



Working with Mobile App

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Disclaimer

This document is intended to support administrators, technology managers or developers using and implementing Smarten. The business needs of each organization will vary and this document is expected to provide guidelines and not rules for making any decisions related to Smarten. The overall performance of Smarten depends on many factors, including but not limited to hardware configuration and network throughput.

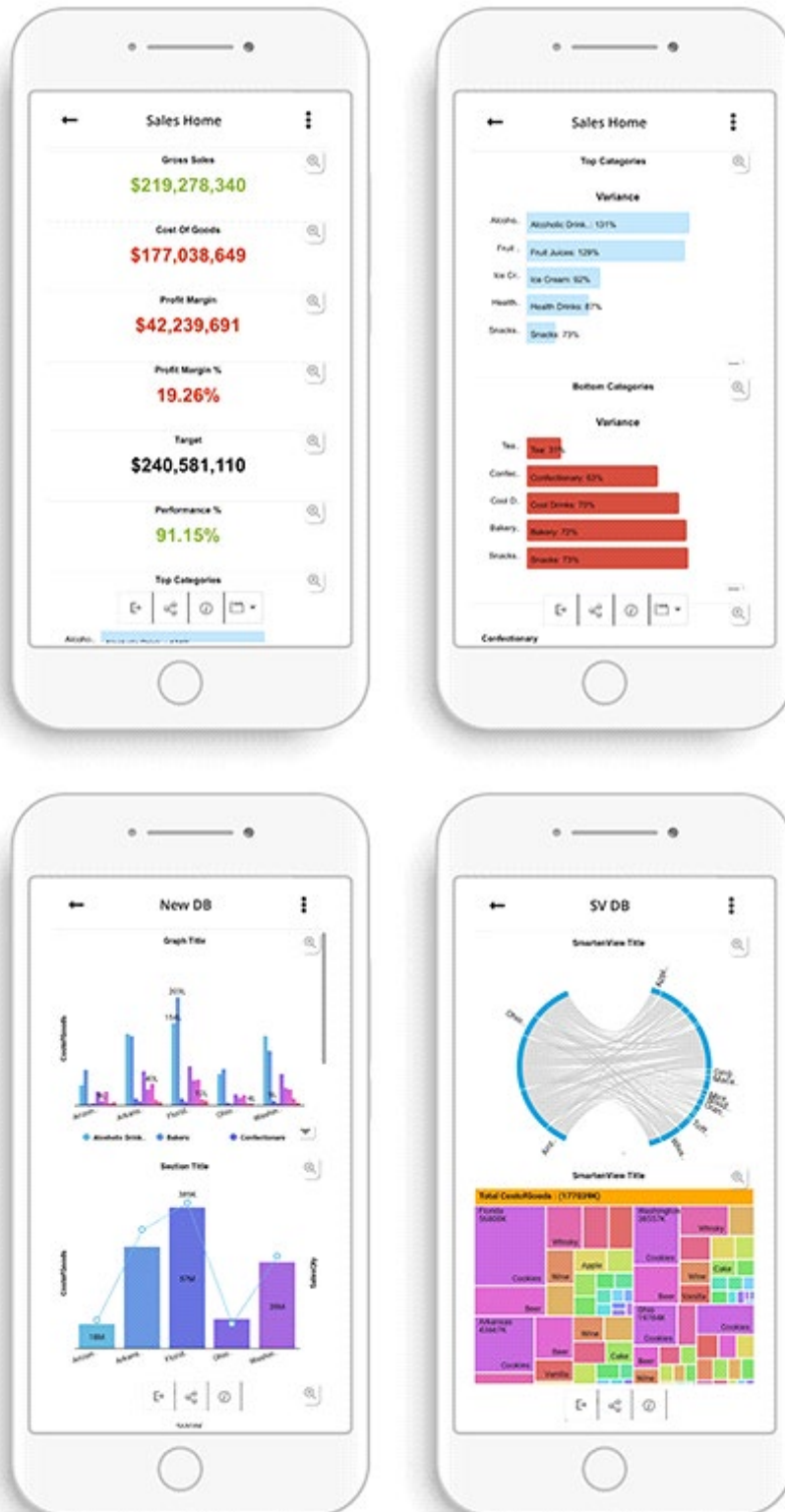
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1 Introduction

Smarten mobile app is a native app for the Smarten Augmented Analytics platform that is available on both Android and iOS platforms. Users can log in to the mobile app using their Smarten credentials and have access to their BI objects as per access rights. Users can also export and share any BI objects, including dashboard and reports.

The Smarten mobile app enables users to access Smarten analytics on the go and from anywhere.



SMARTEN MOBILE APP

2 How it works

- Smarten Mobile App communicates with the Smarten server using secure web APIs depending upon the configured communication channel, i.e., HTTP or HTTPS protocol. If HTTPS is configured on the Smarten server, the Smarten Mobile App will communicate with the Smarten server on a secure HTTPS channel.
- To access the Smarten Mobile App, the user must log in using a secured ID and password. Mobile app user authentication is based on the authentication method configured on the Smarten server. Authentication methods and user credentials are the same for the Smarten Mobile App and for the Smarten web interface and employ Smarten proprietary default authentication, enterprisewide authentication methods using directory services such as AD and LDAP, and custom authentication using Single sign on (SSO).
- The Smarten Mobile App is secure. It does not store or share the user identity or related data or transfer data to third-party systems. The Smarten Mobile App does not store dashboard or report data on the user's local mobile device or on third-party apps.
- Administrators do not need to separately configure and allow access to Smarten Mobile App users for dashboards, reports, and other Smarten objects. All access rights and privileges defined on the Smarten enterprise server will also be used by the Smarten Mobile App as is, and there is no need to have separate access rights management for Mobile app users to manage BI objects access rights for Mobile app users.

Please go through the FAQ section of the Mobile BI page on Smarten.com for more details on how it works and other related information.

3 Assigning Mobile App access to a user

A user needs to have the required permissions to log in to the Smarten Mobile app. Smarten administrator provides the required permissions to the users.

Note:

Smarten Mobile App access rights are add-on access rights to existing BI users.

Procedure

1. Log in to Smarten as an administrator.
2. Click **Administration** from the menu.

Smarten

Welcome shyam

Open

New

Publishing agent

TeamUp

Edit profile

Administration

Logout

About us

Network speed (1.13 MBps)

Recently used

- Sales Home
- Sales Contribution
- Geomap - test
- Brokerage - Ins Brokerage
- Branch Analysis - Ins Brokerage
- Production Costing
- 01 Manufacturing- Main
- Capacity Utilization
- GeoMap
- Conversions

My folders

Repository

TeamUp

Self Serve Data Preparation

SMARTEN MENU—ADMINISTRATION OPTION

- Expand the **Security & permissions** node and click **User type**.

Smarten

Administration

Configuration

Datasources

Cube management

Dataset management

Report management

Repository

Scheduler

Security & permissions

- Security provider configuration
- Access rights policy
- Roles
- User groups
- Users**
- User type
- Anonymous public access configuration

TeamUp

Logs

Environment information

LICENSE INFORMATION

Version: 5.3.0.019

Licensed to: Smarten AWS Demo Server [Evaluation Version]

Number of users: Unlimited

	POWER USERS	USERS	PUBLISH ONLY USERS	SSDP	PREDICTIVE POWER	PREDICTIVE VIEW ONLY	MOBILE APP USERS	OBJECTS WITH PUBLIC ACCESS
BI	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	100	0

Number of admin users: Unlimited

Maximum Records Limit: Unlimited

Number of Datasource(s): Unlimited

API Access: Yes

Mac address: 0a:a3:44:a0:b0:e8

Expiry date: No Expiry

REFRESH LICENSE INFORMATION

JAVA VIRTUAL MACHINE

Java version: 1.8.0_161

Java home directory: /usr/lib/jvm/java-8-oracle/re

Maximum memory: 12 GB (-Xmx)

Used memory: 12 GB (-Xms)

SECURITY AND PERMISSIONS—USER TYPE OPTION

- Select the checkbox under the **MOBILE APP ACCESS** column for the users you want to grant permission to in order to access Smarten through the Smarten Mobile app.

Smarten

Administration

Configuration

Datasources

Cube management

Dataset management

Report management

Repository

Scheduler

Security & permissions

Security provider configuration

Access rights policy

Roles

User groups

Users

User type

Anonymous public access configuration

TeamUp

Logs

User type

Search [] All roles [] All groups [] All []

PERSON NAME	EMAIL ID	DEPARTMENT NAME	ADMINISTRATOR [23]	POWER USER [18]	USER [9]	PUBLISH ONLY USER [1]	NONE [0]	SSDP [39]	SMARTENINSIGHT	MOBILE APP ACCESS [10]
AayushShah	aayush@smarten.com		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ajit	st@gmail.com		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Akash	Alpha@gmail.com	AKS Group	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ambrose	a.raj@kr.com		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Arbuda	arbuda@smarten.com		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SAVE

USER TYPE—MOBILE APP ACCESS PERMISSION

- Click **Save**.

4 Installing and Configuring Mobile App

You can download and install the Smarten mobile app from the Google Play store and Apple App Store. After the app is downloaded and installed, you need to log in and configure the app.

Procedure

- Open the Smarten Mobile App.
- Enter the Smarten URL that you want to access.
You must enter the fully qualified URL of the Smarten server of your organisation. The Smarten server must be accessible through the internet from your mobile device. For example, 'https://bi.yourcompany.com/smarten'.

