**

If your device provides cellular data access, you might want the app to use only Wi-Fi networks to download reports. Limiting the app’s use of cellular networks reduces your data use. When cellular data is turned off for the app, make sure that you are connected to a Wi-Fi network. The app requires a network for many tasks, such as the following:

- navigating reports on a server, adding and downloading reports
- using interactive features in reports, such as data drilling and filtering
- commenting

For more information, see “Local Data Availability and Offline Reports”. For information about additional cellular data settings, see the User's Guide for your device.

By default, this setting is turned off.
**Turn Off the Wi-Fi Only Setting**

To turn off the Wi-Fi only setting:

1. If you are in the report viewer, tap ← to exit.
2. Tap ☐ to open the navigation drawer.
3. Tap **Settings**.
4. Tap the **Wi-Fi Only** switch.
5. Tap ← to exit Settings.

**Turn On the Wi-Fi Only Setting**

To turn on the Wi-Fi only setting:

1. If you are in the report viewer, tap ← to exit.
2. Tap ☐ to open the navigation drawer.
3. Tap **Settings**.
4. Tap the **Wi-Fi Only** switch.
5. Tap ← to exit Settings.
Adding and Updating Reports

Adding Reports

Open Add Reports

To open Add Reports:

1. If you are in the report viewer, tap to exit.

2. Tap and tap My Reports.

3. Tap .

Locate a Report on a Server Connection

Complete these steps in Add Reports:

1. Tap a server connection.

TIP  indicates a secure server connection in the All Connections list.

2. Tap a folder to view its contents.

Updating Reports Automatically

What Is Automatic Update?

Turn Off Automatic Update

Turn On Automatic Update

Updating Reports on Demand

Update the Report You Are Viewing

Responding to Notifications

What Are Notifications?

Respond to a Report Notification

Add Report Failure Notification

Disable and Enable SAS Visual Analytics App Notifications
TIP 🔄 indicates that the report was already added.

TIP ☞ To refresh the folder contents, drag a finger down the screen.

3 Drag your finger left and right in the navigation bar to view your path. Tap any part of the path to view that folder.

TIP Tap All Connections to view the list of servers again.

4 To drill up, tap the folder name in the navigation path. The selected folder’s list scrolls onto the screen if it is not already displayed.

### Add a Report

The following slideshow introduces how to add a report. A detailed procedure follows the slideshow.

View the slideshow in SAS Help Center.

Complete these steps in Add Reports:

1 Navigate to the report.
2 Tap the report to view its Details window.
3 Tap Add to add the report to My Reports.

You can also add multiple reports at one time. See “Selecting Multiple Reports”.

### Updating Reports Automatically

#### What Is Automatic Update?

When a report that you added to My Reports is updated on the server, you can choose to have SAS Visual Analytics App automatically update that report on your device.

The setting must be turned on and the app must be active in order to check for updates. These checks occur at the following times:

- when you start or re-activate the app
- every 15 minutes after the app opens

Note: The app cannot control how the device prioritizes the updates.

By default, this setting is turned on.

Note:

- If you have turned on the Wi-Fi only setting, reports are updated only when a Wi-Fi network is available.
- Automatic update does not apply to reports that use remote data (remote data).
**Turn Off Automatic Update**

To turn off automatic update:

1. If you are in the report viewer, tap \( < \) to exit.
2. Tap \( \Rightarrow \) to open the navigation drawer.
3. Tap **Settings**.
4. Tap the **Automatic update** switch.
5. Tap \( < \) to exit Settings.

**Turn On Automatic Update**

To turn on automatic update:

1. If you are in the report viewer, tap \( < \) to exit.
2. Tap \( \Rightarrow \) to open the navigation drawer.
3. Tap **Settings**.
4. Tap the **Automatic update** switch.
5. Tap \( < \) to exit Settings.

**Updating Reports on Demand**

You can update a report to make sure you have the latest changes and data.

**Update the Report You Are Viewing**

Complete these steps in an open report:

1. Tap \( \Rightarrow \) or **open the Overflow menu**.
2. Tap **Update**.
   - If the report has no updates, a message is displayed.
     *Note: A message is not displayed for remote-data reports.*
   - If there are updates, the report is downloaded.
Responding to Notifications

What Are Notifications?

Notifications provide alerts and other information about apps on your device.

SAS Visual Analytics App generates notifications when the following changes occur while you are not using it:

- One or more reports have been updated or are new on your device.
- One or more reports have failed to be added on your device.

In addition, SAS Visual Analytics App provides notifications when you are using the Present Screen feature.

Users of Android prior to 8.0 (Oreo) can view and respond to notifications in the Notification Center. Android 8.0 users can respond to notifications in the Notification Center, or they can take advantage of the Notification Badges (dots) feature. SAS Visual Analytics App provides two channels for notifications: Report Status Updates and Screen Mirroring. You can determine the settings for these channels. In addition, you can use the new Notification Badges feature to display a preview of a notification. For more information about notification channels and notification badges, see the documentation for the version of Android running on your device.

Respond to a Report Notification

When a report is updated or new, or an add request has failed, a notification is generated.

Updated Report Notifications

When you receive an updated report notification, you can respond in the following ways:

- View the progress of the report download.
- After the update is complete, you can tap the notification for a single report to open that report in SAS Visual Analytics App.
  - If the notification is for multiple reports, tap the notification to open SAS Visual Analytics App.
- View detailed information. For single reports, the report description is shown, if available.
  - For multiple reports, all affected report titles and descriptions are shown, if available.
- (Notification Center only) Share the report. Tap Share.

The steps that you take to perform these actions depends on whether you are using the Notification Center or using the Notification Badges feature. For information, see the documentation for the version of Android running on your device.

New Report Notifications

Notifications for new reports occur when you add a new report.

You can respond in the following ways:

- View the progress of the report download.
- After the download is complete, you can tap the notification for a single report to open that report in SAS Visual Analytics App.
  - If the notification is for multiple reports, tap the notification to open SAS Visual Analytics App.
(Notification Center only) Share the report. Tap Share.

The steps that you take to perform these actions depends on whether you are using the Notification Center or using the Notification Badges feature. For information, see the documentation for the version of Android running on your device.

**Add Report Failure Notification**

When you receive a failure notification (⚠️), you can view detailed information. For single reports, the report description is shown if available. For multiple reports, all affected report titles and descriptions are shown, if available.

The steps that you take to perform these actions depends on whether you are using the Notification Center or using the Notification Badges feature. For information, see the documentation for the version of Android running on your device.

**Disable and Enable SAS Visual Analytics App Notifications**

You can control whether you receive notifications from SAS Visual Analytics App. Notifications are enabled by default. For more information about disabling notifications, see the documentation for the version of Android running on your device.
### Reviewing Your Reports

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Viewing My Reports</strong></td>
<td>30</td>
</tr>
<tr>
<td>View My Reports</td>
<td></td>
</tr>
<tr>
<td><strong>Identifying Your Favorite Reports</strong></td>
<td>30</td>
</tr>
<tr>
<td>Your Favorites on Every Device</td>
<td></td>
</tr>
<tr>
<td>View Your Favorites</td>
<td></td>
</tr>
<tr>
<td>Add a Report to Favorites</td>
<td></td>
</tr>
<tr>
<td>Remove a Report from Favorites</td>
<td></td>
</tr>
<tr>
<td><strong>Tracking Recent Reports</strong></td>
<td>31</td>
</tr>
<tr>
<td>Recent Reports on Every Device</td>
<td></td>
</tr>
<tr>
<td>View Your Recent Reports</td>
<td></td>
</tr>
<tr>
<td>Clear Recent</td>
<td></td>
</tr>
<tr>
<td><strong>View Collections</strong></td>
<td>32</td>
</tr>
<tr>
<td>What Is a Collection?</td>
<td></td>
</tr>
<tr>
<td>What Is Auto-Add?</td>
<td></td>
</tr>
<tr>
<td>View a Collection</td>
<td></td>
</tr>
<tr>
<td>Auto-add a Collection</td>
<td></td>
</tr>
<tr>
<td>Remove Auto-add</td>
<td></td>
</tr>
<tr>
<td><strong>Locate Details about a Report</strong></td>
<td>33</td>
</tr>
<tr>
<td>Identify a Report’s Server and Path Information</td>
<td></td>
</tr>
<tr>
<td>Determine When a Report Was Updated</td>
<td></td>
</tr>
<tr>
<td>View the Table of Contents for a Report</td>
<td></td>
</tr>
<tr>
<td>Identify Who Created a Report</td>
<td></td>
</tr>
<tr>
<td><strong>Remove a Report</strong></td>
<td>34</td>
</tr>
<tr>
<td><strong>Searching Reports</strong></td>
<td>34</td>
</tr>
<tr>
<td>How Search Works</td>
<td></td>
</tr>
<tr>
<td>Search Reports</td>
<td></td>
</tr>
<tr>
<td>Filter Search Results</td>
<td></td>
</tr>
<tr>
<td><strong>Sorting Reports</strong></td>
<td>36</td>
</tr>
<tr>
<td>Sort Reports</td>
<td></td>
</tr>
<tr>
<td>Sort Search Results</td>
<td></td>
</tr>
<tr>
<td><strong>Selecting Multiple Reports</strong></td>
<td>37</td>
</tr>
<tr>
<td>Select Multiple Reports in My Reports, Recent, Favorites, and Collections</td>
<td>37</td>
</tr>
<tr>
<td>Select Multiple Reports in Add Reports</td>
<td>38</td>
</tr>
<tr>
<td>Select Multiple Reports in Search Results</td>
<td>38</td>
</tr>
</tbody>
</table>
Viewing My Reports

In My Reports, you can manage the reports that are available to view on your device. You can also update reports with recent changes. All of the reports that you view are added from a server connection. See “What Is a Server Connection?”

