Mobile Analysis Guide

Analyzing Data with MicroStrategy Mobile
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CONTENTS

1. Getting Started with MicroStrategy Mobile for iPhone ..................... 1
   Prerequisites .................................................................................. 2
   Getting started with MicroStrategy Mobile for iPhone ..................... 2
   Receiving alerts when data meets certain conditions: Push notifications ...... 4
   Sorting the list of reports, documents, and folders ................................. 5
   Running and viewing reports and documents ....................................... 5
   Running reports and documents ....................................................... 6
   Viewing and navigating data in a grid or graph report ....................... 8
   Viewing and navigating data in a document ...................................... 10
   Sharing reports and documents via email ........................................... 13
   Printing reports and documents ....................................................... 14
   Answering prompts in MicroStrategy Mobile for iPhone ................... 14
   Using the Prompts screen ................................................................ 15
   Achieving the best response from MicroStrategy Mobile .................... 16

2. Analyzing Reports and Documents on an iPhone .......................... 17
   Analyzing reports and documents on an iPhone ................................ 18
   Sorting data in a grid report ............................................................ 18
Viewing data at different levels: drilling .........................................................19
Viewing reports and documents: links ...............................................................19
Opening iPhone applications in documents using links ....................................20
Viewing a subset of data: changing your prompt answers ..................................20
Copying text from documents ............................................................................21
Viewing more information about a point on a graph: tooltips .............................21
Using documents to send or update data in your data warehouse: Transaction Services ..................................................22
Interacting with data ..........................................................................................23
Analyzing data in a tabular layout: Interactive Grids ..........................................24
Analyzing data on a Map: Maps .........................................................................25
Analyzing data at a glance: Microcharts ............................................................28
Analyzing data on a time-based graph: Time Series ...........................................30
Downloading multimedia files: Multimedia .......................................................31
Uploading images to your data warehouse from your camera or photo album 31
Browsing a gallery of images: Image Viewer ...................................................32
Playing videos: Video Player ..............................................................................32
Using interactive dashboards on an iPhone .......................................................33
Prerequisites ........................................................................................................33

3. Getting Started with MicroStrategy Mobile for iPad .................................35
Prerequisites ........................................................................................................36
Getting Started with MicroStrategy Mobile for iPad .........................................36
Receiving alerts when data meets certain conditions: Push notifications ........38
Sorting the list of reports, documents, and folders ...........................................39
Running and viewing reports and documents ..................................................40
Running reports and documents you have subscribed to ..................................40
Running reports and documents by browsing to their location .........................41
Viewing grid and graph reports .........................................................................42
Viewing Report Services documents ..................................................................43
4. Analyzing Reports and Documents on an iPad

Prerequisites

Analyzing reports and documents on an iPad

Sorting data in a grid report

Viewing more information about a data point on a graph: tooltips

Viewing data at different levels: drilling

Viewing reports and documents: links and buttons

Viewing subsets of data: changing your prompt answers

Opening other iPad applications from documents using links

Using documents to send or update data in your data warehouse:
 Transaction Services

Copying text from documents

Interacting with data

Analyzing trends at a glance: Microcharts

Analyzing data on a Map: Map

Analyzing data on a time-based graph: Time Series

Analyzing data in a Graph Matrix

Analyzing relationships between items in a Network visualization

Analyzing data on a heat map: Heat Map

Analyzing data on a calendar: Date Selection

Analyzing events on a timeline

Analyzing data overlaid on images: Image Layout

Downloading multimedia files: Multimedia
Uploading images to your data warehouse from your camera or photo album 67
Browsing a gallery of images: Image Viewer ........................................... 68
Playing videos: Video Player ................................................................. 68
Using interactive dashboards on an iPad ............................................. 68

5. Getting Started with MicroStrategy Mobile for Android ....................... 71
   Prerequisites ....................................................................................... 72
   Getting started with MicroStrategy Mobile for Android ....................... 72
   Running and viewing reports and documents .................................... 74
      Running reports and documents .................................................... 74
      Navigating data in a grid or graph report ....................................... 77
      Navigating data in a document ..................................................... 80
   Filtering data: Changing the page-by attribute ................................... 83
   Sharing data: sending a screenshot of a report or document ............... 83
   Annotating reports and documents on an Android Tablet .................. 84
   Filtering displayed data: Answering prompts ..................................... 85
      Answering different types of prompts ......................................... 85
      Using the Prompt Summary screen .......................................... 86
   Achieving the best response from MicroStrategy Mobile ................... 87

6. Analyzing Reports and Documents on an Android device .................... 89
   Viewing data at different levels using drilling .................................... 90
   Analyzing data using links .................................................................. 91
   Analyzing data in a table: Interactive Grid widgets ............................ 92
   Analyzing data on a map: Map widgets .......................................... 93
   Analyzing trends at a glance: Microcharts widget ............................. 94
   Analyzing data on a time-based graph: Time Series widgets ............... 95
   Using documents to send or update data in your data warehouse: Transaction Services ................................................................. 96
   Uploading images .............................................................................. 97
   Viewing images .................................................................................. 98
Introduction

This chapter provides an overview of basic tasks that analysts can perform with MicroStrategy Mobile for iPhone.

The steps and images below are based on the default settings of the application. Your interaction with the application depends on the configurations made by your administrator. For information on customizing MicroStrategy Mobile, see the MicroStrategy Mobile Design and Administration Guide.

If you are designing reports and documents for the iPhone, see the MicroStrategy Mobile Design and Administration Guide.

For information on installing and configuring MicroStrategy Mobile for iPhone, see the MicroStrategy Mobile Design and Administration Guide.
Prerequisites

- You must have an iPhone 6, iPhone 6 Plus, iPhone 5s, iPhone 5, iPhone 4S, iPhone 4, iPhone 3GS, or iPod Touch device.
- You must have the following privileges:
  - Use MicroStrategy Mobile, for all projects containing reports or documents that you want to view.
  - Mobile View Document.
  For information on privileges, contact your administrator.

Getting started with MicroStrategy Mobile for iPhone

It is recommended that you install the MicroStrategy Mobile application sent to you by your administrator.

To run the MicroStrategy application on your iPhone, tap the MicroStrategy Mobile icon. You may be prompted for your MicroStrategy user name and password.

When the application opens, the MicroStrategy Home screen is displayed, as shown below.
The Home screen lists the projects your device is connected to. You can use the Home screen to browse these projects and run reports and documents.

The format of the Home screen may vary according to how your administrator has configured it. Buttons may open a report, launch a micro application, open a folder for browsing, and so on. For information on customizing the Home screen, see the MicroStrategy Mobile Design and Administration Guide.

To access different areas of your application, swipe to the right to display the navigation menu. You can access the navigation menu from any screen outside the reports and documents in your app. The options in the navigation menu are described below:

- **Home**: Displays the list of projects your device is connected to.
- **Recently viewed**: Displays reports and documents that you have recently accessed.
- **Subscriptions**: Displays reports and documents that you are subscribed to.
- **Offline Transactions**: Some documents may include forms that you can fill out and send back to your company’s database. The Offline Transactions screen displays a list of documents that will send information to your company’s database once you are connected to the Internet.
- **Report Queue**: While a report or document is opening, you can tap **View Later** to download the report or document in the background and continue using your app. The Report Queue displays the reports and documents that were downloaded.
• **Settings**: Allows you to configure the MicroStrategy Mobile servers and projects that you are connected to, and general administrative and display options.

It is recommended that you configure the application using the configuration URL that you receive from your administrator.

• **Learn more**: Displays MicroStrategy’s Mobile website.

• **Help**: Displays the Help for the application.

To close the navigation menu, tap the navigation menu icon.

### Receiving alerts when data meets certain conditions: Push notifications

You can configure MicroStrategy to send you an alert on your iPhone when a metric on a report meets a specific condition. For example, you can choose to receive an alert if the Profit data in a report drops below $50,000. These alerts are called push notifications, and can be received even if the MicroStrategy iPhone application is not running. For information on setting up push notifications, see the *MicroStrategy Mobile Design and Administration Guide*.

### Enabling and disabling alerts

You enable or disable alerts using your iPhone’s Settings screen.

The documentation listed below refers to software produced by third-party vendors and thus is subject to change. MicroStrategy makes no guarantee on the availability or accuracy of third-party documentation.

### To enable or disable push notifications

1. Open your iPhone’s Settings screen. On the iPhone’s Home screen, tap **Settings**.
2. Tap **Notification Center**. The Notification Center page opens, with a list of applications that can send you alerts (push notifications).
3. Tap **MicroStrategy**.
4. Turn the **Show in Notification Center** switch on or off.
If you have enabled notifications, configure the push notifications, as described in the following steps:

a  Choose an Alert Style from the list:
   ▫ None: No alerts are displayed for push notifications.
   ▫ Banners: Display at the top of the iPhone screen. Tap a banner to open MicroStrategy Mobile. If you ignore the banner, it will close automatically.
   ▫ Alerts: Display as a pop-up window on the iPhone. Tap a button to open MicroStrategy Mobile or close the alert.

b  Turn the Sounds switch on or off.

c  Turn the View in Lock Screen switch on or off.

Push the Home button to return to the iPhone’s Home screen.

Sorting the list of reports, documents, and folders

Some screens, such as the Home screen and the Subscriptions screen, contain a list of files, such as reports, documents, and folders, that you can sort. Sorting can help make it easier to find the report or document you want or identify which files were updated so you can see any new data. By default, files are sorted by name.

To sort by the name of the file, the date the file was last modified, or the type of file, tap the Sort icon at the top. Select Name, Last Modified, or Type, depending on how you want to sort the folder.

You can also sort by the date the files were last downloaded to your iPhone. From the navigation menu, select Settings. Turn on Show Timestamp Options. Return to the screen with the files you want to sort, tap the Sort icon, and select Last Updated.

Running and viewing reports and documents

Once you have started MicroStrategy Mobile, you can view reports and documents on your device.

Some reports and documents may prompt you with questions when the report or document is run. The answer you provide to a prompt determines the data that is displayed on a report or document. For steps to answer prompts, see Answering prompts in MicroStrategy Mobile for iPhone, page 14.

This section contains information about the following:
• Running reports and documents, page 6
• Viewing and navigating data in a grid or graph report, page 8
• Viewing and navigating data in a document, page 10
• Sharing reports and documents via email, page 13
• Printing reports and documents, page 14

For information about interacting with the data displayed on a report or document, see Chapter 2, Analyzing Reports and Documents on an iPhone.

Running reports and documents

You can locate and run reports and documents in the following ways:

• Running them from a list of subscribed-to reports and documents. For steps, see Running subscribed-to reports and documents, page 6.
• Browsing to their location within a project. For steps, see Locating and running reports and documents, page 7.

To update the list of reports and documents, drag the screen down.

Running subscribed-to reports and documents

You can quickly access reports and documents that you have subscribed to using the Subscriptions button in the navigation menu on the left.

Subscribing to a report or document causes your iPhone to automatically download the report or document on a defined schedule, which allows you to open the report or document quickly and access it at any time. For steps to subscribe to a report or document, see the MicroStrategy Web Help.

The following steps describe how to run a subscribed-to report or document.

To run subscribed-to reports and documents

1  Within MicroStrategy Mobile, swipe to the right to display the navigation toolbar.

2  Tap Subscriptions. A list of subscribed-to reports and documents is displayed.

3  Tap a report or document on the list to run it. The report or document is displayed.
Locating and running reports and documents

You can run reports and documents by navigating to where they are located within a project that your iPhone is connected to.

To locate a report or document, you must have the proper permissions in MicroStrategy to access the folders containing the report or document. For information about the permissions that are assigned to you, contact your administrator.

To run reports and documents from a folder within a project

1. From the default Home screen, tap the name of the project you want to browse. The folders within the selected project are displayed.

2. Browse to the folder that contains the report or document that you want to run. A list of reports and documents is displayed.

   The icon next to the report or document name indicates whether it is a grid report, graph report, document, or Visual Insight dashboard.
   - Grid reports: 
   - Graph reports: 
   - Documents: 
   - Dashboards: 

3. To make it easier to find the report or document you want, you can sort the contents of the folder by name, the date the file was last modified, or the type of file. Tap the Sort icon at the top. Select Name, Last Modified, or Type, depending on how you want to sort the folder.

   You can also sort by the date the files were last downloaded to your iPhone. From the navigation menu, select Settings. Turn on Show Timestamp Options. Return to the screen with the files you want to sort, tap the Sort icon, then select Last Updated.

4. To view the report or document details, tap the info button next to the report or document’s name. A description of the report or document displays, along with the dates it was last modified and refreshed.
To return to the list of reports and documents, tap the back arrow icon at the top of the screen.

5 Tap a report or document on the list to run it. The report or document is displayed.

For information about viewing and navigating reports, see *Viewing and navigating data in a grid or graph report, page 8.*

For information about viewing and navigating documents, see *Viewing and navigating data in a document, page 10.*

As you navigate the projects you are connected to, the name of the folder you are currently in displays at the top of the screen. To return to a folder you were in before, swipe the current folder’s name to the right, then tap the name of the folder you want to return to.

**Viewing and navigating data in a grid or graph report**

There are two types of MicroStrategy reports: grid reports and graph reports.

- Grid reports display business data organized in rows and columns.
- Graph reports present data visually in styles such as a bar, line, or pie graph.

The following actions can be applied to most grid and graph reports after they have been displayed:

- To switch between full screen mode and non-full screen mode, tap the report.
  
  Full screen mode displays as much data on the screen as possible.

  Non-full screen mode displays a navigation bar at the top of the grid. The navigation bar shows the back button and the report name.

- If the report is in full screen mode, you can display the report’s title, switch the page-by group, or exit the report by tapping the action button.[1](https://example.com)

- To change the orientation between portrait and landscape, rotate the device.

- To scroll across a report, swipe the screen horizontally. To scroll up and down a report, swipe the middle of the screen vertically.

- To change the group of data that is displayed, tap the currently displayed group of data at the top of the report and choose another group. You can also perform a horizontal swipe at the edge of the screen to move between groups of data.
The currently displayed group of data appears in the page-by-bar at the top of the report.

The following sections show examples of grid and graph reports displayed on an iPhone:

- For examples of grid reports on an iPhone, see *Viewing and navigating data in grid reports, page 9.*
- For examples of graph reports on an iPhone, see *Viewing graph reports, page 9.*

**Viewing and navigating data in grid reports**

Grid reports are the most commonly used type of report. A grid report organizes business data into rows and columns. The image below shows a grid report displayed on an iPhone.

![Grid Report Example](image)

Some reports are designed to have data automatically appear with special formatting depending upon certain conditions (such as sales over $1 million, or inventory below 50). This is called conditional formatting.

The data that meets the condition is considered to be data that has passed the threshold of the condition; once data passes the threshold, the formatting is applied. Thresholds are cells of data that are formatted differently from the rest of the data on a report.

In the example report above, the report uses thresholds in the Cost column.

**Viewing graph reports**

Graph reports present data visually in a style such as a bar, line, or pie graph. The images below provide examples of graph reports displayed in MicroStrategy Mobile for the iPhone.
• To view tooltips to explain parts of a graph, such as a single bar in a bar graph, tap and hold on the screen.

• To zoom, perform a pinch on the center of the screen or double-tap the center of the screen to switch between a zoomed-in view and a zoomed-out view.

**Viewing and navigating data in a document**

Documents are used to present data from multiple reports in a presentation-quality format. They can contain a variety of graphics and text, depending upon their design.
The following actions can be used to view and navigate data in a document. Some of these actions may be disabled by the designer. For more information about designing documents for use on the iPhone, see the MicroStrategy Mobile Design and Administration Guide.

- Switch between portrait and landscape orientations by rotating the device.
- Zoom in or out on a document by performing a pinch on the center of the screen or double-tapping the center of the screen.

The following example shows a basic document displayed on an iPhone.