← Smarten Setup

Smarten URL

<https://demo.smartent.com/smarten>



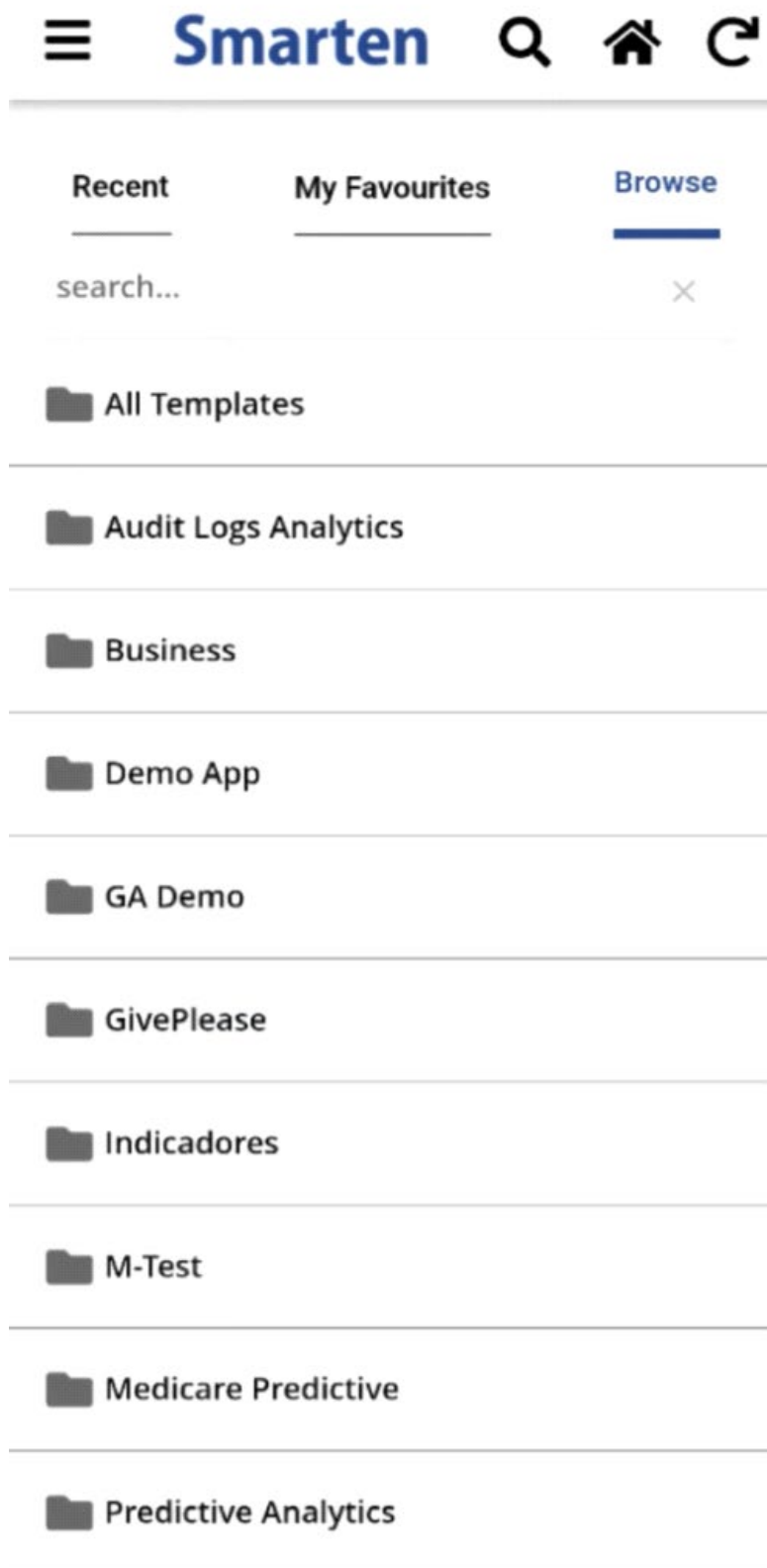
I have read and agreed to the [Terms of Smarten EULA](#)

Submit

For assistance, please contact your Smarten Administrator.

SMARTEN MOBILE APP—SPECIFY SMARTEN URL

3. Tap **Submit**.
4. Enter your login credentials, and tap **Sign In**. You can use the same credentials that you use to access the web interface of Smarten.
The Smarten mobile app landing screen is displayed.

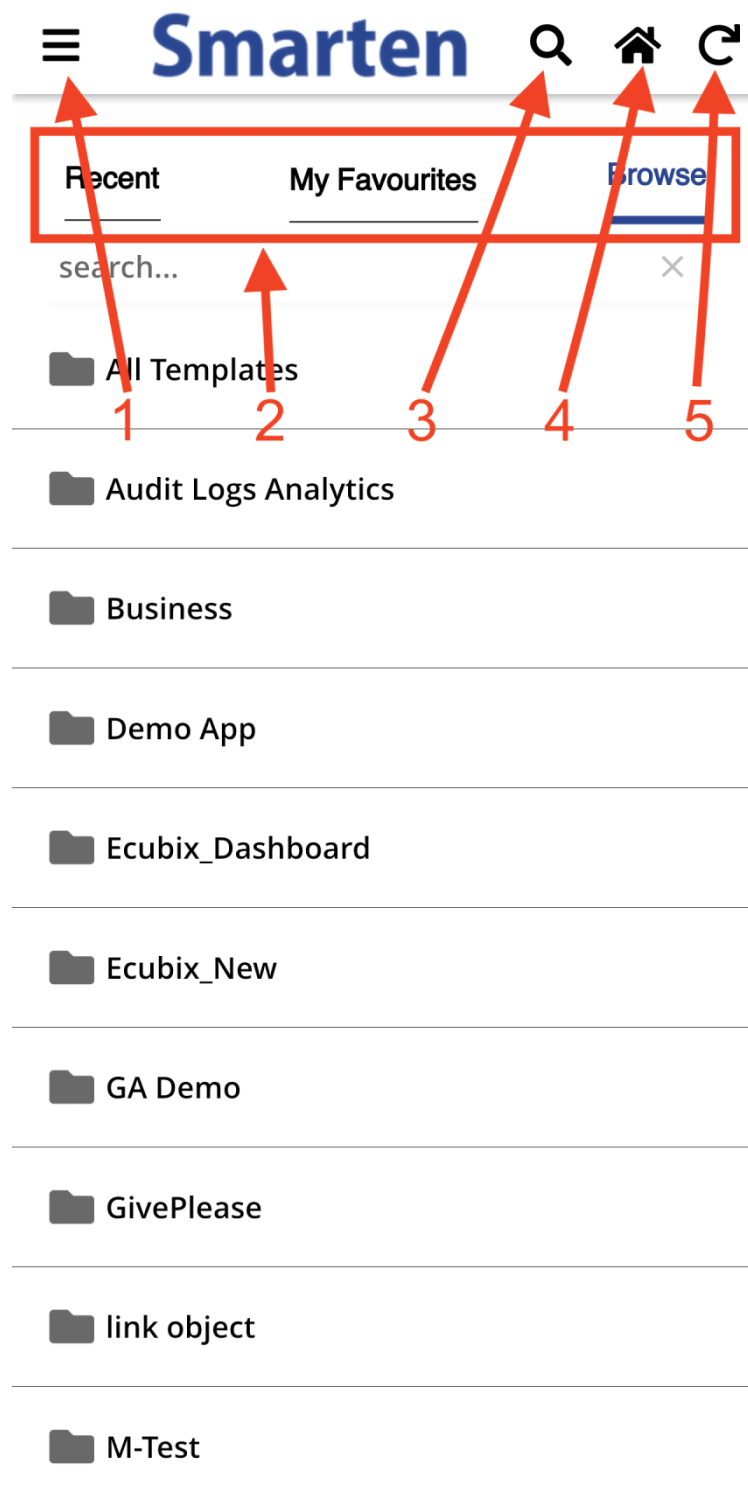


SMARTEN MOBILE APP—LANDING SCREEN

5 Smarten Mobile App user interface

This section provides Smarten mobile app user interface overview.

5.1 Overall navigation



SMARTEN MOBILE APP—INTERFACE

Element	Description
1	Menu contains options to navigate to the home screen, browse objects, configure Smarten URL, about Smarten mobile app, and sign out.
2	Recent, My Favourites, and Browse tabs allow you to browse objects.
3	The search option allows you to access the NLP search (Clickless analytics) feature.
4	The home button displays the object that you have marked as home. If home page is not set, then it will show the Browse objects page.
5	The refresh button refreshes the current screen.

