

# Intellicus Mobile Application

## Version – 24.3.0

Copyright 2024 Intellicus Technologies. All rights reserved.

This document and its content are copyrighted material of Intellicus Technologies.

The content may not be copied or derived from, through any means, in parts or in whole, without prior written permission from Intellicus Technologies. All other product names are believed to be registered trademarks of the respective companies.

[info@intellicus.com](mailto:info@intellicus.com)

[www.intellicus.com](http://www.intellicus.com)

December 2024

## Contents

Overview .....	4
Pre-requisites .....	4
Getting Started .....	5
Home.....	7
Explorer.....	8
Datasets or Query Objects .....	9
Browsing Datasets.....	9
Analyzing Datasets .....	11
Analytical Object or Cube Object.....	12
Reports.....	13
High Speed View Reports .....	14
Smart View and Ad hoc Reports .....	44
Standard Report.....	45
Dashboards.....	46
Favorites .....	48
Servers .....	49
Settings.....	50
Security .....	50
Reports.....	50
Auto Update.....	50
Device Information.....	51
Alerts and Push Notifications .....	52
Push Notifications .....	52
Mobile Device Settings on the Portal .....	53
Registration Mode .....	53
Add Devices.....	54
View and Manage Added Devices .....	55
Configuring Mobile Device Policy .....	55
Properties .....	55
Authentication.....	56

## Overview

Intellicus mobile BI takes your reports and analytics to tablets and phones on Android and iOS platforms. Our mobile analytics solution delivers instant access to your essential business insights.

This document helps you learn how to use the Intellicus mobile applications.

## Pre-requisites

The Intellicus mobile application fetches data from the Web Server for mobile analysis. To view your data and reports on mobile, you must have them on an Intellicus server.

Intellicus mobile application runs on iOS and Android mobile devices, iPads, and tablets.

To install and analyze data on the mobile applications, you need:

- An Android device with Android 5.0 or higher versions.
- An iOS device with iOS 11.0 or higher versions.

**Note:**

Please ensure the server is running.

## Getting Started

To achieve business analytics on mobile devices, perform the following steps.

1. Navigate to Google Play Store (Android devices) or App Store (iOS devices).
2. Search **Intellicus** and tap **Install**.

The memory required to install the mobile application is displayed.



Upon opening the application, you are prompted to enter the server address where your Intellicus web application is running.

1. Tap the **Connect Now** button to open the **Connect to Server** screen.
2. Enter the server details along with the username and password.  
For example, if you use a demo connection, specify the server address as <https://demo.intellicus.cloud/intellicus/> and connect using default credentials.

### Note:

Please ensure your server is running while attempting to make this connection.

If Windows-based authentication is enabled on this server, you must log in using your Windows credentials.

**Note:**

- The **Default Server** checkbox will be disabled as this is the first connection you will make; hence, this is the default server. Connecting to other servers lets you update your preferences on the **Servers** page.
- Once you connect and register to an Intellicus Web Server, your username and password are associated with the server and device. Hence, you must use the same credentials when connecting to this server from this device.
- If you try registering on this server using the same device and different credentials, you will receive an error.
- To register this device using different credentials, unregister this device from this server.

The Intellicus mobile application **Home** screen opens upon connecting to a server. The screen consists of the following entities in the bottom pane.

- **Home** for exploring various entities (reports, dashboards, analytical objects, and datasets) in the respective tab.
- **Explorer** for viewing entities like reports, dashboards, analytical objects, and datasets saved under various categories on the Web Server.
- **Favorites** for quickly accessing entities marked as favorites.
- **Servers** are used to view connected servers' information and set server preferences.

- **Settings** for setting application preferences.

## Home

The home page lists entities under various tabs (All, Dataset, Reports, Cubes, and Dashboards) available on the selected report server.

On this page, perform the following operations.

- Tap the required tab.
- Tap the entity name to **Download** it. The download will occur based on the entity size, network strength, and speed.
- Swipe the entity name to expose options to **Download**, **Update**, mark it as **Favorite/Unfavorite** or **Remove**.

### Note:

The remove action will remove the downloaded data; however, the report name will persist. The report can be again downloaded for analysis.

- Use **Sort By** to sort the list of entities by **Download Time**, **Name**, and **Recent**.
- Tap the **Refresh** button at the top to refresh the schema. The count of entities on individual tabs is mentioned with the entities' headings.



## Explorer

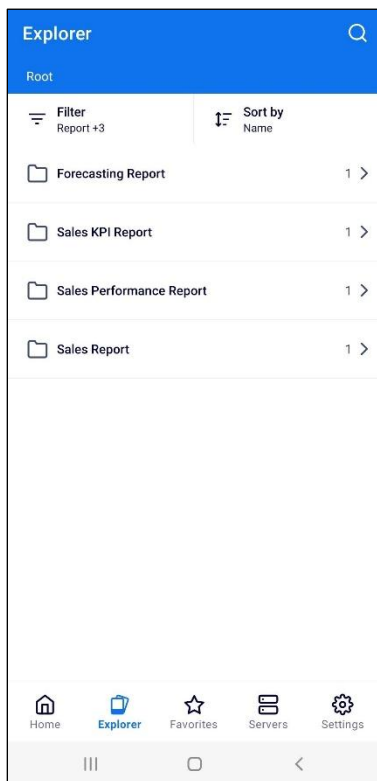
The Explorer page lists various categories, subcategories, and entities under them. It comprises datasets (query objects), report types, analytical objects (cubes), and dashboards.

Perform the following operations on this page.

- Tap the entities to **Download** them.
- Alternatively, left-swipe the entity to **Download**, **Update** the downloaded entity, mark it as **Favorite/ Unfavorite**, or **Remove** the downloaded entity.

**Note:** The remove action will remove the downloaded data; however, the entity name will persist. It can be again downloaded for analysis.

- Tap **Sort By** to sort the list of entities by **Name**, **Download Time**, **Recent**, and **Type**. The count of entities present in each category or subcategory is mentioned along with their name.



Let's now look at various entities in **Explorer** and understand them with a few examples.



## Datasets or Query Objects

You can open and browse through the data of any individual query object and analyze your dataset in the form of charts or grids.

Tap the **Dataset** tab at the top of the Intellicus mobile application's home page. Alternatively, tap **Explorer > Expand the required category and subcategory to view your saved datasets** (query objects).

Perform the following operations.

- Tap the dataset or left-swipe on the dataset title to **Download**. This imports the selected datasets from the server to the mobile application.

### Note:

If your datasets are not correctly loaded, a **Warning** sign will appear.

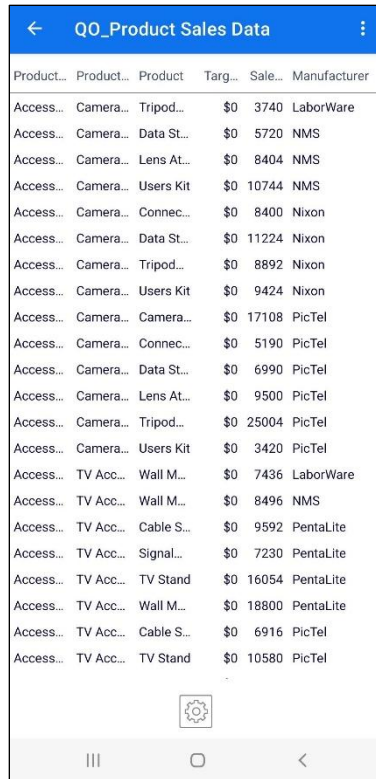
- Try reloading/ updating the datasets or checking your server and network connection to verify the connection is set correctly.
- Once you have successfully loaded your datasets, browse the data in the respective datasets or start analyzing them.
- Tap the dataset you want to explore or right-swipe it to view it in **Grid View**.
- You can import or download more than one dataset in Android and iOS applications.
- Tap the **Update** option to update the dataset by fetching the latest updates from the server.
- Tap **Remove** or **Delete** to delete the dataset.
- Tap **Favorites** to mark the dataset as a favorite.

### Note:

You can fetch a maximum of 25000 records in datasets. This limit ensures that your analysis does not slow down due to mobile memory and space availability. To achieve the maximum out-of-dataset analysis, create a summarized query object (adding filters, removing unwanted data, etc., to keep the dataset relevant to your analysis needs) to view and analyze your complete dataset on the fly.

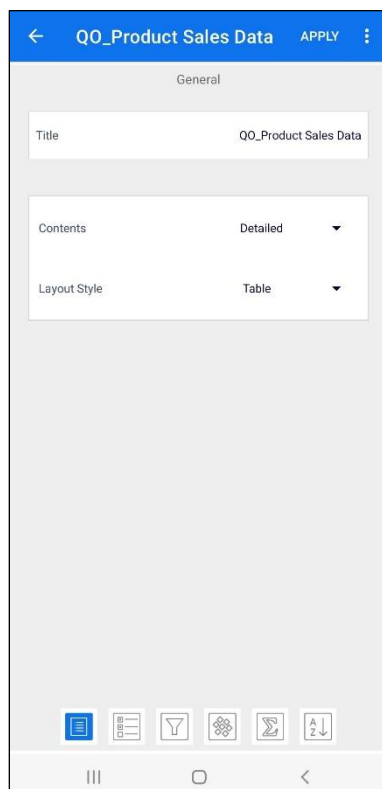
## Browsing Datasets

You can browse your selected dataset using the grid view option. Right-swipe the dataset title and tap the **Grid View** option.