**Switching between panels in a document: panel stacks**

A document may contain panels that you can switch between, similar to slides in a slideshow.

You may be able to switch between panels by tapping a button or link, or by swiping left or right.

Some panels contain a gray bar at the bottom with a row of circles, as shown below. Each circle represents a panel and the currently displayed panel is marked with a dark circle.
To switch between panels, swipe left or right.

**Viewing and navigating tabs in a document**

A document may contain multiple tabs across the bottom of the document, called layouts. To view a layout, tap the tab with the layout’s name.

Each layout functions as a separate document and can have its own grouping of data, formatting, and so on. The following examples show two different layouts from the same document.

The following examples show two different layouts from the same multi-layout document.
Sharing reports and documents via email

You can share a screenshot of a MicroStrategy report or document with your contacts using email. Your recipients do not need to have MicroStrategy installed to view the screenshot. The steps to share a screenshot are as follows.

**Prerequisites**

- You must have configured an email account on your iPhone.

---

**To share reports via email**

1. In MicroStrategy Mobile, open a report or document that you want to share with your contacts.
2. In the top-right corner, tap the **Menu** button \( \text{≡} \). The context menu opens.
3. Tap the **Email** icon \( \text{✉️} \). A new email message is composed, with a screenshot of the report attached.
4. Type the email addresses of your contacts in the **To** and **Cc/Bcc** fields, as applicable.
5. Once you have composed the email, tap **Send**. The email is sent.
Printing reports and documents

If you have an AirPrint-capable printer available on your network, you can print a copy of your report or document, as described in the steps below. For a complete list of printers that support AirPrint, as well as information about configuring an AirPrint printer, see your Apple documentation.

**Prerequisite**

- You must have an AirPrint supported printer on your network to be able to print from your iPhone.

**To print reports and documents**

1. In MicroStrategy Mobile, open a report or document that you want to print.
2. In the top-right corner, tap the **Menu** button •••.
3. Tap the **Print** icon 📹. The Printer Options dialog box opens.
4. To choose a printer, tap **Printer**. A list of available printers is displayed.
5. Tap the name of the printer you want to print from. The printer is selected, and you are returned to the Printer Options dialog box.
6. To change the number of copies to print, use the plus + and minus - buttons.
7. If your printer supports double-sided printing, turn the **Double-sided** switch on.
8. When you are satisfied with the settings, tap **Print**.

**Answering prompts in MicroStrategy Mobile for iPhone**

Some reports and documents may ask you to choose what data is displayed by asking you questions, called prompts. Prompts allow you to display only the data that you want to view.

The following table lists the types of prompt you may have to answer and steps to answer them.
<table>
<thead>
<tr>
<th>Type of Prompt</th>
<th>Answering the prompt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar</td>
<td>To select a date, tap it. To select a range of dates, tap and hold the start date, and drag until the end date.</td>
</tr>
<tr>
<td>Date/time wheel</td>
<td>Scroll through the columns to select a date and time.</td>
</tr>
<tr>
<td>Text prompt</td>
<td>Tap inside the text box to begin typing an answer.</td>
</tr>
<tr>
<td>Numerical slider</td>
<td>Drag the slider to choose a value.</td>
</tr>
<tr>
<td>Numeric stepper</td>
<td>Tap the plus or minus button to select a value.</td>
</tr>
<tr>
<td>Numeric wheel</td>
<td>Scroll to the value you want to use.</td>
</tr>
<tr>
<td>On/Off switch</td>
<td>Slide the switch to turn it on or off.</td>
</tr>
<tr>
<td>Location</td>
<td>Tap the button to use your current location.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You are prompted for permission to use your location.</td>
</tr>
<tr>
<td>Barcode</td>
<td>Use your device’s camera to scan a barcode or QR code. To manually enter a barcode, tap the keypad button and enter the number that corresponds with the barcode.</td>
</tr>
<tr>
<td>Selections from a list</td>
<td>For a list of possible selections, tap the name of the list. Tap an item in the list to select it. The item you select is displayed in the report or document. If an arrow icon displays next to an item, then the item itself may contain one or more lists. Tap the arrow icon to display the lists, then tap the lists to view the items you can select from the list. To change the list so that the items you select are excluded from the report or document, tap in list next to the list’s name. To de-select an item, tap the item again. To de-select all items in a list, tap the X next to the list’s name.</td>
</tr>
</tbody>
</table>

**Using the Prompts screen**

The Prompts screen displays the prompts associated with a report or document and your response to them. The Prompts screen displays if one or more of the following conditions are met:

- The report or document contains at least one prompt
- You have not opened this report or document before
- You have not saved your previous answers to the prompts in this report or document
- An answer you provided does not meet the prompt’s requirements
The Prompts screen displays each prompt’s name, description, and the answers you have provided. Tap the name of a prompt to answer it.

If the answer you have provided does not meet the prompt’s requirements, the requirements are displayed in red text.

To change your prompt answers before running the report, tap the name of the prompt that you want to revise.

When the prompt’s answer requirements are met, tap **Apply** to run the report. If you want to change your prompt answers after you run the report, tap the Menu button ⬇️ then tap the Prompts icon 📊 to display and edit your prompt answers.

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**Achieving the best response from MicroStrategy Mobile**

The speed at which your list of reports is retrieved and reports are refreshed in MicroStrategy Mobile depends on several factors:

- Your mobile service provider.
- The time at which you are accessing the reports and documents.

The speed at which a report or document opens in MicroStrategy Mobile depends on several factors:

- The amount of usable memory on the mobile device.
- The processor speed of the mobile device.
- The version of the mobile device.
- The size and contents of the reports and documents.

For best practices to create reports and documents for use with MicroStrategy Mobile, see the *MicroStrategy Mobile Design and Administration Guide*.

Consider creating subscriptions to your most commonly used reports and documents. This will give you access to them in the Reports folder on your Home screen, and will pre-load their contents on your device so that they will open more quickly. For steps to subscribe to a report or document, see the *MicroStrategy Web Help*. 
ANALYZING REPORTS AND DOCUMENTS ON AN iPHONE

Introduction

This chapter describes some of the tasks that an analyst can perform to analyze data in a MicroStrategy report or document using MicroStrategy Mobile on an iPhone. The following topics are covered:

• Analyzing reports and documents on an iPhone, page 18
• Interacting with data, page 23
• Using interactive dashboards on an iPhone, page 33

After you run a report or document in MicroStrategy Mobile, you can view data at different levels, view a subset of data, and analyze data using interactive graphs. You can also follow links to display different reports or documents, or to access iPhone functionality such as sending email or placing phone calls.

Prerequisite

• This chapter assumes you are familiar with the information provided in Chapter 1, Getting Started with MicroStrategy Mobile for iPhone.
Analyzing reports and documents on an iPhone

You can interact with MicroStrategy reports and documents that are displayed on an iPhone to analyze the data. This section provides details to perform the following:

- Sorting data in a grid report, page 18
- Viewing data at different levels: drilling, page 19
- Viewing reports and documents: links, page 19
- Using documents to send or update data in your data warehouse: Transaction Services, page 22
- Viewing a subset of data: changing your prompt answers, page 20
- Copying text from documents, page 21

You can also view details about a specific point on a graph report. For more information, see Viewing more information about a point on a graph: tooltips, page 21.

**Sorting data in a grid report**

Sorting allows you to reorganize the way data is displayed so that you can analyze it more effectively. For example, you could sort the data in a report in descending order of profit to get a quick idea of your most profitable products.

---

**To sort data in a grid report**

1. Tap and hold the column header you want to sort your data by. The context menu opens.

2. Tap Sort. The Sort menu opens, for sorting in ascending or descending order, as shown below.

   ![Sort Menu Example](image)

3. Tap Sort Ascending, or Sort Descending, as applicable.
Viewing data at different levels: drilling

Some MicroStrategy reports and documents allow you to view information at lower, more detailed levels or higher, summarized levels. For example, a report can display time at the year level by default, but can also display data grouped by quarter or month.

<table>
<thead>
<tr>
<th>Supplier</th>
<th>Units Sold</th>
<th>Revenue</th>
<th>Profit</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACS Innovations</td>
<td>2,802</td>
<td>$1,237,776</td>
<td>$218,871</td>
</tr>
<tr>
<td>ATF Electronics</td>
<td>528</td>
<td>$372,525</td>
<td>$60,348</td>
</tr>
<tr>
<td>Audiometrics Inc.</td>
<td>3,421</td>
<td>$550,880</td>
<td>$94,912</td>
</tr>
<tr>
<td>Digital Equipment</td>
<td>2,063</td>
<td>$159,424</td>
<td>$28,065</td>
</tr>
<tr>
<td>Digital Office Inc.</td>
<td>1,635</td>
<td>$538,867</td>
<td>$90,296</td>
</tr>
<tr>
<td>DSS Appliance Co.</td>
<td>2,001</td>
<td>$926,595</td>
<td>$168,972</td>
</tr>
<tr>
<td>Entertaintron Inc.</td>
<td>3,472</td>
<td>$684,536</td>
<td>$119,718</td>
</tr>
<tr>
<td>Impact Components</td>
<td>2,161</td>
<td>$327,935</td>
<td>$57,508</td>
</tr>
<tr>
<td>MegaStore Corp.</td>
<td>1,148</td>
<td>$617,987</td>
<td>$108,968</td>
</tr>
<tr>
<td>Universal EL</td>
<td>1,570</td>
<td>$611,319</td>
<td>$100,671</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>20,801</strong></td>
<td><strong>$6,027,843</strong></td>
<td><strong>$1,057,330</strong></td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td><strong>2,080</strong></td>
<td><strong>$602,784</strong></td>
<td><strong>$105,733</strong></td>
</tr>
<tr>
<td><strong>Maximum</strong></td>
<td><strong>3,472</strong></td>
<td><strong>$1,237,776</strong></td>
<td><strong>$218,871</strong></td>
</tr>
</tbody>
</table>

You may be able to change the level at which you are viewing data by tapping an object. In the example above, tapping ACS Innovations displays data for each category of products sold by ACS Innovations.

To go back to the level you were at previously, tap the back arrow in the top left.

If drilling was enabled for a report or document, you can drill from page-bys, attributes, or metrics. Drilling is enabled by the designer. For an introduction to drilling, see the Basic Reporting Guide.

Viewing reports and documents: links

Some documents may contain links that you can use to open a report or another document, navigate to another location in your app, or open another application on your iPhone.

To open a link in a document, tap the link. The link may be an image or a text field. The function and appearance of a link depends on the way it was designed.

Tapping on a link may change the following properties of the report or document that the link executes:

- The group of data displayed in the report or document
- The prompt answers that are used in the report or document
- The view of the report: as a grid, as a graph, or as a grid and graph
• If the document contains multiple tabs, called layouts, the tab that displays when the document opens

For steps to create links in documents, see the MicroStrategy Mobile Design and Administration Guide.

Opening iPhone applications in documents using links

Some documents may contain links that you can use to interact with applications that are stored on your iPhone. Tap the link to open the application. The link may be an image or a text field. The function and appearance of a link depends on the way it was designed.

A link in a MicroStrategy document may open one of the following applications on your iPhone:

• Email  
• Phone  
• SMS (text)  
• Maps  
• Videos

For example, a MicroStrategy document displays sales information for a particular product, including how the product is selling and which stores carry it. The document contains links to applications on your iPhone, which you can tap to:

• Open a video demonstrating the product  
• View a map of the nearest stores that carry the product  
• Call the store to see if they have the product in stock

The document designer determines how these applications are accessed on the document, and what actions the applications perform. For more information on creating links that open other iPhone applications, see the MicroStrategy Mobile Design and Administration Guide.

Viewing a subset of data: changing your prompt answers

MicroStrategy reports and documents that present you with a question use your prompt answers to display a subset of data. Some reports and documents may allow you to change your prompt answer to display different subsets of data without having to re-execute the report.
To change your prompt answers, tap the **Menu** button (_barang_) at the top of the report or document, then tap the **Filter** button ( Barang ). The Filter screen is displayed, and you can change your prompt answers.

**Copying text from documents**

You can copy text from a document. First, select the text to copy by tapping and holding the text. If zoom is disabled, you can also select the text by double-tapping it.

If you do not know whether or not zoom is enabled, double-tap the text. If zoom is enabled, double-tapping zooms in or out.

From the pop-up menu that displays, choose to copy the selected text or select all the text in the text field.

If the text is displayed in the Detail section of a document, you must tap the text.

**Viewing more information about a point on a graph: tooltips**

A tooltip displays detailed information about a specific data point on a graph report. Tooltips provide information such as the value of a specific data point, the name of a group, or the label of a graph’s X-axis. An example of a tooltip in a boxplot graph is shown below:
To display a tooltip on a graph report, tap and hold on a data point on the graph.

**Using documents to send or update data in your data warehouse: Transaction Services**

Some documents may include forms that you can use to edit or add information to your data warehouse through Transaction Services. Some examples are documents that approve requests, track business activity, and execute business decisions, directly from your mobile device. Any new data or changes are saved in your data warehouse.

**Prerequisites**

To use a Transaction Services-enabled document, you must meet the following criteria:

- You must have Transaction Services.
- You must have the Execute Transaction privilege.
- The Transaction Services-enabled document must already be created.

**Using Transaction Services-enabled documents**

Depending on the way the document is designed, you may be able to manipulate data in the following ways:

- Edit text or numerical values in a text box.
- Use a slider to select from a range of values.
- Select values from a drop-down list.
- Use an On/Off switch for Yes or No conditions.
- Use a date/time wheel to select a date.
- Use your device’s camera to scan a barcode. To manually enter a barcode or QR code, tap the keypad button and enter the number that corresponds with the barcode.

Once you have completed your manipulations, you may be able to perform one or more of the following:

- The designer may use different names for the buttons or links described below.
- To preview the results of your changes in the Grid/Graph without updating your data warehouse, tap Recalculate.
• To update your data warehouse with the values you provided, tap Submit.

If you are not connected to the internet, the document as added to the list of offline transactions that are pending changes. Your changes are sent to your data warehouse when a connection is available. For steps to edit your pending changes, see To edit pending transactions below.

• To undo the changes you have made, tap Discard Changes. The document reverts to the values from the last time you submitted data.

To edit pending transactions

1 In the document’s header, tap the Offline Transactions button: . A list of the transactions that are pending changes are displayed.

2 To change the values you want to submit, tap a transaction in the queue to select it, and then tap Edit.

3 To delete a transaction, tap the transaction in the queue to select it, and then tap Delete.

4 To view transactions for all documents that are pending changes, tap the list icon , then tap the document whose transactions you want to edit or delete.

Interacting with data

Documents displayed on an iPhone can contain interactive objects you can use to analyze data, upload or download files, and so on.

For examples of interactive objects you can use to analyze data, and instructions to analyze the data that they contain, see the following sections:

• Analyzing data in a tabular layout: Interactive Grids, page 24
• Analyzing data on a Map: Maps, page 25
• Analyzing data at a glance: Microcharts, page 28
• Analyzing data on a time-based graph: Time Series, page 30

For instructions to use interactive objects that allow you to view videos, upload images, and download files, see the following sections:

• Downloading multimedia files: Multimedia, page 31
• *Uploading images to your data warehouse from your camera or photo album, page 31*

• *Browsing a gallery of images: Image Viewer, page 32*

• *Playing videos: Video Player, page 32*

**Analyzing data in a tabular layout: Interactive Grids**

Some documents may display data in an interactive grid, as shown in the example below.

In this interactive grid, attributes and metric values are displayed in the columns and rows, and grouping appears at the top of the screen.

The actions that you can perform depend on how the table was designed. You may be able to do the following:

• If a column has an orange triangle above its title, the column contains more than one metric. You can tap the column's title to switch between metrics.

• To sort the grid by a column, tap and hold the title of the column. Click **Sort**, then choose **Ascending** or **Descending** to sort the grid by the column.