View My Reports

My Reports is the default window in the app. It shows all of the reports that you have added on this mobile device.

If you are in Recent, Favorites, or a collection, tap  and tap My Reports.

Your reports are grouped:

- My Reports shows the reports that you have added on this device.
  
  Note: Typically, added reports are downloaded to your device. However, some reports might require additional security and use remote data instead. See “Remote Data Availability and Report Security”.

- Sample Reports shows any sample reports that you have added on this device. See “Viewing Sample Reports”.

Identifying Your Favorite Reports

Your Favorites on Every Device

In the app, Favorites shows the reports that you have marked as favorites. Your favorites are tracked by the server on which the reports are located. When you add a report to your favorites, the server adds that report to your favorites on any other devices that you use to view reports, including SAS Visual Analytics on your desktop system. The same is true when you remove a report from your favorites. However, your favorites are not shown on every device automatically. On each device you must first define the server connection to the server on which your favorite reports are located.

View Your Favorites

To view your favorites, tap  and tap Favorites.

Favorites can contain one or more folders (also called groups). Tap a folder to display its reports. Folders can contain folders, too. Tap on the breadcrumb path to return to the previous level.

Add a Report to Favorites

You can add reports to your favorites while a report is open in the report viewer, or when a closed report appears in the following areas: My Reports, Recent, a collection, search results, or Add Reports.

Add an Open Report to Favorites

Complete these steps in the report viewer:

1. Tap  or open the Overflow menu.
2 Tap Add to favorites.

Add a Closed Report to Favorites
To add a closed report to your favorites:
1 Tap ⭐.
2 Tap Add to favorites.
In Add Reports, tap the report tile and tap ⭐.
You can also add multiple reports at one time. See “Selecting Multiple Reports”.

Remove a Report from Favorites
You can remove reports from your favorites while a report is open in the report viewer, or when a closed report appears in the following areas: My Reports, Recent, Favorites, a collection, search results, or Add Reports.

Remove an Open Report from Favorites
Complete these steps in the report viewer:
1 Tap ⋯ or open the Overflow menu.
2 Tap Remove from favorites.

Remove a Closed Report from Favorites
To remove a closed report from your favorites:
1 Tap ⭐.
2 Tap Remove from favorites.
In Add Reports, tap the report tile and tap ⭐.
You can also remove multiple reports at one time. See “Selecting Multiple Reports”.

Tracking Recent Reports
Recent contains reports that you have recently viewed on one of your devices.

Recent Reports on Every Device
Recent shows the reports that you have recently viewed on one or more of your devices. Recent reports appear in the app only after you have specified the connection to the applicable server. The history of your recent report access is maintained by the server on which the report is located. Your history is shared with all of the devices that you use to view reports from that server, including SAS Visual Analytics on your desktop system.

You can clear the history of report access, which clears Recent. Doing so clears the history on the selected server connection and on the device. If you have viewed reports from multiple server connections, you must clear the history for each server connection. See “Clear Recent”.
View Your Recent Reports

To view your recent reports, tap \( \square \) and tap Recent.

Clear Recent

To clear Recent:

1. Tap \( \square \) and tap Settings.
   
   **TIP** You might have to scroll down to locate Settings.

2. Scroll down and tap the server connection for which you want to clear the history.

3. Tap Clear recent reports.

   **TIP** The button changes to the disabled state when the history has been cleared. If this button is disabled before you tap it, then there are no recent reports to clear.

View Collections

What Is a Collection?

A *collection* shows a group of reports that a collection owner has selected and made available to users. Each collection is a selection in the navigation drawer.

A collection can also contain one or more folders (also called groups). Each folder can contain one or more reports or be empty. The reports contained in the folder are favorites that belong to the collection owner. By adding the folder to the collection, the owner has chosen to make the reports available to other users.

What Is Auto-Add?

*Auto-add* is a feature that automatically adds reports that are members of a collection. Auto-add works in the following ways:

- If you have not added any reports in the collection, selecting auto-add adds all of the reports to *My Reports*.
- If you have already added some of the reports in the collection, selecting auto-add adds the remaining reports to *My Reports*.
- If you have selected auto-add and new reports are added to the collection, the new reports are automatically added to *My Reports*.
- If you have selected auto-add and reports that you did not manually add are removed from the collection, those reports are automatically removed from *My Reports*.

When you remove auto-add, reports in the collection are no longer automatically added to *My Reports*.

Note: If you added some of the reports in the collection before selecting auto-add, they remain in *My Reports*. 

---

**Chapter 4 / Reviewing Your Reports**
View a Collection

To view a collection, tap  and tap the name of a collection.

The collection opens to display its reports.

A collection can contain one or more folders (also called groups). Tap a folder to display its reports. Folders can contain folders, too. Tap on the breadcrumb path to return to the previous level.

Auto-add a Collection

To learn how auto-add works, see “What Is Auto-Add?”

In the collection, tap .

The button toggles to indicate the change: ☑.

Remove Auto-add

To learn how auto-add works, see “What Is Auto-Add?”

In the collection, tap .

The button toggles to indicate the change: ☑.

Locate Details about a Report

Identify a Report’s Server and Path Information

Identify an Open Report’s Server and Path Information

On the toolbar at the bottom of the report viewer, tap .

Identify a Closed Report’s Server and Path Information

In the Add Reports window, tap a report tile to view its details.

Determine When a Report Was Updated

Determine When an Open Report Was Updated

On the toolbar at the bottom of the report viewer, tap .

Determine When a Closed Report Was Updated

In the Add Reports window, tap a report tile to view its details.
View the Table of Contents for a Report

You cannot preview a report’s table of contents in the Add Reports window. For reports that use remote data (ı), the table of contents is not available until you open the report and the data is downloaded. See “Remote Data Availability and Report Security”.

View the Table of Contents for an Open Report

Complete these steps in an open report:

1. Tap .
2. Tap a page tile to go to that page.

   TIP If the report is large, scroll down to view more page tiles.

Identify Who Created a Report

Identify Who Created an Open Report

On the toolbar at the bottom of the report viewer, tap .

Identify Who Created a Closed Report

In the Recent, Favorites, or collection views, tap a report tile. The name of the person who created the report is shown beneath the report title.

In the Add Reports window, tap a report tile to view its details.

Remove a Report

To remove a report:

1. Tap on the report tile.
2. Tap Remove from My Reports.
3. Tap OK in the confirmation window.

You can also remove multiple reports at one time. See “Selecting Multiple Reports”.

Searching Reports

The search feature is available anywhere that you see in the app.
How Search Works

What Can I Search?
You can search reports that are located in My Reports and on all of your connected servers. Both locations are searched at the same time.

**TIP**
- The search is not case sensitive.
- If you do not have a network connection, search is disabled.

During a search, the following content is reviewed for the search string:
- the report name
- report descriptions
- keywords
- the report source file

Because the report source file is also searched, some reports can appear in the search results because of a data set or object that is used in the report. For example, if a report uses a data set called Cars, that report will be in the search results for “cars.” If a report contains a bar chart, that report will be in the search results for “bar chart.”

Can I Narrow My Search?
You can narrow your search by using quotation marks ("), and the plus sign (+) and minus sign (–) operators.

- To specify some or all of a report title, enclose the title in quotation marks—for example, “accessibility in SAS Visual Analytics App”. The search is not case sensitive.
- To require a term, prepend the term with the plus sign—for example, +sample.
- To exclude a term, prepend the term with the minus sign—for example, –sample.

You can also append a wildcard (*) operator to single- and multiple-word searches. For example, if you search for the word "sample," then it is converted to sample*. You get different results than if you entered "sample", +sample, or "sample".

How Many Results Can I Receive?
You can receive up to 100 results for each connection that you include in your search. The search results can also include an unlimited number of results from reports in My Reports.

Search Reports
To search reports:

1. Tap in the options bar.
2. Tap the Search for reports field. The keyboard appears.
3. Enter all or part of a search string.
Tip To narrow the search, use search operators.

4 Tap 📑 on the keyboard.

The reports that include the search string appear in a results list. The results list is categorized by the location of the reports.

You can filter the results.
You can sort the results.

5 (Optional) To add a report in the search results, tap ⬇️ on the tile and then tap Add.

**Tip** You can also add multiple reports at one time. See "Selecting Multiple Reports".

6 If you already added the report, you can open it. Tap the report.

7 To clear the search results, tap ✗ in the search field.

8 To dismiss search, tap ←.

**Filter Search Results**

Tip You can select filter options before or after you receive search results.

To filter search results:

1 Tap ☰ in the options bar.

2 Select one or more filter options:
   - the location, such as My Reports or the server connection
   - the report author’s name
     Note: This option is available only after the search is completed.
   - the date on which the report was last updated on the server

3 Tap Apply.

**Sorting Reports**

You can sort reports wherever you see ☰.

**Sort Reports**

To sort reports, tap ☰ and make a selection.

Note: Available sort selections vary depending on the view.

Name

- sorts the reports by name and then by the date of the last successful update of the report on the server.
Connection
sorts the reports by their associated server connection, then by their name, and then by the date of the last successful update of the report on the server.

Date Added
sorts the reports by the date when they were added and then by their name.

Last Updated
sorts the reports by the date of their last successful update of the report on the server, and then by their name.

Most Recently Viewed
In My Reports, this selection sorts the reports by the date of their last access on this device and then by their name.

In the Recent view, this selection sorts the reports by their associated connection, then by the most recently viewed date across all devices.

Sort Search Results
You can sort search results. To learn about search, see “Searching Reports”.

To sort the results, tap and make a selection:

Name
sorts the reports by name and then by the last successful update of the report on the server.

Last Updated
sorts the reports by the date of their last successful update of the report on the server, and then by their name.

Relevance
sorts the reports by relevance that is determined by the associated server connection.

