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Welcome

Getting Started

How Do I Use the App?
Check out the new features.
View the videos: SAS Mobile BI for Windows playlist on YouTube
Use JAWS software? See the accessibility document.

Common Tasks

View Reports
“Add a Server Connection”
What’s New
SAS Mobile BI 8.2 for Windows 10 provides the following changes and enhancements.

Enhanced support for interactive filters.

View the slideshow in SAS Help Center.

A new control bar appears at the top of a report page that includes interactive filters. When a one-way or two-way filter is applied, a control appears in the bar, identifying the selected filter value. Multiple one-way filters are indicated by a separator (>). For more information, see “About Data Filters, Filter Controls, and Data Highlighting” on page 37.

Enhanced security capabilities.

This release of SAS Mobile BI uses more granular capabilities to control access to specific features in the app. For information, see “Troubleshooting SAS® Mobile BI” on page 61.

Enhanced support for report features.

This release of SAS Mobile BI for Windows includes the following enhancements to report features.

- You can now copy, save and share the image of an entire page or of individual report objects.
- Additional drilling capabilities let you view available selections in a hierarchy level in one or more hierarchies.
- The Information view has been enhanced to include a new object selection list. You can select the report, the current page, or an object on the current page in the list. The Information view is refreshed to display data about the selected item.
- Support has been added for dynamic web content objects. You can provide data to and get data from these objects.
- The app can now display the avatars of SAS Visual Analytics users in report comments.
You can now add comments to a report page.

Support has been added to the Comment feature so that you can edit or remove any comment or reply that you have created.

The app now provides alternative themes that you can use when viewing a report. For more information, see “Overriding Report Themes”.

Support for the latest versions of SAS Visual Analytics.
The application provides seamless support for SAS Visual Analytics 8.2, 8.1, 7.4, and 7.3 servers.

Enhancements and fixes.

What Is SAS® Mobile BI?

Use SAS Mobile BI to view and share charts and reports on Apple, Android, and Windows devices. For device support information, see the SAS Mobile BI page in the appropriate location:

- Apple iTunes store
- Google Play
- Microsoft Windows store

With SAS Mobile BI 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 reports

TIP SAS Mobile BI runs on desktop systems and tablets that use Windows 10. Depending on your device, you can use touch gestures on the screen or other input devices, such as touchpads and mice.

SAS Mobile BI supports viewing reports even when your device is offline. See “What Is an Offline Report?”

You can create these charts and reports using SAS® Visual Analytics.

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 Mobile BI

**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 in as guest when you add the server connection.

3 After you add a server connection, you can add reports to your subscriptions.

4 After you have subscribed to 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 the SAS Mobile BI app. See “About Sample Reports”.

---

**Where Did the Portfolio and Library Go?**

If you have used prior versions of SAS Mobile BI, you are familiar with the app’s portfolio and library. Starting in release 7.3, the app uses new names for these locations.

The portfolio is now called subscriptions views. Here, you can select from the following views:

- Subscriptions
- Recent
- Favorites
- Any collections that are available for you. Each collection is its own view.

The library is now called Add Reports. Open this window to add reports to your Subscriptions view. You can add and manage server connections in this location, too.

---

**What Does That Symbol Mean?**

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

- ✔ indicates that you have subscribed to 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 “About Local and Remote Report Data”.
Where Is the Help?
If you have located the SAS Mobile BI Help by using an internet search, know that you can also open the Help while in the app.

In the Subscriptions, Recent, Favorites, or collections views:
   Tap 📞 in the navigation bar and then tap Help.

In Add Reports:
   Tap 📞 in the navigation bar and then tap Help.

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

The Help opens in your web browser.

Can I Use Touch Gestures and Other Input Devices?
SAS Mobile BI runs on desktop systems and tablets that use Windows 10. Depending on your device, you can use touch gestures on the screen or other input devices, such as touchpads and mice.

Right-mouse click
   On a tablet, press and hold on the screen.

Click
   On a tablet, tap.

Scroll
   On a tablet, slide your finger across the screen.

For more information, see Touchpad gestures for Windows 10 at the Microsoft website.

Can I Add the SAS Mobile BI Application to My Start Screen?
As with other Windows applications, you can add (“pin”) the SAS Mobile BI application to your Start Screen to access the application quickly whenever you need it.

To add SAS Mobile BI to the Start Screen:
1 Tap the Windows logo on the taskbar.
2 In the list of applications, tap All apps and navigate to the SAS Mobile BI application.
3 Tap and hold the SAS Mobile BI application, and then release and tap Pin to Start.

You can remove (“unpin”) the application from the Start Screen at any time.

To remove the application from the Start Screen:
1 Tap the Windows logo on the taskbar.
2 On the Start Screen, tap and hold the application tile. Then release and tap Unpin from Start.

Note: Uninstalling the application also removes the icon from the Start Screen.
What Is an Offline Report?

On a mobile device, when SAS Mobile BI cannot connect to the server, any report that you view on that device is offline. Typically, this is because the device does not have a network connection, but it can also be because of security measures that prevent access to an internal network or server. Because SAS Mobile BI cannot communicate with the server, certain app functionality is modified.

Depending on how a report is designed, an offline report might continue to work as designed or some of its functionality might adjust to offline mode.

For detailed information about offline functionality and settings that administrators can use to adjust offline support, see the documentation on the SAS Mobile BI Product web page.

Note: Offline reports are not the same as reports that use remote data for security purposes. You might see this feature called tethering or live connection. It refers to a security setting that requires that your device maintain a connection to the server in order to view data in a report. For more information, see “About Local and Remote Report Data”.

Note: If you use a report frequently and want to access it quickly, you can pin that report to the Start Screen. For information, see “Add a Report to the Start Screen”.
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 SAS Mobile BI, 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 Visual Analytics administrator for your user ID, password, and server information.

Your administrator can also tell you the following:

- If the server provides a guest connection. See “What Is a Guest Connection?”
- If the server requires a passcode. See “What Are Passcodes?”

TIP When you first open the SAS Mobile BI app, a connection to the SAS Demo Server might be present. See “About Sample Reports.”
What Is a Guest Connection?

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: 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:

- the Recent view
- comments
- alert subscriptions

If the Favorites view 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.

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. If you are not in Subscriptions, tap \( \text{订阅} \) in the navigation bar.
2. Tap \( \text{扩展} \) on the command bar
3. Tap **Connect to your organization’s content** 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 bar.
   - 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** \( \text{安全} \) indicates a secure server connection in the **All Connections** list.

7. Tap **Next** to verify the connection.
If the connection fails, a message is displayed to help you correct the problem.

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.

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

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.

(***Optional*) In the **Description** field, customize the description for the new connection.

- If you delete the default description, you must enter a new description. The field cannot be left blank.

Tap **Next** to verify your access to the server.

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?"

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, the app requires you 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. Press and hold the server connection that you want to edit. A menu appears.

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. Press and hold the server connection that you want to edit. A menu appears.

3. Tap **Edit**.

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

   **Note:** You might have to scroll the page up to view all of this field.

5. Tap **Save** to save the update.
Enable Esri Premium Services

Complete these steps:
1. Tap  in the navigation bar.
2. Tap **Esri Premium Services**.

   Servers that provide Esri premium services are displayed 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.
3. Tap the switch for the server that you want to enable.
   - If the app does not request your Esri credentials, the Esri services are turned on at this point.
   - If the app requests 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.
   - Tap **Logon**.

Disable Esri Premium Services

Complete these steps:
1. Tap  in the navigation bar.
2. Tap **Esri Premium Services**.
3. Tap the switch for the server that you want to disable.

Remove a Server Connection

When you remove a server connection, any report subscriptions from the affected server are removed from your device.

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. Press and hold the server connection that you want to edit. A menu appears.
3. Tap **Remove**.
4. Scroll to the bottom and tap **Remove**.