• To undo a sort, tap and hold the title of the column you used to sort the grid. Click **Clear Sort**.

• To display different groups of data, tap different page-bys.

• Tap on objects to drill. For more information about drilling, see *Viewing data at different levels: drilling, page 19*. 
• Tap on objects to follow links. For more information about linking, see Viewing reports and documents: links, page 19, and Opening iPhone applications in documents using links, page 20.

• To toggle between full screen and non-full screen mode, tap the center of the screen once.

• To switch the page displayed, swipe across the screen.

**Analyzing data on a Map: Maps**

Some documents may display data based on locations on a map, as shown below.

![Map with pins representing nearby stores](image)

The map uses pins to represent nearby stores. Stores with pins that overlap each other are grouped together, with the number of pins in the group marked in the circle.

Some maps may show image markers or the color concentrations of a density map, instead of pins. For an example of a density map, see Analyzing data on a Map: Map, page 58.

The document containing a map may prompt you for your current location, so that the map can show locations that are within a given distance from your current location. For instructions to answer prompts on an iPhone, see Answering prompts in MicroStrategy Mobile for iPhone, page 14.

Depending upon how the map was designed, you may be able to:

• Swipe to a different area on the map.
• Zoom in or out by pinching the map. For some maps, markers are displayed instead of colors as you zoom in.

• Rotate the map by placing two fingers on the map and spinning them.

• View more information about a specific marker, by tapping the marker on the map.

• Switch between Map, Satellite, and Hybrid views. Tap the Settings icon, tap Style, and then tap the appropriate button.

• Select a different metric to display with the markers. Tap the Settings icon, tap Map Based on, and select the metric you want to display.

• You can ungroup markers. Tap the Settings icon, tap Marker Type, and turn off Advanced Clustering.

• You can display or hide text with a marker’s metric value instead of the marker. Tap the Settings icon, tap Marker Type, and select either Marker or Text. The map shown below has metric text displayed.

If Advanced Clustering is turned on, the metric text is for the group of markers.

• You can select a set of locations to analyze by creating a region. To do this, tap the Select icon, and do one of the following:
To select locations within a certain radius of a central location, tap the **Circle** icon. Tap the central location, then drag your finger outward until the radius is as large as you want. As you draw, the radius of the circle, in miles, is displayed.

To select locations within a rectangular area, tap the **Rectangle** icon, and then draw a rectangle on the map. As you draw, the length and width of the rectangle, in miles, is displayed.

To select locations by drawing a freeform shape around them, tap the **Freeform** icon, and then draw a shape on the map around the locations.

To select individual markers, tap the **Marker** icon, and then select markers on the map. Tap **Done** to create the region.

A tab for the newly defined region is displayed at the top of the screen, listing how many markers or locations are included in the region. For example, in the map displayed below, two regions have been created. First, a rectangle was drawn on the map, which created Region 1, with 20 markers. Next, a circle was drawn on the map, which created Region 2, with 30 markers. If more than one region is defined, as in this case, another tab, labeled All, is also displayed. The All tab selects all the regions.

If more than two regions are created, you can scroll through the regions in the tab by swiping the tab. To close the tab, tap the slider (shown below) in the tab.
After you create a region, you can analyze data by:

- Browsing through the markers in a region. Tap the region in the region tab to display a list of the markers in the region. Tap a marker to view more information about the marker. You can browse through the details for each marker by tapping the arrows to navigate through the markers.

- Drilling in a region. Tap the region on the map, then tap Drill. Drilling allows you to view information at lower, more detailed levels or higher, summarized levels.

- Zooming in on the region. Tap the region in the region tap, then tap Zoom.

- Deleting all defined regions from the map. Tap the Select icon, and then tap the x icon.

**Analyzing data at a glance: Microcharts**

Some documents may contain a grid with miniature charts, called microcharts, that you can use to view trends in a metric’s value at a quick glance. An example is shown below:
To analyze data with Microcharts

1. To view information about a data point in a graph, tap and hold your finger over it. A tooltip with more information appears, as shown below.

2. Drag your finger along the graph to view tooltips for each data point.

3. If some metric columns do not fit on the screen, swipe horizontally to view the other metric columns.
4 Depending on how the microchart was designed, you can sort the microchart based on one of its columns. Tap the title of the column to sort the rows in ascending order, based on the values in the column. Tap the title of the column again to sort in descending order. Tapping the title of the column a third time undoes the sort.

**Analyzing data on a time-based graph: Time Series**

Reports and documents can include a line graph that displays data over a period of time. The graph may contain multiple data series. For example, the values for the various profit and revenue metrics for the Books and Electronics categories for a two-year period are displayed in the image below:

Use the slider at the bottom to select a time period to view. The highlighted section is the time period you are currently viewing.

The actions that you can perform with the graph depend upon how the graph was designed. You may be able to do any of the following:

- Change the orientation of the graph between portrait and landscape by rotating the device.
- To view data for a specific amount of time, tap one of the time periods at the top of the graph. In the example above, you can select either a six-month or twelve-month time period.
- To display tooltips, tap and hold on the graph. For example, if you tapped and held on the Books Revenue graph line for September, the tooltip would display $93,728.
- To scroll through the time axis, drag the slider below the graph.
- To view a longer or shorter period of time, drag the left or right edge of the slider to adjust its size.
• To view a legend of all the metrics, tap the bar on the right edge of the graph. The example already displays the metric legend. You can select a metric to highlight it in the graph.

**Downloading multimedia files: Multimedia**

Some documents may include files that you can download. These files can be of various formats, such as videos, PDFs, ePub files, and so on.

Any new files that were not in a document previously are labeled as New the next time you view or refresh the document, indicating that new content is available.

Depending on how the document was designed, you may be able to do the following:

• To start downloading the file, tap the **Download** button. A progress bar indicates the status of the download.
• To cancel a download, tap the **Cancel** button.
• To open a file, tap its icon.

**Uploading images to your data warehouse from your camera or photo album**

Some documents may allow you to upload images by selecting an image from your photo album or by taking a picture using your device’s camera, if applicable.

---

**To upload images**

1. **Tap** Add Photo.

   If your device has a camera, a menu is displayed, with the option to either take a new photo, or use an existing photo.

   If your device does not have a camera, your photo albums are displayed.

2. To take a new photo, do the following:

   a  **Tap** Take New Photo. The camera opens.

   b  If your device has a front and a back camera, you can switch between the two cameras by tapping the Switch Camera icon 📸.
c Use the camera to take a photo. A preview of the photo is displayed, with a white frame.

3 To use a photo from your album, do the following:
   a Tap Choose Existing Photo. A list of the photo albums on your device is displayed.
   b Navigate to the photo you want to upload, and tap its thumbnail. The photo is displayed, with a white frame.

4 Drag the photo in the white frame to crop the photo and select which area to use. To zoom into the photo, use a pinch gesture.

5 When you have selected which area to use, tap Use Photo. To discard this photo and take a new one, tap Retake.

6 A preview of the cropped photo displays, with the option to add a caption.

7 To discard this photo and take a new one, tap Retake.

8 To use this photo, tap Done. The photo appears on the screen. To add more photos, tap the Add Photo again, and repeat the above steps. Once you have selected a photo, the counter on the top-right of the frame indicates the number of photos you have chosen.

   The number of photos you can upload may be limited by the designer.

9 To upload all the photos, tap Submit. The photos are uploaded, and depending on the document’s configuration, a confirmation may appear.

Browsing a gallery of images: Image Viewer

Some documents may include a gallery of images, which you can browse to view different images.

Depending on how the gallery is designed, you may be able to do the following:

• Swipe left or right to navigate between images.
• Tap an image to make it fill the screen.

Playing videos: Video Player

Some documents may include an embedded video that you can view. Tap Play to begin the video.
If a local copy of the video was cached on your device, you can view the video whether or not the device is connected to the internet. While your mobile device is online, the video can be downloaded or streamed.

In order to view streaming videos when the mobile device is offline, ensure that the video is fully downloaded while the mobile device is online. By default, the video file is discarded when you close the MicroStrategy Mobile application. Your administrator can ensure that streaming videos are downloaded and stored on the mobile device for offline use. Steps to do so are provided in the *Mobile Design and Administration Guide*.

**Using interactive dashboards on an iPhone**

Some dashboards may be interactive so you can actively explore business data on an iPad. You can add or remove attribute elements from a visualization to change your the data you are viewing. An example of a dashboard is shown below.

![Interactive Dashboard Example](image)

For information on designing dashboards, see the *MicroStrategy Web Help*.

**Prerequisites**

To view interactive dashboards using your iPhone, you must enable AirPlay® Mirroring on your device, which allows you to show your device's screen on an external display. The requirements are as follows:
• An iPhone 4S or better, connected to a Wi-Fi network.
• An Apple TV®, connected to the same Wi-Fi network.
• An external display, connected to the Apple TV.

For steps to enable AirPlay Mirroring, refer to the following Apple Support article: [http://support.apple.com/kb/HT5209](http://support.apple.com/kb/HT5209).

---

**To interact with a VI dashboard using an iPhone and external display**

1. Using your iPhone, enable AirPlay Mirroring for the display that you want to use for your dashboard.
2. In MicroStrategy Mobile, open the dashboard. The visualizations are shown on the external display, and the Filters section is displayed on your iPhone.
3. To include or exclude attribute elements from the dashboard, use the Filters section.
4. To interact with the dashboard shown on the external display, at the top-right of your device’s screen, tap Control. The control screen opens, which allows you to interact with the VI dashboard using gestures such as pinch and swipe.
**Chapter 3: Getting Started with MicroStrategy Mobile for iPad**

**Introduction**

This chapter provides an overview of basic tasks that analysts can perform with MicroStrategy Mobile for iPad.

The steps and images below are based on the default settings of the application. Your interaction with the application depends on the configurations that your administrator has made. For information on customizing MicroStrategy Mobile, see the *MicroStrategy Mobile Design and Administration Guide*.

If you are designing reports and documents for the iPad, see the *MicroStrategy Mobile Design and Administration Guide*.

If you are an administrator planning to deploy and configure MicroStrategy Mobile for mobile device users, see the *MicroStrategy Mobile Design and Administration Guide*.
Prerequisites

- You must have an iPad device with iOS 4.3.x or higher.
- You must have the following privileges:
  - Use MicroStrategy Mobile, for all projects containing reports or documents that you want to view.
  - Mobile View Document.
  For information on privileges, contact your administrator.

Getting Started with MicroStrategy Mobile for iPad

It is recommended that you install the MicroStrategy Mobile application sent to you by your administrator.

To start MicroStrategy Mobile for iPad, tap the application’s icon. You may need to type your MicroStrategy user name and password.

When you log in to MicroStrategy, the Home screen displays. You can access the projects you are connected to, any reports you have subscribed to, and reports that you have recently accessed.
The icons on your Home screen may vary, depending on the configuration set by your administrator. For example, you may see additional shortcuts to reports and documents. For information on customizing the Home screen, see the *MicroStrategy Mobile Design and Administration Guide*.

From the toolbar on the left, you can select from the following options:

- **Home**: Displays the list of projects your device is connected to.
- **Recently viewed**: Displays reports and documents that you have recently accessed.
- **Subscriptions**: Displays reports and documents that you are subscribed to.
- **Offline Transactions**: Some documents may include forms that you can fill out and send back to your company’s database. The Offline Transactions screen displays a list of documents that will send information to your company’s database once you are connected to the Internet.
- **Report Queue**: While a report or document is opening, you can tap View Later to download the report or document in the background and continue
using your app. The Report Queue displays the reports and documents that were downloaded.

- **Settings**: Allows you to configure the MicroStrategy Mobile servers and projects that you are connected to, and general administrative and display options.

   It is recommended that you configure the application using the configuration URL that you receive from your administrator.

- **Learn more**: Displays MicroStrategy’s Mobile website, where you can learn more about MicroStrategy Mobile.

- **Help**: Displays the help for the application.

- If you have tagged any reports and documents, the tags you created. Tap the name of a tag to view reports and documents with the tag.

To close the navigation menu, tap the navigation menu icon.

**Receiving alerts when data meets certain conditions:**

**Push notifications**

You can configure MicroStrategy to send you an alert on your iPad when a metric on a report meets a specific condition. For example, you can choose to receive an alert if the Profit data in a report drops below $50,000. These alerts are called push notifications, and can be received even if the MicroStrategy iPad application isn’t running. For information on setting up push notifications, see the *MicroStrategy Mobile Design and Administration Guide*.

**Turning alerts on or off**

You can turn alerts on or off using the application’s Settings screen.

The documentation listed below refers to software produced by third-party vendors and thus is subject to change. MicroStrategy makes no guarantee on the availability or accuracy of third-party documentation.

**To turn alerts on or off**

1. On the iPad’s Home screen, tap **Settings**. The Settings screen opens.
2 Tap Notification Center. The Notification Center page opens, with a list of applications that can send you alerts.

3 Tap MicroStrategy.

4 Turn the Show in Notification Center switch on or off.

Selecting the display of the alert

You can specify whether you want to receive notifications as pop-up alerts, with sounds, or both, through your iPad’s Settings screen.

The documentation listed below refers to software produced by third-party vendors and thus is subject to change. MicroStrategy makes no guarantee on the availability or accuracy of third party documentation.

To change the type of notification using the iPad’s Settings screen

1 Open your iPad’s Settings screen. On the iPad’s Home screen, tap Settings.

2 Tap Notification Center. The Notification Center page opens, with a list of applications that can send you alerts (push notifications).

3 Tap MicroStrategy.

4 Choose an Alert Style from the list:
   a None: No alerts are displayed for push notifications.
   b Banners: Display at the top of the iPad screen. Tap a banner to open MicroStrategy Mobile. If you ignore the banner, it will close automatically.
   c Alerts: Display as a pop-up window on the iPad. Tap a button to open MicroStrategy Mobile or close the alert.

5 Turn the Sounds switch on or off.

6 Turn the View in Lock Screen switch on or off.

Sorting the list of reports, documents, and folders

Some screens, such as the Home screen and the Subscriptions screen, contain a list of files, such as reports, documents, and folders, that you can sort. Sorting can help make it easier to find the report or document you want or identify which files were updated so you can see any new data. By default, files are sorted by name.
To sort by the name of the file, the date the file was last modified, or the type of file, tap the Sort icon 🔄. Select Name, Last Modified, or Type, depending on how you want to sort the folder.

You can also sort by the date the files were last downloaded to your iPad. From the navigation menu, select Settings. Turn on Show Timestamp Options. Return to the screen with the files you want to sort, tap the Sort icon 🔄, then select Last Updated.

Running and viewing reports and documents

Once you have started MicroStrategy Mobile, you can navigate through your project and run reports and documents on the iPad.

Some reports and documents require you to answer questions, called prompts, before the report is executed. For information on answering prompted reports, see Answering prompts in MicroStrategy Mobile for iPad, page 46.

For information on interacting with the data in reports and documents, see Chapter 4, Analyzing Reports and Documents on an iPad.

Running reports and documents you have subscribed to

You can automatically download reports and documents on a specified schedule by subscribing to the report or document. All the reports and documents that you are subscribed are listed in the Subscriptions page.

For steps to subscribe to a report or document, see the MicroStrategy Web Help.

To run reports and documents you have subscribed to

1. From the navigation menu on the left, tap the Subscriptions icon 🔄. A list of the reports and documents you are subscribed to displays, grouped by project.

2. To view the description for a report or document and where the report or document is located, tap the i info button to the right of the report or document’s name. The info pane displays.

   Tap the x button to close the info pane.
3 Tap the name of the report or document you want to run.

For information on viewing and navigating reports, see Viewing grid and graph reports, page 42.

For information on viewing and navigating documents, see Viewing Report Services documents, page 43.

Running reports and documents by browsing to their location

In addition to running reports and documents that you are subscribed to, you can browse folders in projects to locate reports or documents and run them.