Product...	Product...	Product	Targ...	Sale...	Manufacturer
Access...	Camera...	Tripod...	\$0	3740	LaborWare
Access...	Camera...	Data St...	\$0	5720	NMS
Access...	Camera...	Lens At...	\$0	8404	NMS
Access...	Camera...	Users Kit	\$0	10744	NMS
Access...	Camera...	Connec...	\$0	8400	Nixon
Access...	Camera...	Data St...	\$0	11224	Nixon
Access...	Camera...	Tripod...	\$0	8892	Nixon
Access...	Camera...	Users Kit	\$0	9424	Nixon
Access...	Camera...	Camera...	\$0	17108	PicTel
Access...	Camera...	Connec...	\$0	5190	PicTel
Access...	Camera...	Data St...	\$0	6990	PicTel
Access...	Camera...	Lens At...	\$0	9500	PicTel
Access...	Camera...	Tripod...	\$0	25004	PicTel
Access...	Camera...	Users Kit	\$0	3420	PicTel
Access...	TV Acc...	Wall M...	\$0	7436	LaborWare
Access...	TV Acc...	Wall M...	\$0	8496	NMS
Access...	TV Acc...	Cable S...	\$0	9592	PentaLite
Access...	TV Acc...	Signal...	\$0	7230	PentaLite
Access...	TV Acc...	TV Stand	\$0	16054	PentaLite
Access...	TV Acc...	Wall M...	\$0	18800	PentaLite
Access...	TV Acc...	Cable S...	\$0	6916	PicTel
Access...	TV Acc...	TV Stand	\$0	10580	PicTel

Tap the **Settings** button at the bottom of the screen to perform a detailed analysis with some advanced functions on your dataset.



← QO\_Product Sales Data APPLY

General

Title QO\_Product Sales Data

Contents Detailed

Layout Style Table

On the **General** tab, the dataset's title is displayed. On this page, you can perform the following operations.

- Change the **Contents** format from 'Detailed' to 'Summarized.' In **Detailed** format, the records are shown in detailed grid form. In **Summarized** format, the dataset is displayed as a summary of groups with totals created in Grouping, Totals, etc.
- Update the **Layout Style** from 'Table' to 'Form.' The **Layout Style** 'Table' displays the values in tabular format. The **Layout Style** 'Form' displays rows' fields and values vertically. Rows are also vertically placed.
- Choose the fields to display in the dataset in the **Description** tab.
- Apply filters, group your dataset, create totals of different fields, and perform sorting using other tabs.
- Tap **Apply** once you have configured the required functions.

Tap the **Actions** menu ( : ) at the top right corner to:

- **Analyze** it and create a **Saved View** if needed.
- **Add Comments** to the displayed view.
- Tap the **Mail** option to mail a snapshot. The mail picks the default configured email client of your device. You can enter the recipient emails manually.

## Analyzing Datasets

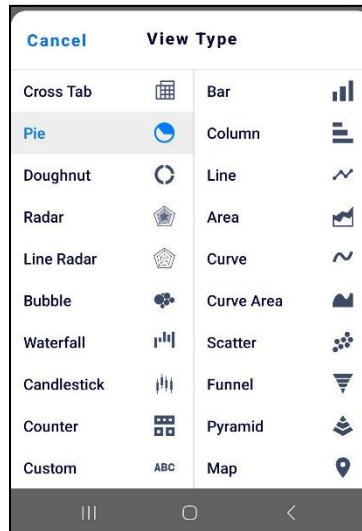
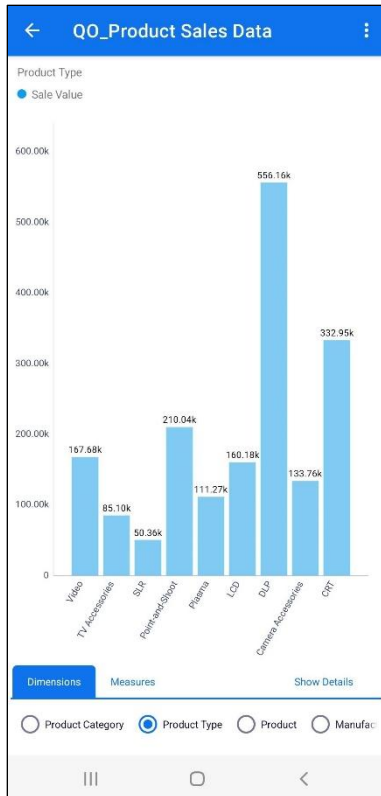
Analyzing the dataset helps you view it in charts. The application supports multiple chart types to help you visualize your data intuitively. Tap to download the dataset or tap **Analyze** from the **Actions** menu ( : ) if you have opened your dataset in the grid view.

By default, your dataset is arranged in a bar chart. The dimensions and measures in the chart are listed below the chart. You can choose which dimensions (you can select one dimension at a time) against what measure(s) you want to view. If there are more dimensions and measures than the ones appearing on the screen, swipe left or right to view them.

### Note:

If you have chosen to view a pie family chart, you can select only one measure at a time.

Tap on any data point on the chart to view the corresponding data values in a grid form through the **Show Details** option. The data corresponds to the data point, dimension, and measures that you have selected.



Tap the **Actions** menu ( : ) to:

- **Update** the chart type
- **Save** the chart
- **Update** the data in the chart
- **Add to Favorites.**
- **Add Comment** and send the displayed view as a screenshot to the required email ID.

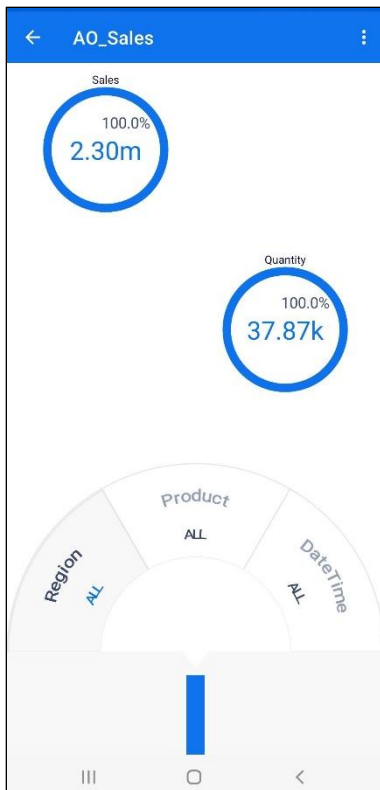
## Analytical Object or Cube Object

Analytical or cube objects are analyzed using a high speed view. This specially designed view automatically aligns the dimensions and measures available in your cube objects for a quick analysis. Once you tap the object or left-swipe the object, your selected cube object starts loading from the Web Server to your device.

### Note:

If your cube objects are not correctly loaded, a **Warning** button appears. Try reloading the cube objects or check your server and network connection to verify the connection is set correctly.

Once your cube objects are loaded, tap any cube object to **View** it or **Check** and **Update** it with the latest datasets. Tapping **Check and Update** checks if the selected cube object has been rebuilt since the last update, fetching the recent cube data from the server.



On this screen, perform the following operations.

- Swipe the screen or spin the wheel if you need more than one measure or dimension to fit the screen. If you have only two dimensions, one dummy dimension gets added to the wheel.
- Select specific dimension values on the wheel to view their corresponding measure values and percentiles.
- To drill down the dimension levels, tap the required dimension and then **Drill Down**. The values inside the dimension are listed as bars at the bottom pane (in portrait mode). You can tap a bar to realign the view based on the chosen value. Long tap to drill further down into the dimensions. In landscape mode, the values inside the dimension appear in a list format.
- Tap **Add Comment** from the **Actions** menu ( :) to add a comment and email it to the required recipient. Add the object as a **Favorite** to quickly access it from the favorites page.

## Reports

The reports section helps you analyze your **Ad hoc**, **Smart View**, **Standard**, and **OLAP** reports on the go. You can download your reports when you are online and analyze them from wherever you

are, even if you are offline. Tap the **Reports** tab from the homepage or search for the required report in **Explorer** under the respective category to download your reports.

Left-swipe the report and tap **Download**. Your selected reports start loading from the Intellicus Web Server to your device.

You can also swipe the report to **Download** the report, **Update** the downloaded report, mark it as **Favorite** or **Unfavorite**, or **Remove** the downloaded report.

**Note:**

If your reports are not properly loaded, a **Warning** button appears. Try reloading the reports or checking your server and network connection to verify the connection is set correctly.

If your report has multiple views (chart, grid, or matrix), double-tap any view to maximize it or restore it to its original state. If your view is larger than the visible view on the screen, swipe the screen in respective directions to view all fields.

**Note:**

Once you update any report type, it updates with the latest datasets and settings on the Web Server. Any changes made to filter, dimensions, chart type, etc., while analyzing on the mobile device will no longer reflect.

## High Speed View Reports

This report lists the filter values under the filters on the top pane. Update the filter conditions as needed.

You can also change the report's view from crosstab to chart type or vice versa by tapping the **View** button at the top right corner of the view pane. When viewing an OLAP dashboard, view all its views and change the view type from the view tab. Tap on any data point to view the associated point labels. Long tap on any field to perform actions like drill down, drill up, and filter (to filter on the selected field).

Swipe up or down to navigate different views.



You can **Add Comments** and then **Email** or **Add to Favorites** by tapping the respective option from the Actions menu ( : ).

### Filters in High Speed View

When you have applied filters in high speed view reports on the Intellicus web application, you can interact and modify the filters on the mobile applications to filter the data as needed. The adjustments made on the mobile application do not impact the original report on the Intellicus web application; instead, they are locally saved on your mobile device until you reload the data from the Intellicus server.

You can configure the **Field Lookup Max Values** property on the Web Portal to configure the number of filter values to appear on the filters. The filter values will appear in the report filters dropdown on mobile applications based on the number you enter in this property. You can manually search for additional values if there are more filter values than the displayed number.

Let's explore the types of filters and ways to use them effectively.

### Report Filters

The filters applied to the report are known as report filters. You'll find a filter button on the report title pane. This button allows you to interact with the filters, update their criteria, and input values

to refine the report as needed. For instance, if you have a sales report and want to filter state-wise information, you can apply the required filters.

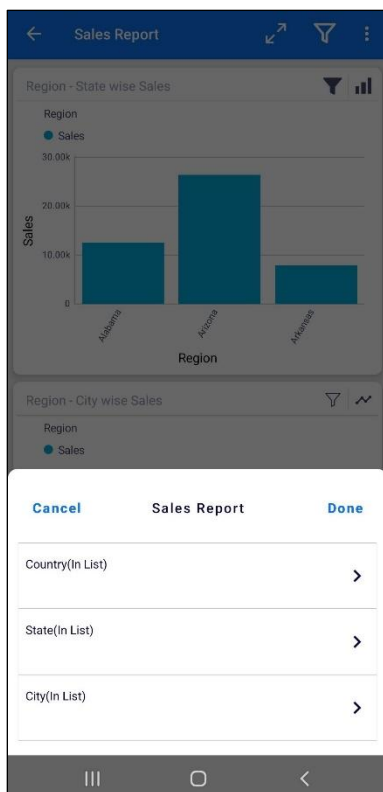
Let's see how you specify various criteria and provide values to filter data based on different states.