Selecting Multiple Reports
You can use Selection mode to work with multiple reports at one time. Selection mode is available whenever Select is present in the overflow menu. Depending on the location in the app, you can use Selection mode to add or remove reports from My Reports, share, or add or remove reports from Favorites.

Select Multiple Reports in My Reports, Recent, Favorites, and Collections
Complete these steps in any of the views:

1 Tap or open the Overflow menu.

2 Tap Select.

3 Tap one or more reports.

indicates that a report is selected.

TIP Tap the arrow next to the number of selected items, and then tap Select All to select all of the reports in the folder.
4 Tap the action that you want to complete.
5 If you decide not to act on the reports, tap \( \times \) to dismiss Selection mode.

### Select Multiple Reports in Add Reports
In order to work with multiple reports at once while in Add Reports, the reports must all be located in the same folder.

1 Navigate to the folder that contains the reports.
2 Tap \( \cdot \) or open the Overflow menu.
3 Tap Select.
4 Tap the button next to each report that you want to select.
   ![Checkmark icon] indicates that a report is selected. Tap this button again if you want to clear the selection.

   **TIP** Tap the arrow next to the number of selected items, and then tap Select All to select all of the reports in the folder.

5 Tap the action that you want to complete.
6 If you decide not to act on the reports, tap \( \times \) to dismiss Selection mode.

### Select Multiple Reports in Search Results
To select multiple reports:

1 Tap \( \cdot \) or open the Overflow menu.
2 Tap Select.
3 Tap one or more reports.
   ![Checkmark icon] indicates that a report is selected.

   **TIP** Tap the arrow next to the number of selected items, and then tap Select All to select all of the reports in the folder.

4 Tap the action that you want to complete.
Viewing Reports

Viewing Reports and Objects

Open a Report

Open a Report from My Reports
Tap any report tile.

Open a Report from Recent, Favorites, or a Collection
To view a report:

1 Tap the report tile to open the Details window.
2 If the report has already been added to your device, tap Open.
   Otherwise, tap Add to download the report.
   When the report is available, tap the report tile to open the Details window, and then tap Open.

Page through a Report
Reports can include more than one page.
To see and select from all the pages:

1. Tap 

2. Tap the page that you want to view.

**View an Object Using the Full Screen**

To maximize an object:

1. Tap the object.

2. Tap \( \rightarrow \) to maximize the object to use the full screen.

To restore the object size:

1. Tap the object.

2. Tap \( \leftarrow \) to restore the object size.

**View a Report Summary**

Report designers can create report summaries that are available for viewing in the SAS Visual Analytics app. When you open a report that has a summary, you can view a textual report summary and play a recording of the summary that includes playback controls.

If available, you can access the summary from the following locations:

- a report tile in **My Reports**
- the Overflow menu in the report viewer

To display the summary, tap **Show summary** in the Overflow menu.

The Summary window displays the report summary text. Controls in the window enable you to play and pause the recording. You can also advance or rewind the recording in 10-second increments.

**Note:** When you play the recording of the summary, a SAS Visual Analytics icon appears in the notifications bar. You can access the summary controls by expanding the notifications tray.

**Overriding Report Themes**

**What Is a Theme?**

A report is designed to use specific colors and fonts. These are called a *theme*. You can override that theme when you view the report in SAS Visual Analytics App.

The following alternative themes are available:

- High Contrast
- Light (Marine)

To learn more about this feature, view the following slideshow.

*View the slideshow in SAS Help Center.*
Override the Theme
To override the theme:

1. If you are in the report viewer, tap  .
2. Tap ➔, and then tap Settings.
4. Tap the theme that you want to use.
5. Tap ➔ to exit Settings.

Learning More about an Object

What Information Is Available about Objects?
Each page of a report can contain one or more objects. You can review information about the report as a whole, or about a selected object. However, the information shown varies depending on how the report is designed. See your report designer for more information.

The object information includes:

- a description of the object
- display rules, if applicable
- filters, if applicable
- rank, if applicable
- alerts, if applicable

Note: The Alerts feature is not supported by servers running SAS Visual Analytics 8.1. The feature is supported by all other releases.
- the Comments feature

View Information about a Report
On the toolbar at the bottom of the report viewer, tap  .

View Information about an Object
Note: The information view displays information about the selected object. If you select a link that takes you to a hidden page, the information view is refreshed to provide detailed information about the objects that are on the hidden page or about the hidden page itself.

Complete these steps in the report viewer:

1. Tap an object.
   See “What Information Is Available about Objects?” on page 41.
2. On the toolbar at the bottom of the report viewer, tap  .
3. (Tablets only) To view information about another object on the page, tap that object.
   The information view shows the information for the selected object.
Receiving Alerts about Data Criteria

What Is an Alert?

An alert specifies criteria to monitor. When data in the report meets the criteria, an email or text message is sent to users that have subscribed to the alert. A report can have one or more alerts settings. When you view the report in SAS Visual Analytics App, you can view the alerts that are set for that report. You can also see whether you are subscribed to an alert. If you are subscribed to an alert, when the alert criteria is met an email is sent to you.

Note:
- Alert criteria and subscriptions are set using SAS Visual Analytics. For more information, see SAS Visual Analytics documentation.
- The Alerts feature is not supported for reports located on servers running SAS Visual Analytics 8.1. It is supported by all other releases.

View Alert Subscriptions

On the toolbar at the bottom of the report viewer, tap ▲.

Using Best-fit Layout for Reports

What Is Best-Fit Layout?

Best-fit layout is when the app rearranges the layout of objects in a page for the best fit available. Use this setting to make your reports easier to view regardless of which device you use or how you hold your device. The best-fit layout adapts depending on your device (tablet or phone) and the device orientation (portrait or landscape).

Note:
- Best-fit layout applies to reports located on servers running SAS Visual Analytics 7.4 and earlier.
- Best-fit layout should not be used with some report features. Contact your report designer to learn if you should turn off best-fit layout.

The setting affects the layout of all reports.
- On a phone, the default setting is on.
- On a tablet, the default setting is off.

You can change the setting while viewing a report or in the app settings.

Rearrange the Layout of Objects

Note: Best-fit layout applies to reports located on servers running SAS Visual Analytics 7.4 and earlier.

Complete these steps while viewing a report:
1 Tap \( \vdash \) or open the Overflow menu.

2 Tap **Rearrange Layout**.

This setting toggles between two states:

- □ Layout for limited space on smaller devices. The objects are laid out vertically. Scroll down to view all objects in a page.
  
  Note: If the device screen is large enough, the app will not change the layout.

- □ Layout for larger devices. The objects are laid out as designed by the report designer.

**Turn On Best-fit Layout**

To turn on this setting:

1 If you are in the report viewer, tap \( \leftarrow \) to exit.

2 Tap \( \equiv \) to open the navigation drawer.

3 Tap **Settings**.

4 Tap the **Best-fit layout** switch.

5 Tap \( \leftarrow \) to exit Settings.

**Turn Off Best-fit Layout**

To turn off this setting:

1 If you are in the report viewer, tap \( \leftarrow \) to exit.

2 Tap \( \equiv \) to open the navigation drawer.

3 Tap **Settings**.

4 Tap the **Best-fit layout** switch.

5 Tap \( \leftarrow \) to exit Settings.
## Navigating Report Features

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Viewing Data</strong></td>
<td></td>
</tr>
<tr>
<td>View Data Details</td>
<td>46</td>
</tr>
<tr>
<td>View Report Data in a Table</td>
<td>46</td>
</tr>
<tr>
<td>Sort Column Data in Tables</td>
<td>46</td>
</tr>
<tr>
<td>Sort Data in Charts and Graphs</td>
<td>47</td>
</tr>
<tr>
<td>View Upper and Lower Range Values for Forecasted Values</td>
<td>47</td>
</tr>
<tr>
<td><strong>Filtering Data</strong></td>
<td>48</td>
</tr>
<tr>
<td>About Data Filters, Filter Controls, and Data Highlighting</td>
<td>48</td>
</tr>
<tr>
<td>View Values of Interactive Filters</td>
<td>50</td>
</tr>
<tr>
<td>View Filters That Run Off the Screen</td>
<td>50</td>
</tr>
<tr>
<td>View the Filter Value on a Slider Control</td>
<td>50</td>
</tr>
<tr>
<td>Select Multiple Values in Crosstabs</td>
<td>50</td>
</tr>
<tr>
<td>Animate an Object</td>
<td>50</td>
</tr>
<tr>
<td><strong>Linking to Other Data or Information</strong></td>
<td>51</td>
</tr>
<tr>
<td>What Are Links?</td>
<td>51</td>
</tr>
<tr>
<td>Link to Another Page or Report</td>
<td>51</td>
</tr>
<tr>
<td>Return to a Prior Link Location</td>
<td>52</td>
</tr>
<tr>
<td>Link to an External Location</td>
<td>52</td>
</tr>
<tr>
<td><strong>Drilling Into Data Hierarchies</strong></td>
<td>52</td>
</tr>
<tr>
<td>What Is a Hierarchy?</td>
<td>52</td>
</tr>
<tr>
<td>Ways to Navigate Hierarchies</td>
<td>52</td>
</tr>
<tr>
<td>Navigate a Data Hierarchy</td>
<td>53</td>
</tr>
<tr>
<td>View Warnings about an Object</td>
<td>53</td>
</tr>
<tr>
<td>Expanding Crosstab Hierarchies</td>
<td>53</td>
</tr>
<tr>
<td><strong>Exploring Data By Using Geographic Mapping Services</strong></td>
<td>54</td>
</tr>
<tr>
<td>What Are Geographic Mapping Services?</td>
<td>54</td>
</tr>
<tr>
<td>What Is a Break?</td>
<td>55</td>
</tr>
<tr>
<td>View Map Data Details</td>
<td>55</td>
</tr>
<tr>
<td>Pan the Map</td>
<td>55</td>
</tr>
<tr>
<td>Search the Map</td>
<td>56</td>
</tr>
<tr>
<td>Identify Data Points by Distance</td>
<td>57</td>
</tr>
<tr>
<td>Identify Data Points by Drive Time</td>
<td>57</td>
</tr>
<tr>
<td>Identify Data Points By Drive Distance</td>
<td>57</td>
</tr>
<tr>
<td>View Map Data in a Table</td>
<td>58</td>
</tr>
<tr>
<td>Highlight Map Data in Explore Mode</td>
<td>58</td>
</tr>
<tr>
<td>Select Map Data to Interact with Other Objects</td>
<td>59</td>
</tr>
</tbody>
</table>
Viewing Data

View Data Details
Objects in a report can display details about a data point.
To view the data details, tap on a location in an object.