To run reports and documents by browsing to their location

1 In the default Home screen, tap the name of the project you want to browse. The folders within the project are displayed.

2 Browse to the folder that contains the report or document that you want to run.

   The icon next to the report or document name indicates whether it is a grid report, graph report, document, or Visual Insight dashboard.

   - Grid reports: 📊
   - Graph reports: 📈
   - Documents: 📝
   - Dashboards: 📊

3 To make it easier to find the report or document you want, you can sort the contents of the project by name, last modified date, type, and any tags you have added to the reports or documents. Tap the Sort icon at the top. Select Name, Last Modified, Type, or Tag, depending on how you want to sort the folder.

   You can also sort by the date the files were last downloaded to your iPad. From the navigation menu, select Settings. Turn on Show Timestamp Options. Return to the screen with the files you want to sort, tap the Sort icon, then select Last Updated.
4 To view a specific report or document’s details, tap the i info button next to the report or document’s name. A description of the report or document displays, along with the dates it was last modified and refreshed. To close the details pane, tap the X icon at the top of the pane.

5 To view descriptions for all items in the folder, tap the Table View icon at the top of the screen. To return to viewing a list of the items in the folder, tap the List View icon at the top of the screen.

6 Tap a report or document in the list to run it. The report or document is displayed.

If you are presented with a prompt to answer, see Answering prompts in MicroStrategy Mobile for iPad, page 46 for details to answer each type of prompt.

For information about viewing and navigating reports, see Viewing grid and graph reports, page 42.

For information about viewing and navigating documents, see Viewing Report Services documents, page 43.

As you navigate the projects you are connected to, the name of the folder you are currently in displays at the top of the screen. To return to a folder you were in before, swipe the current folder’s name to the right, then tap the name of the folder you want to return to.

Viewing grid and graph reports

There are two types of MicroStrategy reports: grid reports and graph reports. Grid reports display business data organized in rows and columns. Graph reports present data visually in styles such as a bar, line, or pie graph.

The following is applicable to most grid and graph reports:

- You can view reports in portrait or landscape mode by rotating the iPad.
- To scroll across a report, swipe horizontally. To scroll up and down a report, swipe vertically.
- In grid reports, tap and hold your finger over a cell to see a magnified view of the data in that cell.
- To switch between viewing the report as a grid or a graph, tap the graph icon at the top-right of the screen.
- The data in a report may be specific to a certain group, displayed in the page-by at the top of the report. To change the group of data, tap the name
of the current group and choose another. You may also be able to switch to another group using gestures, as described in *Using gestures for page-by, page 43.*

**Using gestures for page-by**

You can use gestures to navigate through pages in up to two page-by groups, displayed at the top of the report.

If the designer has enabled book-style page-by navigation, the report is displayed as a book, as shown below.

To navigate through the pages, tap the left or right edge of the report.

If book-style page-by navigation is not enabled, switch between page-by groups by tapping the name of the current page-by group at the top of the page. Select the group you want to view.

**Viewing Report Services documents**

Report Services documents contain several representations of key performance indicators (KPIs), giving you various perspectives of your business data.

**Switching between panels in a document: panel stacks**

A document may contain panels that you can switch between, similar to slides in a slideshow.

You may be able to switch between panels by tapping a button or link, or by swiping left or right.
Some panels contain a gray bar at the bottom with a row of circles, as shown below. Each circle represents a panel and the currently displayed panel is marked with a dark circle.

To switch between panels, swipe left or right.

**Viewing and navigating tabs in a document**

A document may contain multiple tabs across the bottom of the document, called layouts. To view a layout, tap the tab with the layout’s name.

Each layout functions as a separate document and can have its own grouping of data, formatting, and so on. The following image provides an example of a document with multiple layouts.

Tap the name of a layout to switch to it.
Sharing reports and documents via email

You can share a screenshot of a MicroStrategy report or document with your contacts using email. Your recipients do not need to have MicroStrategy installed to view the screenshot. The steps to share a screenshot are as follows.

**Prerequisites**

- You must have configured an email account on your iPad.

---

**To share reports via email**

1. In MicroStrategy Mobile, open a report or document that you want to share with your contacts.
2. In the top-right corner, tap the Menu button. The context menu opens.
3. Tap Email Screen. A new email message displays, with a screenshot of the report included in the body.
4. Type the email addresses of your contacts in the To and Cc/Bcc fields, as applicable.
5. Once you have composed the email, tap Send. The email is sent.

---

**Annotating reports and documents on an iPad**

You can add annotations, such as comments and freehand drawings, to a screenshot of your dashboard, and share the annotated screenshot with your contacts. The steps to annotate and share a screenshot follow.

---

**To annotate and share reports and documents on an iPad**

1. In MicroStrategy Mobile, open a report or document you want to annotate and share.
2. In the top-right corner, tap the Menu button. The context menu opens.
3. Tap Annotate and Share. A screenshot of the dashboard opens.
4. You can annotate the screenshot in the following ways:
   - To draw shapes freehand, use your finger.
   - To add a comment to your drawing, tap the drawing, then tap Add Comment. A comment box is displayed, which allows you to enter text.
• To add a comment anywhere in the screenshot, in the top right of the screen, tap the Add Comment icon [ ]. A comment box is displayed.

• To move the comment box, tap, hold, and drag the box around the screen.

• To resize the comment box, tap, hold, and drag the corners of the box.

5 To email, save, or print the annotated screenshot, tap the Action button [ ], then select the appropriate action.

**Printing reports and documents**

If you have a printer available on your network, you can print a copy of your report or document, as described in the steps below.

**To print reports and documents**

1 In MicroStrategy Mobile, open a report or document that you want to print.

2 In the top-right corner, tap the Menu button [ ].

3 Tap Print. The Printer Options dialog box opens.

4 To choose a printer, tap Printer. A list of available printers is displayed.

5 Tap the name of the printer you want to print from. The printer is selected, and you are returned to the Printer Options dialog box.

6 To change the number of copies to print, use the plus + and minus - buttons.

7 If your printer supports double-sided printing, turn the Double-sided switch on.

8 When you are satisfied with the settings, tap Print.

**Answering prompts in MicroStrategy Mobile for iPad**

Some reports and documents may ask you to choose what data is displayed by asking you questions, called prompts. Prompts allow you to display only the
data that you want to view.

The following table lists the types of prompt you may have to answer and steps to answer them.

<table>
<thead>
<tr>
<th>Type of Prompt</th>
<th>Answering the prompt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar</td>
<td>To select a date, tap it. To select a range of dates, tap and hold the start date, and drag until the end date.</td>
</tr>
<tr>
<td>Date/time wheel</td>
<td>Scroll through the columns to select a date and time.</td>
</tr>
<tr>
<td>Text prompt</td>
<td>Tap inside the text box to begin typing an answer.</td>
</tr>
<tr>
<td>Numerical slider</td>
<td>Drag the slider to choose a value.</td>
</tr>
<tr>
<td>Numeric stepper</td>
<td>Tap the plus or minus button to select a value.</td>
</tr>
<tr>
<td>Numeric wheel</td>
<td>Scroll to the value you want to use.</td>
</tr>
<tr>
<td>On/Off switch</td>
<td>Slide the switch to turn it on or off.</td>
</tr>
<tr>
<td>Location</td>
<td>Tap the button to use your current location.</td>
</tr>
<tr>
<td></td>
<td>Note: You are prompted for permission to use your location.</td>
</tr>
<tr>
<td>Barcode</td>
<td>Use your device's camera to scan a barcode or QR code. To manually enter a barcode, tap the keypad button and enter the number that corresponds with the barcode.</td>
</tr>
<tr>
<td>Selections from a list</td>
<td>For a list of possible selections, tap the name of the list. Tap an item in the list to select it. The item you select is displayed in the report or document. If an arrow icon displays next to an item, then the item itself may contain one or more lists. Tap the arrow icon to display the lists, then tap the lists to view the items you can select from the list. To change the list so that the items you select are excluded from the report or document, tap in list next to the list's name.</td>
</tr>
</tbody>
</table>

**Using the Prompts screen**

The Prompts screen displays the prompts associated with a report or document and your response to them. The Prompts screen displays if one or more of the following conditions are met:

- The report or document contains at least one prompt
- You have not opened this report or document before
- You have not saved your previous answers to the prompts in this report or document
- An answer you provided does not meet the prompt’s requirements
The Prompts screen displays each prompt’s name, description, and the answers you have provided. Tap the name of a prompt to answer it.

If the answer you have provided does not meet the prompt’s requirements, the requirements are displayed in red text.

To change your prompt answers before running the report, tap the name of the prompt that you want to revise.

When the prompt’s answer requirements are met, tap Apply to run the report. If you want to change your prompt answers after you run the report, tap the Menu button then tap the Prompts icon to display and edit your prompt answers.

**Achieving the best response from MicroStrategy Mobile**

The speed at which your list of reports is retrieved and reports are refreshed in MicroStrategy Mobile depends on several factors:

- Your mobile service provider or internet service provider.
- The time at which you are accessing the reports and documents.

The speed at which a report or document opens in MicroStrategy Mobile depends on several factors:

- Amount of usable memory on the mobile device.
- The version of the mobile device.
- The size and contents of the reports and documents.

For best practices for creating reports and documents for use with MicroStrategy Mobile, see the *MicroStrategy Mobile Design and Administration Guide*.

Consider creating subscriptions to your most commonly used reports and documents. This gives you access to them in the Reports tab on your Home screen, and can pre-load their contents on your device so that they open more quickly. For steps to create subscriptions, see the *MicroStrategy Web Help*. 
ANALYZING REPORTS AND DOCUMENTS ON AN iPAD

Introduction

This chapter describes the tasks you can perform to interact with and analyze data in MicroStrategy Mobile for iPad. The following sections are covered:

• Analyzing reports and documents on an iPad, page 50
• Interacting with data, page 56
• Using interactive dashboards on an iPad, page 68

Prerequisites

• This chapter assumes you are familiar with the information provided in Chapter 3, Getting Started with MicroStrategy Mobile for iPad.
Analyzing reports and documents on an iPad

This section describes the following ways in which you can interact with data in MicroStrategy Mobile for iPad:

- Sorting data in a grid report, page 50
- Viewing more information about a data point on a graph: tooltips, page 51
- Viewing data at different levels: drilling, page 51
- Viewing reports and documents: links and buttons, page 53
- Viewing subsets of data: changing your prompt answers, page 53
- Opening other iPad applications from documents using links, page 54
- Using documents to send or update data in your data warehouse: Transaction Services, page 54
- Copying text from documents, page 56

Sorting data in a grid report

Sorting allows you to reorganize the way data is displayed so that you can analyze it more effectively. For example, you could sort the data in a report in descending order of profit to get a quick idea of your most profitable products.

To sort data in a grid report

1  Tap and hold the column header you want to sort your data by. The context menu opens.
2  Tap Sort. The Sort menu opens, for sorting in ascending or descending order, as shown below.
3  Tap Sort Ascending, or Sort Descending, as applicable.
Viewing more information about a data point on a graph: tooltips

A tooltip displays detailed information about a specific data point on a graph report. Tooltips provide information such as the value of a specific data point, the name of a group, or the label of a graph’s X-axis. An example of a tooltip in a pie chart is shown below:

To display a tooltip on a graph report, tap and hold a data point on the graph.

Viewing data at different levels: drilling

Drilling lets you view your data at levels other than those displayed in the report or document. For example, a report displays data at the year level by default. You can drill down to view the same data at the quarter level. Alternatively, you can drill to another dimension, such as Geography, to view data at the city level.

If drilling is enabled, **Drill Anywhere** appears when you tap and hold an attribute header or attribute element, as shown below:
To drill on a grid or graph

1. Tap and hold an attribute header or attribute element, and then release. The context menu appears.

2. Tap **Drill Anywhere** (on a grid) or **Drill** (on a graph). The graphical drill path selector appears, as shown below. A list of dimensions to which you can drill is displayed.

To cancel drilling at any time, tap the close button \(\times\) at the top-right of the drill path selector.

3. In the drill path interface, scroll through the displayed dimensions until the one you want to drill to is highlighted in the center.

4. Tap the dimension’s name. The dimension gets added to the drill path on the left, and a list of attributes representing that dimension appears.

5. Repeat the procedure, adding an attribute to the drill path. The **Update** icon appears, as shown below.

If you want to change your selections, tap the name of the first dimension you selected, shown in blue at the far left of the screen. The drill path is reset.
6 Once you have made your selection, tap **Update** to refresh the report with data for your chosen attribute.

7 To return to the original report, tap the **Back** button on the top-left.

**Viewing reports and documents: links and buttons**

A link is a connection between the currently displayed MicroStrategy document and another document or report. When selected, a link executes a document or report from the currently displayed document.

Links in MicroStrategy documents can be displayed as images, text, or buttons. The function and appearance of a link depends upon the way it is designed.

A button can also open a different screen, such as the Home screen or the Report List.

To follow a link that is displayed on a document, tap the button, or the linked image or text. To return to the original document, tap the **Back** arrow at the top-left of the screen.

When a link executes a report or document, it can change the following properties of the report or document that it executes:

- The grouping of a report or document
- The layout of a document
- The view of a report: as a grid, as a graph, or as a grid and graph
- The prompt answers that are used in a report or document
- The selector values that are used in a document

A link can also display the Group-by page. For more information about the Group-by page, see *Chapter 3, Getting Started with MicroStrategy Mobile for iPad*.

For steps to create links in documents, see the *MicroStrategy Mobile Design and Administration Guide*.

**Viewing subsets of data: changing your prompt answers**

MicroStrategy reports and documents that contain prompts use your prompt answers to display a subset of data. Some reports and documents may allow you to change your prompt answer to display different subsets of data without having to navigate to the report and re-execute it.
Reports or documents that allow you to change your prompt answers may display a Filter icon at the top of the screen.

To change your prompt answers after the report has run, tap the Filter icon. The prompt screen is displayed, and you can change your prompt answers.

**Opening other iPad applications from documents using links**

A MicroStrategy document can use links to open other iPad applications, such as Safari, Mail, and Google Maps. For example, a document may report sales per employee. When you view the document, you can tap a link to send an email to an employee using Mail.

The document designer determines how applications are accessed on the document, and what actions the applications perform. For information about designing documents, see the MicroStrategy Mobile Design and Administration Guide.

**Using documents to send or update data in your data warehouse: Transaction Services**

Some documents may include forms that you can use to edit or add information to your data warehouse through Transaction Services. Some examples are documents that approve requests, track business activity, and execute business decisions, directly from your mobile device. Any new data or changes are saved in your data warehouse.

**Prerequisites**

To use a Transaction Services-enabled document, you must meet the following criteria:

- You must have Transaction Services.
- You must have the Execute Transaction privilege.
- The Transaction Services-enabled document must already be created.

**Using Transaction Services-enabled documents**

Depending on the way the document is designed, you may be able to manipulate data in the following ways:

- Edit text or numerical values in a text box.
- Use a slider to select from a range of values.
• Select values from a drop-down list.
• Use an On/Off switch for Yes or No conditions.
• Use a date/time wheel to select a date.
• Use your device’s camera to scan a barcode or QR code. To manually enter a barcode, tap the keypad button [ ] and enter the number that corresponds with the barcode.

Once you have completed your manipulations, you may be able to perform one or more of the following:

The designer may not use all the buttons described below, or may use different names for them.

• To preview the results of your changes in the Grid/Graph without updating your data warehouse, tap Recalculate.
• To update your data warehouse with the values you provided, tap Submit.

If you are not connected to the internet, the document is added to the list of offline transactions that are pending changes. Your changes are sent to your data warehouse when a connection is available. For steps to edit your pending changes, see To edit pending transactions below.

• To undo the changes you have made, tap Discard Changes. The document reverts to the values from the last time you submitted data.

To edit pending transactions

1 In the document’s header, tap the Offline Transactions button: . A list of the transactions that are pending changes are displayed.