**Note:**

We applied filters with blank values on the web portal for demo purposes, making the report visible with complete data.

To apply the necessary filters, perform the following steps.

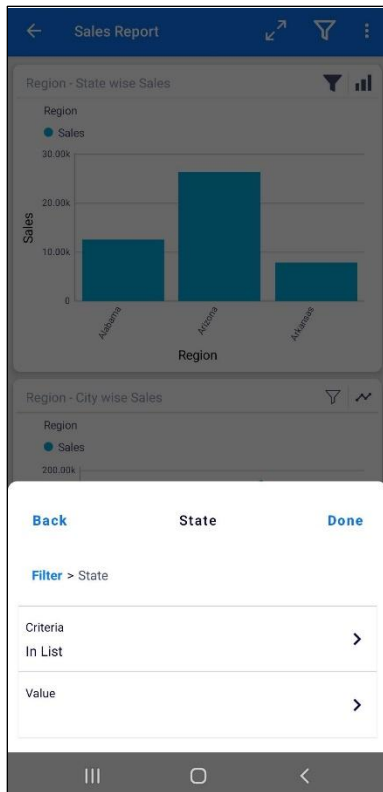
1. Tap the **Filter** button from the report title pane to view the filters applied to the report.



2. Notice that there are three report filters on this report: Country, State, and City.

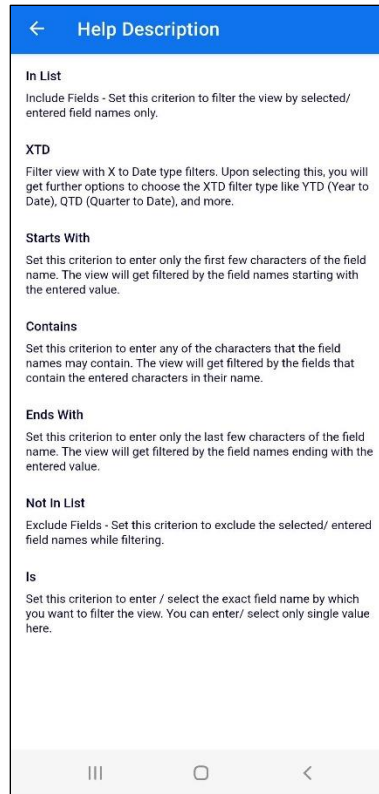
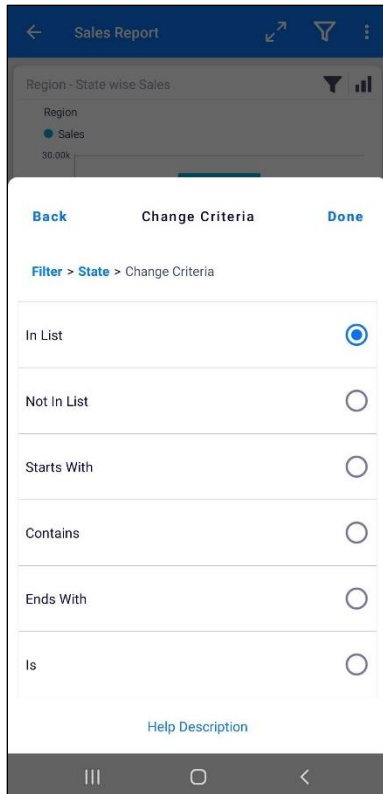


3. Tap the field to filter data based on a particular field. **State** in this case.



4. This will open a popup with the following operations.  
**Criteria** – Specify the requirements based on which you want to select the value to filter the report.  
**Value** – Specify the value based on which you want to filter the report.
5. Tap **Criteria**.

The following screen lists the criteria. To learn more about various criteria, tap the **Help Description** button on the **Change Criteria** popup.

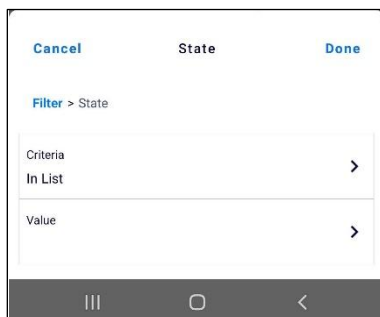


### In List

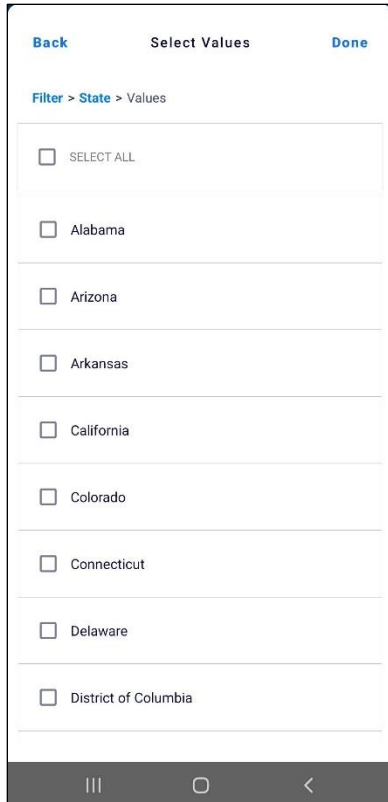
Tap the **In List** criterion to filter the views with only the values you select here. Let's choose **In List** as an example. Tap the back arrow button from the **Help Description** page to navigate to the **Change Criteria** popup.

Tap the **In List** radio button and tap **Done**.

This action will take you back to the **Criteria and Value** popup. The criterion you selected will be visible under **Criteria**.

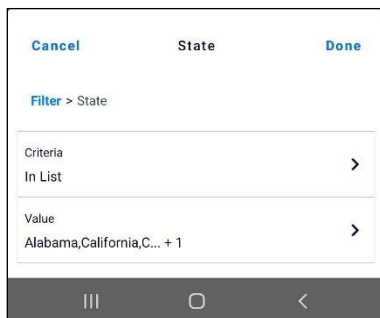


6. Tap **Value** to view and select values.



For example, select the checkboxes to filter the report for **Alabama, California, Colorado, and Delaware.**

7. Tap **Done** once you have made the required selections. This will take you back to the **Criteria** and **Value** popup. Here, you can review your selections for both **Criteria** and **Value** fields.



8. Tap **Done** once you have confirmed the selections.  
This will navigate you back to the **Filters** popup. Review the criteria and values you have applied to the required field.

9. Similarly, you can apply filters to other fields as needed. Tap **Done** to use the filters.



## Other Criteria

### Not in List

While filtering, tap the Not In List criterion to exclude the selected field names.

### Starts With

Tap **Start With** to enter the first few characters of the field name. The filter will be applied based on the field names starting with the entered value. In the **Change Criteria** popup, Tap **Starts With** and Tap **Done**.

### **Contains**

Tap **Contains** to enter the characters that belong to the field name in the same order you specify here. The filter will be applied based on the entered characters' field names. Setting this criterion is like 'Starts With.'

### **Ends With**

Tap **Ends With** to enter the last few characters of the field name ending in the order you specify here. The filter will be applied based on the field names ending the entered characters. Setting this criterion is like 'Starts With.'

### **Is**

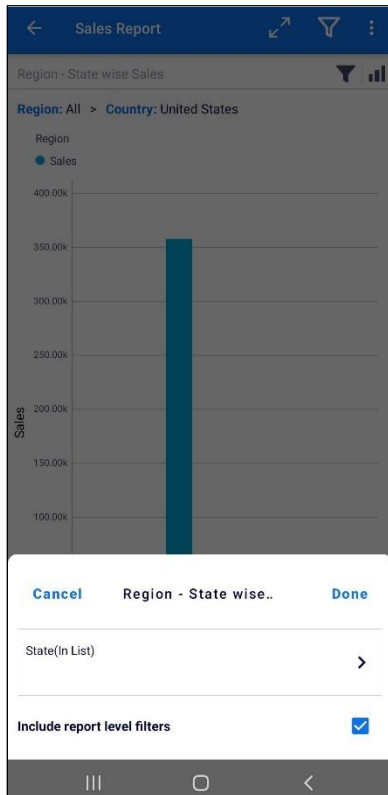
Tap **Is** criterion to filter the views with only the value you choose here. The filter will be applied based on the field name that you choose here. Setting this criterion is like that of 'In List.'

### **Note:**

In the case of the Date/ Time fields, the **Between** criterion is visible, where you can specify the period to filter the data. With **On** criterion, you can select year/month/week/day/date to filter the data based on the selected value.



Tap the filter button on the required widget. This will list the filters applied on the widget.



In the filter dialog, you will see an option to **Include a report-level filter. This option will help you retain report filters if they match the filters applied at the widget level; otherwise, 'no data available' will be displayed.**

For example, suppose the report filter criterion is In List, and the selections are Alabama, California, Colorado, and Delaware. On the widget filters, the selections are Alabama, Arizona, the District of Columbia, and Florida; the report will filter for States—Alabama, as it is the only common field.

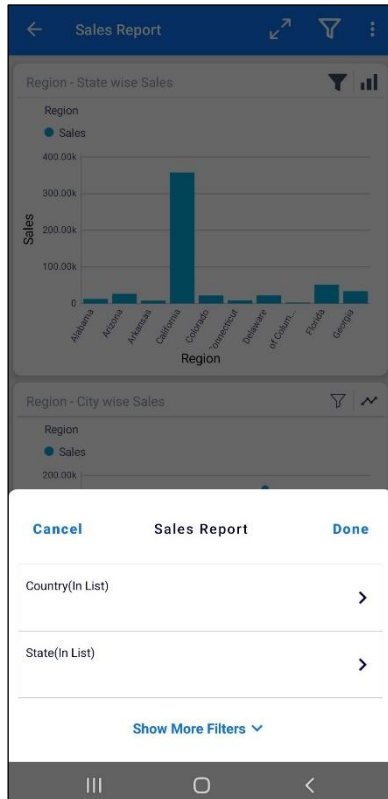
#### Note:

If no filters are applied at the widget level on the web application, the filter button will remain light. The option to Include report level filter will be visible upon tapping the button. It is usually selected by default. Clearing it will remove the effect of the filters applied at the report level, if any.