About Sample Reports

The SAS® Mobile BI app provides many sample reports for you. When you first open the SAS Mobile BI app, some sample reports are available in **Subscriptions**. 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.

**Note:**
- The SAS Demo Server provides a guest connection. Reports located on a guest connection do not support all of the app’s features, such as the comments feature. For more information, see “What Is a Guest Connection?”
You can remove sample reports from Subscriptions. You can always subscribe to sample reports from the SAS Demo Server again. See “Subscribe to a Report”.

You can remove the SAS Demo Server connection. See “Remove a Server Connection”.

You can always reconnect to the SAS Demo Server. See “Restore Sample Reports”.

## Securing Reports and Data

### Locking the App with a Passcode

#### What Are Passcodes?

The SAS® Mobile BI app provides a passcode feature that locks the app. 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 the affected server, it requires that you create a passcode. An organization uses a required passcode to secure its reports.

You create or enter a required passcode at these times:

- when you connect to a passcode-secured server for the first time
  - **Note:** The first time the Passcode window appears, you can close the window without creating a passcode. However, when you attempt to subscribe to a report from the affected server, a passcode is required at that 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 continues to lock the app. 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 Locks the App

Both required and optional passcodes lock the app. They differ in the time length and how many passcode attempts you are permitted.

**required passcode**

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

**optional passcode**
When the app is inactive for 5 minutes, locks the app.
Permits 10 attempts.
When you exceed the number of attempts, locks the app for 15 minutes.

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 BI 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 reinstall 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.
2. 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. Tap OK to close the Create Passcode window.

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

Create an Optional Passcode
Complete these steps:
1. Tap in the navigation bar.
2. Tap Application Security.
3. Tap Add.

   The Create Passcode window appears.
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. Tap OK to close the Create Passcode window.

Change a Passcode
Complete these steps:
1. Tap in the navigation bar.
2. Tap Application Security.
3. Tap Change.

   The Change 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. To close the Change Password window, tap OK.
Remove an Optional Passcode

Complete these steps:
1 Tap ☰ in the navigation bar.
2 Tap Application Security.
3 Tap Remove.
   The Enter Passcode window appears.
4 Enter your current passcode to verify your identity and remove the passcode. The Passcode removed window appears. Tap OK.

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

About Local and Remote Report Data

What Is Local and Remote Report Data?
When you subscribe to a report, it appears in Subscriptions. However, depending on the security assigned to your user ID, the report data might not exist on your device. Report data can be local or remote:

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

How Do I Know a Report Uses Remote Data?
If a report uses remote data, the report tile in Subscriptions displays the cloud icon: ☁️.
If a report uses local data, this icon does not appear on the tile.

Why Do 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 Does Remote Data Work?
Each time you open a report with remote data, the app connects to the server. 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 Subscriptions. If you are not connected to a network and you try to open the report, it does not open.

About the Whitelist
The SAS® Mobile BI 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.
Restoring App Settings

Restore the Default Settings

Restoring the default settings removes all reports and server connections and resets all settings.

To restore the default settings:
1. If you are in the report viewer, tap ← to exit.
2. Tap in the navigation bar.
3. Tap General.
4. Tap Restore Default Settings.
5. Tap Restore.

TIP You can tap anywhere outside the message window to close it without restoring the default settings.

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. If you are in the report viewer, tap ← to exit.
2. Tap in the navigation bar.
3. Tap General.
4. Tap the Restore Sample Reports switch.
5. Tap Restore.

TIP You can tap anywhere outside the message window to close it without restoring the sample reports.
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 ← in the navigation bar.
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.

   **TIP** 🗝 indicates that the report is already subscribed and downloaded.

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.

What Is a Subscription?

A subscription is how you identify reports on a server connection that you want to view. When you subscribe to a report, it is downloaded to your device and added to Subscriptions.

To subscribe to a report, you must be assigned the appropriate roles and capabilities in SAS® Visual Analytics. Contact your SAS Visual Analytics administrator about these assignments.

Subscribe to a Report

The following slideshow introduces how to subscribe to 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 pane.
3 Tap Subscribe to add the report to Subscriptions.

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

Updating Reports Automatically

What Is Automatic Update?

When a subscribed report is updated on the server, you can choose to have SAS® Mobile BI 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:
- Report subscriptions are updated only when the device is connected to a network.
- Automatic update does not apply to reports that use remote data (_attached).
It changes to off.

**Turn On Automatic Update**

To turn on automatic update:
1. If you are in the report viewer, tap ← to exit.
2. Tap 🔊 in the navigation bar.
3. Tap Reports.
4. Tap the Automatic Update switch.
   It changes to on.

---

**Updating Reports on Demand**

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

**Update a Closed Report**

To update a report on demand:
1. In the subscription views, press and hold on the report tile.
2. Tap Details.
3. Tap 🔄.

**Update the Report You Are Viewing**

Complete these steps in an open report:
1. Tap 🔄.
2. Tap 🔄.
   - 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.
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Viewing Current Subscriptions

What Are Subscriptions?

Subscriptions help you manage which reports are available to view on your device. Subscriptions also enable the app to update reports with recent changes. All of the reports that you view are subscribed from a server connection. See “What Is a Server Connection?”

View Your Subscriptions

The Subscriptions view is the default view in the app. It shows all of the reports that you subscribe to on this mobile device.

If you are in another subscriptions view, tap and tap Subscriptions.

Your subscriptions are grouped:

- **Frequently Viewed** shows the reports that you view most frequently on this device.
- **My Subscriptions** shows the reports to which you have subscribed on this device.

  **Note:** Typically, subscribed reports are downloaded to your device. However, some reports might require additional security and use remote data instead. See “About Local and Remote Report Data”.

- **Samples** shows any sample reports to which you have subscribed on this device. See “About Sample Reports”.

Identifying Your Favorite Reports

Your Favorites on Every Device

In the app, the Favorites view 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 ★ in the navigation bar.

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 views: Subscriptions, Recent, collections, search results, or Add Reports.
Add an Open Report to Favorites

Complete these steps in the report viewer:
1. Tap.
2. Tap ★.

Add a Closed Report to Favorites

To add a closed report to your favorites:
1. Press and hold on the report tile.
2. Tap Add to favorites.

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 views: Subscriptions, Favorites, Recent, collections, search results, or Add Reports.

Remove an Open Report from Favorites

Complete these steps in the report viewer:
1. Tap.
2. Tap ★.

Remove a Closed Report from Favorites

To remove a closed report from your favorites:
1. Press and hold on the report tile.
2. Tap Remove from favorites.

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

Tracking Recent Reports

The Recent view contains reports that you have recently viewed on one of your devices.

Recent Reports on Every Device

The Recent view 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 the Recent view. 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 the Recent View”.
**View Your Recent Reports**

To view your recent reports, tap 📊 in the navigation bar.

**Clear the Recent View**

To clear the Recent view:

1. Tap 🔄 in the navigation bar.
2. Tap 📊.
3. To view your connections, 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.

4. Press and hold the server connection for which you want to clear the history. A menu appears.
5. Tap **Edit**. The connection opens.
6. Scroll to the bottom and tap **Clear Recent Reports for Connection**.

**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.

7. Tap **Cancel**.

---

**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 pane.

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-Subscription?**

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

- If you have not subscribed to any reports in the collection, selecting auto-subscribe adds all of the reports to your subscriptions.
- If you have already subscribed to some of the reports in the collection, selecting auto-subscribe adds the unsubscribed reports to your subscriptions.
- If you have selected auto-subscribe and new reports are added to the collection, the new reports are automatically added to your subscriptions.
- If you have selected auto-subscribe and reports that you did not manually subscribe to are removed from the collection, those reports are automatically removed from your subscriptions.

When you remove auto-subscribe, you no longer have a subscription to the reports in the collection.
Note: If you subscribed to some of the reports in the collection before selecting auto-subscribe, you still subscribe to those 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-subscribe to a Collection**

To learn how auto-subscription works, see “What Is Auto-Subscription?”