2 To change the values you want to submit, tap a transaction in the queue to select it, and then tap Edit.

3 To delete a transaction, tap the transaction in the queue to select it, and then tap Delete.

4 To view transactions for all documents that are pending changes, tap the list icon , then tap the document whose transactions you want to edit or delete.
Copying text from documents

You can copy text from a document. First, select the text to copy by tapping and holding the text. If zoom is disabled, you can also select the text by double-tapping it.

If you do not know whether or not zoom is enabled, double-tap the text. If zoom is enabled, double-tapping zooms in or out.

From the pop-up menu that displays, choose to copy the selected text or select all the text in the text field.

If the text is displayed in the Detail section of a document, you must tap the text.

Interacting with data

Documents on the iPad can contain interactive objects you can use to interact with rich, graphical displays of data, view videos, download files, and so on.

For examples of interactive objects you can use to analyze data, and instructions to analyze the data that they contain, see the following sections:

- Analyzing trends at a glance: Microcharts, page 57
- Analyzing data on a Map: Map, page 58
- Analyzing data on a time-based graph: Time Series, page 60
- Analyzing data in a Graph Matrix, page 60
- Analyzing relationships between items in a Network visualization, page 61
- Analyzing data on a heat map: Heat Map, page 62
- Analyzing data on a calendar: Date Selection, page 64
- Analyzing events on a timeline, page 64

For instructions to use interactive objects that allow you to view videos, upload images, and download files, see the following sections:

- Downloading multimedia files: Multimedia, page 66
- Uploading images to your data warehouse from your camera or photo album, page 67
- Browsing a gallery of images: Image Viewer, page 68
- Playing videos: Video Player, page 68
Analyzing trends at a glance: Microcharts

Some documents may contain a grid with miniature charts, called microcharts, that you can use to view trends in a metric’s value at a quick glance. An example is shown below:

To analyze data with Microcharts in MicroStrategy Mobile

1. To view information about a data point in a graph, tap and hold your finger over it. A tooltip with more information appears, as shown below.

2. Drag your finger along the graph to view tooltips for each data point.

3. Depending on how the microcharts grid was designed, you can sort the grid based on one of its columns. Tap the title of the column to sort the rows in ascending order, based on the values in the column. Tap the title of the column again to sort in descending order. Tapping the title of the column a third time undoes the sort.
4 If some metric columns are not displayed, swipe horizontally to view the metric columns that could not fit on the screen.

**Analyzing data on a Map: Map**

Documents can display data based on locations on a map. Points of interest may be marked on the map, and may be different sizes based on the value of a metric.

The map below shows the population of large cities in Europe using colors. Darker colors indicate a higher population density.

![Map](image)

A map may show image markers or bubble markers instead.

The document containing a map may prompt you for your current location so the map can show locations that are within a given distance from you. For information about answering prompts on an iPad, see *Chapter 3, Getting Started with MicroStrategy Mobile for iPad*.

Depending on how the map was designed, you may be able to:

- Swipe to a different area on the map.
- Zoom in or out by pinching the map. For some maps, markers are displayed instead of colors as you zoom in.
- Rotate the map by placing two fingers on the map and spinning them.
- View more information about a specific marker, by tapping the marker on the map.
- Switch between Map, Satellite, and Hybrid views. Tap the name of the current view, then tap the appropriate button.
• Select a different metric to display with the markers. Tap the name of the current metric, then tap the metric you want to display.

• You can select a set of locations to analyze, by creating a region. To do this, tap the Select icon •••, and do one of the following:
  ▫ To select locations within a certain radius of a central location, tap the Circle icon. Tap the central location, then drag your finger outward until the radius is as large as you want. As you draw, the radius of the circle, in miles, is displayed.
  ▫ To select locations within a rectangular area, tap the Rectangle icon, and then draw a rectangle on the map. As you draw, the length and width of the rectangle, in miles, is displayed.
  ▫ To select locations by drawing a freeform shape around them, tap the Freeform icon, and then draw a shape on the map around the locations.
  ▫ To select individual markers, tap the Marker icon, and then select markers on the map. Tap Done to create the region.

A tab for the newly defined region is displayed at the right of the screen, listing how many markers or locations are included in the region. For example, in the map displayed above, three regions have been created. First, a circle was drawn on the map, which created Region 1, with four markers. Next, a freeform shape was drawn on the map, which created Region 2, with seven markers. Finally, a rectangle was drawn on the map, which created Region 3, with four markers. Tapping All selects all the regions.

If more than two regions are created, you can scroll through the region tabs by swiping the tabs. To close the region tabs, tap the Close icon (shown below) in the region tabs.

• After you create a region, you can analyze data by:
  ▫ Viewing more information about a specific marker, by tapping the marker on the map.
  ▫ Browsing through different marker information for a region, tapping the region in the region tab. Tap a marker to view more information about the marker.
  ▫ Drilling in a region. Tap the region on the map, and then tap Drill. Drilling allows you to view information at multiple levels.
  ▫ Zooming in on a region. Tap the region in the region tab, and then tap Zoom.
 Deleting all defined regions from the map. Tap the Select icon ⋮, and then tap the x icon.

Analyzing data on a time-based graph: Time Series

Some documents may include a line graph that displays data over a period of time, called a Time Series. A Time Series may contain multiple data series. For example, the Time Series shown below displays values for the Profit metric for the Business and Drama subcategories:

Use the slider at the bottom to select a time period to view. The highlighted section is the time period you are currently viewing.

The actions that you can perform depend on how the Time Series was designed. Depending upon the Time Series that you are analyzing, do any of the following:

- To display tooltips, tap and hold part of the graph.
- To scroll through the time axis, swipe horizontally, or drag the highlighted portion of the slider at the bottom.
- To view a longer or shorter period of time, drag the left or right edge of the slider to adjust its size.
- To view a legend of all the metrics, tap the bar on the right edge of the Time Series.

Analyzing data in a Graph Matrix

Some documents may contain a chart with multiple graphs, called a Graph Matrix visualization. The data may be displayed in different graph styles, such
as line, bar, or scatter. An example of a Graph Matrix that uses line graphs is shown below.

You may be able to perform the following actions in a Graph Matrix visualization:

- Use a pinch gesture to zoom into the graphs. To return to the original zoom level, double-tap the visualization.
- Tap and hold points on the graphs to view additional information about them.

**Analyzing relationships between items in a Network visualization**

You can use a Network visualization to quickly view data about relationships between individual items. Each node represents a business attribute, while the lines between them represent the relationships between them. An example of a Network visualization that displays the relationships between product categories and subcategories is shown below.
You can perform the following actions on a Network visualization:

- To view information about a node and its relationships to other nodes, tap the node.
- To zoom into the visualization, use the pinch gesture.
- To switch between arranging nodes in a force-directed layout, circular layout, and linear layout, tap F, C, or L, respectively.
- To manually arrange nodes, tap Select, and tap and drag nodes to rearrange them.

**Analyzing data on a heat map: Heat Map**

Some documents may include heat maps, which are visualizations that let you quickly grasp the state and impact of a large number of variables at one time.
The characteristics of heat maps are described below:

- The size of each rectangle represents its relative weight.
- The color of each rectangle represents its relative value.
- Large areas (displayed with thicker borders) represent different groups of data.
- Small rectangles represent individual elements.

Depending on how the heat map is designed, you may be able to perform the following actions:

- To zoom in or out, perform a pinch gesture.
- To view more information about an element, tap and hold your finger over it.
- You can temporarily delete elements from your view. Tap the Edit button, then turn on the Enable Delete switch. Tap Close.
- To delete an element from the Heat Map, tap and hold your finger over it, then tap X.
• To restore deleted elements, tap the Edit button. Under Restore elements, tap the elements you want to restore. To restore all elements, tap All. When you are done, tap Restore.

Analyzing data on a calendar: Date Selection

Some documents may include an interactive calendar that lets you view events for every day of the month in either a Month, Week or Day view. An example of a calendar in Month view is below:

![Calendar Image]

Depending on how the calendar is configured, you may be able to perform the following actions:

• Tap an event to view additional information about it.
• Tap Day, Week, or Month for different views of your data.
• Events may be color-coded. To view a legend, tap the Legend button.

Analyzing events on a timeline

The Timeline lets you track events or milestones over time. For example, while viewing data for products, you can view milestones for every million units sold, and the state of your business at that point.
The example below shows a Timeline that displays timelines for a set of assets, with markers for events such as the beginning or end of a lease or a new purchase.

Depending on how the Timeline is configured, you may be able to do the following:

- Tap an event to view additional information about it.
- Tap a cell in the left column to view additional information about it.
- Tap the metric headers on the right or bottom to cycle through the available metrics.

**Analyzing data overlaid on images: Image Layout**

Some documents may include data overlaid on an images as a colored area. For example, a document may contain an image of a store’s layout, where each section of the store is a separate colored area.
You can view data for separate colored sections on the image. Tap and hold your finger over a bubble or colored area. A tooltip is displayed, with the metrics for that area.

**Downloading multimedia files: Multimedia**

Some documents may include files that you can download. These files can be of various formats, such as videos, PDFs, ePub files, and so on.

Any new files that were not in a document previously are labeled as New the next time you view or refresh the document, indicating that new content is available.

Depending on how the document was designed, you may be able to do the following:

- To start downloading the file, tap the **Download** icon 🔄. A progress bar shows the status of the download.
- To cancel a download, tap ✗.
- To open a file, tap its icon.
Uploading images to your data warehouse from your camera or photo album

Some documents may allow you to upload images by selecting a photo from your photo album or by taking a picture using your device’s camera, if applicable.

To upload images

1. Tap Add Photo.
   - If your device has a camera, a menu is displayed, with the option to either take a new photo or use an existing photo.
   - If your device does not have a camera, your photo albums are displayed.

2. To take a new photo, do the following:
   a. Tap Take New Photo. The camera opens.
   b. Use the camera to take a photo. A preview of the photo is displayed, with the option to add a caption.

3. To use a photo from your album, do the following:
   a. If your albums are not already displayed, tap Choose Existing Photo. A list of the photo albums on your device is displayed.
   b. Navigate to the photo you want to upload, and tap its thumbnail. The Choose Photo screen is displayed.
   c. If you want to select a specific area of the photo to use, pinch to zoom into the photo, and drag on the photo until the area you want is in the center of the frame.

4. When you have selected which area to use, tap Use. A preview of the photo is displayed, with the option to add a caption.

5. To use this photo, tap Use (if you took a new photo) or Upload (if you are using an existing photo), as applicable. To discard this photo and use another, tap Retake. The photo appears in the screen.

6. To add more photos, tap the Add Photo again, and repeat the above steps. As you select photos, the counter on the top-right of the frame indicates the number of photos you have chosen.

The number of photos you can upload may be limited by the designer.
7 To upload all the photos, tap **Submit**. The photos are uploaded, and depending on the document’s configuration, a confirmation may appear.

**Browsing a gallery of images: Image Viewer**

Some documents may include a gallery of images, which you can browse to view different images.

Depending on how the gallery is designed, you may be able to do the following:

- Swipe left or right to navigate between images.
- Tap an image to make it fill the screen.

**Playing videos: Video Player**

Some documents may include an embedded video that you can view. Tap **Play** to begin the video.

If a local copy of the video was cached on your device, you can view the video whether or not the device is connected. While your mobile device is online, the video can be downloaded or streamed.

In order to view streaming videos when the mobile device is offline, ensure that the video is fully downloaded while the mobile device is online. By default, the video file is discarded when you close the MicroStrategy Mobile application. Your administrator can ensure that streaming videos are downloaded and stored on the mobile device for offline use. Steps to do so are provided in the *Mobile Design and Administration Guide.*

**Using interactive dashboards on an iPad**

Some dashboards may be interactive so you can actively explore business data on an iPad. You can add or remove attribute elements from a visualization to change your the data you are viewing. An example of a dashboard is shown below.
For information on designing dashboards, see the *Dashboards and Widgets Creation Guide*.

When you run a dashboard, it is displayed as a grid, graph, or a collection of one or more visualizations. Depending on how the dashboard is designed, you may be able to do the following:

- If more than one visualization is available, swipe to the left or right to navigate between visualizations.
- Use the drop-down lists in the Filters pane to include or exclude attribute elements from the dashboard.
- Use the page-by bar at the top to view different groupings, or pages, of data.
- If more than one visualization is available, tap an attribute element in one visualization to filter the display of other visualizations.
- If more than one visualization is available, tap an attribute element in one visualization to highlight matching attribute elements and metrics in other visualizations.

You can also display your dashboard on an external display using AirPlay Mirroring, which allows you to show your iPad’s screen on an external display. The requirements are:

- An iPad 2 or better, connected to a Wi-Fi network.
- An Apple TV®, connected to the same Wi-Fi network.
- An external display, connected to the Apple TV.
For steps to enable AirPlay Mirroring, refer to the following Apple Support article: http://support.apple.com/kb/HT5209.
GETTING STARTED WITH MICROSTRATEGY MOBILE FOR ANDROID

Introduction

This chapter provides an overview of basic tasks that analysts can perform on an Android phone or table using MicroStrategy Mobile.

The steps and images below are based on the default settings for the MicroStrategy Mobile for Android application. Your interaction with the application depends on the configurations that your administrator has made. For information on customizing MicroStrategy Mobile, see the MicroStrategy Mobile Design and Administration Guide.

If you are designing reports and documents for use with MicroStrategy Mobile for Android, see the MicroStrategy Mobile Design and Administration Guide.

If you are an administrator planning to deploy and configure MicroStrategy Mobile for mobile device users, see the MicroStrategy Mobile Design and Administration Guide.
**Prerequisites**

- You must have an Android device that meets the MicroStrategy Mobile system requirements. For an up-to-date list of these requirements, see the MicroStrategy Mobile Readme.

- You must have the following privileges:
  
  - Use MicroStrategy Mobile, for all projects containing reports or documents that you want to view
  
  - Mobile View Document

  For information on privileges, contact your administrator.

**Getting started with MicroStrategy Mobile for Android**

It is recommended that you install the MicroStrategy Mobile application sent to you by your administrator.

To start using MicroStrategy Mobile on your device, tap the MicroStrategy Mobile icon. You may be prompted for your MicroStrategy user name and password.

When the application opens, the MicroStrategy Home screen is displayed. The default Home screen is shown below.
Your Home screen buttons may vary according to how your administrator has configured the Home screen. For information on customizing the Home screen, see the MicroStrategy Mobile Design and Administration Guide.

The default Home screen buttons are described below:

- **Subscriptions**: Displays the reports and documents that you have subscribed to.

- **Shared Library**: Displays the MicroStrategy projects that your device can connect to. Tap a project to display the folders within it. Tap a report or document to run it.

- **Settings**: Allows you to configure the MicroStrategy Mobile servers and projects that you are connected to, and general administrative and display options.

  It is recommended that you configure the application using the configuration URL that you receive from your administrator.

- **Help**: Displays the help for the application.

You can return to the Home screen at any time by tapping the MicroStrategy logo at the top left corner of the screen.
Running and viewing reports and documents

Once you have started MicroStrategy Mobile, you can run and view reports and documents on your device.

This section contains information about the following:
- Running reports and documents, page 74
- Navigating data in a grid or graph report, page 77
- Navigating data in a document, page 80
- Filtering displayed data: Answering prompts, page 85
- Achieving the best response from MicroStrategy Mobile, page 87

For information about interacting with the data displayed on a report or document, see Chapter 6, Analyzing Reports and Documents on an Android device.

Running reports and documents

You can locate and run a report or Report Services document by browsing to its location within a project. Steps to browse to reports and documents are below.

Once a report is run, you can view the data it displays and manipulate the data to see trends and results for your organization or department.