#### Prompted Filters

While applying a filter in the **Advanced Filter** tab on the Intellicus web application, if the user prompts any filters, the prompted filters are given preference and are reflected on the filter popup

on the mobile applications. For example, if you prompt the Country and State filters, only the prompted filters will be reflected upon tapping the filter button on the report.



Tap the **Show More Filters** button to view the complete list of filters (prompted and unprompted) applied to the report.

If there are no prompted filters, all the filters applied will be visible under the filters button, and no **Show More Filters** button will appear.

### Reordering Prompted Filters

You can view and easily adjust the order of filters from the report header on the Intellicus web application instead of reordering them in the **Advanced Filter** settings. This order preference will supersede the order specified in the advanced filter settings dialog on the Intellicus web application. The reordered prompted filters will appear as defined in the report header filters. Upon tapping **Show More Filters**, all the filters will appear in the order set in the advanced filters dialog.



## (X) To Date Analysis, Date Preset, and YOY Comparison

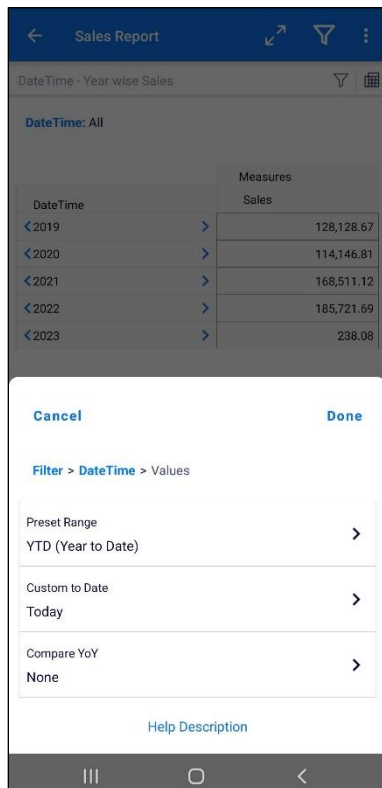
In high speed reports, the Intellicus portal provides a mechanism to perform (X) To Date analysis. The 'X' can take values as Year, Quarter, Month, or Week, depending on the hierarchy of your data. This is present as a filter. On the filters pane, tap the required filters based on the below conditions.

- The analysis refers to comparing statistical changes between one and the previous year(s)/quarter(s)/month(s)/weeks(s).
- You can switch to other filters if need be.
- (X)TD analysis is performed only on the time dimension for a standard, fiscal, or custom calendar. Depending on the calendar specified, you can filter data until the current or user-specified date.

You can also specify the date for comparing previous years/ quarters/ months/ weeks as below:

- **Year** -> Start of the year (as per calendar selected) to the date specified.
- **Quarter** -> Start of the quarter (as per calendar selected) to the date specified.
- **Month** -> Start of the month (as per calendar selected) to the date specified.
- **Week** -> Start of the week (per the selected calendar) to the specified date.

Use the **Compare YOY** function to compare and filter data based on conditions like CY + 1PY (Current year + 1 Previous Year), i.e., comparing the filtered data from the XTD filter to data from the previous CP.



## Data Pivoting

Intellicus lets you pivot data in charts when YOY filtering is applied. This helps to compare the current year's data with previous years' data for the same range by breaking the single data set in a yearly fashion represented by multiple-year series instead of one single series for the whole data set. This is available for only XY chart types (bar, column, scatter, area, curve area, line).

## Help Description

Tap the **Help Description** option on the XTD filters pages to learn how the filters work in depth.

## Filter to Specify Latest Date

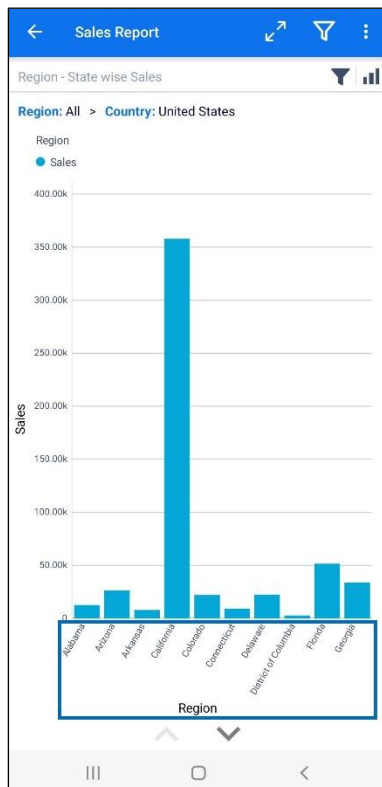
Select/ clear the **Latest Date** checkbox to fetch data based on the most recent data update. In mobile applications, the **Latest Date** filter option is only visible if selected on the web portal and **Report Filters**.

## Properties and Features Supported in High Speed Reports

The high speed report supports numerous features and associated properties that can be set on the web portal. This enhances the report viewing and analyzing experience for the business user on mobile applications. Properties like X-axis chart properties, Y-axis chart properties, X-title support, enhanced others visibility, measure selection in high speed reports, font property, show title, grid lines, line thickness and opacity, heat map, 100 percent stacking, chart description, hierarchy breadcrumbs, counter chart layout, sorting, complete crosstab field name on popup are some that are supported on the mobile applications. The Counter KPI with trend indicator and micro chart views are also supported. The values and visibility can be set on the web portal.

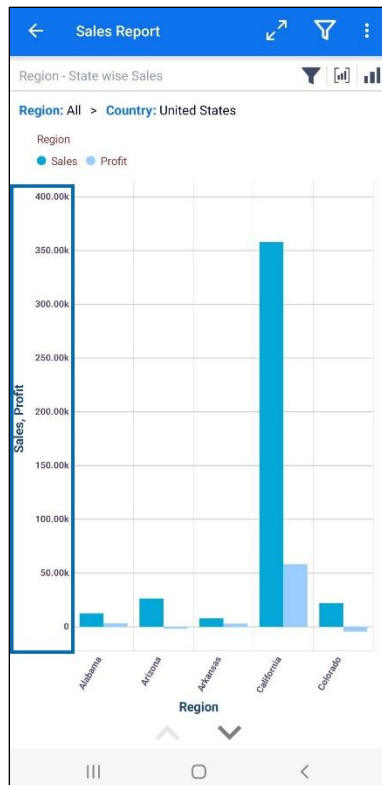
## X-Axis Chart Properties

The mobile applications provide comprehensive support for X-axis chart properties, aligning seamlessly with configurations specified on the web portal. You can leverage powerful analysis features, including X-Axis Title, Wrap Label, Label Rotation, and Enable Ellipsis, ensuring a consistent and enriched experience for mobile users across different platforms. The values of these properties must be specified on the web portal.

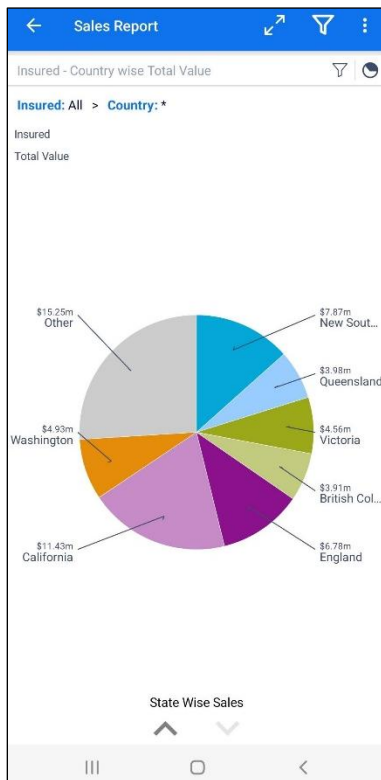


## Y-Axis Chart Properties

The mobile applications provide comprehensive support for Y-axis chart properties, aligning seamlessly with configurations specified on the web portal. You can leverage powerful analysis features, including Y-Axis Title, Stack Type, Threshold, Min, and Max, ensuring a consistent and enriched experience for mobile users across different platforms. The values of these properties must be specified on the web portal.



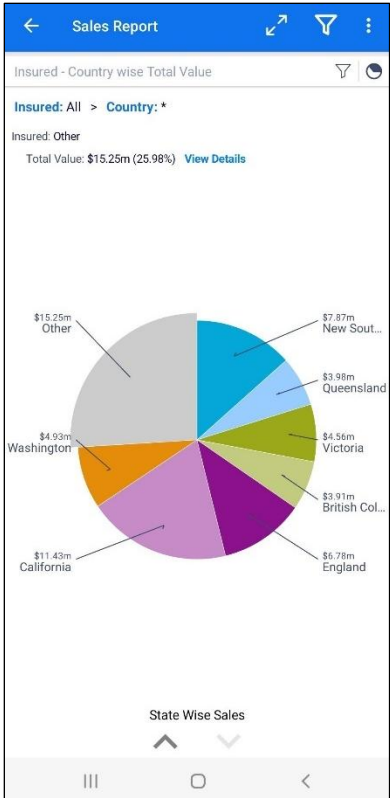
## X-title Support



You can view X titles for various high speed view charts (Pie, Doughnut, Pyramid, and Funnel) as specified on the Intellicus web portal. The property must be enabled on the portal to be visible on the chart.

## Enhanced 'Others' Visibility

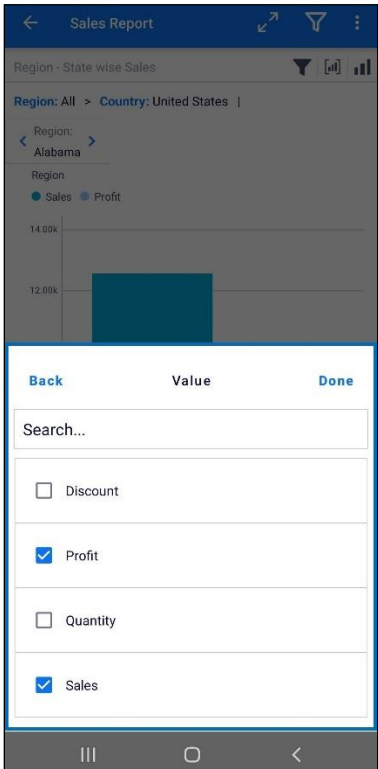
You can delve into the information under 'Others' across high speed view charts if your chart has 'Others' value. Whatever designers specify in the “Other Group Value and Color” property (percentage, color) is visible as is on the mobile applications. Tap the **View Detail** button to view all the values-related details under ‘Others.’