In the collection, tap 📝.

The button toggles to indicate the change: 📝.

**Remove Auto-subscribe**

To learn how auto-subscription works, see “What Is Auto-Subscription?”

In the collection, tap 📝.

The button toggles to indicate the change: 📝.

---

**Locate Details about a Report**

**Identify a Report’s Server and Path Information**

**Overview**

The following slideshow introduces how to find a report’s server and path information. Detailed procedures follow the slideshow.

View the slideshow in SAS Help Center.

**Identify an Open Report’s Server and Path Information**

In an open report, tap ⬇️.

The information appears in the Details window.

**Identify a Closed Report’s Server and Path Information**

Complete these steps in the subscription views:

1. Press and hold on the report tile.
2. Tap Details.

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**
In an open report, tap ▸.
The information appears in the Details window.

**Determine When a Closed Report Was Updated**
In the subscription views, the date of the report’s last update appears on the report tile.
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 ( Macronix ), the table of contents is not available until you open the report and the data is downloaded. See “About Local and Remote Report Data”.

View the Table of Contents for an Open Report

Complete these steps in an open report:
1. Tap ▸.
2. Scroll down to view the page tiles.
3. Tap a page tile to go to that page.

View the Table of Contents for a Closed Report

Complete these steps:
1. Press and hold on the report tile.
2. Tap Details.
3. Scroll down to view the page tiles.

**TIP** Tap a page tile to open the report to that page.

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

Identify a Report’s Author

**Identify an Open Report’s Author**
In an open report, tap ▸.
The information appears in the Details window.

**Identify a Closed Report’s Author**
Complete these steps in the subscription views:
Press and hold on the report tile.

2 Tap Details.

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

Unsubscribe from a Report

To unsubscribe from a report:

1 In the Subscriptions view, press and hold on the report tile.
2 Tap Remove.
3 Tap Remove in the confirmation window.

You can also unsubscribe from 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 your subscriptions and on all of your connected servers. Both locations are searched at the same time. The search is not case sensitive.

TIP 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 report 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 “bar chart.”

Can I Narrow My Search?

You can narrow your search by using quotation marks ("), 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 Mobile BI”. 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 the subscribed reports in your Subscriptions view.

**Search Reports**

Complete these steps from Subscriptions or Add Reports:
1. Tap the **Search for reports** field. The keyboard appears.
2. Enter all or part of a search string.

   **TIP** To narrow the search, use search operators.

3. 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.

4. (Optional) To subscribe to a report in the search results, tap that report, and then tap **Subscribe**.
5. If you already subscribe to the report, you can open it. Tap the report and then tap **Open**.
6. To clear the search results, tap in the search field.
7. To dismiss search, tap .

**Filter Search Results**

To filter search results:
1. Tap **Filter by** in the upper left corner.
2. Select one or more filter options:
   - the location, such as subscriptions 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

Filter options are applied as you select them.

**Sorting Reports**

You can sort reports wherever you see the **Sort by** list.

**Sort Reports**

To sort reports, tap the **Sort by** list 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.

Subscription date
sorts the reports by the date of their subscription 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 the Subscriptions view, 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 the Sort by list 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. Depending on the location in the app, you can use Selection mode to subscribe, unsubscribe, share, or add or remove reports from Favorites.

Select Multiple Reports in Subscriptions, Recent, Favorites, and Collection Views
Complete these steps in any of the views:
1 Tap ☑️.
2 Tap one or more reports.
   ✔ indicates that a report is selected.
   
   **TIP** Tap ☐ in the upper left corner of the view to select all of the reports in the folder.

3 Tap the action that you want to complete.
4 If you decide not to act on the reports, tap Cancel 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 .
3. Tap next to each report that you want to select.
   - indicates that a report is selected. Tap this button again if you want to clear the selection.

   **TIP** Tap in the upper left corner of the view 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 Cancel to dismiss Selection mode.
Viewing Reports

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Open a Report

Open a Report from the Subscriptions View
Tap any report tile.

Open a Report from the Recent, Favorites, or Collection Views
To view a report:
1 Tap the report tile to open the Details window.
2 If SAS Mobile BI has a subscription to the report, tap Open.
   Otherwise, tap Subscribe to download the report.
3 When the report is available, tap Open.

Open a Report from the Start Screen
On the Windows Start Screen, tap any report tile.
Add a Report to the Start Screen

If you have reports that you use frequently and want to access quickly, you can add (or “pin”) them to the Start Screen. Tapping a report tile on the Start Screen opens SAS Mobile BI (if it is not already open) and displays the report.

To add a report to the Start Screen:
1. Open the Details pane:
   - In the report viewer, tap \[\text{Details} \].
   - In the Subscriptions view, press and hold the report tile, and then tap **Details**.
2. Tap ✕.

   A confirmation message appears.
3. Tap **Yes**.

   A report tile is added to the Start Screen. The tile displays the report’s thumbnail image, if one is available. If the report does not have a thumbnail image, the SAS Mobile BI logo appears.

You can remove (or “unpin”) a report from the Start Screen at any time.

To remove a report from the Start Screen:
1. Open the Details pane:
   - In the report viewer, tap \[\text{Details} \].
   - In the Subscriptions view, press and hold the report tile, and then tap **Details**.
2. Tap ✕.

   The report tile is removed from the Start Screen.

Note: Unsubscribing to a report also removes its tile from the Start Screen.

Note: You can also add the SAS Mobile BI application to the Start Screen. See “Can I Add the SAS Mobile BI Application to My Start Screen?”.

Page through a Report

Reports can include more than one page.

You can flick left or right on the device screen to view the pages in sequence.

To see and select from all the pages:
1. Tap \[\text{Page} \].
2. Scroll up to view all of the pages.
3. Tap the page that you want to view.
4. To dismiss the view without selecting a page, tap \[\text{Page} \].

View a Report Object Using the Full Screen

To maximize a report object:
1. Tap the object to highlight it.
2. Tap \[\text{Maximize} \] to maximize the object to use the full screen.
3. Tap \[\text{Maximize} \] to restore the object size.
Viewing Reports with the Windows Magnifier

You can use the Windows Magnifier tool while you work with reports in the SAS® Mobile BI app. This feature enables you to temporarily enlarge any report or report item in order to see the items more clearly.

The Magnifier tool provides three different views that you can use with the app: full screen, lens, and docked. For complete details about how to use the Magnifier tool, refer to your Windows documentation or online Help.

It is helpful to be aware of the following tips while you use the Magnifier in the report viewer:

- To turn on the Magnifier tool, tap ... on the command bar, and then tap Magnify. In the Ease of Access Window that appears, slide the Magnifier switch to on.
- To change the default full screen view, use the Magnifier toolbar that initially appears in the upper left region of the report. In this toolbar, you can tap Views to choose lens or docked mode, tap the Plus Sign and Minus Sign buttons to zoom the display in and out, and tap Options to access additional magnification settings.
- To expose the Magnifier toolbar when it is hidden from view, tap the Windows magnifying glass icon in the upper left region of the report.
- To exit magnification, tap ✖ in the Magnifier toolbar or hold down the Windows key and press the Escape key.

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 Mobile BI.

The following alternative themes are available:

- High Contrast
- Light (Marine)

Override the Theme

To override the theme:

1. Tap ☰ in the navigation bar.
2. Tap Accessibility. A list of themes opens.
3. Tap the theme that you want to use.

Learning More about a Report Object

What Information Is Available about Report Objects?

Each page of a report can contain one or more report objects.

You can review information about a report, the current page, and the objects on that page in the Information view. When you access this view, an object selection list appears below the Information label. The name of the currently selected item (the report, the current page, or one of the objects) is displayed. Tap ▼ to expand the list. The report, current page, and the objects on the current page are presented in a hierarchy.
The Information view displays the following information about the report, current page, and report objects. However, the information shown varies depending on how the report is designed. See your report designer for more information.