View Report Data in a Table
You can view underlying report data while viewing an object.
Complete these steps:
1. Tap to view the object in full-screen mode.
2. (Tablet) In the toolbar at the bottom of the report viewer, tap .
   (Phone) In the toolbar at the bottom of the report viewer, tap and then tap Show Details.
   Data details appear in a table beneath the object.
3. Tap a row in the table to highlight the associated item in the object.
   You can also tap in the report to locate the corresponding row in the table.
   TIP You can scroll the table up and down to view all of the rows.

4. (Tablet) In the toolbar at the bottom of the report viewer, tap to close the table.
   (Phone) In the toolbar at the bottom of the report viewer, tap and then tap Hide Details to close the table.

Sort Column Data in Tables
By default, table columns support sorting. You can sort the values in an individual column. You can also set up primary and secondary sorts. If no columns sort, see Columns Do Not Sort in a Table.
To sort data in a column, tap the column heading.
The following options appear:
Ascending
sorts the data from low value to high value (A to Z or from 0 to 9).
Descending
sorts the data from high value to low value (Z to A or from 9 to 0).
Type
displays secondary sorting options that you can apply to additional columns.

For each additional column that you want to sort, tap the column heading, tap Type, and then tap Secondary. Tap Ascending or Descending.

Note: After you apply a secondary sort, creating or modifying the primary sort clears all previously applied secondary sorts.
Reset
returns the data to its original sort order.

Note: A check mark indicates the current sort order of the data.

Sort Data in Charts and Graphs
Charts and graphs have a predefined sort order that is determined by the report author.
In charts and graphs in which the report author has turned on X- and Y-axis labels, you can change the default sort order of either the X axis or Y axis or both.

To change the default sort order for a single measure (X axis, Y axis, or both) in a chart or graph:

1 Tap the X-axis label and tap one of the following options:
   Ascending
   sorts the data from low value to high value (A to Z or from 0 to 9).
   Descending
   sorts the data from high value to low value (Z to A or from 9 to 0).
   Reset
   returns the data to its original sort order.
   Note: A check mark indicates the current sort order of the data.

2 Tap the Y-axis label. Tap Ascending, Descending, or Reset.

When multiple measures exist on a single axis, you can choose the measure upon which to sort.
For example, assume that the X-axis label presents two measures, one for East Coast and one for West Coast.
In this case, tap the X-axis label, and then tap Measure. Tap East Coast or West Coast, and then tap the sort option that you want.

View Upper and Lower Range Values for Forecasted Values
For every forecasted value, charts also provide an upper and lower range value.
To view the upper and lower range values:

1 Press and hold your finger on the axis in the chart.
   A reference line appears. The reference line displays tooltips for the range values that intersect the reference line.

2 Without lifting your finger, move your finger along the axis.
   The reference line moves and displays the range for other forecasted values.

Report designers might include forecasted values on the following types of charts:
- bar chart
- line chart
- bubble chart
- scatter chart
Filtering Data

About Data Filters, Filter Controls, and Data Highlighting

Data Filters
SAS Visual Analytics App displays interactive reports. Depending on how a report is designed, you can select areas in a report to dynamically filter data.

TIP Be sure to ask your report designer to describe any filter controls that are available in the report and explain how to use them.

Report designers can use the following types of data filters in reports:

Object-level filters
filters data in one or more objects. A report can include one or more of these filters.

Interactive filters
an object provides interactive selections that filter one or more other objects on the same page.

For example, you have a report page that contains two objects: a pie chart and a bar chart. When you tap a slice in the pie chart, the value of that slice filters the data in the bar chart.

A report can include one or more of these filters.

Interactive filters
an object provides interactive selections that filter one or more other objects on the same page.

For example, you have a report page that contains two objects: a pie chart and a bar chart. When you tap a slice in the pie chart, the value of that slice filters the data in the bar chart.

A report can include one or more of these filters.

Report-level filters
filters data in the report as a whole. A report can include one or more of these filters.

Page-level filters
filters data in the page as a whole. A report can include one or more of these filters.

Page-link filters
a link that opens another page in a report. Depending on the selection made in the source page, the link filters all of the objects in the target page. On the source page, page-links are located in a window. On the target page, the applied filter value is located in a window.

Report-link filters
a link that opens another report. Depending on the selection made in the source report, the link filters all of the objects in the target report. On the source page, report-links are located in a window. In the target report, the applied filter value is located in a window.

Incoming filters
filters data by one or more values that are passed in from another report or object. For example, when chart A interacts with chart B, the value selected in chart A is the incoming filter for chart B.

See also “Filter Controls” and “Filter Control Bars”.

Filter Controls
Filter controls provide a way for you to control how data is filtered in a report. For example, if data is filtered by month, a filter control enables you to specify a month. Report designers can select from a variety of controls when they create data filters in reports. Some filter controls are familiar, such as buttons, lists, text fields, check boxes, radio buttons, single sliders, and range sliders. Your report designer might customize the behavior of some of these controls, but the controls all work in a familiar way.
Other filter controls are less obvious, such as parameters, links, interactions, and highlighting. For example, your report designer can specify whether one-way filters appear in the filter control bar. Unless your report designer tells you that specific controls are present, you might not realize they are in the report.

**TIP** Be sure to ask your report designer to describe any filter controls that are available in the report and explain how to use them.

**Filter Control Bars**

When a report contains report-level or page-level filters, the filter controls are located in a window. Interactive data filters are located on the filter control bar.

**Report-Level Control Bar**

Report-level filters affect data in the report as a whole. The following examples are report-level filters:

- A filter control in the report that filters the report data as a whole.
- A link from a source report that opens a target report and filters its data.

Tap 🔄 in the report title bar to open the window and display the filters.

**Page-Level Control Bar**

Page-level filters affect data on the current page only. The following examples are page-level filters:

- A filter control for a page that simultaneously filters all of the objects on that page.
- A link from one page in the report that opens another page and filters that page’s data.

Tap 🔄 in the report title bar to open the window and display the filters.

**Interactive-Filter Control Bar**

Interactive filters affect objects on the current page. This control bar appears across the top of the page.

The interactive-filter control bar displays one-way filters and two-way filters that you select on the current page. One-way and two-way filters behave as follows:

- **One-way filters:** A selection in object A filters all objects on the page. A selection in object B filters all objects on the page, except object A.
- **Two-way filters:** A selection in object A filters all objects on the page. A selection in object B filters all objects on the page, including object A.

**Data Highlighting**

Reports can be designed to enable the *highlighting* of data. As with filtering, you select a filter value. However, instead of displaying only the data that is filtered, the affected data is highlighted.

**Note:** Highlighting is also called *brushing* or *linked selection*. Highlighting is not the same as report-link filters or page-link filters.

Depending on how an object is designed, you can highlight data in the following ways:

- make a selection from a filter control.
- tap a value in a chart or graph.
- tap a value in a table or crosstab.

The data is highlighted in one or more objects in the report page.
**View Values of Interactive Filters**

The interactive filter control bar displays one-way filters and two-way filters that you select on the current page. If no selections are made on the page, **No Selections** appears next to the **Filters** label at the beginning of the control bar.

When you select a value in an object that has an interactive filter, a filter control appears in the control bar. The control indicates the selected value. If you select a different value in the filter, the text in the filter control is updated to reflect the new selection.

Each filter control has a clear button. Tap ✎ to clear the filter and remove the control from the control bar.

**Note:** If an object (such as a control prompt) requires a filter, the clear button does not appear in the filter control.

If multiple one-way filters are selected, a separator (>) appears between their controls on the bar. The separators indicate that the selection in one filter affects the other filters. Separators are not displayed when multiple two-way filters are selected.

**Note:** If you clear a one-way filter or change the selected value for a one-way filter, subsequent filters on the control bar are cleared. Their filter controls are removed from the control bar. Changing the selected value for a two-way filter or clearing its filter control has no affect on other filter controls on the control bar.

If you maximize an object on the page, the interactive filter control bar is hidden.

**View Filters That Run Off the Screen**

If the control bar has more filters than it can display (for example, on a phone), the bar scrolls horizontally. Drag left and right to view the filters.

**View the Filter Value on a Slider Control**

When a report uses a slider control, you can press and hold your finger on the slider bar or the slider indicator to see the filter value.

**Select Multiple Values in Crosstabs**

Depending on how a report is designed, crosstabs can support making multiple selections:

1. Tap to select the first value.
2. For each additional value that you want to select, press on that value until the selection is activated.
3. To clear a selection, press on that value until the selection is cleared.

**Animate an Object**

In animated objects, the data points are animated across a range of time.

1. Tap the object.
   - The **Play** button ( ▶️ ) appears in the lower left corner.
2. Tap ▶️ to start the animation.
   - A progress indicator for the time range appears briefly.
The value on the left is the current time point in the animation time range.
The value on the right is the final time point in the animation time range.