**Back** **Other: \$15.25m (25.98%)**

South Australia	\$1.24m	2.11%
Tasmania	\$479.88k	0.82%
Alberta	\$44935.61	0.08%
Ontario	\$73.92	0.00%
Charente-Maritime	\$68883.47	0.12%
Essonne	\$558.59k	0.95%
Garonne (Haute)	\$109.28k	0.19%
Hauts de Seine	\$526.83k	0.90%
Loir et Cher	\$42947.48	0.07%
Loiret	\$183.13k	0.31%
Moselle	\$188.09k	0.32%
Nord	\$782.80k	1.33%
Pas de Calais	\$22685.85	0.04%
Seine (Paris)	\$1.08m	1.84%
Seine Saint Denis	\$758.96k	1.29%
Seine et Marne	\$219.47k	0.37%
Somme	\$59110.56	0.10%
Val d'Oise	\$93511.80	0.16%

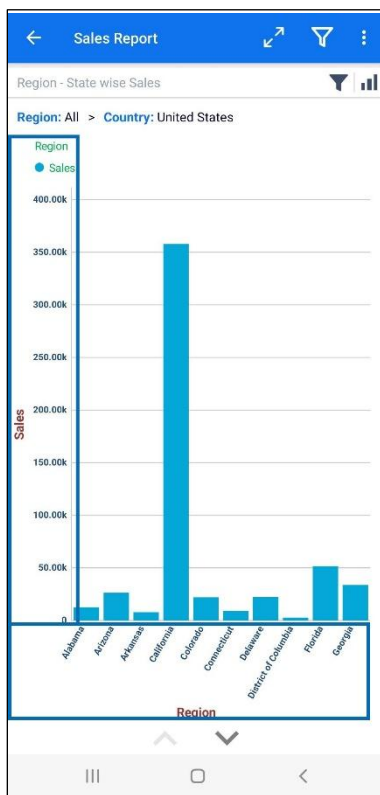
Measure Selection in High Speed Reports



The option to choose measures is conveniently available through the measure's dropdown, giving you greater control over data exploration. The feature would be made available on the mobile application when the **Allow Measure Selection in View Mode** property is enabled for the selected widget on the Intellicus web application.

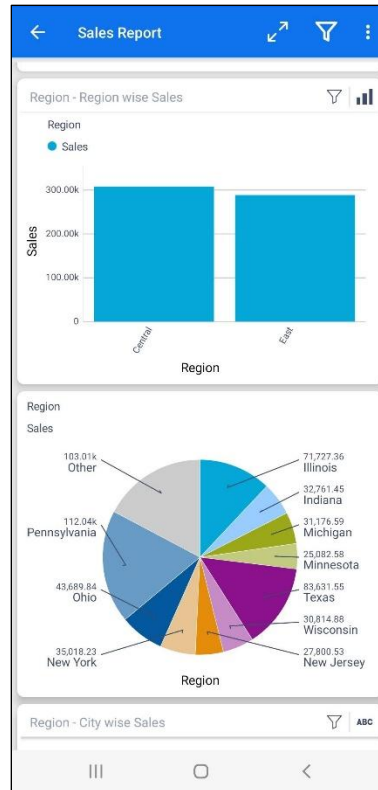
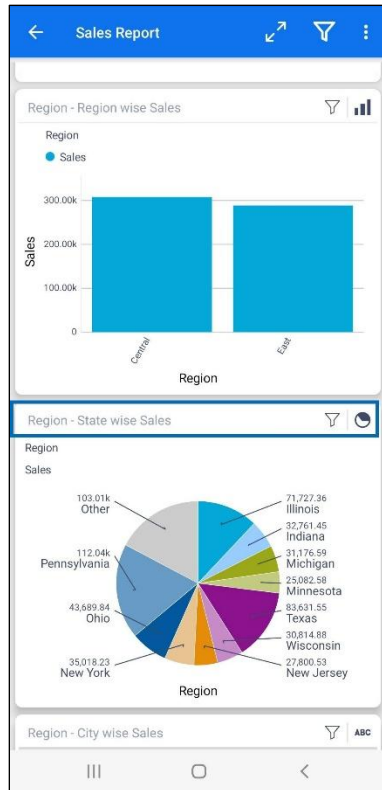
### Font Property

Administrator users can configure font properties (like font color and style for X-Axis and Y-Axis labels and titles) on the Intellicus web application and seamlessly visualize them on the mobile application. These properties can be set at the report level for consistency or individually for specific views. Additionally, properties set at the report level can be inherited across selected views by selecting the **Use Report Level Settings** checkbox.



### Show Title

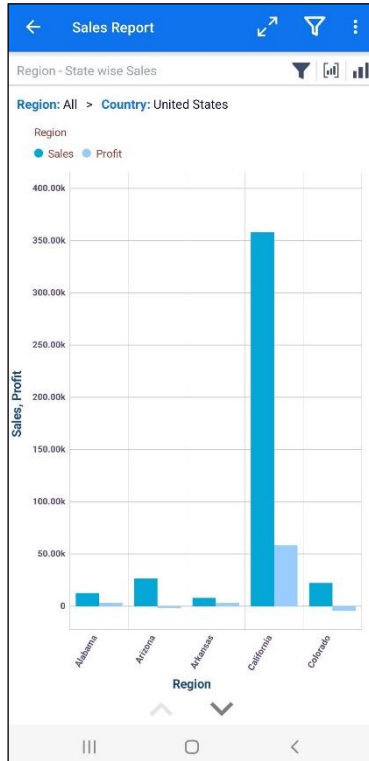
You can easily customize their viewing experience by showing or hiding titles from different views (default views on the mobile application). Configuration can be managed seamlessly through the Intellicus web application. Select or clear the **Show Title** checkbox to display or conceal the title in your selected view.





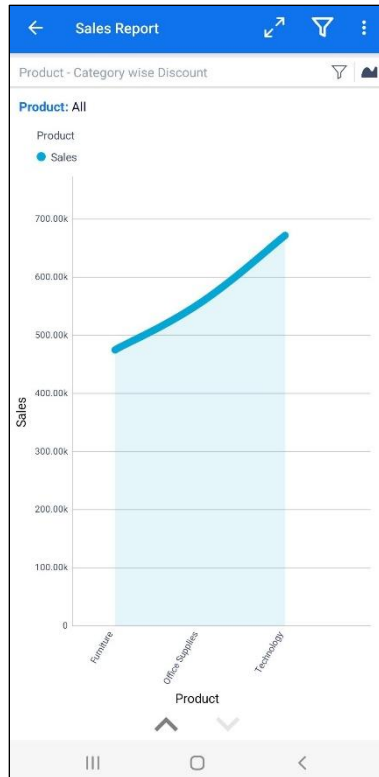
## Grid Lines

You can conveniently select the relevant properties on the Intellicus web portal to enable the grids on mobile applications. This update provides you with greater flexibility and control over the presentation of data in high speed views, enhancing the overall user experience.



## Line Thickness and Fill Opacity

The mobile application supports viewing line thickness and opacity properties as configured on the Intellicus Portal. Whether it's line charts with customized line thickness values or charts like curve areas with defined fill opacity in %, the mobile application will faithfully display these properties, ensuring a consistent and accurate representation of your data visuals. The required values must be set on the web portal.



## Heat Map

The mobile application supports heat maps. Designers can use heat map properties to create color codes to identify important information. These properties must be set on the web portal.

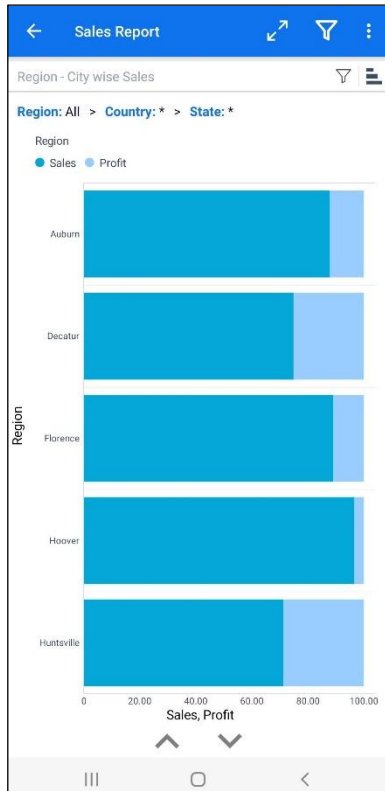
Product - Category wise Sales

Product: All > Category: Furniture > Sub-category: Tables

Product	Measures Sales
< Anderson Hickey Conga Table...	41.37
< Balt Solid Wood Rectangular T...	1,613.41
< Balt Solid Wood Round Tables	8,920.84
< Balt Split Level Computer Trai...	2,817.74
< Barricks 18" x 48" Non-Folding...	1,216.41
< Barricks Non-Folding Utility Ta...	482.58
< Bevis 36 x 72 Conference Tabl...	6,410.29
< Bevis 44 x 96 Conference Tabl...	3,208.15
< Bevis Boat-Shaped Conferenc...	3,994.35
< Bevis Oval Conference Table, ...	4,867.01
< Bevis Rectangular Conference...	1,038.09
< Bevis Round Bullnose 29" Hig...	7,462.42
< Bevis Round Conference Roo...	513.86
< Bevis Round Conference Tabl...	2,734.40
< Bevis Round Conference Tabl...	1,960.39
< Bevis Traditional Conference ...	1,633.46
< BoxOffice By Design Rectangu...	986.98
< BPI Conference Tables	2,763.09

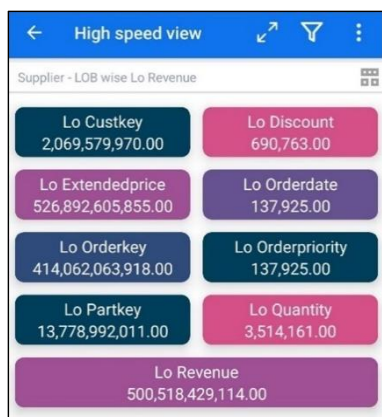
## 100 percent Stacking

The mobile application also supports 100 percent stacking to visualize charts with critical information in a single view.



