



WebFOCUS App for iOS User's Guide Version 3 Release 2.3

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Preface

This content describes how you can install and use the WebFOCUS app for iOS.

How This Manual Is Organized

This manual includes the following chapters:

	Chapter/Appendix	Contents
1	Introducing WebFOCUS Mobile on iOS	Introduces WebFOCUS Mobile and the Mobile app for iOS.
2	Mobile New UI Basics on iOS	Discusses how to navigate the new interface of the WebFOCUS app.
3	The Fancy Stuff on iOS	Discusses adding and removing server connections, handling email content, and updating the WebFOCUS app.
4	Mobile Legacy UI Basics on iOS	Discusses how to navigate the WebFOCUS app for opening, viewing, and saving content.
5	Additional Resources on iOS	Introduces additional WebFOCUS app resources that are available online.

Conventions

The following table lists and describes the conventions that apply in this manual.

Convention	Description
THIS TYPEFACE	Denotes syntax that you must enter exactly as
or	shown.
this typeface	
this typeface	Represents a placeholder (or variable) in syntax for a value that you or the system must supply.
underscore	Indicates a default setting.

Convention	Description
this typeface	Represents a placeholder (or variable), a cross- reference, or an important term. It may also indicate a button, menu item, or dialog box option you can click or select.
this typeface	Highlights a file name or command.
Key + Key	Indicates keys that you must press simultaneously.
{ }	Indicates two or three choices; type one of them, not the braces.
[]	Indicates a group of optional parameters. None are required, but you may select one of them. Type only the parameter in the brackets, not the brackets.
	Separates mutually exclusive choices in syntax. Type one of them, not the symbol.
	Indicates that you can enter a parameter multiple times. Type only the parameter, not the ellipsis points ().
	Indicates that there are (or could be) intervening or additional commands.



Introducing WebFOCUS Mobile on iOS

WebFOCUS Mobile is an innovative, mobile business intelligence platform that enables organizations to build their content once and share it across devices. Consistent with the overall strategy to deliver thin-client applications and development tools, it is the most scalable and extensible solution on the market. With this thin-client approach in place, organizations can deliver applications and content to mobile devices without having to change their underlying infrastructure. These topics introduce WebFOCUS Mobile, and the app for iOS.

In this chapter:

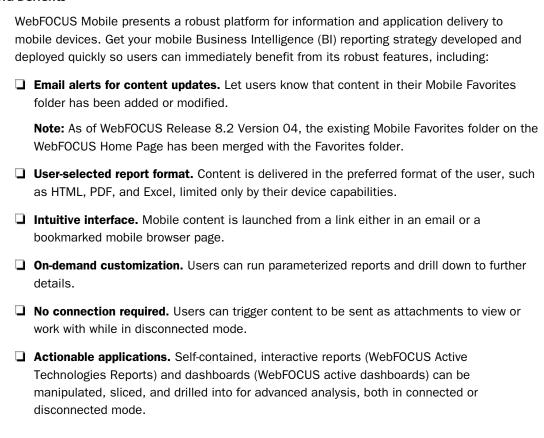
- WebFOCUS Mobile
- Introducing the WebFOCUS App
- ☐ Getting the WebFOCUS App on an iOS Device

WebFOCUS Mobile

WebFOCUS Mobile is an Information Builders mobile server platform that delivers business content to any mobile device.



Features and Benefits



Introducing the WebFOCUS App

WebFOCUS is a simple, intuitive app that empowers users of mobile devices, such as Apple[®] iPad[®] or Android[™] phones, with robust, innovative, easy-to-use reporting and analysis. The WebFOCUS app, through integration with WebFOCUS Active Technologies, delivers rich, deep, highly interactive analytic functionality to mobile devices, fully exploiting their native gestures. As a result, users can manipulate data from a variety of sources in an almost unlimited number of ways in just a couple of taps. The app allows users to manage their business dashboards and content for viewing and interactive analysis, even when they are not connected to the Internet.

The WebFOCUS app eliminates the need to custom-develop native applications for each mobile device, accelerating deployment and reducing total cost of ownership. Any user, on any device, can now efficiently and economically leverage true operational business intelligence at any time.



The WebFOCUS app is your enterprise on your mobile device.

If Active Technologies reports and dashboards, PDF documents, Excel® spreadsheets, and other types of BI content get deployed, The WebFOCUS app efficiently captures, manages, and organizes it in a catalog on the native device. Content can be annotated with comments or descriptions for rapid retrieval, letting users quickly find the content they need by name or keyword. Users can also subscribe to BI content, which is automatically pushed to them at regular intervals.

The WebFOCUS app provides an easy and intuitive way for mobile device users to:
Run reports, charts, and pages online, from any corporate data in any source.
Save, annotate, and catalog BI documents locally, for offline analytic operations.
Ensure security and encryption for any data saved on the device.
Sort, filter, drill down, roll-up, calculate, and more, in both connected and disconnected modes.
Fully support native device characteristics, gestures, charting, menus, and controls within content.
Subscribe to and receive content on a scheduled basis or when events occur. This feature requires the WebFOCUS Report Library option.
Open and catalog documents received as email attachments.

Share content regardless of the mobile device, browser, or platform people are using.

Find and retrieve content using native search capabilities.