Locating and running reports and documents

Use the Shared Library button on the default Home screen to browse the folders in a project. You can run reports and documents from the list displayed within the folders by tapping the report or document name. Details are as described below:
- To run reports and documents on an Android phone, page 75
- To run reports and documents on an Android tablet, page 75

You must have the proper privileges in MicroStrategy to access folders in a project. For information about the privileges that are assigned to you, contact your administrator.
To run reports and documents on an Android phone

1. From the default Home screen, tap the Shared Library button, shown below.

![Shared Library button]

A list of projects that your mobile device is connected to is displayed.

2. From the list of projects, select the project that you want to browse. The folders within the selected project are displayed.

3. Browse to the folder that contains the report or document that you want to run. A list of reports and documents is displayed. The icon next to the report or document name indicates whether it is a grid report, graph report, or document.

   - Grid reports appear with this icon: 

   - Graph reports appear with this icon: 

   - Documents appear with this icon: 

4. To view the report or document details, tap and hold it. A preview is displayed.

   To run the report or document from the preview, tap View.

5. Tap a report or document on the list to run it. The report or document is displayed.

   If you are presented with a prompt to answer, see Filtering displayed data: Answering prompts, page 85 for details to answer each type of prompt.

   For information about navigating reports, see Navigating data in a grid or graph report, page 77.

   For information about navigating documents, see Navigating data in a document, page 80.

To run reports and documents on an Android tablet

1. From the default Home screen, tap a project’s icon. The folders within the project are displayed.
2 Browse to the folder that contains the report or document that you want to run.

For reports and documents that you have run before, a thumbnail preview is displayed. For reports and documents that you have not run yet, a generic icon appears.

- Grid reports appear with this icon: 

- Graph reports appear with this icon: 

- Documents appear with this icon: 

3 Tap the report or document. The description, the date that it was last accessed, and additional information about the report or document is displayed in the right pane.

4 Tap View to run the report or document. The report or document is displayed.

If you are presented with a prompt to answer, see Filtering displayed data: Answering prompts, page 85 for details to answer each type of prompt.

For information about viewing and navigating reports, see Navigating data in a grid or graph report, page 77.

For information about viewing and navigating documents, see Navigating data in a document, page 80.

Running reports and documents you have subscribed to

All the reports and documents that you are subscribed to appear under the Reports tab on the Home screen.

To run reports and documents you have subscribed to

1 From the Android Tablet Home screen, tap Subscriptions or tap Home on an Android Phone.

2 Tap a report’s name to run it.

Running recently opened reports or documents

If you are currently viewing a report or document, you can quickly access one of the other reports or documents that you recently opened.
To run reports and documents that you recently opened

1. From an open report or document, tap the report or document title. The Recently Opened menu opens.

2. Tap the name of the recently opened report or document that you want to open.

Navigating data in a grid or graph report

The following actions can be applied to most grid and graph reports after they have been displayed:

- To change the orientation between portrait and landscape, rotate the device.

- To scroll across large reports, swipe the middle of the screen horizontally. To scroll up and down large reports, swipe the middle of the screen vertically.

- To change the group of data that is displayed, tap the Menu button and then tap Page-by. Select the group of data that you want to display.

The following sections show examples of grid and graph reports displayed on an Android device, and steps taken to analyze their data.

Navigating data in grid reports

A grid report organizes business data into rows and columns. The image below shows a grid report displayed on an Android device.
Some reports display special formatting depending upon certain conditions, for example, sales over $1 million, or inventory count below 50.

In the example below, the report shows specially formatted data that has met specific conditions, or thresholds, in the Sales column:

<table>
<thead>
<tr>
<th>Region</th>
<th>Employee</th>
<th>Metrics</th>
<th>Sales</th>
<th>Rank by Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northeast</td>
<td>Sawyer</td>
<td>Leanne</td>
<td>$302,400</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Kelly</td>
<td>Laura</td>
<td>$278,238</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Yager</td>
<td>Beth</td>
<td>$263,247</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Kieferson</td>
<td>Jack</td>
<td>$62,033</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>De Le Torre</td>
<td>Sandra</td>
<td>$61,801</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Sonder</td>
<td>Melanie</td>
<td>$40,269</td>
<td>6</td>
</tr>
<tr>
<td>Mid-Atlantic</td>
<td>Bernstein</td>
<td>Lawrence</td>
<td>$138,064</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Folks</td>
<td>Adrienne</td>
<td>$116,088</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Hollywood</td>
<td>Robert</td>
<td>$112,044</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Corcoran</td>
<td>Peter</td>
<td>$36,743</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>Brown</td>
<td>Vernon</td>
<td>$36,545</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Ingles</td>
<td>Walter</td>
<td>$34,064</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>Smith</td>
<td>Thomas</td>
<td>$26,936</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Young</td>
<td>Sarah</td>
<td>$24,734</td>
<td>8</td>
</tr>
</tbody>
</table>

To magnify the contents of a cell in the grid, tap and hold the desired cell. The Info Viewer appears and displays the cell value, column headings, row headings, and Drill and Link buttons, as in the following example.
If the grid was designed with a drill map for the selected attribute, tap Drill to view the drill options. If the grid was designed with a link for the selected attribute, tap Link to open the link.

**Viewing graph reports**

Graph reports present data visually in a style such as a bar, line, or pie graph. The images below provide examples of graph reports displayed on an Android device.
Tooltips provide information such as the value of a specific data point, the name of a group, or the label of a graph’s X-axis. To view tooltips to explain parts of a graph, such as a single bar in a bar graph, tap and hold on the screen. An example of a tooltip in a stacked bar graph is shown below:

**Navigating data in a document**

Report Services documents generally provide data from multiple reports. They can contain a variety of grids, graphs, interactive visualizations, and text, depending upon their design.

The following example shows a simple document displayed on an Android device.
The following actions can be applied to most documents after they have been displayed:

- To change the orientation between portrait and landscape, rotate the device.

- To scroll across large documents, swipe the middle of the screen horizontally. To scroll up and down large documents, swipe the middle of the screen vertically.

- There are several ways to view different groups of data, depending on how the document was designed. You may be able to do one or more of the following:
  - Change the group of data that is displayed by tapping the **Menu** button, and then tapping **Grouping**. Select the group of data that you want to display.
  - Swipe horizontally to view different pages (or panels) of data.
  - If a dark bar appears at the bottom of the document (as shown in the image below), tap one of the circles in it to see another group of data.
If a button or link is displayed, tap it to view a different group of data or to access other functionality such as email or a video.

If tabs are displayed across the bottom of the document (as shown in the image below), tap the tab for the set of data that you want to see.

From the Menu button, choose Layouts. Select the layout, or group of data, that you want to see.

For more information about designing documents for use on mobile devices and which make use of these features, see the MicroStrategy Mobile Design and Administration Guide.
Filtering data: Changing the page-by attribute

If your report was designed with a page-by attribute, you can change the page-by to display data at different levels. For example, if Year is a page-by attribute, you can choose to display metric values for a desired year.

To select the page-by attribute for a report

1. Tap the Page-by button. The Page By screen opens.
2. Tap the desired page-by attribute.
3. Select the desired attribute element.
4. Tap back to go back to the Page By screen.
5. Tap OK.

Sharing data: sending a screenshot of a report or document

You can share data from MicroStrategy Mobile by sending a screenshot of a report or document by email, text message, and so on.

To share a screenshot of a report or document

1. Tap the Share button. The Share via... screen opens.
2. Tap the name of the application to use to share the screenshot. The application opens.
   Select recipients and deliver your content using the selected application.
Annotating reports and documents on an Android Tablet

You can add annotations, such as comments and freehand drawings, to a screenshot of your dashboard, and share the annotated screenshot with your contacts. The steps to annotate and share a screenshot follow.

To annotate and share reports and documents on an Android Tablet

1. In MicroStrategy Mobile, open a report or document you want to annotate and share.

2. In the top-right corner, tap the Annotate button. The Annotate menu and a screenshot of the dashboard open.

3. You can annotate the screenshot in the following ways:
   - To draw shapes freehand, click Freehand Drawing and use your finger to draw.
   - To change the color of your drawing, tap the drawing, tap Color, and select the desired color.
   - To delete a drawing, tap the drawing and then tap Delete.
   - To add a comment anywhere in the screenshot, tap Add Comment. Type your comment in the box.
   - To move the comment box, tap, hold, and drag the box around the screen.
   - To resize the comment box, tap, hold, and drag the corners of the box.
   - To edit the text in a comment box, tap the box and then tap Edit.
   - To delete a comment box, tap it and then tap Delete.

To share the annotated screenshot, tap the Share button and select the desired sharing medium.
Filtering displayed data: Answering prompts

Some reports and documents request your input to define what data is displayed. A report or document requests this information by displaying one or more prompts. When you provide an answer to a prompt, you define the data you want to see.

Answering different types of prompts

How you answer a prompt differs depending upon the type of prompt you are answering. The following table lists the types of prompts and how to answer each one.

<table>
<thead>
<tr>
<th>Type of Prompt</th>
<th>Answering the Prompt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar</td>
<td>To select a date, tap it.</td>
</tr>
<tr>
<td></td>
<td>To select a range of dates, tap and hold the start date, and drag until the end date.</td>
</tr>
<tr>
<td>Text prompt</td>
<td>Tap inside the text box to begin typing an answer.</td>
</tr>
<tr>
<td>Numerical slider</td>
<td>Drag the slider to choose a value.</td>
</tr>
<tr>
<td>Numeric stepper</td>
<td>Tap the plus or minus button to select a value.</td>
</tr>
<tr>
<td>On/Off switch</td>
<td>Tap the box to select it and turn it on.</td>
</tr>
<tr>
<td></td>
<td>Tap the box again to clear the check mark and turn it off.</td>
</tr>
<tr>
<td>Location</td>
<td>Tap the button to use your current location.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You are prompted for permission to use your location.</td>
</tr>
<tr>
<td>Barcode</td>
<td>To scan a barcode or QR code, tap the barcode icon, and use your device’s camera to scan a barcode.</td>
</tr>
<tr>
<td></td>
<td>To manually enter a barcode, tap the prompt name, and then type the number that corresponds with the barcode or select from a list of barcodes.</td>
</tr>
<tr>
<td>Selections from a list</td>
<td>To add an item to the list, select the item’s check box.</td>
</tr>
<tr>
<td></td>
<td>To remove an item from the list, clear the item’s check box.</td>
</tr>
<tr>
<td></td>
<td>If the list of items is long, you can scroll through the list.</td>
</tr>
<tr>
<td>GPS Prompt</td>
<td>To insert your current location in the GPS Search field, tap the GPS icon.</td>
</tr>
<tr>
<td></td>
<td>To select from a list of locations, tap the prompt name.</td>
</tr>
</tbody>
</table>
Using the Prompt Summary screen

The Prompt Summary screen displays a variety of information about the prompts associated with a report or document. This screen is displayed if one or more of the following conditions are met:

- The report or document contains more than one prompt
- The answer that you provided does not meet the prompt’s requirements
- A prompt requires you to turn a switch on or off, select a number, or type in a text box

The Prompt Summary screen displays each prompt’s name, description, and the answers that you have provided.

You can change your prompt answers before running the report or document. To do so, on the Prompt Summary screen, tap the prompt’s name that you want to revise. This opens the prompt screen for that prompt.

To clear a date/time answer on the prompt summary screen, swipe the prompt answer from left to right.

If the prompt’s answer requirements have been met, tap Run Report or Run Document to run the report or document.

Filtering data: Changing your prompt answers

Some reports and documents may allow you to change your prompt answer to display different subsets of data without having to re-execute the report.

To change prompt answers on a report or document

1. Tap the Filter button. The Prompt Summary screen opens. On Android tablets, the Prompt Summary pane opens to the left of the report or document.

2. Change the prompt answers as necessary. For steps to answer each type of prompt, see Filtering displayed data: Answering prompts, page 85.

Tap Run Report or Run Document. The report or document is re-executed, using the new prompt answers that you provided.
Achieving the best response from MicroStrategy Mobile

The speed at which your list of reports and documents is retrieved and reports and documents are refreshed depends on several factors:

• Your mobile service provider
• The time at which you are accessing the reports and documents

The speed at which a report or document opens in MicroStrategy Mobile depends on several factors:

• The amount of usable memory on the mobile device
• The processor speed of the mobile device
• The version of the mobile device
• The size and contents of the report or document

Well-designed reports and documents perform best. For best practices to create reports and documents for use with MicroStrategy Mobile, see the MicroStrategy Mobile Design and Administration Guide.
ANALYZING REPORTS AND DOCUMENTS ON AN ANDROID DEVICE

Introduction

This chapter describes ways to analyze data in a MicroStrategy report or document using MicroStrategy Mobile on an Android phone or tablet.

After you run a report or document in MicroStrategy Mobile, you can view data at different levels, view a subset of data, and interact with some of the displayed data and certain features of the document. You can also follow links to display different reports or documents, or send email or place phone calls.

This chapter assumes you are familiar with the information provided in Chapter 5, Getting Started with MicroStrategy Mobile for Android.

This chapter provides details to perform the following:

• Viewing data at different levels using drilling, page 90
• Analyzing data using links, page 91
• Using documents to send or update data in your data warehouse: Transaction Services, page 96.
• Analyzing data with widgets:
  ▫ *Analyzing data in a table: Interactive Grid widgets, page 92*
  ▫ *Analyzing data on a map: Map widgets, page 93*
  ▫ *Analyzing trends at a glance: Microcharts widget, page 94*
  ▫ *Analyzing data on a time-based graph: Time Series widgets, page 95*
  ▫ *Uploading images, page 97*
  ▫ *Viewing images, page 98*

**Viewing data at different levels using drilling**

Some MicroStrategy reports and documents allow you to view information at multiple levels. For example, a report displays data at the year level by default, but can also display data by quarter or month. If a report or document lets you drill to other levels, the Drill option appears in bold in the Info Viewer, as shown in the following image.

![Info Viewer example](image)

In the example above, tapping and holding **Nov 2009** displays the Info Viewer for that month. To view the drill options for Nov 2009, tap **Drill** in the Info Viewer.
When you drill, and then navigate back to the initial report or document, the group-by, page-by, and layout settings that were selected in the initial report or document are preserved.

To perform the default drilling action for an object in the grid, tap it. For an introduction to drilling concepts, see the MicroStrategy Basic Reporting Guide.

Analyzing data using links

A link is a connection between the currently displayed MicroStrategy document and another document, a different screen, or another app. When selected, a link can do one of the following:

• Execute another document or report from the currently displayed document.
• Return you to the Prompt Summary screen or the Group-by page for the current report or document.
• Open another application on your device. Documents can interact with the following apps via links:
  ▫ Email
  ▫ Phone
  ▫ SMS (text messaging)
  ▫ Maps
  ▫ Videos

Links in MicroStrategy documents can be displayed as images or text. To follow a link that is displayed in a report or document, tap the linked image or text.

An object that contains a link can also be able to be drilled on. In this case, when you tap the object, a menu is displayed. Select whether to follow the link or to drill on the object.
Analyzing data in a table: Interactive Grid widgets

Data can be displayed in an interactive table as part of an Interactive Grid widget.

An example of an Interactive Grid widget is shown below:

<table>
<thead>
<tr>
<th>Region</th>
<th>Profit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northeast</td>
<td>$298,472</td>
</tr>
<tr>
<td>Mid-Atlantic</td>
<td>$432,541</td>
</tr>
<tr>
<td>Southeast</td>
<td>$254,244</td>
</tr>
<tr>
<td>Central</td>
<td>$229,126</td>
</tr>
<tr>
<td>South</td>
<td>$177,290</td>
</tr>
<tr>
<td>Northwest</td>
<td>$194,137</td>
</tr>
<tr>
<td>Southwest</td>
<td>$358,289</td>
</tr>
<tr>
<td>Web</td>
<td>$209,602</td>
</tr>
<tr>
<td>Northeast</td>
<td>$266,107</td>
</tr>
<tr>
<td>Mid-Atlantic</td>
<td>$393,828</td>
</tr>
<tr>
<td>Southeast</td>
<td>$235,010</td>
</tr>
<tr>
<td>Central</td>
<td>$199,603</td>
</tr>
<tr>
<td>South</td>
<td>$158,043</td>
</tr>
<tr>
<td>Northwest</td>
<td>$164,316</td>
</tr>
<tr>
<td>Southwest</td>
<td>$322,977</td>
</tr>
<tr>
<td>Web</td>
<td>$205,523</td>
</tr>
</tbody>
</table>

In this widget, attributes and metric values are displayed in the columns and rows, and grouping appears at the top of the screen. The widget above is grouped by Region.