## Rounded Corners and Shadow Effects

The report views feature round corners and shadow effects. Additionally, spacing between views enhances presentation.



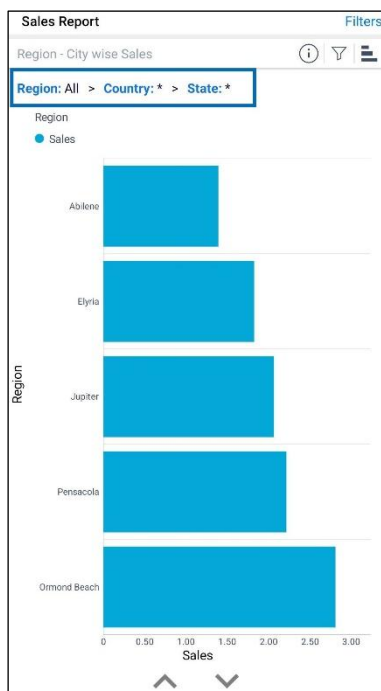
## Chart Description

You can view descriptions added to various charts to get a deeper understanding. The descriptions are added to the Intellicus web application and can be viewed seamlessly on the mobile application. Tap the info icon to view the widget-level description or the report name to view the description at the report level.



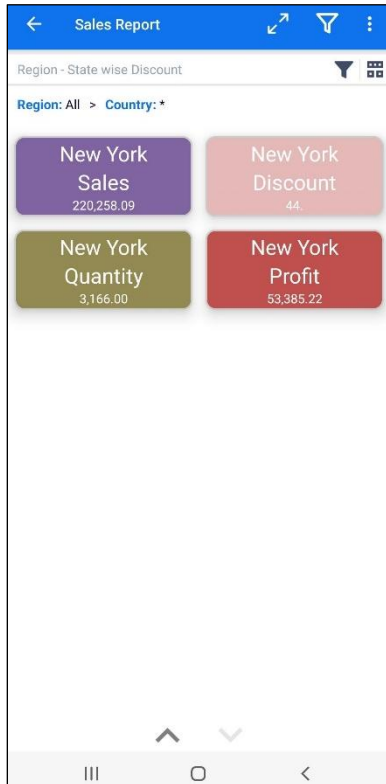
## Hierarchy Breadcrumbs

In the high speed reports, you can view hierarchy breadcrumbs. This feature empowers you to navigate through different dimension hierarchies swiftly.



## Counter Chart Layout Properties

Designers can customize the position, size, and color of the measure name, as well as the measure value and dimension name in counter charts on the Intellicus web application. Style properties like font, border, and background color can also be specified for the counter chart on high speed reports. When no font size is set, the element's font size is automatically adjusted based on the parent container size. These properties are seamlessly supported on the mobile application as visible on the web portal.



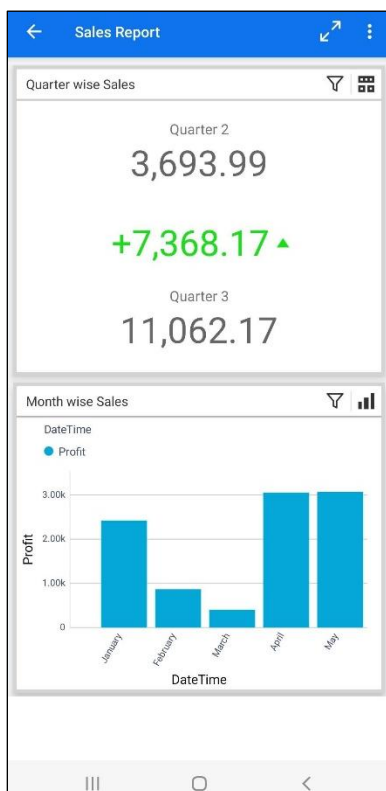
Multiple measures or values (rows) are displayed vertically in a counter chart on the mobile applications.



## KPI Counter with Trend Indicator

The mobile applications will seamlessly display the KPI with the trend indicator view for the counter chart type. The web portal allows you to design KPIs with trend indicators, offering various properties to display KPIs and trends, enabling comparisons across multiple measures or date dimensions.

Additionally, advanced settings allow you to specify whether an increasing or decreasing trend is favorable. Using options like "High is good" or "Low is good," you can configure color coding for the trend direction. These configurations on the portal are fully compatible with the mobile app, providing a seamless viewing experience.



### Note:

The size of the **Trend Indicator Icon** is automatically adjusted for mobile applications irrespective of the selection made on the Web Portal.

The **Width** and **Border Style** values set in the Layout Properties are auto-adjusted for mobile applications.

Multiple measures or values (rows) are displayed vertically in a counter chart on mobile applications.

## KPI Counter with Micro Chart

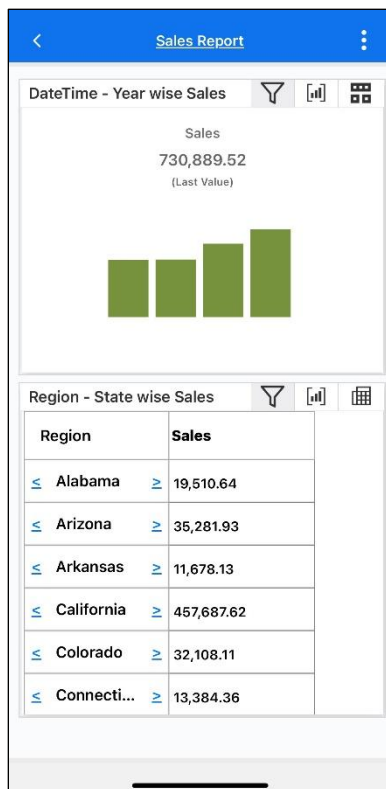
A new view **KPI with micro chart** is introduced to help you add and personalize these charts as needed on the portal. Micro charts allow you to quickly assess and analyze the data and visualize trends over a specified period, such as the last X days or months.

### Note:

The size of the **KPI Counter with Micro Chart** view is automatically adjusted for mobile applications irrespective of the selection made on the Web Portal.

The **Width** and **Border Style** values set in the Layout Properties are auto-adjusted for mobile applications.

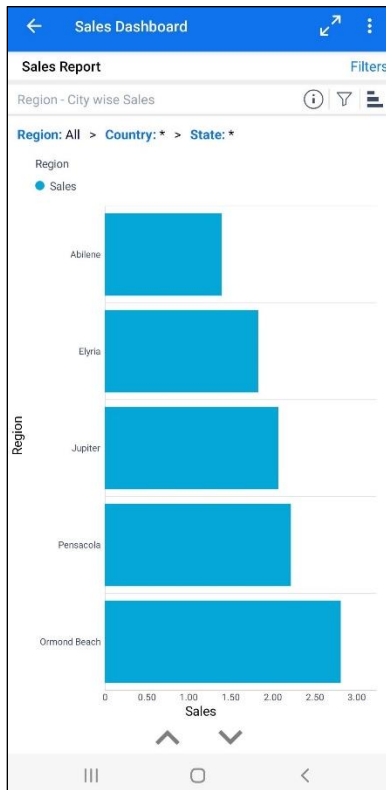
Due to the library's behavior, which adapts based on available space, grid lines, axis lines, and legends will be shown dynamically. However, efforts will be made to match their display to a normal chart wherever possible.



## Sort Order Property

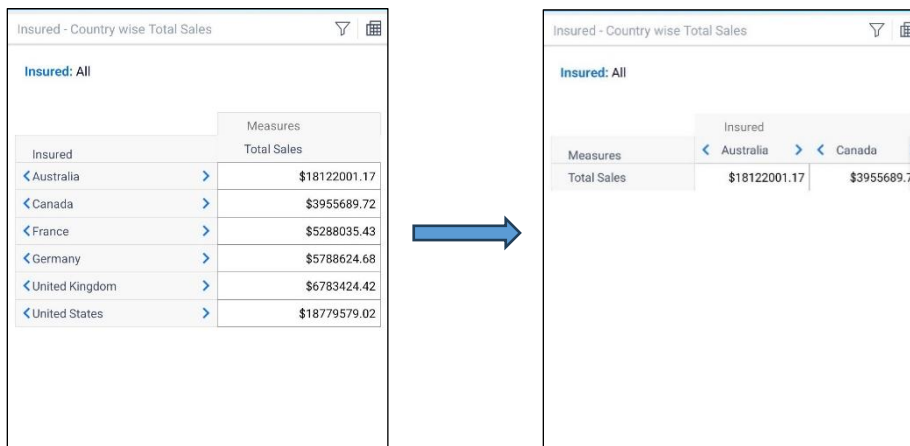
Sorting order settings performed on the Intellicus web application will be reflected as are mobile applications. This feature provides a streamlined and organized view of their data, ensuring a

consistent and intuitive platform experience. You need to set this property on the web application under **Sort Order**.



### View Swapped Axis

You can seamlessly access and visualize the modifications to the swapped axes on the web portal.





## Crosstab Styles

This enhancement ensures platform consistency, allowing you to explore data effortlessly with color-coded visual cues. Mobile applications support both default and custom styles.

### Note:

You must manually synchronize the report server on the mobile application server page to reflect any backend styling changes made to crosstab styles every time.

If highlighting or heatmap styles are applied, the color preferences specified in the highlight or heatmap settings take precedence.