- 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 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 report objects that are on the hidden page or about the hidden page itself.

Complete these steps in the report viewer:
1. Tap an object to highlight it.
2. Tap to open the Information view.
   
   See “What Information Is Available about Report Objects?”
3. To view information about another report object on the page, expand the object selection list at the top of the Information view. The currently selected item is highlighted in the list. Tap another object. Alternatively, you can tap an object in the report viewer.

Note: Objects in a stack container are listed as individual items in the hierarchy. The container is not listed. If the selected object is a composite object, when the object is maximized its sub-elements are listed beneath it in the hierarchy.

The Information view shows the information for the highlighted object.

**TIP** To view information about the current page or about the report as a whole, tap the appropriate entry in the object selection list.

4. Tap to close the Information view.

**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 the SAS® Mobile BI 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**

Complete these steps in the report viewer:

1. Tap 🔄 to open the Information view.
2. Tap Alerts.

   **TIP** You might have to scroll down to locate the button.

3. Alerts are grouped by report object. Scroll the Alerts view to view all alerts.
4. Tap 🔄 to return to the Information view.

**Subscribe to an Alert**

Complete these steps in the report viewer:

1. Tap 🔄 to open the Information view.
2. Tap Alerts.
3. Scroll to the alert and tap the subscription switch to On.
4. Tap 🔄 to return to the Information view.

**Unsubscribe to an Alert**

Complete these steps in the report viewer:

1. Tap 🔄 to open the Information view.
2. Tap Alerts.
3. Scroll to the alert and tap the subscription switch to Off.
4. Tap 🔄 to return to the Information view.
## Navigating Report Features

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Viewing Data

View Data Details
Report objects can display details about a data point.
To view the data details, tap on a location in a report object.
A context menu appears. If data details are available, they are displayed in the menu by default.

View Data in Explore Mode
Use Explore mode to explore underlying data while viewing a report object.
Complete these steps:
1 Tap to view the object in full-screen mode.
2 Tap to open Explore mode.

TIP You can still tap the report object when the table is open.
3 Tap a row in the table to highlight the associated data in the object.

TIP You can scroll the table up and down to view all of the rows.
4 Tap to close Explore mode.

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 column sorts the data from low value to high value. Tap the heading again to sort from high value to low value.

For additional sort options, press and hold the column heading, tap Sort, and then 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).

Secondary
displays secondary sorting options that you can apply to additional columns.

For each additional column that you want to sort, press and hold the column heading, tap Sort, and then Secondary. Then select 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 and hold the X-axis label, tap **Sort**, 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 and hold the Y-axis label. Tap **Sort**, 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 and hold the X-axis label, and then tap **Sort**, Tap **East Coast** or **West Coast**, and then tap the sort option that you want.

Filtering Data

About Data Filters, Filter Controls, and Data Highlighting

Data Filters

SAS Mobile BI 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 report objects. A report can include one or more of these filters.

- **Interactive filters**
  - a report object provides interactive selections that filter one or more other report objects on the same page.
  - For example, you have a report page that contains two report 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 report objects in the target page. On the source page, page-link filters are located in a report object's context menu. On the target page, the applied filter value is located in the filter control bar.

Report-link filters
  a link that opens another report. Depending on the selection made in the source report, the link filters all of the report objects in the target report. In the source report, report-link filters are located in a report object's context menu. In the target report, the applied filter value is located in the filter control bar.

Incoming filters
  filters data by one or more values that are passed in from another report or report 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, page-level, or interactive data filters, the filter controls are located on the applicable 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
  
  The filters are located in a control bar that is below the report title bar. The filter control bar is anchored to the report title bar so that you can use these filters on any page of the report.

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 report objects on that page.
  - A link from one page in the report that opens another page and filters that page’s data.
  
  The filter controls are located in a bar that is across the top of the page.

Interactive-Filter Control Bar
  Interactive filters affect objects on the current page. This control bar appears across the top of the page. If page-level filters exist, the interactive-filter control bar appears under the page-level control bar.

  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 a report 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 report objects in the report page.

**View Values of Interactive Filters**
The following slideshow introduces how to use interactive filters to automatically filter data in multiple report objects. Additional information follows the slideshow.

**View the slideshow in SAS Help Center.**

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.

You can clear one or more filters:

- Tap **X** to clear a filter and remove the control from the control bar.
- Tap **Clear All** to clear all the filters and to remove their filter controls from the control bar.

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

If you can select multiple values in the filter, the control displays the appropriate category or column name followed by the number of selected values. Tap **✓** to see a list of the selected values. To remove a value from the list and clear its selection in the filter, tap **X**.

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.
Toggle the Filter Control Bars

The filter control bars toggle:

- You can display the filter control bars to view filter values.
- You can hide the filter control bars so that the report has more screen space.

To toggle the filter control bars, tap ☑ in the report title bar.

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

View Filters that Run Off the Screen

If the control bar has more filters than it can display, 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.

Animate a Report Object

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

1 Tap the report 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 || to pause the animation and display the progress indicator.

Linking to Other Data or Information

What Are Links?

If a report object provides links, they are available in that report object’s context menu.

Depending on how a report is designed, report 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 Information view provides the filter value. See “View Information about a Report Object”.

Report links
   - links from one report to another report.
The link can also include a filter value. In the target page, the Information view provides the filter value. See “View Information about a Report Object”.

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

Hidden page links
- links from a report object to a page that appears only when the link is tapped. A link can be attached to a report object, image, or text. The hidden page opens on top of the current report page. A hidden page can contain one or more report 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 a report object.
2. On the context menu, tap 📌.
   - 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 📌 to open the Information view.

### 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.

To go back one step, tap ←.

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

1. Tap the arrow button to the right of the report name.
2. Tap a selection in the trail 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 a report object.
2. On the context menu, tap 📌.
   - 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 applicable icon in the Windows taskbar.
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). A report 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 a report object provides data drilling options, they are available in the context menu. In a crosstab, data-drilling options are also provided as links in the table itself.

Depending on how a report 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 a report object.
2. On the context menu, tap ⏺.

   The context menu displays the data-drilling options.

   Note: If an object contains two hierarchies, an indicator ( ⬇️) appears at the bottom of the context menu.

   Flick left and right in the context menu to alternate between the hierarchies.
3. Tap your selection. The new data view appears in the object.
4. To view another level of the data hierarchy, repeat steps 1 through 3.

   TIP To navigate upward in the data hierarchy, tap ⬆️ in the upper left corner of the report object.
5. To view the available selections in a level in one or more hierarchies, or to change a selection:
   a. Tap ✗ in the upper left corner of the report object.

      The drill options window appears.

      Note: If the report 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 report 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 report object draws the new data view.
View Warnings about a Report Object

If you drill down to a level of the report 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.
- You can view the rank applied to the crosstab in the Information view.

Expand the Hierarchy in a Crosstab

To expand a single item in a crosstab (for example, to expand the year 2017), 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. Press and hold a column heading or row heading.
2. Tap Expand Hierarchy Name.
   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), 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. Press and hold a column heading or row heading.
2. Tap Collapse Hierarchy Name.

Exploring Data By Using Geographic Mapping Services

What Are Geographic Mapping Services?

A report can contain a report 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, pizza 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 "Enable Esri Premium Services" and "Disable 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. A context menu appears.

Tap **(||)** to display the data details if the details are not already displayed.
Pan the Map

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

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

   **TIP** Zooming the report 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 initial 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 🚁 to view the map in full-screen mode.
2. 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.

3. Tap 🌋.
4. Enter your search string in the **Search map** field.

   Depending on what you enter, the Search interface displays up to ten suggestions. Up to five recent search strings for searches that have occurred during the current application 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.

5. To initiate a search using the string that is typed, select 🎯 or press Enter. 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.