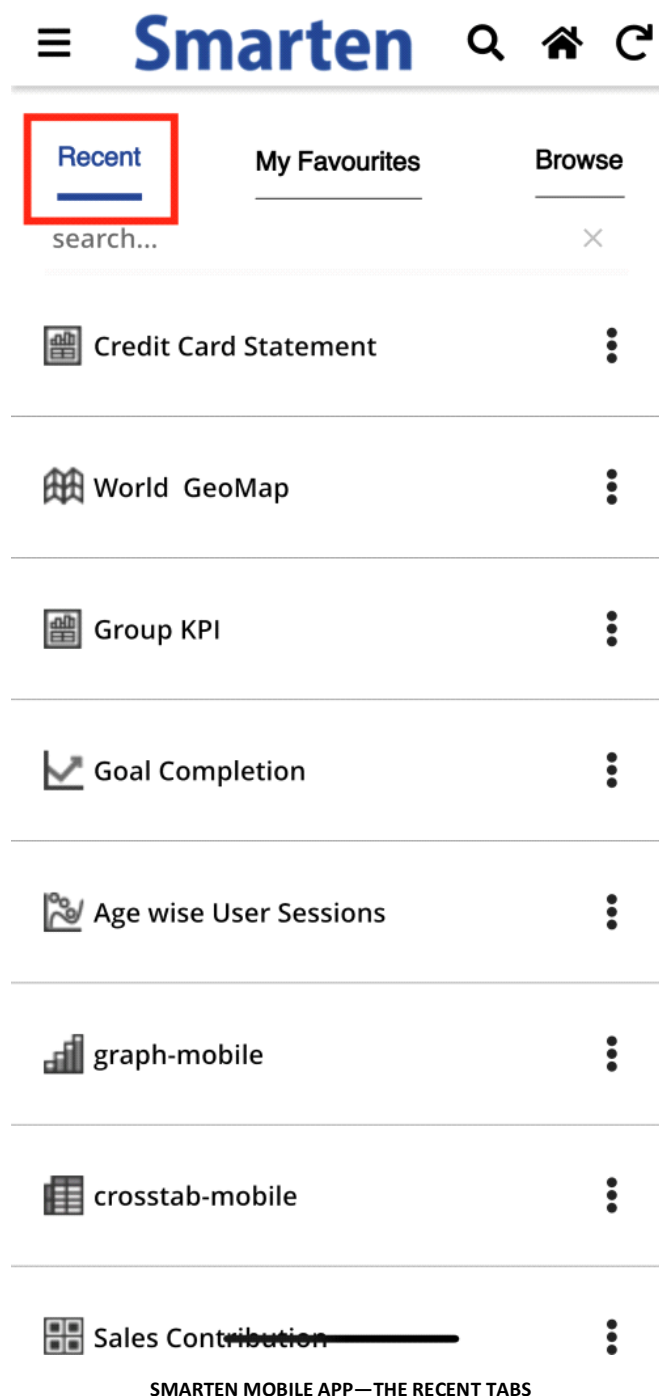
5.2 Browse objects

The Smarten mobile app provides many ways to browse objects. Users can use any of the following options to browse an object:

- Recent—Displays the objects you have recently viewed
- My Favourites—Displays a list of objects that you have marked as favourite
- Browse—Displays the Smarten repository that allows you to browse for an object from the entire repository

5.2.1 Recent Tab

The **Recent** tab displays the objects that you have viewed recently.



SMARTEN MOBILE APP—THE RECENT TABS

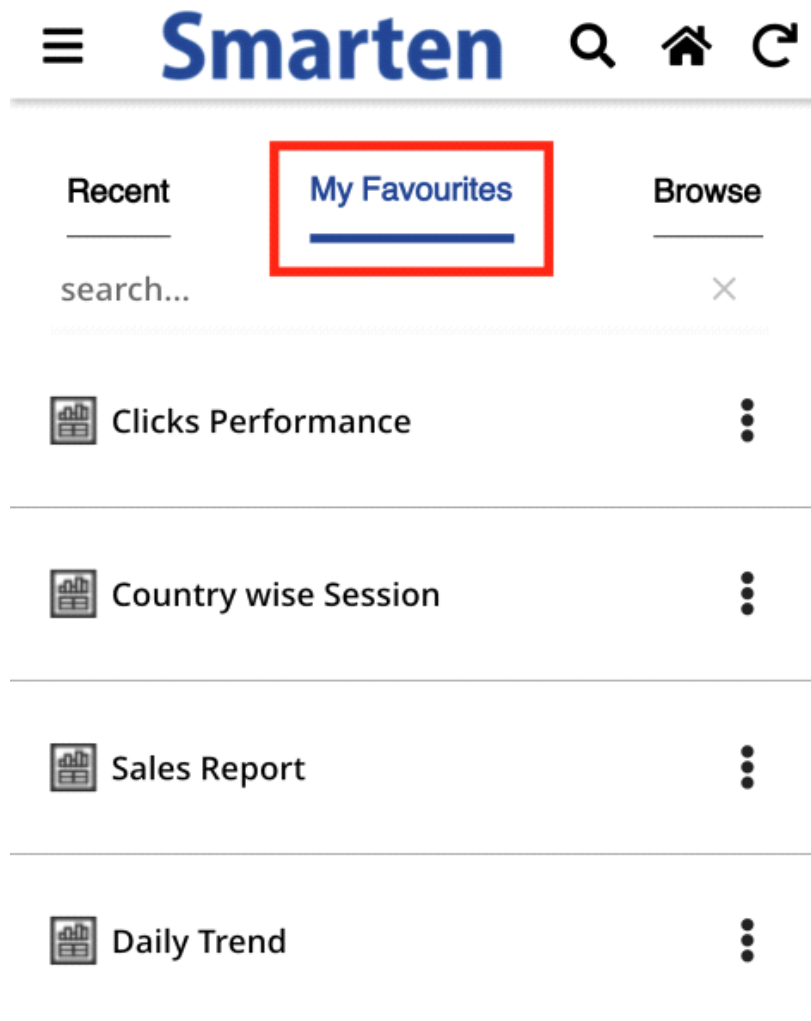
You can perform the following actions on the objects listed in the **Recent** tab:

- **Mark as Home:** Use this option to display that object on the home page.
- **Mark as Favourite:** Use this option to mark the object as favourite.
- **Remove from Favourite:** Use this option to remove the object as a favourite.

You can also search for an object by its name within the tab.

5.2.2 My Favourites Tab

The **My Favourites** tab displays the objects that you have marked as favourite.



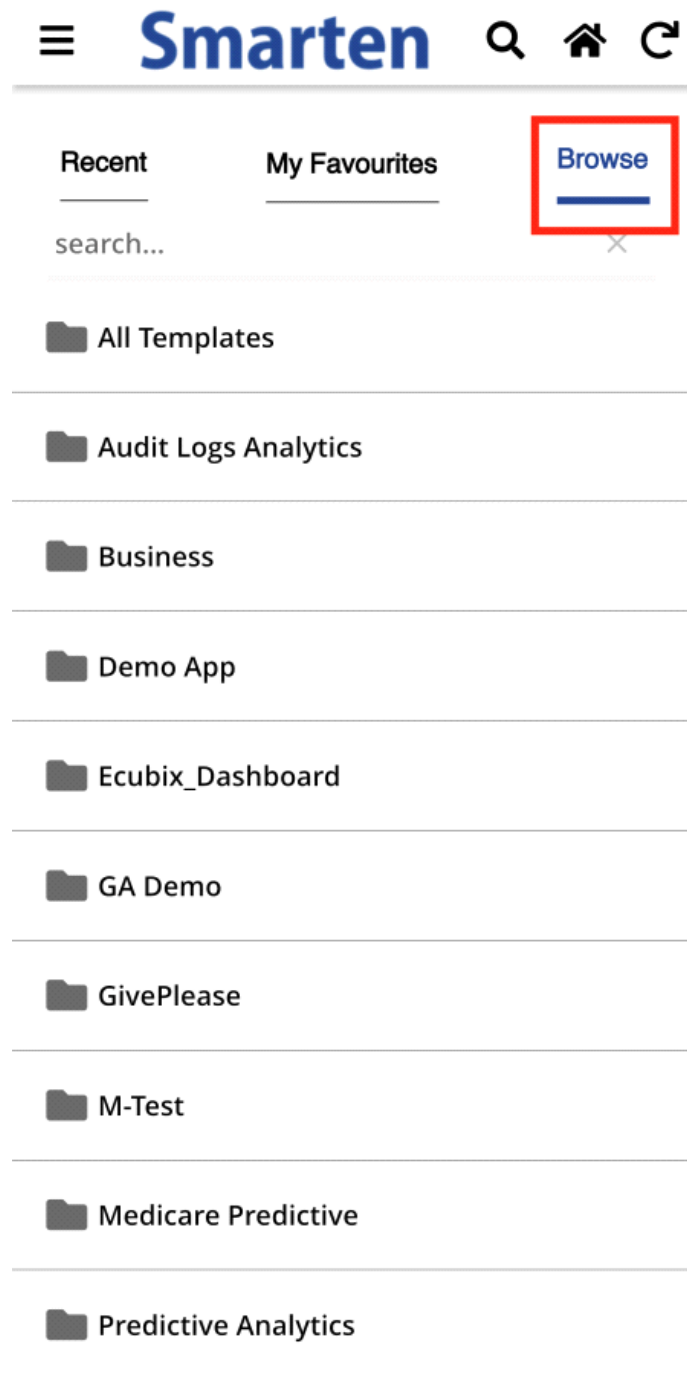
You can perform the following actions on the objects listed in the **Recent** tab:

- **Mark as Home:** Use this option to display that object on the home page.
- **Remove from Favourite:** Use this option to remove the object as a favourite.

You can also search for an object by its name within the tab.

5.2.3 Browse Tab

The **Browse** tab allows you to browse objects from the Smarten repository.