3 To view different time points in the animation, drag the progress indicator along the time range.

4 Tap \( \text{||} \) to pause the animation and display the progress indicator.

---

**Linking to Other Data or Information**

**What Are Links?**

Depending on how a report is designed, objects can include the following types of links:

- **Page links**
  - links from one page in a report to another page in the same report.
  
  The link can also include a filter value. In the target page, the \( \text{||} \) button is enabled in the report title bar if the link applied a filter value.

- **Report links**
  - links from one report to another report.
  
  The link can also include a filter value. In the target page, the \( \text{||} \) button is enabled in the report title bar if the link applied a filter value.

- **External links**
  - links from the report to an external location, such as a web page.

- **Hidden page links**
  - links from an object to a page that appears only when the link is tapped. A link can be attached to an object, image, or text. The hidden page opens on top of the current report page. A hidden page can contain one or more objects. The link can also include a filter value.

  **Note:** This link type was formerly called *Info window*.

**Link to Another Page or Report**

Complete these steps in a report:

1 Tap on a data point in an object.

2 Tap \( \text{||} \).

The linking options appear.

3 Tap your selection.

The linked location opens.

4 (Optional) If a link applied a filter to the data in the target report or page, you can view the applied filter and its value.

   Tap the object, and then tap \( \text{||} \) to display the object information.
Return to a Prior Link Location

When you have linked across multiple pages or reports, you can review the trail of your navigation and return to a prior link location.

**Note:** If you link to a hidden page, the link button is not available. You cannot view the link history to return to a prior link location.

To review the trail of your navigation and select a prior link:

1. In the report title bar, tap 返回. The Link History panel opens.
2. Tap an option in the list to return to that location.

To exit the report viewer and close all reports, tap Close All Reports.

Link to an External Location

To link to an external location:

1. Tap on a data point in an object.
2. Tap 返回. The linking options appear.
3. Tap the external link.
   - The linked location opens in a new window.
4. To return to your previous location, tap the device back button.

Drilling Into Data Hierarchies

What Is a Hierarchy?

A hierarchy is an arrangement of category columns that is based on parent-child relationships. The levels of a hierarchy are arranged with more general information at the top and more specific information at the bottom. For example, a hierarchy of date-time columns contains Year as the top level, Month as the next level, and Day as the bottom level.

Hierarchies enable you to drill down in charts, graphs, and crosstabs (also known as crosstabulation tables). An object can be designed with one or two data hierarchies. For example, an object might have a date-time hierarchy and a geographic hierarchy.

Ways to Navigate Hierarchies

If an object provides data drilling options, they are displayed when you tap a data point in the object. In a crosstab, data-drilling options are also provided as links in the table itself.

Depending on how an object is designed, you can navigate hierarchies in the following ways:

- drill down in a hierarchy to a subset of data and detailed information
- drill up in the hierarchy to a broader data view and general information
- expand or collapse the data hierarchy in a crosstab
- navigate one or two hierarchies

**Navigate a Data Hierarchy**

To drill down or up:

1. Tap on a data point in an object.
   - The data-drilling options appear.
2. Tap your selection. The new data view appears in the object.
3. To view another level of the data hierarchy, repeat steps 1 and 2.

**TIP** To navigate upward in a hierarchy, in the toolbar at the bottom of the report viewer, tap ↑.

4. To view the available selections in a level in one or more hierarchies, or to change a selection:
   a. In the toolbar at the bottom of the report viewer, tap ↓ and then tap **Drill to**.
      - The drill options appear.
      - **Note:** If the object contains two hierarchies and you have drilled into both, you can view the levels in both hierarchies.
   b. To view another level, tap that level. The object draws the new data view.
   c. To change the selection for a level, tap for that level to view a list, and then tap your new selection.
      - The object draws the new data view.

**View Warnings about an Object**

If you drill down to a level of the object that does not have data, a warning appears in the lower right corner of the affected object: ▲.

To view more information about the warning, tap ▲.

**Expanding Crosstab Hierarchies**

**Why Expand a Crosstab Hierarchy?**

You can expand a crosstab hierarchy. Expansion enables you to view multiple levels of data at a time.

For example, in a crosstab that summarizes data for several years, you can expand one or more of the years. The expansion enables you to see the data at the year level and, for the years that you expanded, the data at the month level as well.

Alternatively, you can expand all the children of a hierarchy level. For example, given the same report, you can expand all the years at the same time to review their monthly data.

**Note:**
- When the ranking option is applied to a crosstab, expand and collapse are disabled.
  - Instead, you can drill up and drill down in the hierarchy.
Expand the Hierarchy in a Crosstab

To expand a single item in a crosstab (for example, to expand the year 2017):
1. Tap the item.
2. Tap 📈.

To expand all of the children for a level in a crosstab (for example, to expand the months for all of the years):
1. Tap a column heading or row heading.
2. Tap 📈.

The crosstab expands to display the data that is the next level down in the hierarchy.

To collapse a single item in a crosstab (for example, to collapse the year 2017):
1. Tap the item.
2. Tap 📈.

To collapse all of the children for a level in a crosstab (for example, to collapse the months for all of the years):
1. Tap a column heading or row heading.
2. Tap 📈.

---

Exploring Data By Using Geographic Mapping Services

What Are Geographic Mapping Services?

A report can contain an object that uses maps as a background for data. SAS Visual Analytics uses maps provided by the Esri and OpenStreetMap geographic mapping services to display data points. SAS Visual Analytics retrieves map tiles and location information from these services and then overlays your organization’s data onto the maps.

Depending on how the report is designed, your data can appear on the map as map coordinates, bubbles plotted onto the map, or regions on the map.

You can use the following options:

**Search**
- Search the map for street addresses or points of interest (for example, restaurants).

**Distance**
- Identify data points on a bubble or coordinate map that are within a specified radial distance from a selected point. The map zooms in and highlights the affected area. Data points outside of the affected area remain on the map but are not selected.

**Drive distance**
- (Premium) Identify data points on the map that are within a specified driving distance from a selected point. The map zooms in and highlights the affected area. Data points outside of the affected area remain on the map but are not selected.
Drive time
(Premium) Identify data points on the map that are within a specified driving time from a selected point. The map zooms in and highlights the affected area. Data points outside of the affected area remain on the map but are not selected.

Remember the following considerations about premium services:
- Premium services are supported only on servers running SAS Visual Analytics 8.1 or later.
- **Drive distance** and **Drive time** are premium features provided by Esri. Your organization uses Esri credits to pay for using these features.
- To use these features, you must provide login credentials for the mapping service on at least one of your devices.
- You might need additional capabilities assigned to your user ID. Contact your SAS administrator.
- You can disable and enable the premium services. See “Turn On Esri Premium Services” and “Turn Off Esri Premium Services”.

**What Is a Break?**

You can select additional distances to highlight on the map. Each distance is identified by a break. You can select additional distances when using the **Drive time** and **Drive distance** selections.

For example, you want to identify customers that are within 5 miles and 10 miles of a location. When you select **Drive distance**, you set the distance for 5 miles. Then, you add a break and select a distance of 10 miles. The mapping service calculates both distances and highlights the affected areas on the map. The area within 5 miles is a shade of gray. The area within 5 to 10 miles is another shade of gray.

**TIP** This option is a premium feature provided by the mapping service. When you specify more than one distance, the calculation costs more and takes longer to process. The app supports up to three distances or time spans in a calculation.

**View Map Data Details**

To view data about a data point, tap that data point in the map.

**Pan the Map**

To view areas of the map that are outside the area of the object, you can pan the map:

1. To turn on Pan mode, pinch or spread your fingers on the object to zoom in or out.

   **TIP** Zooming the object alerts the app that your subsequent gestures are not intended to page through the report.

2. Drag a finger on the map to pan the viewable area.

3. Turn off Pan mode. Double-tap the map to restore its original view.

   **TIP** You can now page through the report again.
**Search the Map**

You can search for street addresses or points of interest (for example, pizza restaurants). You can receive up to 20 results.

**TIP** If there are more than 20 results, the 20 shown are those nearest the current visual center of the map.

Complete the following steps:

1. Tap the map.
2. Tap \( \) to view the map in full-screen mode.
3. Drag your finger on the map to position your chosen location to the visual center of the map.

**TIP** Search works from the current visual center of the map and continues outward.

4. Tap \( \) .
5. Enter your search string in the **Search map** field.
   Depending on what you enter, the Search interface displays up to 20 suggestions. Up to five recent search strings for searches that have occurred during the current app session are also displayed. As you continue to type, new suggestions replace earlier ones.

**TIP** Search works within the current visual bounds of the map. If you want search results outside the current visual bounds, you must drag the map to view the area in which you want to receive new search results and tap \( \) again.

6. To initiate a search using the string that is entered, select \( \). Alternatively, you can select any one of the suggested search items or recent search items in the list.

The search results appear. A location pin for each result appears on the map. The pin number matches its result. When available, the search results also provide the name and street name of each location.

7. Tap a result to highlight its pin on the map. Tap the pin to display the location data.

8. You can highlight data points surrounding the selected result by selecting a distance option.

   **Note:** For information about premium services, see “What Are Geographic Mapping Services?”

   Tap \( \). 

   **Distance**
   
   Specify a distance from the search result location.

   **Drive time**
   
   (Premium) Specify a drive time from the search result location.

   **Drive distance**
   
   (Premium) Specify a driving distance from the search result location.

9. To start a new search, tap \( \).
**Identify Data Points by Distance**
To identify data points that are located within a specified distance:

1. Select the location to use for the center of distance calculation:
   - To select a data point, tap the data point and then tap  
   - To select any location on the map, press and hold on that location.

2. Tap **Distance**.

3. Enter the distance.

4. By default, miles is the selected measure. Tap **Miles** to display a menu that enables you to switch between Miles and Kilometers. Tap the measure that you want.