6. Tap a result in the list or its pin on the map.
7. 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?”

   **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.
8 To start a new search, collapse the list and tap X.

**Identify Data Points by Distance**

The following slideshow introduces how to identify data points by distance. A detailed procedure follows the slideshow.

View the slideshow in SAS Help Center.

To identify data points that are located within a specified distance:
1 Tap the data point to use for the center of the distance calculation, and then tap Distance on the context menu.
2 Tap Distance on the context menu.
3 Tap Miles or Kilometers to use your preferred measure.
4 Enter the distance.
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?”

The following slideshow introduces how to identify data points by drive time. A detailed procedure follows the slideshow.

View the slideshow in SAS Help Center.

To identify data points that are located within a specified drive time:
1 Tap the data point to use for the center of the distance calculation, and then tap Distance on the context menu.
2 Tap Drive Time on the menu.
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?”

The following slideshow introduces how to identify data points by drive distance. A step-by-step procedure follows the slideshow.

View the slideshow in SAS Help Center.

To identify data points that are located within a specified drive distance:
1 Tap the data point to use for the center of the distance calculation, and then tap Distance on the context menu.
2 Tap Drive Distance on the menu.
3 Tap Miles or Kilometers to use your preferred measure.
4 Enter the drive distance.
5 (Optional) To identify more than one set of data points, tap Add break and enter an additional data point.
   - See “What Is a Break?”
6 Tap Apply.

The map highlights the data points that are located within the specified drive distance.
View Map Data in Explore Mode

Use Explore mode to explore underlying data while working with a map.

Complete these steps:
1. Tap 📶 to view the map in full-screen mode.
   - The Explore mode palette appears in the upper right corner.
2. Tap 📶 to open Explore mode.
   
   **TIP** You can still tap the map when the table is open.
3. Tap a row in the table to see the associated location in the map.
   
   **TIP** You can scroll the table up and down to view all of the rows.
4. Tap 📶 to close Explore mode.

Highlight Map Data in Explore Mode

When in Explore mode, you can select areas on the map and the associated table data is highlighted.

Complete these steps:
1. Tap 📶 to view the map in full-screen mode.
   - The Explore mode palette appears in the upper right corner.
2. Tap 📶.
3. Tap a selection shape: □ or ○.
   
   **Note:** The shapes that are available depend on how the report is designed.
4. Tap and drag on the map to select an area of the map.
   - The associated data for this area is highlighted in the table.
5. To highlight other table data, tap inside the selection shape and drag to the new area.
   - The movement is reflected in the table.
6. To dismiss the selection, tap outside the selection shape.

Select Map Data to Interact with Other Report Objects

When in Explore mode, you can select areas on the map to identify data for an interaction in other report 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 report objects for interactions.

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

Complete these steps:
1. Tap 📶 to view the map in full-screen mode.
   - The Explore mode palette appears in the upper right corner.
2. Tap 📶.
3. Tap a selection shape: □ or ○.
   
   **Note:** The shapes that are available depend on how the report is designed.
4. Tap and drag on the map to select an area of the map.
5 Tap ⬅️ to restore the map to its initial size.

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

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

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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 email the link.

TIP
- You can share a report without subscribing to it.
- You can share multiple reports at once. See “Selecting Multiple Reports”.

Email a Report
To email a report:
1. Open the Details pane:
   - In the report viewer, tap ...
   - In the subscription views, press and hold on the report tile, and then tap Details.
   - In Add Reports, tap a report.
2. Tap ...
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 Mobile BI. For example, in an email app, tap Send.

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

Copying, Saving, and Sharing Reports with Others

How Can I Share Report Images?
You can copy, save, and share reports and report objects as image files in the following ways:
- Copy a report image to your device clipboard, and paste the image into another app
- Save a report image to your device as a Portable Network Graphics file (PNG)

Copy a Report Image
To copy a report image to your device clipboard:
1. View the page that displays the information you want to copy.
2 Do one of the following:
   - To copy the entire page, tap anywhere in the report, and then tap...
   - To copy an individual report object, press and hold the object.
3 Tap Copy on the menu.
4 Paste the image from the clipboard into any application that supports images.

**Save a Report Image**

To save a report image as a file to your device:
1 View the page that displays the information you want to save.
2 Do one of the following:
   - To save the entire page, tap anywhere in the report, and then tap...
   - To save an individual report object, press and hold the object.
3 Tap Save image on the menu.

SAS Mobile BI saves the image as a PNG file to a folder named **SAS Mobile BI** in your **Pictures** folder.

**Using the Touch Indicator for Presentations**

**What Is a Touch Indicator?**

A *touch indicator* is a small circle that indicates where your finger is touching the screen. When your device is connected to a display device, either by cable or wirelessly, you can use the touch indicator setting. The touch indicator enables your audience and yourself to see what you are touching on the display. When this setting is turned on, SAS® Mobile BI can display the touch indicator.

By default, this setting is turned on.

**Turn On the Touch Indicator**

To turn on the touch indicator:
1 In the Search Windows field, enter **touch feedback** and tap the Enter button.
2 In the results list, tap **Show visual feedback when you touch the screen**. The Visual options page opens.
3 In the Touch Feedback section, tap the **Show visual feedback when I touch the screen** switch.
   - It changes to blue (On).
4 For optimal presentation performance, tap the **Use darker, larger visual feedback** switch.
   - It changes to blue (On).

**Turn Off the Touch Indicator**

To turn off the touch indicator:
1 In the Search Windows field, enter **touch feedback** and tap the Enter button.
2 In the results list, tap **Show visual feedback when you touch the screen**. The Visual options page opens.
3 In the Touch Feedback section, tap the **Show visual feedback when I touch the screen** switch.
   - It changes to white (Off).
4 Tap the **Use darker, larger visual feedback** switch.
   - It changes to white (Off).
Annotating a Report Page

What Is Annotation?
When you use the Windows Ink feature, the app creates a screen capture of the current page that you are viewing in the report. You can draw and write your observations on the image.

When you are finished, you can share the annotated page with others.

Note: The Windows Ink feature requires that you have Windows 10 Anniversary Update 1607 installed on your device.

Annotate a Report Page

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

View the slideshow in SAS Help Center.

To annotate a copy of a report page:
1 Display the report page that you want to annotate.
2 On the Windows system tray, tap 😊.

TIP If 😊 is not displayed, press and hold any location in the Windows taskbar, and then tap Show Windows Ink Workspace Button.

3 In the workspace area, tap Screen sketch. An image of the page that you are viewing appears.

The following tools are available:
- 🖊 Tap the pen to write or draw on the image. You can change the color and width of the output.
- 📌 Tap the pencil to write or draw on the image. You can change the color and width of the output.
- 🎨 Tap the highlighter to draw translucent color on the image. You can change the color and width of the output.
-rase All Ink button to clear all of the annotation.
- �uler button to draw straight lines anywhere on the image.
- 🖊 Tap the Touch Writing button to toggle the touch writing feature on or off.
- 🔄 Tap the Undo button for each action that you want to undo.
- 🔄 Tap the Redo button for each action that you want to redo.
- 🍋 Tap the Crop button to crop or cut out parts of the image.
- 🧨 Tap Clear All to clear all annotations.

Share the Annotated Page

You can share the annotated page in the following ways:
- Share an image of the annotated page using email or text messages.
- Copy an image of the annotated page to your device clipboard and paste the image into another app.
Save an image of the annotated page on your device.

Save the Annotated Page
Save your annotated page before you exit Screen Sketch. Tap and then specify a name and location on your device.

Note: If you do not save, your annotated page is discarded.

Exit the Annotate Window
To exit Screen Sketch, tap the Close button.

Note: If you have not saved the annotated page, it is discarded.