Other ways to analyze data in a table may be enabled for your document, and include:

- Tapping the metric to switch between metrics, if a report or document contains more than one metric.

- Displaying different groups of data by tapping the **Menu** button at the top right corner of the screen, then tapping **Page-By** (for a report) or **Grouping** (for a document) and selecting the group of data that you want to display.

- If drilling is enabled for an object, the object is underlined. Drilling allows you to view data at different layers. Drill on an object by tapping it. For an example, see *Viewing data at different levels using drilling, page 90*. 
• Switch between displaying the widget in full screen and non-full screen mode by tapping the **Enter full screen** or **Exit full screen** button.

## Analyzing data on a map: Map widgets

Reports and documents can display information based on locations on a map, as shown below:

Map widgets can use Geo Location prompts to narrow the map area that is displayed. For example, when you answer the prompt with your current location, a Map widget can show locations that are within a given distance from your current location. For instructions to answer prompts on an Android device, see *Filtering displayed data: Answering prompts, page 85*.

Points of interest can be marked on the map. In the example above, the markers indicate stores in the area. A tooltip is displayed for a specific marker, to provide details about the selected store. To display a tooltip, tap on a marker.

Other ways to analyze data on a page may be enabled for your document, and include:

• Selecting a different metric by tapping the header in the top right.
• If using Android 3.X or higher, zoom by performing a pinch.
• Switching between Map, Satellite, Terrain, and Hybrid views by tapping the **Menu** button at the top right corner of the screen, and then selecting the appropriate option.

### Analyzing trends at a glance: Microcharts widget

The Microcharts widget lets you visualize trends in a metric’s value at quick glance. An example of the Microcharts widget on an Android tablet is shown below:

<table>
<thead>
<tr>
<th>Custom Categories</th>
<th>[Sparkline]</th>
<th>[Bar]</th>
<th>Profit</th>
<th>Revenue</th>
<th>[Bullet]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category Sales</td>
<td>Min: $284,293</td>
<td>Max: $1,183,293</td>
<td>$5,293,624</td>
<td>$35,023,708</td>
<td></td>
</tr>
<tr>
<td>Category Sales</td>
<td>Books</td>
<td>Min: $26,786</td>
<td>Max: $569,192</td>
<td>$569,278</td>
<td>$2,640,094</td>
</tr>
<tr>
<td>Category Sales</td>
<td>Electronics</td>
<td>Min: $236,210</td>
<td>Max: $550,623</td>
<td>$4,289,603</td>
<td>$24,391,303</td>
</tr>
<tr>
<td>Category Sales</td>
<td>Movies</td>
<td>Min: $124,682</td>
<td>Max: $532,291</td>
<td>$254,698</td>
<td>$4,098,943</td>
</tr>
<tr>
<td>Category Sales</td>
<td>Music</td>
<td>Min: $63,851</td>
<td>Max: $325,811</td>
<td>$180,044</td>
<td>$3,893,367</td>
</tr>
<tr>
<td>Top 5 Items by Revenue Contribution</td>
<td>Min: $36,181</td>
<td>Max: $579,363</td>
<td>$683,151</td>
<td>$3,833,938</td>
<td></td>
</tr>
<tr>
<td>Bottom 3 Suppliers by Revenue</td>
<td>Min: $2,696</td>
<td>Max: $5,448</td>
<td>$48,730</td>
<td>$418,023</td>
<td></td>
</tr>
</tbody>
</table>

**To analyze data with the Microcharts widget**

1. To view information about a data point in a graph, tap and hold your finger over it. A tooltip with information is displayed.
2. Drag your finger along the graph to view tooltips for each data point.
3. To expand all of the elements in tree mode, pinch open over the collapsed categories.
4. To collapse all of the elements in tree mode, pinch close over the expanded categories.
Analyzing data on a time-based graph: Time Series widgets

Reports and documents can include a line graph that displays data over a period of time, by using a Time Series widget.

A Time Series widget can contain multiple data series on the same graph. For example, the values for the Cost metric for the Books and Electronics subcategories are displayed in the image above.

Other ways to analyze data on a time-based graph may be enabled for your document, and include:

- Displaying tooltips by tapping and holding on the graph.
- Changing the metric or attribute being displayed by tapping the object. (If you can change the object, a small triangle appears in the top left.)
- Scrolling through the time axis by swiping horizontally, or if you are using a tablet, dragging the highlighted portion of the slider at the bottom.
- Selecting a fixed time period by tapping its header.
- If you are using a tablet, determine the range of values to view by dragging the left or right edge of the slider to adjust its size.
Using documents to send or update data in your data warehouse: Transaction Services

Some documents may include forms that you can use to edit or add information to your data warehouse through Transaction Services. Some examples are documents that approve requests, track business activity, and execute business decisions, directly from your mobile device. Any new data or changes are saved in your data warehouse.

**Prerequisites**

- You must have the Execute Transaction privilege.
- The document must be a Transaction Services-enabled document.

Depending on how the document is designed, you may be able to manipulate data in the following ways:

- Edit text or numerical values in a text box.
- Use a slider to select from a range of values.
- Select values from a drop-down list.
- Use an On/Off switch to answer Yes or No questions.
- Use a date/time wheel to select a date.

Once you have made the changes that you want to make, select one of the following options:

- The designer may use different names for the buttons or links described below.
- To preview the results of your changes without updating your data warehouse, tap **Recalculate**.
- To update the data warehouse with the values that you provided, tap **Submit**.

  If you are not connected to the internet, the Transactions Queue button is displayed. Your changes are sent to your data warehouse when a connection is available.

- To undo the changes you have made, tap **Discard Changes**. The document reverts to the values from the last time you submitted data.
To edit pending transactions

1. In the Shared Library, tap the Menu button.

2. Tap the Transactions Queue button. The Transactions Queue opens, with a list of pending transactions.

3. To change the values you want to submit, tap a transaction in the queue to select it, and then tap Edit.

4. To delete a transaction, tap the transaction in the queue to select it, and then tap Delete.

Uploading images

If enabled in the document you are viewing, you can upload images to the document by either selecting an image from your photo album, or by taking a picture using your device’s camera. You can display only a specific area of a photo, and you can provide captions for photos that you upload to a document.

To upload images using the Photo Uploader widget

1. In a document with the Photo Uploader widget, tap Add Photo.
   - If your device has a camera, a menu is displayed, with the option to either take a new photo or use an existing photo. Follow the steps below to take a new photo or use an existing photo from your album.
   - If your device does not have a camera, your photo albums are displayed. Follow the steps below to use an existing photo from your album.

2. To take a new photo, do the following:
   a. Tap Take New Photo. The camera opens.
   b. Use the device’s camera to take a photo. A preview of the photo is displayed, with the option to add a caption.
   c. To use this photo in the document, tap Use. To discard this photo and take a new one, tap Retake.
3 To use a photo from your album, do the following:
   a  Tap **Choose Existing Photo**. A list of the photo albums on your device is displayed.
   b  Navigate to the photo to upload, and tap its thumbnail. The Choose Photo screen is displayed.
   c  Use the pinch gesture to zoom into the photo, and drag on the photo to select which area to use.
   d  When you have selected which area to use, tap **Use**. A preview of the photo is displayed, with the option to add a caption.
   e  To use this photo in the document, tap **Upload**. To discard this photo and use another, tap **Retake**.

Once you have selected a photo, the counter at the top right of the widget indicates the number of photos you have chosen.

4 To add more photos, tap **Add Photo** again, and repeat the steps above to either take a new photo or use a photo from an album.

5 After you have added all the photos, upload them by tapping **Submit**. Depending on the document’s configuration, a confirmation may appear.

**Viewing images**

Some documents may include a browsable series of images. In these documents, you can swipe left or right to navigate between images, and tap an image to make it fill the screen.
Additional Resources

Resources

Documentation

MicroStrategy provides both manuals and online help; these two information sources provide different types of information, as described below:

- **Manuals**: In general, MicroStrategy manuals provide:
  - Introductory information and concepts
  - Examples and images
  - Checklists and high-level procedures to get started

  The steps to access the manuals are described in *Accessing manuals and other documentation sources, page 106*.

  Most of these manuals are also available printed in a bound, soft cover format. To purchase printed manuals, contact your MicroStrategy Account Executive with a purchase order number.

- **Help**: In general, MicroStrategy help provides:
  - Detailed steps to perform procedures
  - Descriptions of each option on every software screen
Translations

For the most up-to-date translations of MicroStrategy documentation, refer to the MicroStrategy Knowledge Base. Due to translation time, manuals in languages other than English may contain information that is one or more releases behind. You can see the version number on the title page of each manual.

Finding information

You can search all MicroStrategy books and Help for a word or phrase, with a simple Google™ search at http://www.google.com. For example, type “MicroStrategy derived metric” or “MicroStrategy logical table” into a Google search. As described above, books typically describe general concepts and examples; Help typically provides detailed steps and screen options. To limit your search to MicroStrategy books, on Google’s main page you can click More, then select Books.

Additional formats

MicroStrategy manuals are available as electronic publications, downloadable on the Apple iBookstore or Google Play, and can be read on your iOS or Android device respectively. To download a book, search for the book’s title in the iBookstore or Google Play respectively. To view a list of manuals that are currently available, scan the following QR codes using your device’s camera:

For iOS devices, scan the following QR code:

![QR Code for iOS]

For Android devices, scan the following QR code:

![QR Code for Android]
For new MicroStrategy releases, it may take several days for the latest manuals to be available on the iBookstore or Google Play.

Manuals for MicroStrategy overview and evaluation

  
  Instructions for installing, configuring, and using the MicroStrategy Evaluation Edition of the software. This guide also includes a detailed, step-by-step evaluation process of MicroStrategy features, where you perform reporting with the MicroStrategy Tutorial project and its sample business data.

  
  Overview of the installation and evaluation process, and additional resources.

  
  Evaluate MicroStrategy as a departmental solution. Provides detailed information to download, install, configure, and use the MicroStrategy Suite.

Resources for Identity and Loyalty

- *Alert Commerce Management System (CMS) Guide* and *Alert API Reference*
  
  Content resources providing steps to deliver and manage marketing and commerce content through the Alert mobile applications.

- *Usher Administration Guide*
  
  Steps to perform mobile identity validation using the Usher mobile identity network to issue electronic badges for identifying users.

Manuals for query, reporting, and analysis

- *MicroStrategy Installation and Configuration Guide*
  
  Information to install and configure MicroStrategy products on Windows, UNIX, Linux, and HP platforms, as well as basic maintenance guidelines.

- *MicroStrategy Upgrade Guide*
Instructions to upgrade existing MicroStrategy products.

- **MicroStrategy Project Design Guide**
  Information to create and modify MicroStrategy projects, and understand facts, attributes, hierarchies, transformations, advanced schemas, and project optimization.

- **MicroStrategy Basic Reporting Guide**
  Instructions to get started with MicroStrategy Developer and MicroStrategy Web, and how to analyze data in a report. Includes the basics for creating reports, metrics, filters, and prompts.

- **MicroStrategy Advanced Reporting Guide: Enhancing Your Business Intelligence Application**
  Instructions for advanced topics in the MicroStrategy system, building on information in the Basic Reporting Guide. Topics include reports, Freeform SQL reports, Query Builder reports, filters, metrics, Data Mining Services, custom groups, consolidations, and prompts.

- **Document and Dashboard Analysis Guide**
  Instructions for a business analyst to execute and analyze a document in MicroStrategy Developer and MicroStrategy Web, building on basic concepts about projects and reports presented in the MicroStrategy Basic Reporting Guide.

- **MicroStrategy Report Services Document Creation Guide: Creating Boardroom Quality Documents**
  Instructions to design and create Report Services documents, building on information in the Document and Dashboard Analysis Guide. It is organized to help guide you through creating a new document, from creating the document itself, to adding objects to the new document, and formatting the document and its objects.

- **MicroStrategy Dashboards and Widgets Creation Guide: Creating Interactive Dashboards for your Data**
  Instructions for designing and creating MicroStrategy Report Services dashboards, a type of document that is optimized for viewing online and for user interactivity. It builds on the basic concepts about documents presented in the MicroStrategy Report Services Document Creation Guide.

- **MicroStrategy OLAP Services Guide**
  Information on MicroStrategy OLAP Services, which is an extension of MicroStrategy Intelligence Server. OLAP Services features include Intelligent Cubes, derived metrics, derived elements, dynamic aggregation, view filters, and dynamic sourcing.

- **MicroStrategy Office User Guide**
Instructions for using MicroStrategy Office to work with MicroStrategy reports and documents in Microsoft® Excel, PowerPoint, and Word, to analyze, format, and distribute business data.

- **MicroStrategy Mobile Analysis Guide: Analyzing Data with MicroStrategy Mobile**
  
  Information and instructions for using MicroStrategy Mobile to view and analyze data, and perform other business tasks with MicroStrategy reports and documents on a mobile device.

- **MicroStrategy Mobile Design and Administration Guide: A Platform for Mobile Intelligence**
  
  Information and instructions to install and configure MicroStrategy Mobile, as well as instructions for a designer working in MicroStrategy Developer or MicroStrategy Web to create effective reports and documents for use with MicroStrategy Mobile.

- **MicroStrategy System Administration Guide: Tuning, Monitoring, and Troubleshooting your MicroStrategy Business Intelligence System**
  
  Concepts and high-level steps to implement, deploy, maintain, tune, and troubleshoot a MicroStrategy business intelligence system.

- **MicroStrategy Supplemental Reference for System Administration: VLDB Properties, Internationalization, User Privileges, and other Supplemental Information for Administrators**
  
  Information and instructions for MicroStrategy administrative tasks such as configuring VLDB properties and defining data and metadata internationalization, and reference material for other administrative tasks.

- **MicroStrategy Functions Reference**
  
  Function syntax and formula components; instructions to use functions in metrics, filters, attribute forms; examples of functions in business scenarios.

- **MicroStrategy MDX Cube Reporting Guide**
  
  Information to integrate MicroStrategy with MDX cube sources. You can integrate data from MDX cube sources into your MicroStrategy projects and applications.

**Manuals for Analytics Modules**

- **Analytics Modules Installation and Porting Guide**
- **Customer Analysis Module Reference**
- **Sales Force Analysis Module Reference**
• Financial Reporting Analysis Module Reference
• Sales and Distribution Analysis Module Reference
• Human Resources Analysis Module Reference

Manuals for Narrowcast Services products

• MicroStrategy Narrowcast Server Getting Started Guide
  Instructions to work with the tutorial to learn Narrowcast Server interfaces and features.
• MicroStrategy Narrowcast Server Installation and Configuration Guide
  Information to install and configure Narrowcast Server.
• MicroStrategy Narrowcast Server Application Designer Guide
  Fundamentals of designing Narrowcast Server applications.
• MicroStrategy Narrowcast Server System Administrator Guide
  Concepts and high-level steps to implement, maintain, tune, and troubleshoot Narrowcast Server.
• MicroStrategy Narrowcast Server Upgrade Guide
  Instructions to upgrade an existing Narrowcast Server.