5. Tap **Apply**.
   - The app zooms into the map and highlights the data points that are located within the specified distance.

**Identify Data Points by Drive Time**

Note: For information about premium services, see “What Are Geographic Mapping Services?”
To identify data points that are located within a specified drive time:

1. Select the location to use for the center of distance calculation:
   - To select a data point, tap the data point and then tap  
   - To select any location on the map, press and hold on that location.

2. Tap **Drive time**.

3. Enter the drive time duration.

4. (Optional) To identify more than one set of data points, tap **Add break** and enter an additional data point.
   - See “What Is a Break?”

5. Tap **Apply**.
   - The map highlights the data points that are located within the specified drive time.

**Identify Data Points By Drive Distance**

Note: For information about premium services, see “What Are Geographic Mapping Services?”
To identify data points that are located within a specified drive distance:

1. Select the location to use for the center of distance calculation:
   - To select a data point, tap the data point and then tap  
   - To select any location on the map, press and hold on that location.

2. Tap **Drive distance**.

3. Enter the drive distance.
By default, miles is the selected measure. Tap Miles to display a menu that enables you to switch between Miles and Kilometers. Tap the measure that you want.

(Optional) To identify more than one set of data points, tap Add break and enter an additional data point. See “What Is a Break?”

Tap Apply.

The map highlights the data points that are located within the specified drive distance.

**View Map Data in a Table**

You can view the underlying data while working with a map.

Complete these steps:

1. Tap the map.

2. Tap to view the map in full-screen mode.

3. (Tablet) In the toolbar at the bottom of the report viewer, tap .
   (Phone) In the toolbar at the bottom of the report viewer, tap and then tap Show details.

   Data details appear in a table below the map.

   **TIP** You can still tap the map when the table is open.

4. Tap a row in the table to highlight the associated item in the map.

   **TIP** You can scroll the table up and down to view all of the rows.

5. (Tablet) In the toolbar at the bottom of the report viewer, tap to close the table.
   (Phone) In the toolbar at the bottom of the report viewer, tap and then tap Hide details to close the table.

**Highlight Map Data in Explore Mode**

You can select areas on the map and the associated table data is highlighted.

Complete these steps:

1. Tap the map.

2. Tap to view the map in full-screen mode.

3. (Tablet) In the toolbar at the bottom of the report viewer, tap .
   (Phone) In the toolbar at the bottom of the report viewer, tap and then tap Show details.

4. Tap .

   **TIP** You can still tap the map when the table is open.

5. Tap a selection shape: or .

   **Note:** The shapes that are available depend on how the report is designed.
6 Tap and drag on the map to select an area of the map.
   The associated data for this area is highlighted in the table.

7 To highlight other table data, tap inside the selection shape and drag to the new area.
   The movement is reflected in the table.

8 To dismiss the selection, tap outside the selection shape.

**Select Map Data to Interact with Other Objects**

When in Explore mode, you can select areas on the map to identify data for an interaction in other objects. Because you must view the map in full-screen to use Explore mode, you cannot see the interactions when they occur. You must restore the map to its initial size and review the other objects for interactions.

**TIP** Ask your report designer if the map has any interactions with other objects.

Complete these steps:

1 Tap the map.

2 Tap 🍂 to view the map in full-screen mode.

3 Tap 🍂.

   **TIP** You can still tap the map when the table is open.

4 Tap a selection shape: □ or ○.
   **Note:** The shapes that are available depend on how the report is designed.

5 Tap and drag on the map to select an area of the map.

6 Tap 🍂 to restore the map to its initial size.

   **TIP** Be careful not to tap the map and dismiss the selected area.

7 Review the objects on this page for interactions based on the data selected.
Sharing Reports

Sending Reports to Others

How Can I Send a Report? ................................. 61
Email or Text a Report .................................. 62

Receive a Report Link .................................. 62

Present Your Screen to Others ......................... 62

Sharing an Object Image from the Report Viewer .... 63
Share an Object Image .................................. 63
Receive an Object Image Email ......................... 63

Annotating a Report Page or Object ................. 63
What Is Annotation? .................................... 63
Annotate a Report Page or Object ..................... 64
Share the Annotated Page or Object ................. 64
Save the Annotated Page or Object ................. 64
Exit the Annotate Window ............................. 65

Printing Reports ........................................ 65
Print a Report or an Object While Viewing It .... 65
Print a Report from Add Reports ...................... 65
Print a Report from Search Results .................. 65
Print a Report While in My Reports, Recent, Favorites, or Collection Views ................. 66

Sending Reports to Others

How Can I Send a Report?

The app generates a report link that enables you to send a report. A report link is a link that opens the report. You can send a link by using email or text.

When a recipient taps the link, the app downloads the report and adds it to My Reports, and opens it. If the recipient does not have a server connection to the server on which the report is located, the app automatically sets up the connection.

TIP

- Sharing a report is a great way to quickly and easily add a server connection. See “Quickly Add a Server Connection”.
- Depending on how a report is accessed, the email can also contain a screen capture of a page from the report.
You can share a report without adding it to My Reports.
You can share multiple reports at once. See “Selecting Multiple Reports”.

Note: Your email and text message app availability can vary depending on your device.

### Email or Text a Report

To email or text a report:

1. Do one of the following:
   - In the report viewer, tap on the toolbar at the bottom of the report viewer.
   - In the My Reports, Recent, Favorites, or collection views, tap on the report tile.
   - In Add Reports, tap a report.
2. Tap Share.
3. If your device has multiple apps for sharing, an app selection window opens. Tap the app that you want to use.
   A window appears with the report information.
4. Tap the To field and enter the contact information for the recipient.
5. (Optional) Tap the message area to enter text.
6. Complete the action to return to SAS Visual Analytics App. For example, in an email app, tap Send.

You can also send multiple reports at one time. See “Selecting Multiple Reports”.

### Receive a Report Link

When you receive an email or a text message with a link to a report, tap the link to open the report.

- If you already added the affected report to My Reports, SAS Visual Analytics App opens the report.
- If you have not added the report, the app asks whether you want to download the report.
- If you choose to download the report, the app asks whether to open the report when the download is complete.
- If you have not created a connection to the server hosting the report, the app prompts you to create a connection.

### Present Your Screen to Others

You can share your device screen with others while you use SAS Visual Analytics App. Participants invited to the presentation do not require SAS Visual Analytics App. The screen is viewed in a web browser. The web browser can be located on a desktop system or a mobile device.

Note: Present screen is for SAS Visual Analytics App only. When you leave the app, the presentation automatically pauses.
This feature is located in the report viewer. Tap 🎭 and then tap Present Screen.

---

### Sharing an Object Image from the Report Viewer

You can share the image of an object that you are viewing in the report viewer. The app generates an image of the object, and a link to the report that contains the object. You can email the image and link to another user. When the recipient receives the email, they can view the attached object image. When they tap the link, the app downloads the report and adds it to My Reports. If the recipient does not have a server connection to the server on which the report is located, the app automatically sets up the connection.

#### Share an Object Image

To share the object image:

1. Open a report and select the object.
2. Tap 🎭 in the toolbar at the bottom of the report viewer.
3. Tap Share.
4. If your device has multiple apps for sharing, an app selection window opens. Tap the app that you want to use.
   - A window appears with the object information.
5. Tap the To field and enter the contact information for the recipient.
6. (Optional) Tap the message area to enter text.
7. Complete the action to return to SAS Visual Analytics App. For example, tap Send.

#### Receive an Object Image Email

When you receive an email with an object image, you can tap the image to open it. To see the report that contains the object, tap the link.

- If you have the report in My Reports, SAS Visual Analytics App opens the report.
- If you do not have the report, the app asks whether you want to download the report.
- If you choose to download the report, the app asks whether to open the report when the download is complete.
- If you have not created a connection to the server hosting the report, the app prompts you to create a connection.

---

### Annotating a Report Page or Object

#### What Is Annotation?

When you select the Annotate feature, the app creates a screen capture of either the currently selected object or the page that you are currently reviewing in the report. You can draw and write your observations on the image.
When you are finished, you can share the annotated image with others.

**Annotate a Report Page or Object**

To annotate a copy of a report page or object:

1. Navigate to the appropriate report page.
2. If you want to annotate an object, tap the object to select it.
3. Tap on the toolbar at the bottom of the report viewer.
4. Tap **Annotate**.

An image of the page or object appears.

The following tools are available:

- **Pen**: Tap the pen to write or draw on the image. You can change the color and width of the output. This is the default tool.
- **Highlighter**: Tap the highlighter to draw translucent color on the image. You can change the color and width of the output.
- **Eraser**: Tap the eraser to erase parts of the annotation.
- **Clear All**: Tap to clear all of the annotation. You can also change the size of the eraser.
- **Undo**: Tap the **Undo** button for each action that you want to undo.
  - (Phone) Tap A menu appears. Tap **Undo**. Repeat this process for each action that you want to undo.
- **Redo**: Tap the **Redo** button for each action that you want to redo.
  - (Phone) Tap A menu appears. Tap **Redo**. Repeat this process for each action that you want to redo.

**Share the Annotated Page or Object**

To share the annotated image:

1. In the annotation window, tap .
2. If your device has multiple apps for sharing, an app selection window opens. Tap the app that you want to use.
   - A window appears with the annotated image.
3. Tap the **To** field and enter the contact information for the recipient.
4. (Optional) Tap the message area to enter text.
5. Complete the action to return to SAS Visual Analytics App. For example, tap **Send**.

**Save the Annotated Page or Object**

To save your annotated page or object, tap .

A notification appears at the bottom of the screen that indicates the location where the image is saved on the device.
Note: Depending on your device, the image of your annotation is saved to your device’s Gallery, File Manager, or both.

Exit the Annotate Window
To exit the Annotate window, tap ✓. The annotated image is saved.