Copy the Annotated Page
You can copy an image of your annotated page to your device clipboard, and then paste the copy into an app that accepts images.
1 Tap .
2 Open another app that can accept images.
3 In the applicable location in the other app, press your finger on the screen and then release.
   An action palette appears.
4 Tap Paste.
   The image of the annotated page appears in the other app.

Printing Reports

Print a Report While Viewing It
To print a report:
1 Tap .
2 Tap Print.
   A progress indicator appears. The server connection generates a PDF of the report, and the PDF is downloaded to your device.

   **TIP** To cancel the process, tap Cancel on the progress indicator.
3 The How do you want to open this file? window appears.
   Tap an app and tap OK to open and print the PDF.

Print a Report from Add Reports
You can print reports with or without a subscription:
1 Tap the report.
2 Tap .
A progress indicator appears. The server connection generates a PDF of the report, and the PDF is downloaded to your device.

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

3. The How do you want to open this file? window appears.
   Tap an app and tap **OK** to open and print the PDF.

### Print a Report from Search Results

You can print reports with or without a subscription:

1. Press and hold on the report tile.
2. Tap **Print**.

   A progress indicator appears. The server connection generates a PDF of the report, and the PDF is downloaded to your device.

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

3. The How do you want to open this file? window appears.
   Tap an app and tap **OK** to open and print the PDF.

### Print a Report While in Subscriptions, Recent, Favorites, or Collection Views

You can print reports with or without a subscription:

1. Press and hold on the report tile.
2. Tap **Print**.

   A progress indicator appears. The server connection generates a PDF of the report, and the PDF is downloaded to your device.

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

3. The How do you want to open this file? window appears.
   Tap an app and tap **OK** to open and print the PDF.

### Exporting Data

#### What Can I Export?

You can export data for a report object.

The following conditions must be true in order for the Export data feature to be available for a report object:

- the SAS Visual Analytics server is running version 8.1 or later, or version 7.4 or later
- the server supports the Export data capability, and the capability is assigned to your user ID
- the selected report object is a table, crosstab table, graph, or gauge

Depending on the type of object that you select, you can export data in any of the following formats:
Microsoft Excel workbook (XLSX)
comma-separated values data file (CSV)
tab-separated values data file (TSV)

Here are some key points about exporting:

- When you export a graph or chart, you are exporting the data for that object, not the image.
- The information that can be exported for an object depends on how the report author set up the report.
- Some report objects do not support all of the options in the Export Data window. For example, when you export a crosstab table, the Detailed data option is sometimes not available.
- When the exported file type is Excel workbook, the spreadsheet generally includes one tab, labeled Results. When you export an Advanced Visual Analytics element with the non-detailed data option, Excel workbook is the only format option available, and data is exported to a spreadsheet with multiple tabs.

**About the Export Data Window**

The following figure shows a sample pie chart.

The following figure shows a sample Export Data window for the pie chart.
By default, the entries that you see for **Rows** and **Columns** in the Export Data window represent data items in the object that you select in the report. In this example, the range in the **Rows** field (1–6) represents the number of regions in the pie chart.

If you select the **Detailed data** option, the columns change to represent the data items in the table that are used to create the report object. Any data item that is not marked as hidden in the table appears in the Export Data window. Note that the range displayed for **Rows** also changes when you select the **Detailed data** option.

Under **Columns**, select the check boxes for the columns that you want to export.

In the **Rows** field, indicate the range of rows that you want to export. Continuing with the pie chart example, you could choose to export rows 3–5. The maximum number of rows that you can export at one time is determined by a server setting. The default value is 100,000. For information about the setting on your server, contact your SAS administrator.

**Note:** The server limit indicates only the maximum number of rows that you can export at one time. In other words, if the server limit is 100,000, you can include row numbers that are above 100,000 in your export. For example, if the report object has 150,000 rows, you can enter 100,001–150,000 in the **Rows** field.

The range that appears in the **Rows** field when you open the Export Data window varies, as follows:

- By default, the application displays the total number of rows in the report object (if the server can detect that number).
- If the server cannot determine the number of rows in the report object, the field displays a default entry of 1–100,000.

If you select **Formatted data** under **Options**, the exported data includes formatting information, such as currency symbols.
Exporting Report Objects with Multiple Parts

A report might include an object that contains more than one part. The following figure shows an advanced analytic object that has three parts.

Note the following when exporting a report object with multiple parts:

- By default, the Export Data window does not display the **Rows** and **Columns** fields. In addition, the **Formatted data** option is selected, and Excel workbook is the only available file type. When you open the exported file in Microsoft Excel, you see a separate worksheet tab for each part of the report object.

- If you select the **Detailed data** option, the Export Data window displays the columns and rows that make up the table that underlies the entire object. All three file types become available. If you export using the Export workbook file type, the resulting file includes a single tab, labeled **Results**, with the data for the entire report object.

Export Data

To export data:

1. Select the object with data that you want to export.
2. Maximize the object, and then tap ↓→.
3. Determine whether you want the data for the object as it appears in the report, or the data in the table used to create the object. To include the data in the underlying table, under **Options**, select **Detailed data**.
4. In **Rows**, enter the range of rows to export.
5. Under **Columns**, select the columns to export.
6. To export formatting information with the data, under **Options**, select **Formatted data**.
7. In the **File Type** list, select the type of export file to create.
Commenting about Reports

Where Can I Add Comments?

The app provides a way to share comments with co-workers who use SAS Mobile BI or SAS Visual Analytics. In the Information view in the report viewer, you can add comments to a report as a whole, to the current page in the report, or to one of the objects on the current page.

Note: The app does not support the Comments feature for reports located on SAS Visual Analytics 8.1 servers.

To access the Comments view, tap to open the Information view. In the object selection list, tap the item to which you want to add a comment. For information, see “Learning More about a Report Object” on page 31.

A Comments button appears. The button includes a counter.

- If you select the report, the counter indicates the number of comments that have been added to the report, to all of its pages, and to all of its objects. This value includes replies.
- If you select the current page, the counter changes to reflect the number of comments that have been added to the page.
- If you select an object on the current page, the counter changes to reflect the number of comments that have been added to the selected object.

TIP If a counter does not appear on the Comments button in the Information view, no comments have been added to the selected item.

When you tap the Comments button, the Comments view opens. The view displays a list of comments and their replies (if any). If no comments have been added, the following button appears in the Comments view.

The following slideshow introduces how to add comments to reports and their objects. Detailed procedures follow the slideshow.

View the slideshow in SAS Help Center.

About the Comments View and Comments

The Comments view heading includes a toolbar. You can tap to return to the Information view. You can use the Search feature to look for a specific comment. For information, see “Search for a Comment”. Below the list of comments is a text field in which you can create a new comment.

A comment consists of the following items:

- a circle with the initials or avatar of the user who created the comment
- the name of the user who created the comment
- a topic title
- the text that makes up the comment
Add a Comment

Complete these steps in the report viewer:
1  Tap to open the Information view.
2  In the object selection list, select the item to which you want to add a comment.
3  Tap Comments to open the Comments view.
4  In the Add a new topic field below the comments list, enter the text for the comment topic.
5  In the Add a comment field, enter the text for the comment.

   Note: Once you begin entering text, you cannot change the object to which the comment will be added. If you start entering the comment text and then select a different object, the Comments view displays the comments for the newly selected object. The comment text for the originally selected report object is discarded.
6  (Optional) Add an attachment to the comment.
7  To post the comment, tap .

   TIP  To add a comment to another item, select that item in the object selection list and then repeat steps 3–7.

Add Attachments

You can add one or more attachments to a comment or reply.

Note: The following file types are supported: Microsoft Office documents, images, PDF, and TXT files.

Complete these steps in the comment or reply:
1  Tap .
2  In the Windows File Explorer, navigate to the location of the file that you want to attach.
3  Select the file, and tap Attach. The filename appears below the comment text.

   Note: Only supported file types appear in the Windows File Explorer. You can select multiple files.