Software Development Kits

• MicroStrategy Developer Library (MSDL)
  Information to understand the MicroStrategy SDK, including details about architecture, object models, customization scenarios, code samples, and so on.
• MicroStrategy Web SDK

  The Web SDK is available in the MicroStrategy Developer Library, which is part of the MicroStrategy SDK.
• Narrowcast Server SDK Guide
  Instructions to customize Narrowcast Server functionality, integrate Narrowcast Server with other systems, and embed Narrowcast Server functionality within other applications. Documents the Narrowcast Server
Delivery Engine and Subscription Portal APIs, and the Narrowcast Server SPI.

**Documentation for MicroStrategy Portlets**

- *Enterprise Portal Integration Help*
  
  Information to help you implement and deploy MicroStrategy BI within your enterprise portal, including instructions for installing and configuring out-of-the-box MicroStrategy Portlets for several major enterprise portal servers.

  This resource can be accessed from the MicroStrategy Product Manuals page, as described in *Accessing manuals and other documentation sources, page 106.*

**Documentation for MicroStrategy GIS Connectors**

- *GIS Integration Help*
  
  Information to help you integrate MicroStrategy with Geospatial Information Systems (GIS), including specific examples for integrating with various third-party mapping services.

  This resource can be accessed from the MicroStrategy Product Manuals page, as described in *Accessing manuals and other documentation sources, page 106.*

**Help**

Each MicroStrategy product includes an integrated help system to complement the various interfaces of the product as well as the tasks that can be accomplished using the product.

Some of the MicroStrategy help systems require a web browser to be viewed. For supported web browsers, see the MicroStrategy Readme.

MicroStrategy provides several ways to access help:

- Help button: Use the Help button or ? (question mark) icon on most software windows to see help for that window.

- Help menu: From the Help menu or link at the top of any screen, select MicroStrategy Help to see the table of contents, the Search field, and the index for the help system.
• F1 key: Press F1 to see context-sensitive help that describes each option in the software window you are currently viewing.

For MicroStrategy Web, MicroStrategy Web Administrator, and MicroStrategy Mobile Server, pressing the F1 key opens the context-sensitive help for the web browser you are using to access these MicroStrategy interfaces. Use the Help menu or ? (question mark) icon to access help for these MicroStrategy interfaces.

## Accessing manuals and other documentation sources

The manuals are available from [http://www.microstrategy.com/producthelp](http://www.microstrategy.com/producthelp), as well as from your MicroStrategy disk or the machine where MicroStrategy was installed.

Adobe Acrobat Reader is required to view these manuals. If you do not have Acrobat Reader installed on your computer, you can download it from [http://get.adobe.com/reader/](http://get.adobe.com/reader/).

The best place for all users to begin is with the *MicroStrategy Basic Reporting Guide*.

To access the installed manuals and other documentation sources, see the following procedures:

- *To access documentation resources from any location, page 106*  
- *To access documentation resources on Windows, page 106*  
- *To access documentation resources on UNIX and Linux, page 107*

### To access documentation resources from any location


### To access documentation resources on Windows

1. From the Windows **Start** menu, choose **Programs** (or **All Programs**), **MicroStrategy Documentation**, then **Product Manuals**. A page opens in your browser showing a list of available manuals in PDF format and other documentation sources.

2. Click the link for the desired manual or other documentation source.
If you click the link for the Narrowcast Services SDK Guide, a File Download dialog box opens. This documentation resource must be downloaded. Select **Open this file from its current location**, and click **OK**.

If bookmarks are not visible on the left side of an Acrobat (PDF) manual, from the **View** menu click **Bookmarks and Page**. This step varies slightly depending on your version of Adobe Acrobat Reader.

**To access documentation resources on UNIX and Linux**

1. Within your UNIX or Linux machine, navigate to the directory where you installed MicroStrategy. The default location is `/opt/MicroStrategy`, or `$HOME/MicroStrategy/install` if you do not have write access to `/opt/MicroStrategy`.

2. From the MicroStrategy installation directory, open the **Help** folder.

3. Open the **Product_Manuals.htm** file in a web browser. A page opens in your browser showing a list of available manuals in PDF format and other documentation sources.

4. Click the link for the desired manual or other documentation source.

5. If you click the link for the Narrowcast Services SDK Guide, a File Download dialog box opens. This documentation resource must be downloaded. Select **Open this file from its current location**, and click **OK**.

If bookmarks are not visible on the left side of an Acrobat (PDF) manual, from the **View** menu click **Bookmarks and Page**. This step varies slightly depending on your version of Adobe Acrobat Reader.

**Documentation standards**

MicroStrategy online help and PDF manuals (available both online and in printed format) use standards to help you identify certain types of content. The following table lists these standards.

These standards may differ depending on the language of this manual; some languages have rules that supersede the table below.

<table>
<thead>
<tr>
<th>Type</th>
<th>Indicates</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>bold</strong></td>
<td>• Button names, check boxes, options, lists, and menus that are the focus of actions or part</td>
</tr>
<tr>
<td>Type</td>
<td>Indicates</td>
</tr>
<tr>
<td>-----------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>italic</strong></td>
<td>• Names of other product manuals and documentation resources</td>
</tr>
<tr>
<td></td>
<td>• When part of a command syntax, indicates variable information to be replaced by the user</td>
</tr>
<tr>
<td></td>
<td>Example: The <em>aggregation level</em> is the level of calculation for the metric.</td>
</tr>
<tr>
<td></td>
<td>Example: Type <code>copy c:\filename d:\foldername\filename</code></td>
</tr>
<tr>
<td><strong>Courier font</strong></td>
<td>• Calculations</td>
</tr>
<tr>
<td></td>
<td>• Code samples</td>
</tr>
<tr>
<td></td>
<td>• Registry keys</td>
</tr>
<tr>
<td></td>
<td>• Path and file names</td>
</tr>
<tr>
<td></td>
<td>• URLs</td>
</tr>
<tr>
<td></td>
<td>• Messages displayed in the screen</td>
</tr>
<tr>
<td></td>
<td>• Text to be entered by the user</td>
</tr>
<tr>
<td></td>
<td>Example: <code>Sum(revenue)/number of months.</code></td>
</tr>
<tr>
<td></td>
<td>Example: Type <code>cmdmgr -f scriptfile.scp</code> and press Enter.</td>
</tr>
<tr>
<td><strong>+</strong></td>
<td>A keyboard command that calls for the use of more than one key (for example, SHIFT+F1).</td>
</tr>
<tr>
<td><strong>️⃣</strong></td>
<td>A note icon indicates helpful information for specific situations.</td>
</tr>
<tr>
<td><strong>🔥</strong></td>
<td>A warning icon alerts you to important information such as potential security risks; these should be read before continuing.</td>
</tr>
</tbody>
</table>
# INDEX

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
</tr>
</thead>
<tbody>
<tr>
<td>accessing MicroStrategy Mobile</td>
<td>best practices to maximize the response from MicroStrategy Mobile</td>
</tr>
<tr>
<td>Android 72</td>
<td>Android 87</td>
</tr>
<tr>
<td>iPad 36</td>
<td>iPad 48</td>
</tr>
<tr>
<td>iPhone 2</td>
<td>iPhone 16</td>
</tr>
<tr>
<td>alert (iPhone and iPad). See push notification. 4</td>
<td>button</td>
</tr>
<tr>
<td>Android. See MicroStrategy Mobile for Android. 71</td>
<td>iPad 53</td>
</tr>
<tr>
<td>annotating a report or document (iPad) 45</td>
<td>C</td>
</tr>
<tr>
<td>answering a prompt</td>
<td>Calendar (iPad) 64</td>
</tr>
<tr>
<td>Android 85</td>
<td>copying text from a document (iPad) 56</td>
</tr>
<tr>
<td>iPad 46</td>
<td>copying text from a document (iPhone) 21</td>
</tr>
<tr>
<td>iPhone 14</td>
<td>D</td>
</tr>
<tr>
<td></td>
<td>dashboard, Visual Insight</td>
</tr>
<tr>
<td></td>
<td>iPad 68</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Tool</th>
<th>Example (iPhone)</th>
<th>Example (iPad)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emailing report</td>
<td>default Home screen 2</td>
<td>Calendar (Date Selection widget) 64</td>
</tr>
<tr>
<td>iPad 45</td>
<td>drilling 51</td>
<td>drilling 51</td>
</tr>
<tr>
<td>iPhone 13</td>
<td>Heat Map widget 62</td>
<td>Graph Matrix visualization (iPad) 60</td>
</tr>
<tr>
<td>example (Android)</td>
<td>Map widget 62</td>
<td>Microcharts widget 57</td>
</tr>
<tr>
<td>default Home screen 72</td>
<td>Microcharts widget 57</td>
<td>tooltip 51</td>
</tr>
<tr>
<td>document 80</td>
<td>tooltip 51</td>
<td>Visual Insight dashboard 68</td>
</tr>
<tr>
<td>drilling 90</td>
<td>multi-layout document 12</td>
<td>example (iPhone)</td>
</tr>
<tr>
<td>graph report 79</td>
<td>panel with a docked selector 11</td>
<td>default Home screen 2</td>
</tr>
<tr>
<td>grid report 77</td>
<td>thresholds 9</td>
<td>drilling 19</td>
</tr>
<tr>
<td>Interactive Grid widget 92</td>
<td>Time Series widget 30</td>
<td>graph report 9</td>
</tr>
<tr>
<td>Map widget 93</td>
<td>Time Series widget 95</td>
<td>grid report 9</td>
</tr>
<tr>
<td>Microcharts widget 94</td>
<td>Microcharts widget 24</td>
<td>Interactive Grid widget 24</td>
</tr>
<tr>
<td>tooltip 29</td>
<td>Map widget 25</td>
<td>Map widget 25</td>
</tr>
<tr>
<td>Multi-layout document 44</td>
<td>Microcharts widget 57</td>
<td>Map widget 25</td>
</tr>
<tr>
<td>Network visualization 61</td>
<td>tooltip 29</td>
<td>Microcharts widget 57</td>
</tr>
<tr>
<td>panel with a docked selector 44</td>
<td>tooltip 29</td>
<td>Multi-layout document 44</td>
</tr>
<tr>
<td>Time Series widget 60</td>
<td>tooltip 29</td>
<td>Network visualization 61</td>
</tr>
<tr>
<td>Timeline widget 65</td>
<td>tooltip 29</td>
<td>panel with a docked selector 44</td>
</tr>
</tbody>
</table>

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viewing 42

iPhone
running 6
tooltip 10, 21
viewing 9
zoom 10
grid report
Android
running 74
threshold 78
viewing 77
iPad
drilling 51
pages 43
running 41
sorting 50
viewing 42
iPhone
drilling 19
running 6
sorting 18
threshold 9
viewing 9

Heat Map widget (iPad) 62

Home screen
Android 72
iPad 36
iPhone 2

image
Android
uploading 97
viewing 98
iPad
uploading 67
viewing 68
iPhone
uploading 31
viewing 32

Image Layout widget (iPad) 65
Image Viewer widget
iPad 68
iPhone 32
Interactive Grid widget
Android 92

iPad application in a document 54
iPad. See MicroStrategy Mobile for iPad. 35
iPhone application in a
document 20

iPhone. See MicroStrategy Mobile for iPhone. 1

link
Android 91
drilling and 91
iPad 53
iPhone 19

Map widget
Android 93
iPad 58
Microcharts widget
iPhone 28
Microcharts widget (Android) 94
Microcharts widget (iPad) 57
MicroStrategy Mobile for
Android 71
accessing 72
document 74
Home screen 72
maximizing response from 87
prerequisites 72
prompt 85
report 74
running a report or
document 40
screenshot of a report or
document 83
MicroStrategy Mobile for iPad 35
accessing 36
document 40
Home screen 36
maximizing response from 48
prerequisites 36
prompt 46
report 40
running a report or
document 40
MicroStrategy Mobile for iPhone 1
accessing 2
document 5
Home screen 2
maximizing response from 16
prerequisites 2
prompt 14
report 5
MicroStrategy Transaction Services
Android 96
iPad 54
iPhone 22
Multimedia widget
iPad 66
iPhone 31
Network visualization (iPad) 61
page-by (Android) 83
Photo Uploader widget
Android 97
iPad 67
iPhone 31
prerequisites
MicroStrategy Mobile for
Android 72
MicroStrategy Mobile for iPad 36
MicroStrategy Mobile for iPhone 2
printing a report or document
iPad 46
iPhone 14
prompt
Android
answering 85
Prompt Summary screen 86
reprompting 86
iPad
answering 46
Filter screen 47
reprompting 53
iPhone
answering 14
Prompt Summary screen 15
reprompting 20
push notification
iPad 38
display 39
turning on or off 38
iPhone 4
display 5
turning on or off 4, 38

refreshing speed
Android 87
iPad 48
iPhone 16
report (Android)
drilling 90
running 74
running subscribed-to 76
speed of refreshing 87
threshold 78
viewing 77
at different levels 90
graph 79
grid 77
report (iPad)
annotating 45
drilling 51
emailing 45
page 43
printing 46
reprompting 53
running 40
running subscribed-to 40
sorting 50
speed of refreshing 48
tooltip on graph 51
viewing 42
    at different levels 51
report (iPhone)
    drilling 19
drilling 19
emailing 13
emailing 13
printing 14
printing 14
reprompting 20
reprompting 20
running 6
running 6
running subscribed-to 6
running subscribed-to 6
sorting 18
sorting 18
speed of refreshing 16
speed of refreshing 16
threshold 9
threshold 9
tooltip on graph 21
tooltip on graph 21
viewing 8
viewing 8
    at different levels 19
    at different levels 19
    graph 9
    graph 9
    grid 9
    grid 9
    widget 23
    widget 23
Reports button (iPhone) 6
Reports button (iPhone) 6

S
screenshot of a report or document (Android) 83
screenshot of a report or document (Android) 83
Shared Library button
    Android 74
    iPhone 7
Shared Library button
    Android 74
    iPhone 7
sorting a report
    iPad 50
    iPhone 18
sorting a report
    iPad 50
    iPhone 18

T
threshold on a report
    Android 78
    iPhone 9
threshold on a report
    Android 78
    iPhone 9
Time Series widget
    Android 95
    iPad 60
    iPhone 30
Time Series widget
    Android 95
    iPad 60
    iPhone 30
Timeline widget (iPad) 64
Timeline widget (iPad) 64
tooltip
    Android 80
    iPad 51
    iPhone 21
tooltip
    Android 80
    iPad 51
    iPhone 21
Transaction Services. See
Transaction Services. See
    MicroStrategy Transaction
    MicroStrategy Transaction
Services. 22
Services. 22

U
updating a data warehouse with
updating a data warehouse with
    Transaction Services
    Transaction Services
    Android 96
    iPad 54
    iPhone 22
    iPad 54
    iPhone 22
uploading an image
   Android 97
   iPad 67
   iPhone 31
uploading an image - iPad 67

V
video
   iPad
      viewing 68
   iPhone
      viewing 32
Video Player widget
   iPad 68
   iPhone 32
viewing
   Android
      document 80
      graph report 79
      grid report 77
      image 98
      report 77
      widget 92
   iPad
      document 43
      image 68
      report 42
      video 68
      Visual Insight dashboard 68
      widget 56

iPhone
document 10
   graph report 9
   grid report 9
   image 32
   report 8
   video 32
   Visual Insight dashboard 33
      widget 23
   Visual Insight dashboard (iPad) 68
   Graph Matrix visualization 60
   Network visualization 61
   Visual Insight dashboard (iPhone) 33
      visualization, Graph Matrix (iPad) 60
      visualization, Network (iPad) 61

W
widget
   Android 89
      Interactive Grid 92
      Map 93
      Microcharts 94
      Photo Uploader 97
      Time Series 95
   iPad 56
      Calendar (Date Selection) 64
      Heat Map 62
      Image Layout 65
Image Viewer  68
Map  58
Microcharts  57
Multimedia  66
Photo Uploader  67
Time Series  60
Timeline  64
Video Player  68

iPhone  23
Image Viewer  32
Microcharts  28
Multimedia  31
Photo Uploader  31
Time Series  30
Video Player  32