SMARTEN MOBILE APP—NAVIGATION TABS

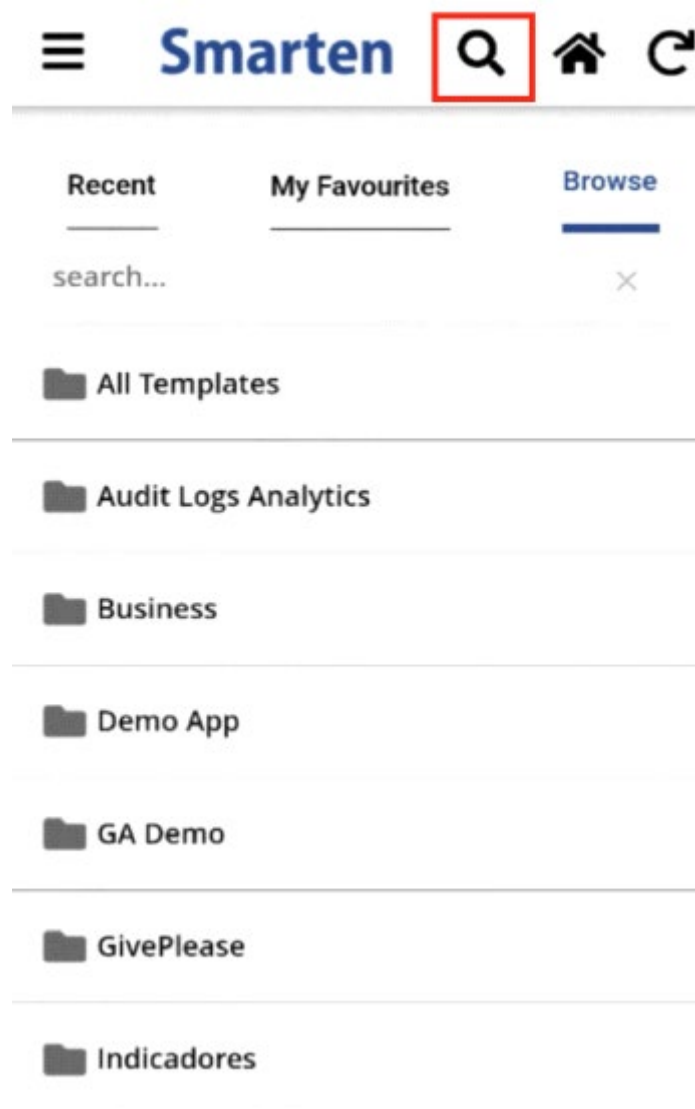
You can perform the following actions on the objects listed in the **Recent** tab:

- **Mark as Home:** Use this option to display that object on the home page.
- **Mark as Favourite:** Use this option to mark the object as a favourite.
- **Remove from Favourite:** Use this option to remove the object as a favourite.

You can also search for an object by its name within the tab.

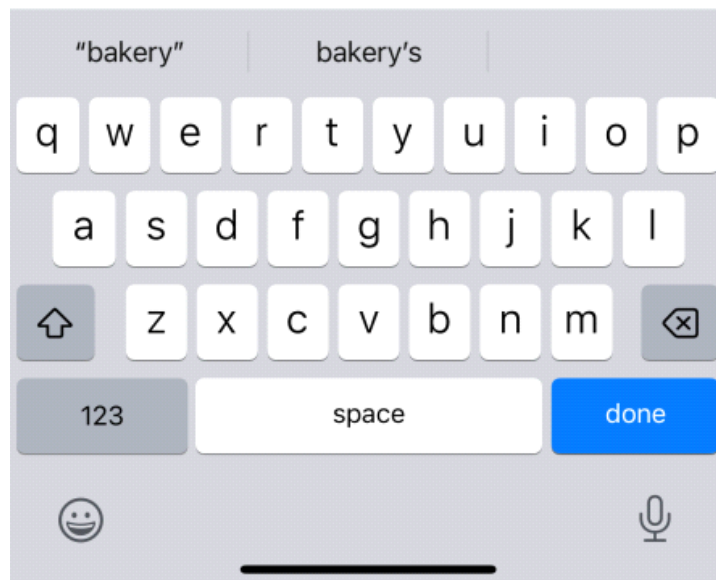
5.3 Clickless Search option

The Clickless search option on the landing screen allows you to search for particular data based on Natural Language Processing (NLP) queries.



SMARTEN MOBILE APP—THE SEARCH BUTTON

The search option displays the recommendations as you type the query in the field.



BROWSE OBJECT: THE SEARCH FIELD

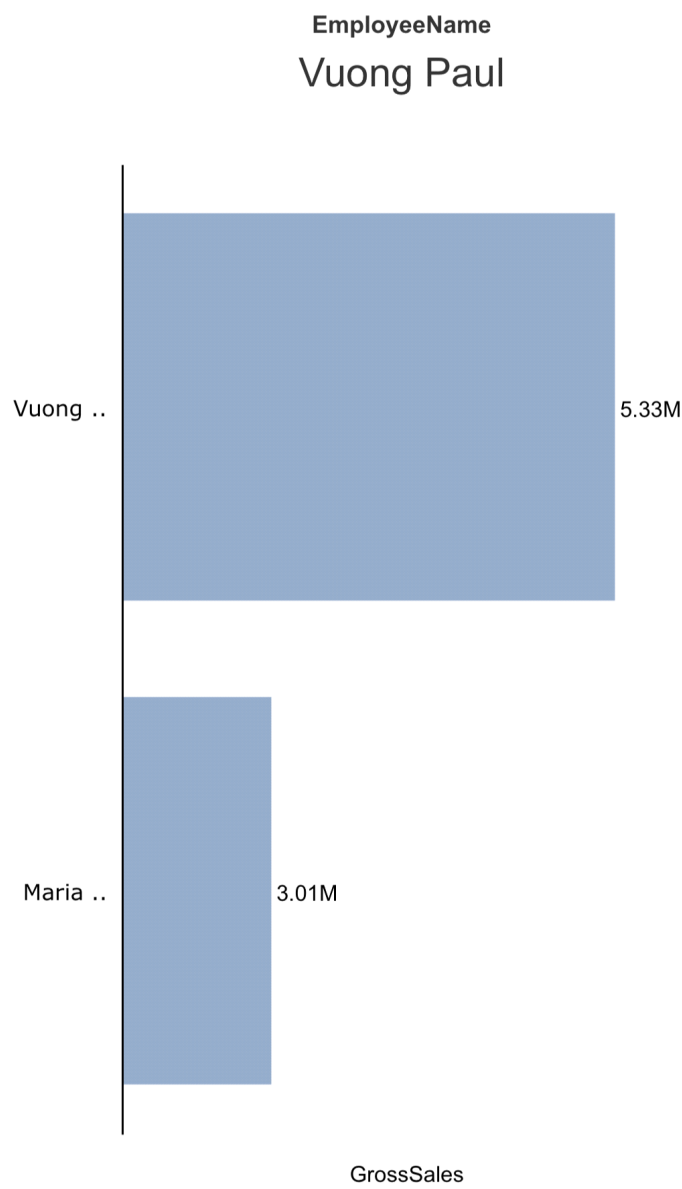
←

Search

⚙

who sold highest bakery in Arizona

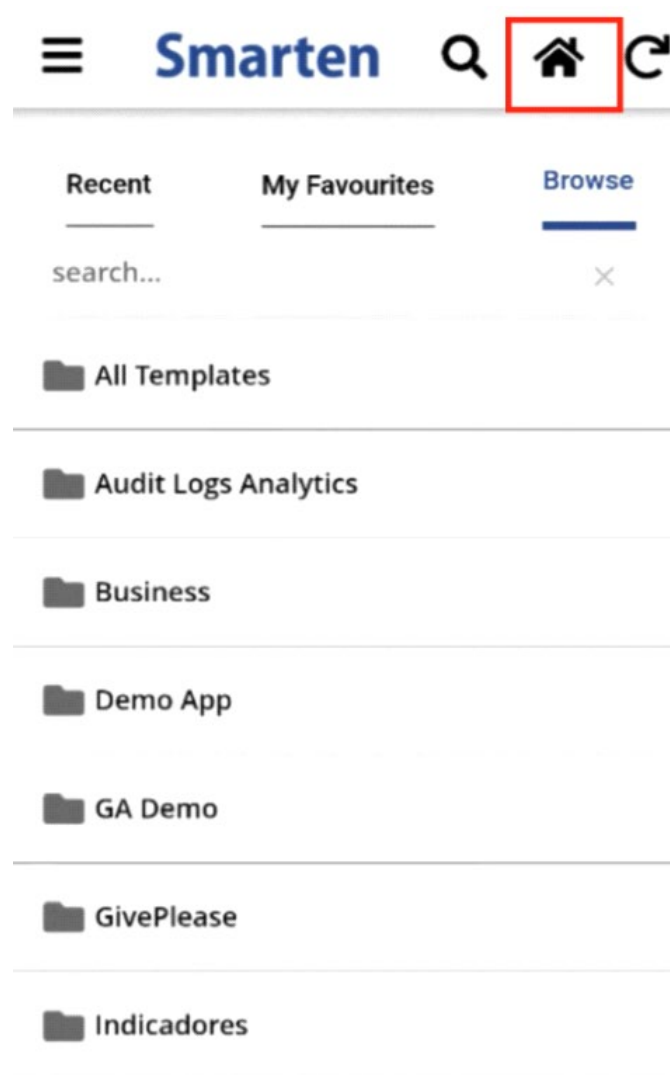
×



BROWSE OBJECT: THE SEARCH RESULT

5.4 Home

The Home button displays the object that you have marked as home. If you have not marked any object as home, the **Browse** tab is displayed. If an object is marked as home, that object is displayed when you log in to the application or tap on the home button.