   Note: To remove an attachment before you post the comment or reply, tap .
4  To post the attachment with the comment or reply, tap .

To view an attachment, tap it. In the How do you want to open this file? window, select the appropriate application, and then tap OK.

To remove an attachment from one of your existing comments or replies, select the comment or reply, tap , and then tap . Tap to post the modified comment or reply.

Reply to a Comment

You can reply to a comment. You cannot reply to another reply.

Complete these steps in the Comments view:
1  Select the comment to which you want to reply.
2  At the end of the comment text, tap Reply.
3  In the Add a reply field below the comments list, enter the text for the reply.
4 To post the reply, tap ▶️. The reply is indented below the comment that you selected in Step 1.

**Search for a Comment**

Complete these steps in the Comments view:

1 In the Comments header, tap 📝. The keyboard appears.
2 In the **Search comments** field, enter all or part of the search string.
3 Tap ← on the keyboard.

The comments that include the search string remain in the comments list, and the search string is highlighted in each comment. If the search text is included in a reply, that reply and its parent comment are displayed in the list. Comments and replies that do not include the search string are temporarily removed from the list.

**Note:** You can redisplay all the comments by tapping ✗ to clear the **Search comments** field.

**Edit a Comment**

You can edit any comment or reply that you have created.

Complete these steps in the Comments view:

1 Select the comment or reply to edit.
2 Tap 📝. The text becomes editable.
3 Edit the text of the comment or reply.
4 (Optional) Add or remove one or more attachments.
5 Tap ▶️ to post the edited comment or reply.

**Delete a Comment**

You can delete any comment or reply that you have created. You cannot delete a reply that you add to someone else’s comment.

Complete these steps in the Comments view:

1 Select the comment or reply to delete.
2 Tap ☓.
3 In the confirmation window, tap **Delete**.
## Troubleshooting SAS® Mobile BI

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### Capabilities Used by SAS Mobile BI

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Problem: A Report Tile Does Not Display an Image

Problem: When you are in the Subscriptions, Recent, Favorites, or collections views, 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 “About Local and Remote Report Data”.

Problem: A Page Tile Does Not Display an Image

Problem: When you view the table of contents for a report, one or more page tiles do not display an image.

Explanation: Some types of report objects do not provide an image for a page tile. For example, tables, crosstabs, and gauges do not provide images.

Resolution: The page tile is working as designed.

Problem: Cannot Subscribe to a Report

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

Explanation: The ability to subscribe to reports and view reports is controlled by a capability assignment.

Resolution: Contact the SAS administrator for the affected server.

- (SAS Visual Analytics 8.1 or later) The required capability is ACCESS_MOBILE_BI.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is VIEW_REPORT.

For more information, see “Problem: A User ID Does Not Have the Required Capability” on page 69.

Problem: The Favorite View is Empty

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

Explanation: The ability to view reports for a particular server in the Favorites view (and in the Favorites folder in the Add Reports view), is controlled by a capability assignment.

Resolution: Contact the SAS administrator for the affected server.

- (SAS Visual Analytics 8.1 or later) The required capability is VIEW_FAVORITES.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is PERSONALIZATION.
Problem: 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 “What Is a Guest Connection?”

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

Explanation 2: The ability to add a report to the Favorites view is controlled by a capability assignment.

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

- (SAS Visual Analytics 8.1 or later) The required capability is MANAGE_FAVORITES.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is PERSONALIZATION.

For more information, see “Problem: A User ID Does Not Have the Required Capability” on page 69.

Problem: 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 “What Is a Guest Connection?”

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

Explanation 2: The ability to remove a report from the Favorites view is controlled by a capability assignment.

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

- (SAS Visual Analytics 8.1 or later) The required capability is MANAGE_FAVORITES.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is PERSONALIZATION.

For more information, see “Problem: A User ID Does Not Have the Required Capability” on page 69.

Problem: 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: The following slideshow shows you how to find a report’s server and path information.

View the slideshow in SAS Help Center.

For detailed steps, see “Identify an Open Report’s Server and Path Information” and “Identify a Closed Report’s Server and Path Information”.

For more information, see “Problem: A User ID Does Not Have the Required Capability” on page 69.
Problem: The Recent View Is Empty

Problem: You have viewed reports, but the Recent view is empty.
Explanation: The Recent view 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 the Recent view is controlled by a capability assignment.
Resolution: Contact the SAS administrator for the affected server. If the issue is a missing capability, the administrator uses one of the following capabilities:
  - (SAS Visual Analytics 8.1 or later) The required capability is ACCESS_RECENTS.
  - (SAS Visual Analytics 7.3 and 7.4) The required capability is PERSONALIZATION.
For more information, see “Problem: A User ID Does Not Have the Required Capability” on page 69.

Problem: 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 a capability assignment.
Resolution: Contact the SAS administrator for the affected server. The required capability is EMAIL.
For more information, see “Problem: A User ID Does Not Have the Required Capability” on page 69.

Problem: The Export Data Option Is Not Available

Problem: You have maximized a report object, but the Export Data option is not available.
Explanation 1: The ability to export report data is controlled by a capability assignment.
Resolution 1: Contact the SAS administrator for the affected server. The required capability is EXPORT_DATA.
For more information, see “Problem: A User ID Does Not Have the Required Capability” on page 69.
Explanation 2: The type of selected report object does not support the export data capability. The report object must be one of the following types: table, crosstab table, graph, or gauge.
For information about other data export requirements, see “What Can I Export?”
Resolution 2: Select a valid type of report object.
Problem: The Detailed Data Option Is Not Available in the Export Data Window

Problem: The Detailed Data option does not appear in the Export Data window.

Explanation: The ability to access this option is controlled by a capability assignment.

Resolution: Contact the SAS administrator for the affected server. The required capability is EXPORT_DETAIL_DATA.

For more information, see “Problem: A User ID Does Not Have the Required Capability” on page 69.

Note: This capability is not available in SAS Visual Analytics 7.3 or 7.4.

Problem: 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 report 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 the SAS Mobile BI 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. Tap the Network icon on the taskbar to locate this setting.
- Make sure that you currently have a wireless or other network connection.

Problem: 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.
Problem: Cannot Delete Reports in Subscriptions

Problem: You cannot delete a report in Subscriptions.

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

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

Problem: Cannot View Comments

Problem: You cannot view comments associated with a report or its contents.

Explanation: The ability to view comments is controlled by a capability assignment.

Resolution: Contact the SAS administrator for the affected server.

- (SAS Visual Analytics 8.1 or later) The required capability is VIEW_COMMENTS.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is COMMENTS.

For more information, see “Problem: A User ID Does Not Have the Required Capability” on page 69.

Problem: 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 a capability assignment.

Resolution: Contact the SAS administrator for the affected server.

- (SAS Visual Analytics 8.1 or later) The required capability is ADD_COMMENTS.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is COMMENTS.

For more information, see “Problem: A User ID Does Not Have the Required Capability” on page 69.

Problem: Unable to Add an Avatar to Comments

Problem: Your avatar does not appear in comments or replies.

Explanation: You must use SAS Visual Analytics to add a picture to your user profile.

Resolution: In SAS Visual Analytics, access the Choose Picture option under General settings to assign or change your avatar. The assigned picture appears when you view your comments and replies in the Comments view of the SAS Mobile BI app. For details, see the SAS Visual Analytics user documentation.
Problem: 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.

Problem: 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 a capability assignment.

Resolution: Contact the SAS administrator for the affected server.

- (SAS Visual Analytics 8.2 or later) The required capability is SUBSCRIBE_TO_REPORT_ALERTS.
  
  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 “Problem: A User ID Does Not Have the Required Capability” on page 69.

Problem: 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.

Problem: Drive Time and Drive Distance Are Missing on an Esri Map

Problem: A report includes a report object that is an Esri map. However, the context menu provides only the Distance selection. 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 additional Esri capabilities assigned to your user ID.
Resolution 2: Your user ID in SAS Visual Analytics must be assigned Esri capabilities. Contact your SAS administrator about your capability assignment.