Region	Measures
	Sales
< Alabama >	12,562.57
< Arizona >	26,391.71
< Arkansas >	7,895.12
< California >	357,847.56
< Colorado >	22,113.01
< Connecticut >	9,108.30
< Delaware >	22,323.29
< District of Columbia >	2,789.32
< Florida >	51,555.82
< Georgia >	33,766.40

## Widget Position

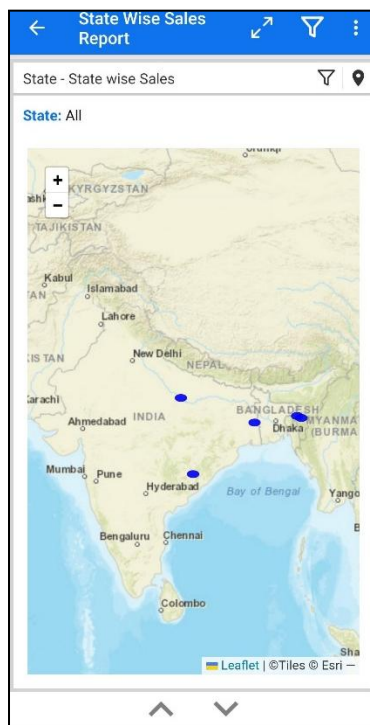
The Widget Position property in the Mobile Layout settings helps you position views as required for the mobile application interface. For example, if you enter the position as 4, the selected view will be displayed at the 4th position on the mobile application. The property is available at the view level.

## Crosstab Name on Popup

To view the full name of a crosstab, tap the crosstab name to open a popup.

## GIS Maps

With Intellicus mobile applications, you can seamlessly view GIS maps like on the web application. The mobile applications support 'Bubble' and 'Boundary' maps and associated map settings.

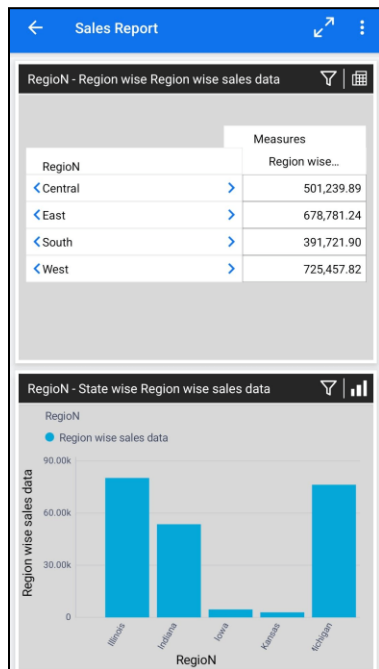


## Custom Colors

You can view custom colors for the following components:

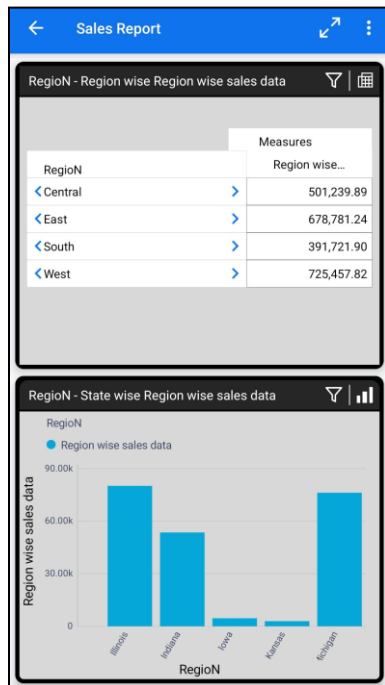
- Report canvas background
- View background
- View header font
- View header background
- View border
- Crosstab font

- Crosstab border



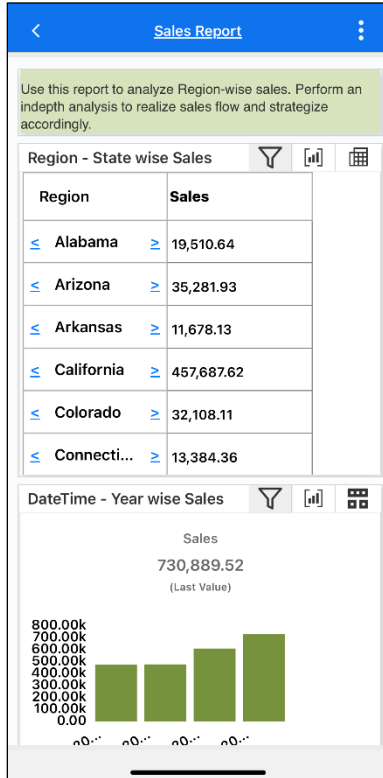
## View Border Radius

You can reshape the views' borders on the Web Portal and seamlessly view them on mobile applications. The view radius can be set to **Rounded**, **Less Rounded**, **More Rounded**, or **Square**.



## Rich Text Editor

With a rich text editor, you can add rich-formatted text, images, URL links, and HTML content and enrich reports with relevant contextual information and styling on the portal and visualize them seamlessly on the mobile application.



## Smart View and Ad hoc Reports

These reports list the filters and parameters on the top pane. You can change the respective values of these operations as you require.

Maximize or minimize the view by zooming in or zooming out.

From the Actions menu (:), **Add Comment** and **Email** the report to a required recipient and **Add to Favorites**.



## Standard Report

When you load a standard report, you can **Generate a Snapshot** or **Download a Recent Snapshot** of the report. Snapshots are the published instances of your reports. You can load it here if you recently published the Intellicus Web Server report. You can also generate a snapshot from your mobile device and view it. There is a limit to the maximum number of snapshots you can load. This limit can be configured in the mobile application settings option, with a maximum of 10.

Suppose there are any parameters or filters in a standard report. In that case, they are visible at the top of the report, and you can modify parameters or update filter criteria as per your requirements. However, you cannot change the field type in filters.

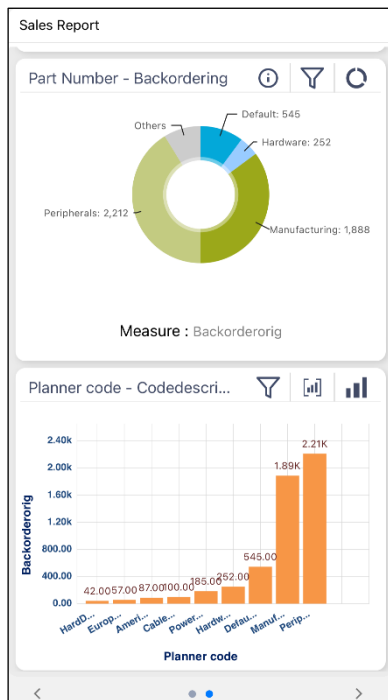
[illegible]

## Dashboards

**Note:**

© 2024 Intellicus Technologies. All rights reserved.

If your dashboards are not correctly loaded, a warning button appears. You can try reloading the dashboards or check your server and network connection to verify the connection is set correctly.



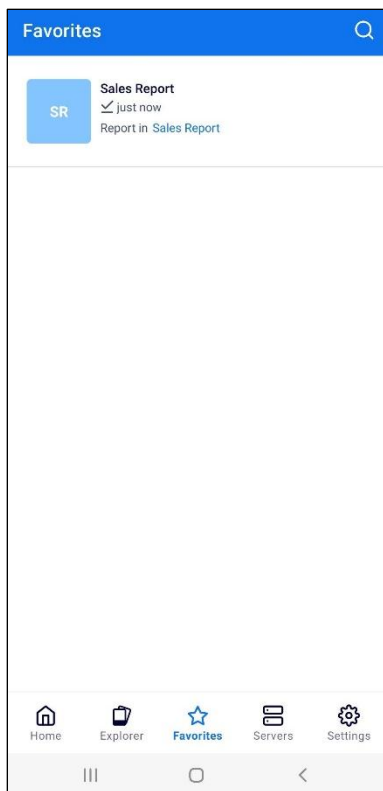
Reports/ Views are arranged in the form of widgets in a dashboard. You can view widgets in your dashboard using the arrow keys on the top left. If a single widget has multiple views, you can navigate various views using the arrow keys at the bottom of the screen.

Parameters and filters for high speed views are visible at the top of the Report/ View. You can modify them as needed.

From the **Actions** menu ( : ) at the top right corner, you can **Add Comments and** Email the findings to a required recipient. You can also add the dashboard to your **Favorites** to quickly access it from the favorites page.

## Favorites

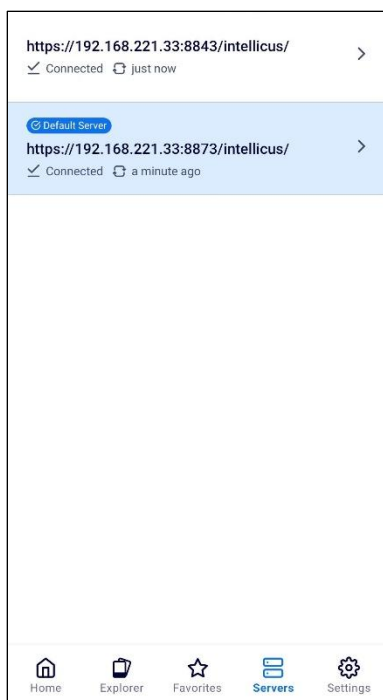
The Favorites page is a centralized hub for all entities marked as favorites. Here, you can effortlessly review a curated list of their preferred entities. This feature streamlines accessibility, enabling you to save time and effort by quickly locating and accessing their desired entities without navigating through the explorer. Tap the search button to look up the required entity. You can tap or left-swipe the entity to download it or mark it as unfavorite.





## Servers

The Servers page comprehensively lists all servers currently connected to the application. You can utilize various options on this page for server management. This includes updating any server as the default server or removing a server when necessary. These options ensure you can customize the server configurations efficiently based on their requirements. You can left-swipe any server to **Sync** or **Remove** it from this device. When you assign any server as the default server, you are automatically navigated to the **Home** page to view all the reports and objects associated with the default server.



## Settings

Mobile applications have various settings that help you set default values, change values, safeguard the application, and more. Tap the settings tab from the bottom to open the settings page.

Once you tap settings, the following options will appear:

### Security

**Enable Passcode**—By enabling a passcode, every time you open the application on mobile, you are prompted to enter a passcode to access the application. If you want to secure who can access the application on your device, keep this as **On**.

**Enable Encryption** – When you load your data on mobile, it gets saved on your device so you can analyze it offline. You can set this option to **On** to keep the data encrypted. If, by chance, your mobile device falls into the wrong hands, no one will be able to decipher your data, as it will be encrypted if you enable this option.