SMARTEN MOBILE APP—THE HOME BUTTON

6 Viewing Smarten objects

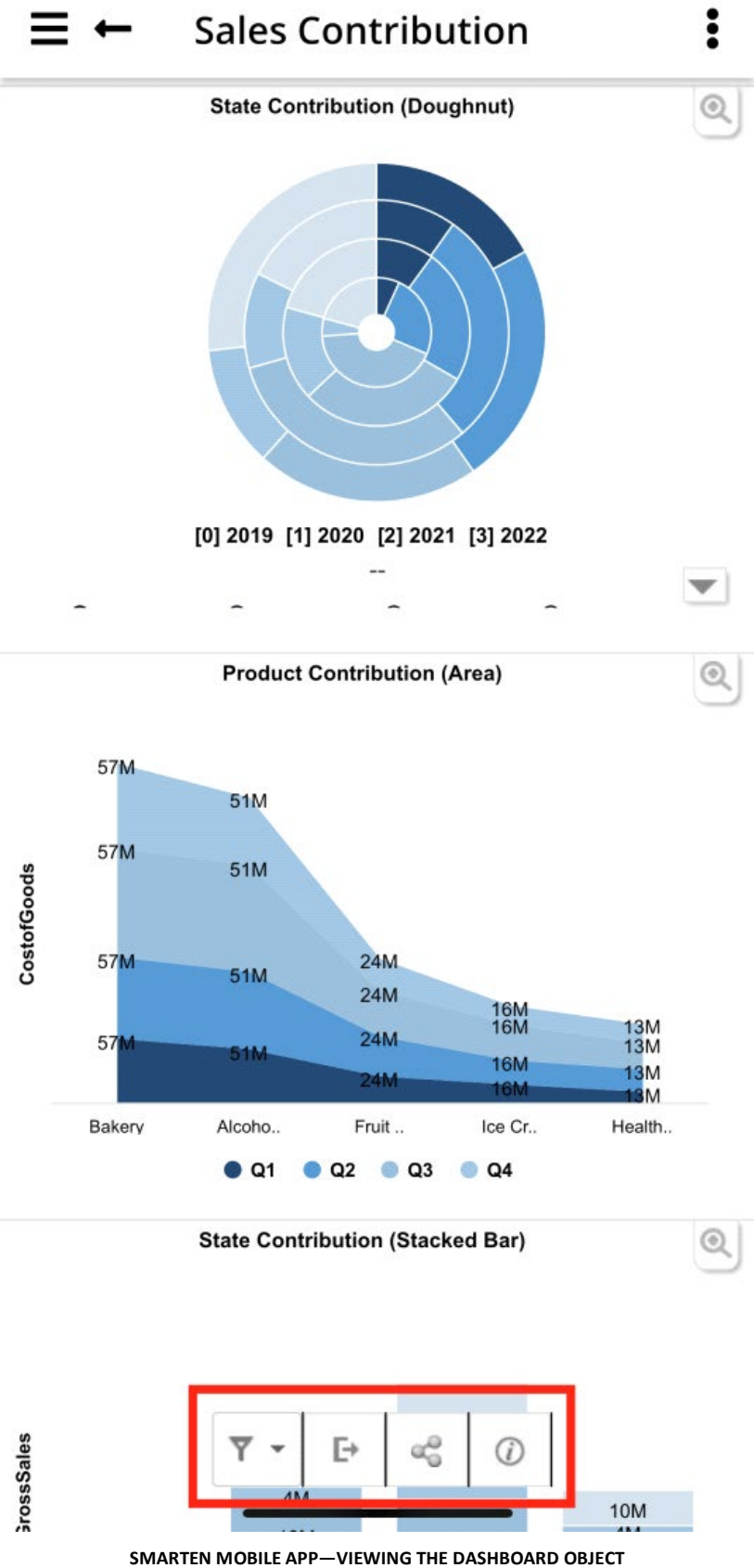
You can tap on an object to view that object. Once the object is opened, you can perform various operations on that object.

Note:

Some of the operations and interactions available on the Smarten Web Application may not be available in the Mobile app.

In the mobile app, Export and Share features are available based on the Export permissions given to the user on a particular object.




6.1 Viewing Dashboard objects









You can perform the following operations on the dashboard object in the Smarten mobile app:

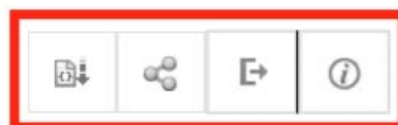
- **Filter:** Use this option to filter the data that is used by the object.
- **Export:** Use this option to export the object as JPG, PNG, PDF, XLS, and XLSX on the mobile device.
- **Share:** Use this option to share the object through another mobile application.
- **Information:** Use this option to view information about the object.
- **Ellipsis menu:**
 - **Mark as Home:** Use this option to display the home page with the object that is marked as home.
 - **Mark as Favourite:** Use this option to display the list of objects that are marked as favourites. If an object is already marked as favourite, the **Remove from Favourite** option is displayed for the object.
- **Zoom button:** Use this option to zoom the dashboard object and display it in full screen.
- **Show/Hide legends:** Use this option to display or hide the legends of a dashboard. In some cases, a few of the legends of a dashboard are displayed. In such cases, you can use this option to view all the legends.

6.2 Viewing Crosstab objects



crosstab-mobile


City	Health Drinks	Ice Cream	
	GrossSales	GrossSales	
Phoenix	216962.54	2014328.09	
Scottsdale	1071165.70	1441359.62	
Summary	1288128.24	3455687.72	
Conway	2983533.85	3726064.19	
Springdale	1316997.71	1845175.32	
Summary	4300531.56	5571239.51	
Lakeland	1871674.11	1413301.69	
Orlando	3812892.50	4160919.59	
Summary	5684566.61	5574221.29	
Cleveland	980335.95	1384363.92	
Dayton	1016454.75	1275467.03	
Summary	1996790.71	2659830.95	
Redmond	1825108.10	1710058.70	
Seattle	2308342.18	2304633.24	
Summary	4133450.28	4014691.94	
	17403467.39	21275671.40	



SMARTEN MOBILE APP—VIEWING THE CROSTAB OBJECT

You can perform the following operations on the crosstab object in the Smarten mobile app:

- **Retrieval parameters:** Use this option to select the retrieval parameters for the object.
- **Share:** Use this option to share the object through another mobile application.
- **Export:** Use this option to export the object as JPG, PNG, PDF, XLS, and XLSX on the mobile device.
- **Information:** Use this option to view information about the object.
- **Ellipsis menu:**
 - **Mark as Home:** Use this option to display the home page with the object that is marked as home.
 - **Mark as Favourite:** Use this option to display the list of objects that are marked as favourites. If an object is already marked as favourite, the **Remove from Favourite** option is displayed for the object.
- **Left:** Use this option to view the columns on the left.
- **Right:** Use this option to view the columns on the right.
- **Up:** Use this option to view the rows at the top.
- **Down:** Use this option to view the rows at the bottom.

6.3 Viewing Tabular objects

FG Inventory Analysis

Item_Unit	Mar	
	SalesQty	Closing Stock
Job Work - Oil Cleaning	3,500.00	6,598.00
Job Work - Water	2,600.00	0.00
Electric Media For EOC-	64.00	521.00
Electric Media For	82.00	34.00
Machine - Model: A1001	17.00	0.00
Jobwork AMC Monthly	33.00	0.00
Machine - Model: B2002	18.00	0.00
Electric Media For EOC-	52.00	381.00
Machine - Model: C3002	19.00	0.00
MG BP Orange - L (Kg.)		
0.8 Micron X 25mm Dia.	17.00	45.00
Gasket For VT-04 (Nos.)	0.00	7.00
MG. Green GN-3702		
Other	24.00	23,487.00