■ 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 Mobile BI.

Note: Depending on your organization, Esri credentials and the server connection credentials can differ. Contact your SAS administrator about your Esri credentials.

Problem: 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.

Problem: 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, reinstall the app. Do so in the following order:
1 Stop the SAS Mobile BI app.
   a Press and hold the taskbar. A context menu appears.
   b Tap Task Manager.
   c Press and hold SAS Mobile BI. A context menu appears.
   d Tap End task.
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.

   a Tap the Windows button.
   b Tap All apps.
   c Locate SAS Mobile BI.
   d Press and hold SAS Mobile BI.
   e Tap Uninstall.
   f Tap Uninstall again.
5 Download and install the SAS Mobile BI app: Microsoft Windows store.
6 Start the app to determine whether the problem is resolved.
7 If the problem persists, contact your technical support staff.
Problem: A User ID Does Not Have the Required Capability

Access to certain features in SAS Mobile BI is controlled by a set of capabilities that can be set on a per user per server basis. This means, for example, that a user ID might be assigned the capability to add comments on one server, but not on another.

If a user is having trouble accessing a feature in SAS Mobile BI, their user ID might not have the necessary capability.

Capabilities used by SAS Visual Analytics 8.1 or later are more granular than those used by SAS Visual Analytics 7.3 or 7.4. The following table provides information about SAS Mobile BI capabilities and the features they control. If a user is having trouble accessing a feature, verify the capabilities that have been assigned to their user ID for the applicable server. For more information, see the following documentation:

- (Release 8.1 or later) SAS Viya Administration: Mobile
- (Release 7.4) SAS Visual Analytics 7.4: Administration Guide and search on mobile.
- (Release 7.3) SAS Visual Analytics 7.3 documentation page and view the Administration Guide PDF.

Table 8.1 Capabilities Used by SAS Mobile BI

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<td><strong>Release 7.3 or 7.4</strong></td>
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<tr>
<td>ACCESS_MOBILE_BI</td>
<td>VIEW_REPORT</td>
</tr>
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<td></td>
<td>Enables a user to subscribe to and view reports.</td>
</tr>
<tr>
<td>ACCESS_RECENTS</td>
<td>PERSONALIZATION</td>
</tr>
<tr>
<td></td>
<td>Enables a user to see items for a particular server in their Recent view. It also enables the user, in Add Reports, to see the contents of the Recent folder for that server.</td>
</tr>
<tr>
<td>ADD_COMMENTS</td>
<td>COMMENTS</td>
</tr>
<tr>
<td></td>
<td>Enables a user to add comments to a report or its contents.</td>
</tr>
<tr>
<td>EMAIL</td>
<td>EMAIL</td>
</tr>
<tr>
<td></td>
<td>Enables a user to share links to reports (and screen captures) by using email, text messaging, or other functionality.</td>
</tr>
<tr>
<td>EXPORT_DATA</td>
<td>EXPORT_DATA</td>
</tr>
<tr>
<td></td>
<td>Enables a user to export data for a report object.</td>
</tr>
<tr>
<td>EXPORT_DETAILED_DATA</td>
<td>Not supported</td>
</tr>
<tr>
<td></td>
<td>Enables a user to select the Detailed data option (if applicable) in the Export Data window. Note: The EXPORT_DATA capability takes precedence over this capability. If a user ID is not assigned the EXPORT_DATA capability, assigning the EXPORT_DETAILED_DATA capability to that user ID has no effect.</td>
</tr>
<tr>
<td>Capability</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>MANAGE_FAVORITES</td>
<td>Enables a user to add a report to the Favorites view, or remove a report from the Favorites view.</td>
</tr>
<tr>
<td>Note:</td>
<td>The VIEW_FAVORITES capability takes precedence over this capability. If a user ID is not assigned the capability to view favorites, the user cannot add or remove favorites, even if the user is assigned the MANAGE_FAVORITES capability.</td>
</tr>
<tr>
<td>SUBSCRIBE_TO_REPORT_ALERTS</td>
<td>Enables a user to view alerts in a report and to subscribe to them.</td>
</tr>
<tr>
<td>Note:</td>
<td>The Alerts feature is not supported on servers running SAS Visual Analytics 8.1.</td>
</tr>
<tr>
<td>VIEW_COMMENTS</td>
<td>Enables a user to view the comments that are associated with a report or its content.</td>
</tr>
<tr>
<td>VIEW_FAVORITES</td>
<td>Enables a user to see items for a particular server in the Favorites view. It also enables the user, in Add Reports, to see the contents of the Favorites folder for that server.</td>
</tr>
</tbody>
</table>
Getting Help

Ways to Get More Help
If you have problems with a report, contact the report designer or your SAS® Visual Analytics administrator. For more help:
- view the videos about SAS® Mobile BI at SAS Mobile BI Documentation web page.
- see the documentation and videos 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 the SAS Mobile BI 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 Mobile BI:
See the SAS Mobile page at this address:
  http://www.sas.com/mobile

Email for information:
  mobilebi@sas.com

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**View the Video Tutorials on YouTube**

SAS® Mobile BI provides video tutorials that show how to use features in the app. These videos are available at SAS Mobile BI for Windows playlist on YouTube

**TIP**
- You must have either Wi-Fi or cellular network access to view the videos.
- The playlist includes videos that are not tutorials. The titles for video tutorials include *(Tutorial)* in them.
- To view the video in the highest quality resolution, make sure HQ is selected.

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**User Interface Help Pages**

**Subscriptions View**

Shows all of the reports to which you subscribe on this mobile device.

**Common Tasks**

View a Report: Tap the report tile.

Add a New Report to Your Subscriptions

“Update a Closed Report”

Add a Report to Favorites

**More Tasks**

View Your Favorite Reports

Review Your Recent Report Access from All Devices

View Collections of Reports

“Email a Report”

“Unsubscribe from a Report”

Print a Report

**TIP** You can print reports with or without a subscription.

“Troubleshooting SAS® Mobile BI”
Add Reports Window
Shows your server connections and the reports that they contain.

Common Tasks
“Subscribe to a Report”
“Add a Server Connection”
“Locate a Report on a Server Connection”
“Search Reports”

More Tasks
View Report Details: Tap the report tile.
“Change the Password for a Server Connection”
“Clear the Recent View”
“Email a Report”
Print a report

TIP You can print reports with or without a subscription.

“Troubleshooting SAS® Mobile BI”

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

Common Tasks
Use Features Designed into the Report
View Reports and Report Objects
“View Information about a Report Object”
“View a Report Object Using the Full Screen”

More Tasks
Annotate a Page from a Report
“Email a Report”
Print a Report
“Troubleshooting SAS® Mobile BI”

Favorites View
Reports added to your favorites on this or another device. See “Your Favorites on Every Device”.
Common Tasks
Subscribe to a Report: Press and hold on the report tile, and then tap Subscribe.
View a Report
“Update a Closed Report”

More Tasks
Remove a Report from Favorites
“Email a Report”
Print a Report

TIP You can print reports with or without a subscription.

Troubleshooting SAS® Mobile BI

Recent View
Reports that you have recently viewed on this or another device.

Common Tasks
Subscribe to a Report: Press and hold on the report tile, and then tap Subscribe.
View a Report
“Update a Closed Report”

More Tasks
“Clear the Recent View”
Add a Report to Favorites
“Email a Report”
Print a Report

TIP You can print reports with or without a subscription.

Troubleshooting SAS® Mobile BI

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

Common Tasks
“Auto-subscribe to a Collection”
View a Report
“Update a Closed Report”
More Tasks

“Remove Auto-subscribe”
Add a Report to Favorites
“Email a Report”
Print a Report

**TIP** You can print reports with or without a subscription.

“Troubleshooting SAS® Mobile BI”