Printing Reports

Print a Report or an Object While Viewing It
To print a report, or a selected object in a report:

1. Open the report.
2. If you want to print a specific object, select that object.
3. Tap on the toolbar at the bottom of the report viewer.
4. Tap Print.
   A progress indicator appears, and the server connection generates a PDF.

   **TIP** To cancel the process, tap Cancel on the progress indicator.

5. A Select an Action window appears. Tap Open.
6. In the Overflow menu, tap Print.

Print a Report from Add Reports
You can print reports whether or not you have added them to My Reports:

1. Tap the report.
2. (Tablet) Tap Print.
   (Phone) Tap ‏ and then tap Print.
   A progress indicator appears, and the server connection generates a PDF.

   **TIP** To cancel the process, tap Cancel on the progress indicator.

3. A Select an Action window appears. Tap Open.
4. In the Overflow menu, tap Print.

Print a Report from Search Results
You can print reports whether or not you have added them to My Reports:
1. Tap on the report tile.

2. Tap **Print**.
   
   A progress indicator appears, and the server connection generates a PDF.

   **TIP** To cancel the process, tap **Cancel** on the progress indicator.

3. A Select an Action window appears. Tap **Open**.

4. In the Overflow menu, tap **Print**.

---

**Print a Report While in My Reports, Recent, Favorites, or Collection Views**

You can print reports whether or not you have added them to **My Reports**:

1. Tap on the report tile.

2. Tap **Print**.
   
   A progress indicator appears, and the server connection generates a PDF.

   **TIP** To cancel the process, tap **Cancel** on the progress indicator.

3. A Select an Action window appears. Tap **Open**.

4. In the Overflow menu, tap **Print**.
Problems in My Reports, Recent, Favorites, or Collections

A Report Is Missing

Problem: A report that was previously in My Reports, Recent, Favorites, or a collection, is no longer there.

Explanation 1: When a report is removed from the server, the report is removed from your device the next time it connects to the server.
Resolution 1: Contact the author of the report.

Explanation 2: If the report is in a collection, when the owner of the collection removes a report from the collection, the report is removed from your device the next time it connects to the server where the collection is located.

Resolution 2: Contact the owner of the collection.

**Favorites Is Empty**

Problem: You added one or more reports to Favorites, but **Favorites** is empty.

Explanation: The ability to view reports from a particular server in **Favorites** (and in the Favorites folder in the Add Reports window), is controlled by an administrative setting.

Resolution: Contact the SAS administrator for the affected server.

- (SAS Visual Analytics 8.1 or later) The required URI is /folders/folders/@myFavorites.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is Personalization.

For more information, see “URIs and Capabilities That Affect the Mobile App” on page 75.

**Cannot Add a Report to Favorites**

Problem: You can view a report, but you cannot add the report to favorites.

Explanation 1: You are accessing the report using a guest connection to the server. In this situation, the Favorites setting is not enabled or only the SAS administrator can add and remove reports from **Favorites**. See “Guest Connection to a Server”

Resolution 1: Contact the system administrator for the affected server.

Explanation 2: The ability to add a report to **Favorites** is controlled by an administrative setting.

Resolution 2: Contact the SAS administrator for the affected server.

- (SAS Visual Analytics 8.1 or later) The required URI is /folders/folders/@myFavorites.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is Personalization.

For more information, see “URIs and Capabilities That Affect the Mobile App” on page 75.

**Cannot Remove a Report from Favorites**

Problem: You cannot remove a report from **Favorites**.

Explanation 1: You are accessing the report using a guest connection to the server. In this situation, the Favorites setting is not enabled or only the SAS administrator can add and remove reports from Favorites. See “Guest Connection to a Server”

Resolution 1: Contact the SAS administrator for the affected server.

Explanation 2: The ability to remove a report from **Favorites** is controlled by an administrative setting.

Resolution 2: Contact the SAS administrator for the affected server.

- (SAS Visual Analytics 8.1 or later) The required URI is /folders/folders/@myFavorites.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is Personalization.

For more information, see “URIs and Capabilities That Affect the Mobile App” on page 75.
A Report Tile Does Not Display an Image

Problem: When you are in My Reports, Recent, Favorites, or a collection, or in search results, one or more report tiles do not display an image.

Explanation: When possible, an image from the report is auto-generated for the report tile. If an image cannot be generated, the report tile displays a default image.

Resolution: The report tile is working as designed.

TIP The default image differs from ✗, which indicates a report that uses remote data. See “Remote Data Availability and Report Security”.

Recent Is Empty

Problem: You have viewed reports, but Recent is empty.

Explanation: Recent can be empty because of the following reasons:

- You downloaded and viewed the report using a guest connection to the server. Reports viewed using a guest connection are not included in the history of recently viewed reports.
- You cleared the recently viewed reports history for the connection.
- The server on which the affected reports are located might have reset your history.
- The ability to view the content of Recent is controlled by an administrative setting.

Resolution: Contact the SAS administrator for the affected server. If the issue is a missing administrative setting, the administrator uses one of the following settings:

- (SAS Visual Analytics 8.1 or later) The required URI is /folders/folders/@myHistory.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is Personalization.

For more information, see “URIs and Capabilities That Affect the Mobile App” on page 75.

Cannot Delete Reports in My Reports

Problem: You cannot delete a report in My Reports.

Explanation: Some of the reports in My Reports are part of a collection that you have auto-added. You cannot delete auto-added reports.

Resolution: To remove the reports, clear the auto-add option for the affected collection. See “Remove Auto-add”.

Problems in Add Reports or Search

Cannot Add a Report

Problem: You attempt to add a report, but it fails.

Explanation: The ability to add reports and view reports is controlled by an administrative setting.

Resolution: Contact the SAS administrator for the affected server.

- (SAS Visual Analytics 8.1 or later) The required URI is /SASMobileBI.
Exported documentation:

(SAS Visual Analytics 7.3 and 7.4) The required capability is View Report and Stored Process. For more information, see “URIs and Capabilities That Affect the Mobile App” on page 75.

**Search Fails to Return Results**

Problem: The app does not return any search results for a server connection.

Explanation: The device is not connected to a network. The app requires a network connection to search a connected server. When there is no network connection, search results include only reports located on the device.

Resolution: Make sure the device is connected to a network and that Airplane mode is turned off.

Note: If search continues to fail, contact your SAS administrator.

**You Do Not Know the Report Location**

Problem: You do not know the server name or the path in which the report is located.

Resolution: In the toolbar at the bottom of the report viewer, tap 📒.

---

**Problems in the Report Viewer**

**Report Data Is Missing or Incomplete**

Problem: The report either partially opens or the app displays the following message:

A server data request was not fulfilled. The object data might be missing or incomplete. Make sure that a network connection is available such as a cellular, Wi-Fi, or other network.

Explanation: This problem occurs when the device is not connected to a network. The report uses data conditions that force SAS Visual Analytics App to retain a live connection with the report server. This connection enables the app to download additional data in response to interactions. This live connection is lost when the device is not connected to a network.

Resolution:

- Make sure that the **Airplane mode** setting is turned off. This setting is located in the Android Settings app. The setting is typically located in the Wireless and Networks section.
- Make sure that you currently have a wireless, cellular, or other network connection.

**Report Is Missing Web Content**

Problem: You see a blank space in a report where web content should appear.

Explanation: Report designers can include a link to web content (such as an external page or YouTube video) in a report. The content to which the link points appears in the report.

The content might be missing because of the following reasons:

- there is no internet connection.
- there was an error in how the link was added to the report.
- the link might no longer be valid.

Resolution:
- Make sure that you currently have a Wi-Fi or other internet connection.
- Contact the report designer.

### Columns Do Not Sort in a Table

**Problem:** You tap a column heading in a table and the column data does not sort.  
**Explanation:** When the column data does not sort, it might be because of one or more factors:
- Some reports might use a type of data that the app cannot dynamically sort.
- Sorting might be disabled for some objects.

**Resolution:** Contact your report designer about the design of the report.

### Drive Time and Drive Distance Are Missing on an Esri Map

**Problem:** A report includes an object that is an Esri map. However, only the **Distance** selection is available. The **Drive time** and **Drive distance** selections are missing.

One or more of the following situations might be the cause:
- **Explanation 1:** The affected report is located on a server running SAS Visual Analytics 7.4 or earlier. Drive time and drive distance functionality are provided by release 8.1 and later.
  - **Resolution 1:** The server must be running SAS Visual Analytics 8.1 or later. Contact your SAS administrator.
- **Explanation 2:** You require an additional Esri setting assigned to your user ID.
  - **Resolution 2:** Contact your SAS administrator. Your user ID in SAS Visual Analytics must be assigned the URI `/webDataAccess/esri/user/token`.  
  - For more information, see "URIs and Capabilities That Affect the Mobile App" on page 75.
- **Explanation 3:** The server does not have your Esri credentials.
  - **Resolution 3:** You must enter your Esri credentials for the applicable server connection in SAS Visual Analytics App.
  - **Note:** Depending on your organization, Esri credentials and the server connection credentials can differ. Contact your SAS administrator about your Esri credentials.

### Cannot View Comments

**Problem:** You cannot view comments associated with a report or its contents.  
**Explanation:** The ability to view comments is controlled by an administrative setting.

**Resolution:** Contact the SAS administrator for the affected server.
- **(SAS Visual Analytics 8.1 or later)** The required URI is `/comments/comments`.  
- **(SAS Visual Analytics 7.3 and 7.4)** The required capability is Add and View Comments.

For more information, see "URIs and Capabilities That Affect the Mobile App" on page 75.