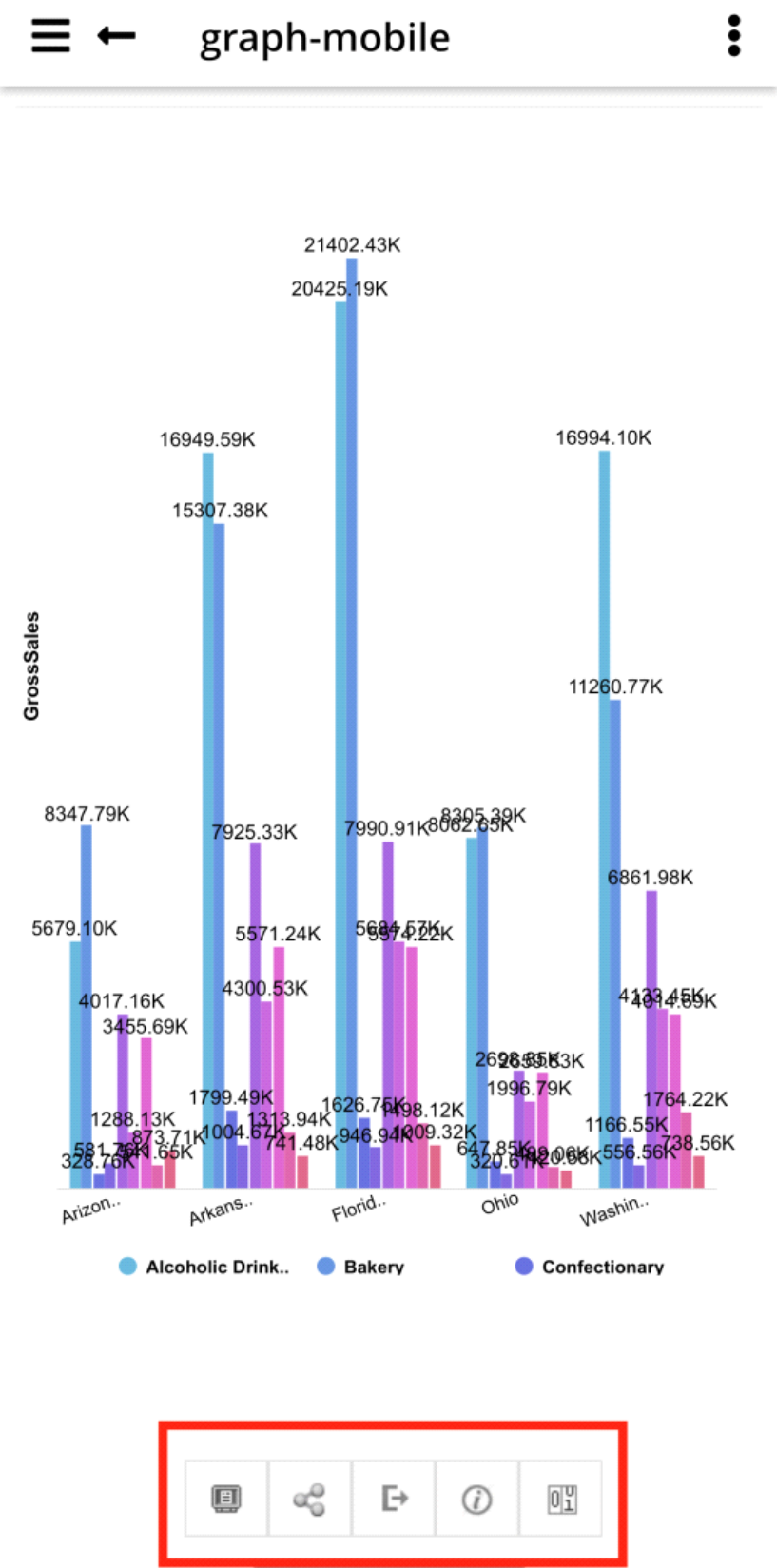


SMARTEN MOBILE APP—VIEWING THE TABULAR OBJECT

You can perform the following operations on the tabular object in the Smarten mobile app:

- **Filter:** Use this option to filter the data that is used by the object.
- **Share:** Use this option to share the object through another mobile application.
- **Export:** Use this option to export the object as JPG, PNG, PDF, XLS, and XLSX on the mobile device.
- **Information:** Use this option to view information about the object.
- **Ellipsis menu:**
 - **Mark as Home:** Use this option to display the home page with the object that is marked as home.
 - **Mark as Favourite:** Use this option to display the list of objects that are marked as favourites. If an object is already marked as favourite, the **Remove from Favourite** option is displayed for the object.
- **Left:** Use this option to view the columns on the left.
- **Right:** Use this option to view the columns on the right.
- **Up:** Use this option to view the rows at the top.
- **Down:** Use this option to view the rows at the bottom.

6.4 Viewing Graph objects

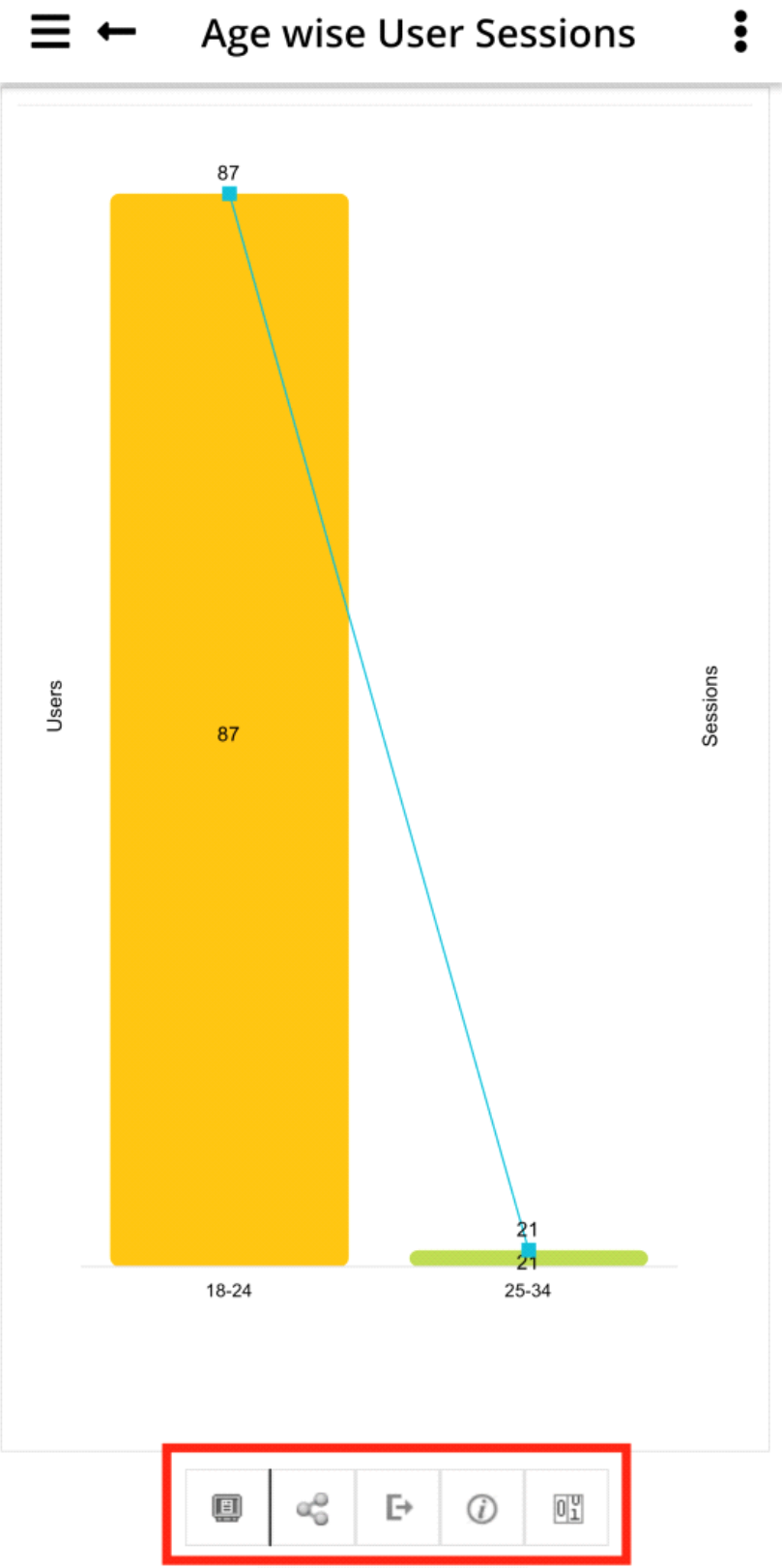


SMARTEN MOBILE APP—VIEWING THE GRAPH OBJECT

You can perform the following operations on the graph object in the Smarten mobile app:

- **Graph data:** Use this option to view graph data of the object.
- **Share:** Use this option to share the object through another mobile application.
- **Export:** Use this option to export the object as JPG, PNG, PDF, XLS, and XLSX on the mobile device.
- **Information:** Use this option to view information about the object.
- **Show all values:** Use this option to show all values in the graph object.
- **Ellipsis menu:**
 - **Mark as Home:** Use this option to display the home page with the object that is marked as home.
 - **Mark as Favourite:** Use this option to display the list of objects that are marked as favourites. If an object is already marked as favourite, the **Remove from Favourite** option is displayed for the object.
- **Show/Hide legends:** Use this option to display or hide the legends of a dashboard. In some cases, a few of the legends of a dashboard are displayed. In such cases, you can use this option to view all the legends.