### Reports

In Standard reports, you can view saved snapshots (published instances of reports). Here, you can set the maximum snapshots your mobile device can hold. The minimum is 1, and the maximum that can be saved is 10.

**Enable IV values for reports** - Set this to **On** if you want to display the what-if independent variable values at the top of the report for reference. Set this to **Off** if you're going to hide the what-if independent variable values from the reports.

### Auto Update

Auto Update setting allows you to update data automatically -

#### **On View Report/ Dashboard**

To allow your report or dashboard to automatically update with the latest dataset from the Intellicus server every time you open them, set 'On View Report/ Dashboard' to On. By default, this option is set to **On**. Turn it **Off** if you want to update reports or dashboards manually.

### **On Parameter Change**

To allow your reports or dashboards to automatically update with every change in any parameter, set 'On Parameter Change' to **On**.

### **Device Information**

This setting displays the mobile device's unique ID, which acts as the device's identification on the Intellicus Web Server.

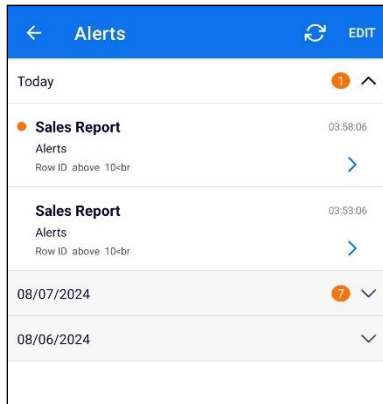
## Alerts and Push Notifications

The mobile application's alert feature keeps you updated with critical changes and anomalies in your data. Alert notifications are generated based on the highlight conditions you set.

Click the **Alert bell** icon from the top right.

The alerts associated with the connected server will open. Click the alert to view and investigate.

Click the **View Report** button to view and analyze the report.



### Push Notifications

Push alert notifications appear on the notification tray based on your subscription settings.

To view many alert notifications, click the notification.

The alerts screen in the Intellicus mobile application will open.

**Note:**

The administrator needs to configure the push notifications on the Intellicus web portal. The steps are described in the 'Configuring Notification Channels' document on the Intellicus documentation portal.

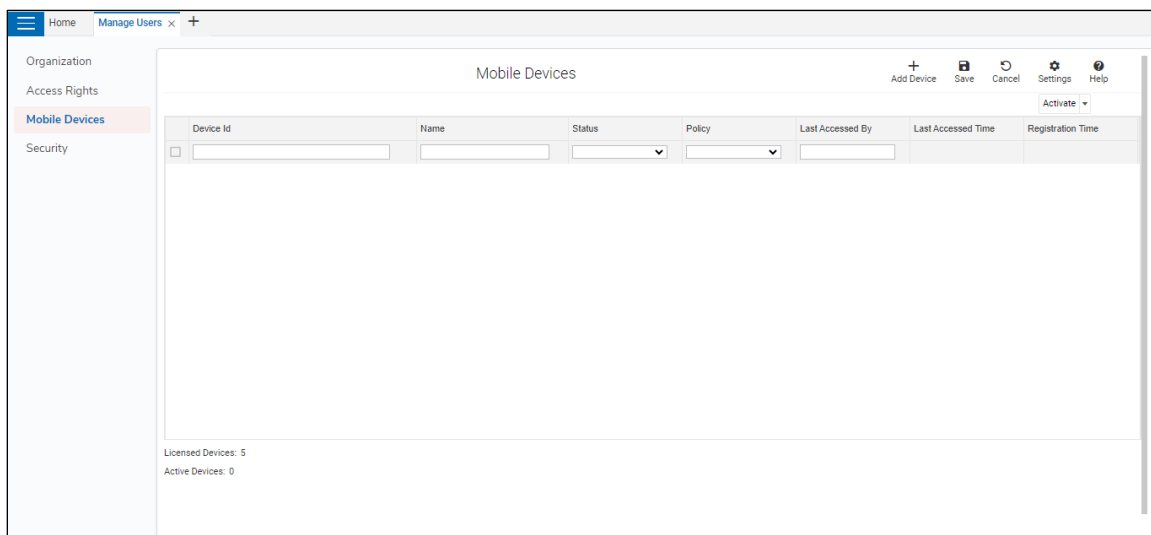
## Mobile Device Settings on the Portal

Intellicus Web Server administrators can manage the server's mobile device users through the web portal. In the **Manage Users** tab, they can add or delete a device, set the status of the device (Active, Pending, Blacklist, Delete), assign a mobile device policy, and view some basic information like last accessed by, last accessed date, and registration date. This helps the administrators to monitor and control the access given to the users on mobile devices.

To manage mobile devices,

Open the Intellicus web portal using the respective server credentials.

Go to **Navigate > Administration > Manage Users > Mobile Devices**



### Registration Mode

You can access these settings by tapping the setting button at the top right corner.

To begin with, the administrator can set if an incoming connection request from a device can –

**Automatically be added** (Registration Mode should be set to Automatic)

**Generate a request to add** (Registration Mode should be set to Request)

**Add manually** (Registration Mode should be set to Manual). If a device tries to connect to a server, an error message asks it to connect to report to the server administrator

Once you set the required registration mode, tap **Save**. You can add the devices automatically or manually to the server as needed.

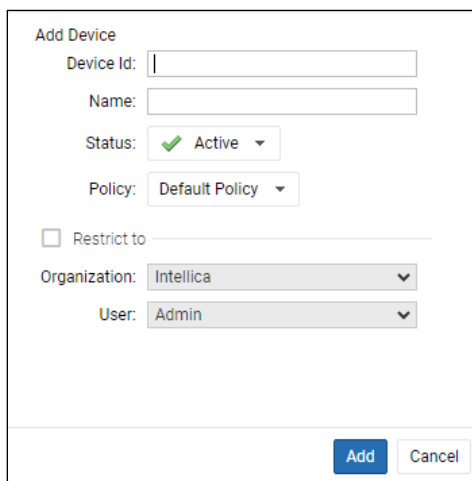
**Note:**

The number of devices that can be added to an Intellicus Web Server is license-governed. The maximum number of devices you can add is specified in your license. You can also view Licensed Devices information at the bottom of the page to know the maximum number of devices that can be added to this server.

## Add Devices

Whether you set registration mode to add devices or to any other value, administrator users can manually add devices to the Intellicus Web Server. To add a device, the admin must have the Unique Device ID of the Intellicus mobile application on that device.

Tap **Add Device** on the Mobile Devices page.



The screenshot shows a modal window titled "Add Device". It contains the following fields and controls:

- Device Id:** A text input field.
- Name:** A text input field.
- Status:** A dropdown menu with a green checkmark icon and the text "Active".
- Policy:** A dropdown menu with the text "Default Policy".
- Restrict to:** A checkbox that is currently unchecked.
- Organization:** A dropdown menu with the text "Intellica".
- User:** A dropdown menu with the text "Admin".
- Buttons:** At the bottom right, there are two buttons: "Add" (in blue) and "Cancel" (in white).

You need to input the **Unique Device ID** in the **Add Device** window. You need to provide a Name of your choice for this device. Set the Status to Active, Pending, or Blacklist, and set a Policy for this device.

Select the **Restrict to** checkbox to restrict this device's user access to a specific organization in the Intellicus portal and mobile application.

In Intellicus, you can create different organizations for users based on departments, roles, etc. If you restrict a mobile device user ID to a specific organization, the user can only view the allowed content for that organization's users.

You can also specify a user type identifying the device user as an administrator, designer, or business user.

Tap **Add** once you input the required values.

### View and Manage Added Devices

You can view the list of devices added to the Intellicus server on the mobile devices page. You can search for the required device information if the list is long. You can search by device ID, name, status type, policy, or last accessed by. The list shows the devices based on the search criteria you input in the search boxes (these are visible below each field's heading).

For instance, if you enter a policy name in the policy name search box, all the devices with the respective policy are listed.

You can change the status or policy assigned to a device in the list view. You can also change the status of multiple devices at once by selecting the respective devices from the left pane and selecting a status from the status option present at the left of the registration mode option.

If you want to delete a device, select it, change its status to **Delete**, and select **Save**.

Tap **Save** once you make the required changes.

## Configuring Mobile Device Policy

The mobile applications can be managed on the Intellicus Web Server, the server to which you connect your mobile application. Admin users or users with specific privileges on the demo server can manage the devices that send connection requests. They can provide role-based access to different entities (reports, datasets, dashboards, etc.) in mobile applications, set some security measures, and limit the scope of usage. The Unique Device ID identifies the mobile applications on the Intellicus Web Server.

### Properties

Intellicus Web Server allows you to create a **Mobile Device Policy** under **Properties**. The policy helps to set authentication guidelines and what actions are supposed to happen to the data in mobile devices in case a user is -

#### **Suspended**

#### **Deleted**

**The user's access is revoked on this server.**

The policy can then be assigned to different devices that users must follow.

To create a mobile device policy –

Open the Intellicus Web portal using the respective server credentials.

Go to **Navigate > Administration > Configure > Mobile Device Policy**

On this page, you can **Add** a new policy, **Modify** an existing policy, or **Delete** a policy.

To add a new policy, tap **Add**.

The fields under Properties have now become active. You need to give this policy a name in the **Policy Name** textbox.

### Authentication

**Mandate Passcode**—You can set this to Yes if you want the devices under this policy to always provide a passcode to access the content in the Intellicus mobile application.

**Server Authentication**—You can set this to Always if you want the server to authenticate devices whenever a connection request is sent.

If you want the server authentication done for a period, you can set this to Valid and specify the number of days. Any connection request sent through devices for the selected days under this policy must first authenticate on the server.

If you want to allow a free pass, set this to Never.

**Session Timeout (seconds)**—If you have set the Mandate Passcode to Yes, the Session Timeout option will be enabled. Here, you need to provide the time of user inactivity, after which the mobile app session will time out, and the app will lock itself.



### **Actions on User Update**

When a mobile device user status is updated, that is -

**The user is suspended.**

**The user's access is revoked.**

**The user is deleted from the server.**

You can specify what actions must be taken on the local mobile data. You can set the values to Delete, Hide, or No Action, as per your preference. If a user is deleted, you can set the action to Delete or No Action.

Once you input values in the above fields, you can **Save** or **Cancel** it.