### Cannot Add Comments

**Problem:** You cannot add a comment to a report or its contents.  
**Explanation:** The ability to add comments to a report or its contents is controlled by an administrative setting.
Cannot Subscribe to Alerts
Problem: You cannot access the Alerts view in the report viewer and subscribe to alerts. The ability to subscribe to alerts is controlled by an administrative setting.
Resolution: Contact the SAS administrator for the affected server.
- (SAS Visual Analytics 8.2 or later) The required URI is /reportAlerts/*.
  Note: The Alerts feature is not supported by SAS Visual Analytics 8.1.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is Personalization.
For more information, see “URIs and Capabilities That Affect the Mobile App” on page 75.

Alerts Do Not Work
Problem: Alerts do not work for a report.
Explanation: The Alerts feature is not supported on servers running SAS Visual Analytics 8.1. It is supported on all other releases.
Resolution: Contact your SAS administrator about the version of SAS Visual Analytics.

The Present Screen Feature Disconnects Too Soon
Problem: You are presenting your screen to others and the present screen feature disconnects while your device is idle.
Explanation: When the device is idle longer than the Automatic Disconnect setting, the present screen feature automatically disconnects and stops the presentation.
Resolution: You can adjust the Automatic Disconnect setting:
1. If you are in the report viewer, tap \( \leftarrow \) to exit.
2. Tap \( \equiv \) to open the navigation drawer.
3. Tap Settings.
4. Scroll down and tap Automatically Disconnect.
5. Tap your selection.
6. Tap \( \leftarrow \) to exit Settings.

Problems in the Screen Presentation Web Application
A screen presentation shows you another person’s device while they are viewing SAS Visual Analytics App. The presentation opens in your web browser. You do not need SAS Visual Analytics App.
The Link to the Presentation Fails to Open

Issue: You received an email invitation to a screen presentation. When you clicked the link in the email, the link fails to open the web page.

Explanation: You must be on the same network as the screen presenter. If you are at another location that uses a different network, the web viewer security blocks the web page from opening.

Resolution: Identify the network that your device is using. Ask the presenter which network the mobile device is using. One of you must change your selected network to be the same as the other.

The Screen Appears to Freeze

Issue: During the presentation, there is no activity on the screen.

Explanation: During longer presentations, the screen might freeze.

Resolution: Ask the presenter whether they are actively navigating a report or the app. If the presenter is active, sign out of the web viewer and then sign in again.

Cannot Email or Share Reports

Problem: You cannot email, text message, or share reports in any way.

Explanation: The ability to share a report is controlled by an administrative setting.

Resolution: Contact the SAS administrator for the affected server.

- (SAS Visual Analytics 8.1 or later) The required URI is /SASVisualAnalyticsCommon_capabilities/shareReport.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is Email.

For more information, see “URIs and Capabilities That Affect the Mobile App” on page 75.

App Fails to Respond or Displays Unexpected Behavior

Problem: The app does not respond or the app displays unexpected behavior.

Resolution: Stop the app and, in some cases, re-install the app. Do so in the following order:

1. Stop SAS Visual Analytics App. The following procedure can vary depending on your Android device.
   a. On the Home screen, tap the Apps icon.
      
      **TIP** The Apps icon is ☐️ on some devices.
   
   b. Locate and tap **Apps**.
      
      **TIP** On some devices this might be Application Manager.
   
   c. Locate and tap **Analytics**.
d Tap **Force stop**.

e A confirmation window appears. Tap **OK**.

f Tap the **Home** button to return to the Home screen.

2 Restart the app to determine whether the problem is resolved.

3 If the problem persists, stop the app again using the procedure in step 1.

4 Delete the app.

**CAUTION!** Deleting an app also deletes the reports and data from your device. Any server connections, user IDs, and passwords are also deleted.

The following procedure can vary depending on your Android device.

a Open Settings.

b Locate **Apps** and tap it.

c Locate **Analytics** and tap it.

   The app Info view appears.

d Tap **Uninstall**.


6 Start the app to determine whether the problem is resolved.

7 If the problem persists, contact your technical support staff.
Technical Information

URIs and Capabilities That Affect the Mobile App

Overview
SAS administrators can control access to certain features in SAS Visual Analytics App. The control method differs depending on the release of SAS Visual Analytics to which the mobile app connects.

- For release 8.1 or later, access is controlled by adjusting rules applied to a user or group of users. Rules are identified by URIs (Uniform Resource Identifiers).
- For release 7.3 and 7.4, access is controlled by assigning capabilities to a role. Then, a user or group of users are given membership to that role.

URIs and capabilities can be set on a per user per server basis. This means, for example, that a user ID might be enabled to add comments on one server, but not on another.

If a user is having trouble accessing a feature in the mobile app, their user ID might not have the necessary URI or capability. If a user is having trouble accessing a feature, verify the URI or capabilities that have been assigned to their user ID for the applicable server.

URIs Used for SAS Visual Analytics 8.1 and Later
The following URIs control access to features in SAS Visual Analytics App when the app connects to SAS Visual Analytics 8.1 and later.

- /SASMobileBI/**
- /SASMobileBI_capabilities/allowWebContent
  Note: This URI is supported on servers running SAS Visual Analytics 8.3 and later.
- /SASMobileBI_capabilities/cacheMobileReportData
- /SASMobileBI_capabilities/exemptFromOfflineTimeLimit
- /SASMobileBI_capabilities/exemptFromPasscodeRequirements
- /SASVisualAnalyticsCommon_capabilities/shareReport
- /comments/comments
Capabilities Used for SAS Visual Analytics 7.3 and 7.4

The following capabilities control access to features in SAS Visual Analytics App when the app connects to SAS Visual Analytics 7.3 and 7.4.

- View Report and Stored Process
- Add and View Comments
- Email
- Export Data
- Export or Print as PDF
- Personalization
- Purge Mobile Report Data
- Limit Duration of Offline Access
- Require Passcode on Mobile Devices

For more information, see the applicable Administration Guide and search on the name of the capability:

- SAS Visual Analytics 7.3 documentation page and view the Administration Guide PDF.

Password Storage on Devices

SAS Visual Analytics App accesses servers on which reports are located. Typically, these servers are configured to require a user ID and password before permitting access. SAS Visual Analytics App stores the user ID and password on the mobile device.

The app uses application programming interfaces (APIs) provided by the mobile device's operating system to store and retrieve this information:

- Android uses the AccountManager API.
- iOS uses the Apple Keychain APIs.
- Windows uses the Microsoft Credentials Locker.
Getting Help

Ways to Get More Help .......................................................... 77
Give Feedback ................................................................. 77
Get Information about SAS Products .................................... 77
User Interface Help ............................................................ 78
  My Reports ................................................................. 78
  Add Reports Window ..................................................... 78
  Report Viewer ............................................................ 79
  Favorites ................................................................. 79
  Recent ................................................................. 80
  Collections ............................................................ 80

Ways to Get More Help

If you have problems with a report, contact the report designer or your SAS administrator.
For more help:

- see the documentation about SAS Visual Analytics at SAS Visual Analytics web page.
- participate in the SAS Visual Analytics section of the SAS Community web site.
- contact SAS Technical Support.

Give Feedback

If you have feedback about SAS Visual Analytics App, contact SAS.
If you have feedback about the Help, submit your comments using the feedback form. In the Feedback category list, select Documentation.

Get Information about SAS Products

For more information about SAS Visual Analytics and SAS Visual Analytics App:
See the SAS Visual Analytics App page at this address: http://www.sas.com/mobile
Email for information:
mobileapps@sas.com

For information about SAS SDK, a free developer’s toolkit for creating custom mobile apps for SAS Visual Analytics reports, see developer.sas.com. SAS SDK is available for iOS and Android operating systems.

User Interface Help

My Reports
Shows all of the reports that you have added on this mobile device.

Common Tasks
View a Report: Tap the report tile.
Add a New Report to My Reports
Add a Report to Favorites
Print a Report

TIP You can print reports whether or not you have added them to your device.

More Tasks
View Your Favorite Reports
Review Your Recent Report Access from All Devices
View Collections of Reports
"Email or Text a Report"
"Remove a Report"
Troubleshooting Problems in My Reports

Add Reports Window
Shows your server connections and the reports that they contain.

Common Tasks
“Add a Report”
“Add a Server Connection”
“Locate a Report on a Server Connection”
“Search Reports”
Print a report

TIP You can print reports whether or not you have added them to your device.
More Tasks

View Report Details: Tap the report tile.
“Change the Password for a Server Connection”
“Clear Recent”
“Email or Text a Report”
Troubleshooting Problems in Add Reports or Search

Report Viewer

View your reports. Explore your data. Share your screen.

Common Tasks

Use Features Designed into the Report
View Reports and Objects
“View Information about an Object”
“View an Object Using the Full Screen”
Update the Report
Print a Report

More Tasks

Present Your Screen to Others
Annotate a Report Page or Object
“Email or Text a Report”
Troubleshooting Problems in the Report Viewer

Favorites

Reports added to your favorites on this or another device. See “Your Favorites on Every Device”.

Common Tasks

Add a Report: Tap on the report tile, and then tap Add to My Reports.
View a Report
Print a Report

TIP You can print reports whether or not you have added them to your device.

More Tasks

Remove a Report from Favorites
“Email or Text a Report”
Troubleshooting Problems in the Favorites View
Recent
Reports that you have recently viewed on this or another device.

Common Tasks
Add a Report: Tap on the report tile, and then tap Add to My Reports.
View a Report
Print a Report

TIP You can print reports whether or not you have added them to your device.

More Tasks
“Clear Recent”
Add a Report to Favorites
“Email or Text a Report”
“Search Reports”
Troubleshooting Problems in the Recent View

Collections
Shows a group of reports that a collection owner has selected and made available to you.

Common Tasks
“Auto-add a Collection”
View a Report
Print a Report

TIP You can print reports whether or not you have added them to your device.

More Tasks
“Remove Auto-add”
Add a Report to Favorites
“Email or Text a Report”
Troubleshooting Problems in a Collection