6.5 Viewing SmartenView objects

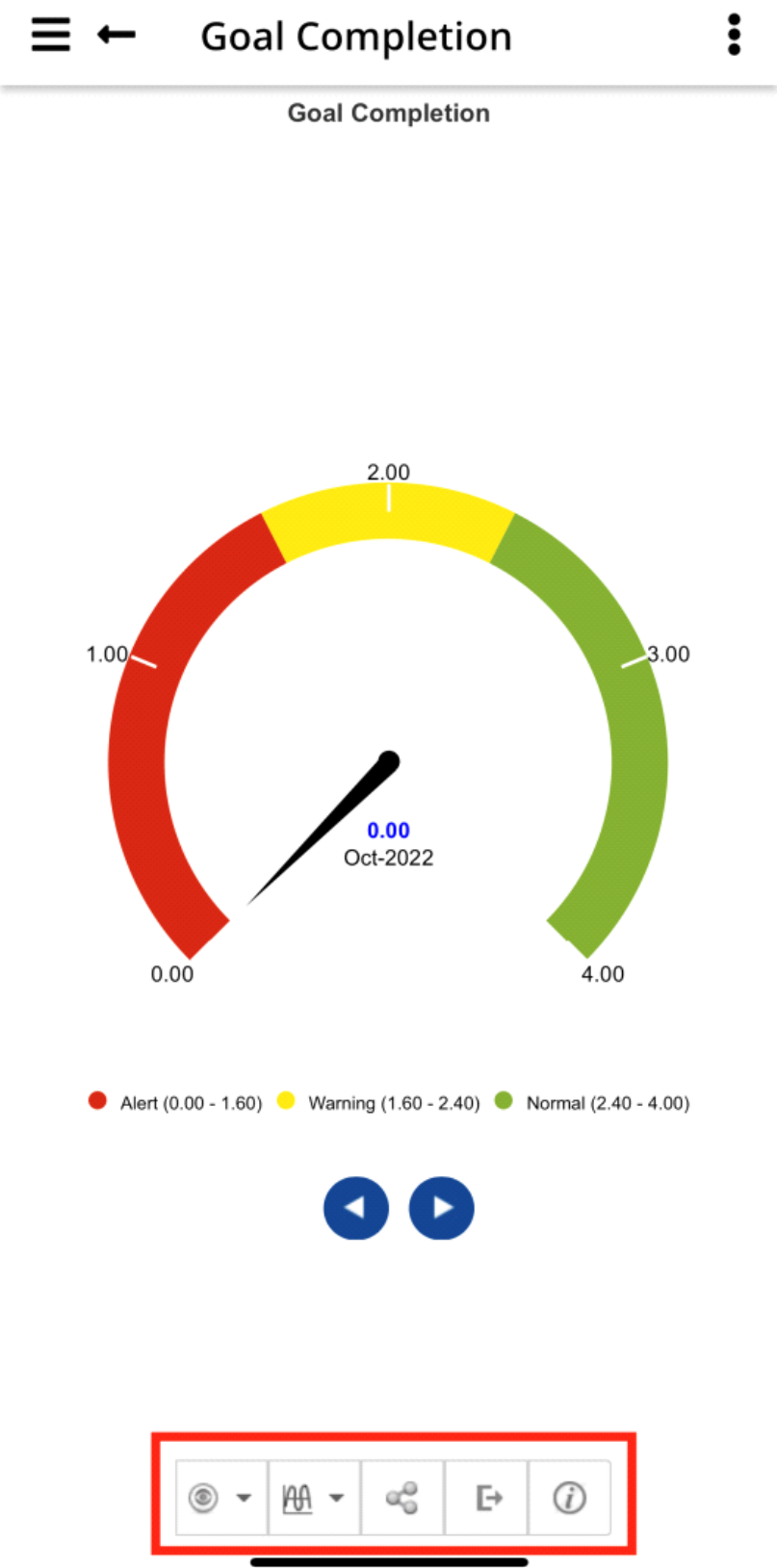


SMARTEN MOBILE APP—VIEWING THE SMARTENVIEW OBJECT

You can perform the following operations on the SmartenView object in the Smarten mobile app:

- **SmartenView Data:** Use this option to view information about the data used in the object.
- **Share:** Use this option to share the object through another mobile application.
- **Export:** Use this option to export the object as JPG, PNG, PDF, XLS, and XLSX on the mobile device.
- **Information:** Use this option to view information about the object.
- **Show all values:** Use this option to show all values in the SmartenView object.
- **Ellipsis menu:**
 - **Mark as Home:** Use this option to display the home page with the object that is marked as home.
 - **Mark as Favourite:** Use this option to display the list of objects that are marked as favourites. If an object is already marked as favourite, the **Remove from Favourite** option is displayed for the object.

6.6 Viewing KPI objects



SMARTEN MOBILE APP—VIEWING THE KPI OBJECT

You can perform the following operations on the KPI object in the Smarten mobile app:

- **KPI View:** Use this option to change the KPI view of the object.
- **Frequency:** Use this option to change how often you want to measure the KPI.
- **Share:** Use this option to share the object through another mobile application.
- **Export:** Use this option to export the object as JPG, PNG, PDF, XLS, and XLSX on the mobile device.
- **Information:** Use this option to view information about the object.
- **Ellipsis menu:**
 - **Mark as Home:** Use this option to display the home page with the object that is marked as home.
 - **Mark as Favourite:** Use this option to display the list of objects that are marked as favourites. If an object is already marked as favourite, the **Remove from Favourite** option is displayed for the object.
- **Left:** Use this option to view the objects on the left.
- **Right:** Use this option to view the objects on the right.

6.7 Viewing KPI group objects

☰

←

Group KPI

⋮

Group KPI					
KPI Name	Period	Actual	Variance	Frequency	
Clicks	13-Oct-2022	0.00	0.00	Daily	<div><div></div><div></div><div></div><div></div></div>
CPC	13-Oct-2022	0.00	0.00	Daily	<div><div></div><div></div><div></div><div></div></div>
Goal Completion	13-Oct-2022	0.00	0.00	Daily	<div><div></div><div></div><div></div><div></div></div>

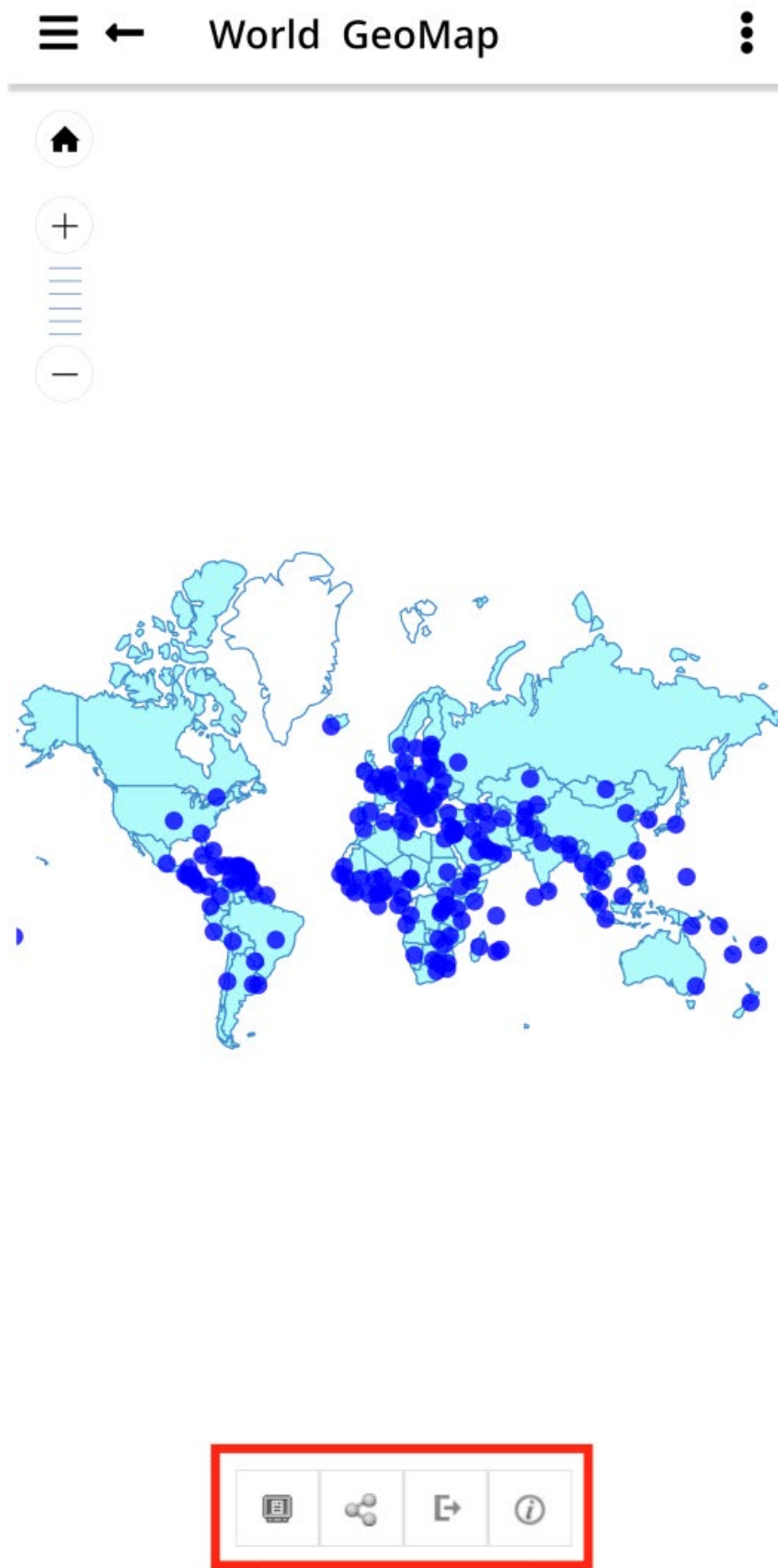


SMARTEN MOBILE APP—VIEWING THE GROUP KPI OBJECT

You can perform the following operations on the group KPI object in the Smarten mobile app:

- **KPI View:** Use this option to change the KPI view of the object.
- **Frequency:** Use this option to change how often you want to measure the KPI.
- **Share:** Use this option to share the object through another mobile application.
- **Export:** Use this option to export the object as JPG, PNG, PDF, XLS, and XLSX on the mobile device.
- **Information:** Use this option to view information about the object.
- **Ellipsis menu:**
 - **Mark as Home:** Use this option to display the home page with the object that is marked as home.
 - **Mark as Favourite:** Use this option to display the list of objects that are marked as favourites. If an object is already marked as favourite, the **Remove from Favourite** option is displayed for the object.

6.8 Viewing Geomap objects



SMARTEN MOBILE APP—VIEWING THE GEOMAP OBJECT

You can perform the following operations on the geomap object in the Smarten mobile app:

- **GeoMap data:** Use this option to view geomap data of the object.
- **Share:** Use this option to share the object through another mobile application.
- **Export:** Use this option to export the object as JPG, PNG, PDF, XLS, and XLSX on the mobile device.
- **Information:** Use this option to view information about the object.
- **Ellipsis menu:**
 - **Mark as Home:** Use this option to display the home page with the object that is marked as home.
 - **Mark as Favourite:** Use this option to display the list of objects that are marked as favourites. If an object is already marked as favourite, the **Remove from Favourite** option is displayed for the object.
- **Plus:** Use this option to zoom in on the object.
- **Minus:** Use this option to zoom out on the object.
- **Home:** Use this option to resize the object to its original size.

6.9 Viewing Print Report objects

Credit Card Statement


<<

<

1

>

>>



BANK REWARDS PLATINUM CARD

Statement for Bank Card Number *****1154

Statement Period: 21 February 2019 to 20 March 2019

At a glance

Statement Date:
20/03/19

Total Amount Due:
Rs.42691.38

Minimum Amount Due:
Rs.2134.57

Due Date:
2019-04-06

Credit Limit:
Rs.675000

Available Credit Limit:
Rs.632309

Available Cash Limit
Rs.54000

Account Summary

Previous balance:
Rs.38552.36

Current Purchases & Oth
Rs.42895.88

Current Cash Advance:
Rs.0

Last Payments Received
Rs.38756.86

Points Earned:
644



SMARTEN MOBILE APP—VIEWING PRINT REPORT OBJECT

You can perform the following operations on the print report object in the Smarten mobile app:

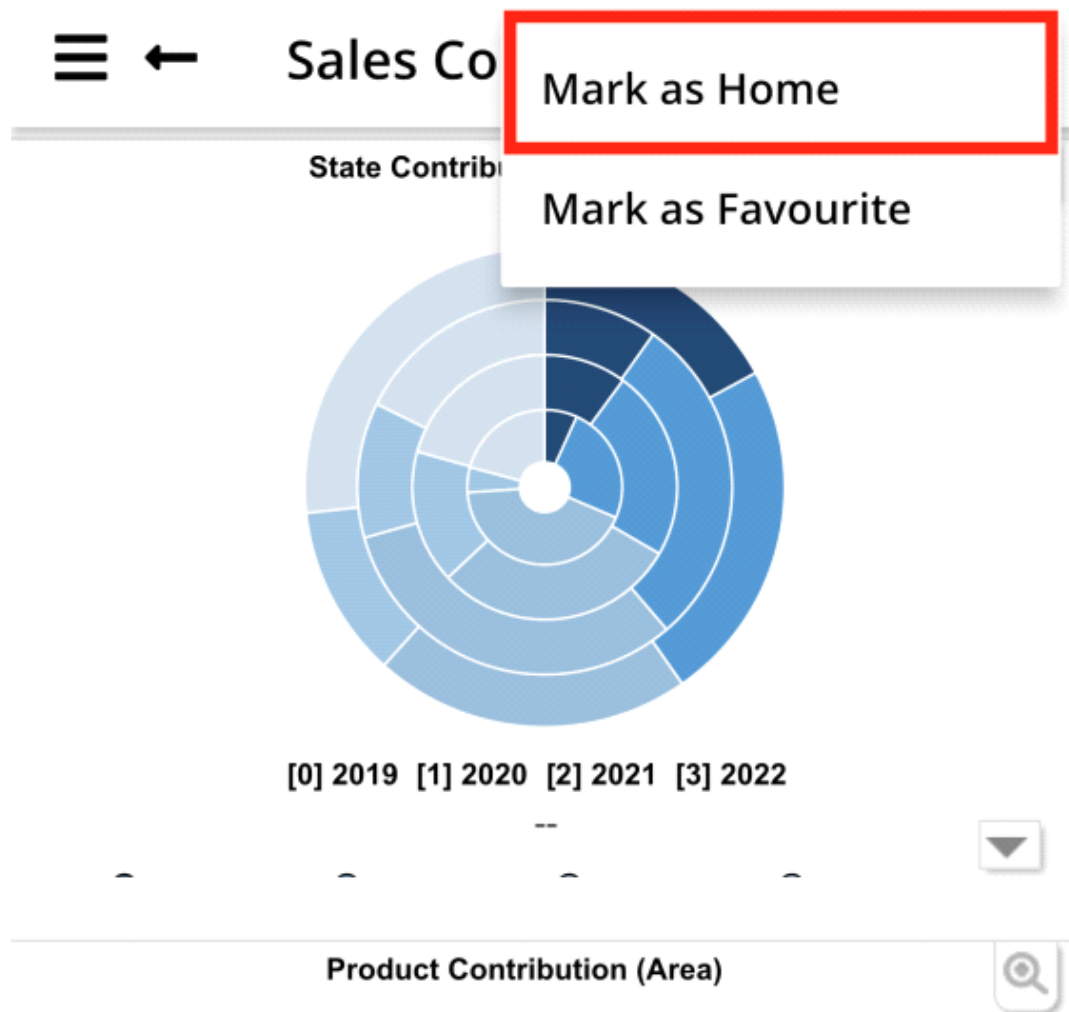
- **Filter:** Use this option to filter the data that is used by the object.
- **Export:** Use this option to export the object as JPG, PNG, PDF, XLS, and XLSX on the mobile device.
- **Share:** Use this option to share the object through another mobile application.
- **Information:** Use this option to view information about the object.
- **Ellipsis menu:**
 - **Mark as Home:** Use this option to display the home page with the object that is marked as home.
 - **Mark as Favourite:** Use this option to display the list of objects that are marked as favourites. If an object is already marked as favourite, the Remove from Favourite option is displayed for the object.
- **Next:** Use this option to view the next page of the report.
- **Previous:** Use this option to view the previous page of the report.
- **First:** Use this option to view the first page of the report.
- **Last:** Use this option to view the last page of the report.

6.10 Marking an Object as Favourite

You can mark many objects as favourites, and all these objects are listed in the **My Favourites** tab for quick access.

Procedure:

1. Open the object that you want to mark as favourite.
2. Select **Mark as Favourite** from the menu.



SMARTEN MOBILE APP—MARK AS FAVOURITE OPTION

If an object is already marked as favourite, the **Remove from Favourite** option is displayed for the object.

6.11 Marking an Object as Home

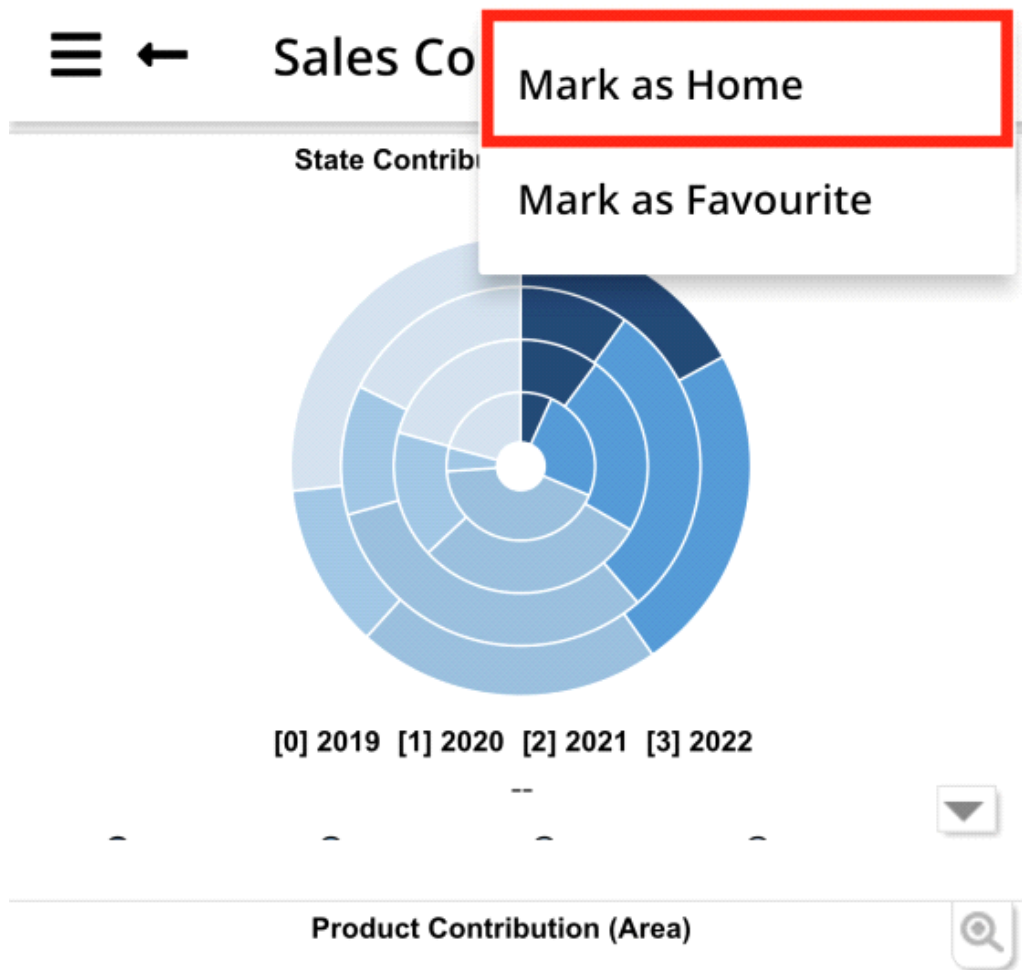
The home button displays an object only if you have marked an object as home. If no object is marked as home, an error message is displayed.

Note:

You can mark only one object as home. The last object you have marked as home is displayed on the home page.

Procedure:

1. Open the object that you want to mark as home.
2. Select **Mark as Home** from the menu.



SMARTEN MOBILE APP—MARK AS HOME OPTION

The object is marked as home and will be displayed the next time you click the home button.

7 Product and Support Information

Find more information about Smarten and its features at www.smarten.com

Support: support@smarten.com

Sales: sales@smarten.com

Feedback & Suggestions: support@smarten.com

Support & Knowledgebase Portal: support.smarten.com