The	The WebFOCUS app also supports the ability to:		
	Use more than one WebFOCUS server and log on automatically.		
	List available Mobile content and view it by tapping it in the list.		
	Store and view history for viewing offline and keeping a copy on file.		
	Share content with other email users.		
	Receive and view pushed Watch items automatically.		
	Note: This feature requires the WebFOCUS Report Library ontion		

Getting the WebFOCUS App on an iOS Device

To download the free WebFOCUS app on your iPad or iPhone:

- 1. Tap the App Store icon.
- 2. Type WebFOCUS in the Search box.
- 3. Tap WebFOCUS in the selection list.
- 4. Tap the WebFOCUS icon.
- 5. Tap FREE.
- 6. Tap INSTALL.
- 7. Enter your $\mbox{\rm Apple}^{\circledR}$ ID and password, if required, or use Touch ID, and tap $\mbox{\it OK}.$

The WebFOCUS app will be downloaded to your device.



Mobile New UI Basics on iOS

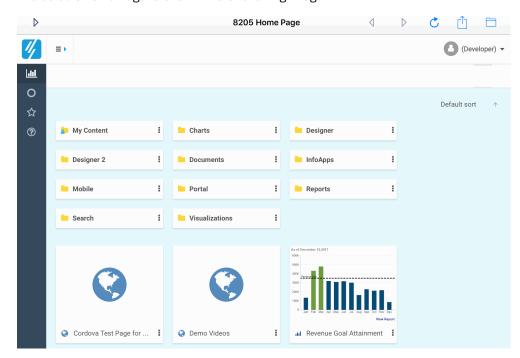
These topics discuss how to navigate the WebFOCUS Home Page on the WebFOCUS app.

In this chapter:

- Navigating the WebFOCUS Home Page
- Using the Navigation Bar
- Performing Search Queries

Navigating the WebFOCUS Home Page

When connecting to a WebFOCUS Release 8.2 Version 04 and higher environment, a mobile version of the WebFOCUS Home Page is available. The Home Page is the default landing page that opens when you first sign in to WebFOCUS from the WebFOCUS app, and serves as a centralized place for viewing and sharing content, performing searches, and using InfoSearch and performing voice queries.



The default Home Page is shown in the following image.

Note:

- Before you can begin to interact with the WebFOCUS Home Page, the WebFOCUS Administrator in your organization must ensure that the WebFOCUS app settings are enabled correctly.
- ☐ To view the Home Page on the WebFOCUS app, make sure the *New Interface* toggle is enabled when connecting to your WebFOCUS environment.

You can toggle the sidebar by clicking the toggle button to expand or collapse the sidebar.

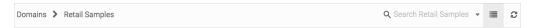
You can use the sidebar to switch between four views of your repository content. These include:

- ☐ **Content.** Displays your repository content and provides options so you can view the content.
- **Portals.** Displays all of the existing portals in your repository. If tags are created for these portals, tag buttons are displayed at the top of the page.
- **Favorites.** Displays the items that you designate as favorites. To designate an item as a Favorite, tap the menu icon, and tap *Add to Favorites*.

■ Ask WebFOCUS. Provides access to the Ask WebFOCUS interface, where you can perform InfoSearch and voice queries, where you can perform type and voice queries on any of your content that is voice-enabled.

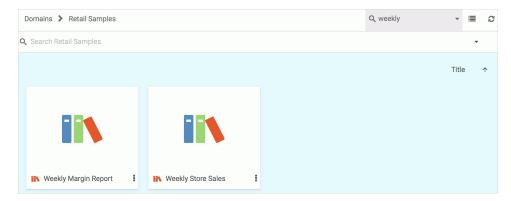
Using the Navigation Bar

The navigation bar is located beneath the banner. You can use the navigation bar to move between folders in your repository, search the contents of a domain or folder, change the view of items in the content area, and refresh content in a domain or folder you select, as shown in the following image.



When you drill down into folders in your repository, the navigation bar generates a breadcrumb trail that you can use to move between folders. You can move back one folder or multiple folders in a single tap. Tapping a folder name shows you the contents of that folder. You can also tap the arrows between the folders, to see the file structure that is currently displayed, with the currently selected folder appearing in bold.

From the navigation bar, you can also search for items in your repository. To search for an item, type a key word in the Search field and tap Enter. The results of your search display in the content area, as shown in the following image.

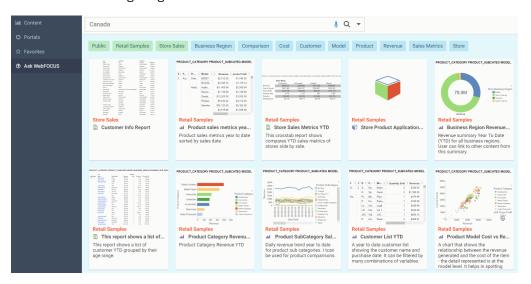


You can also use the Grid View or List View icons to toggle between views of your content in a domain or folder. Grid View allows you to see the thumbnails of your items, while List View is useful when you need to see a large number of items at a glance and allows you to sort your items by various criteria.

Performing Search Queries

Using your iOS devices, such as your iPhone or iPad, you can use InfoSearch to perform simple, Google-style searches to find your BI content. You can also perform voice queries on any voice-enabled content in your repository and access your data from the palm of your hand.

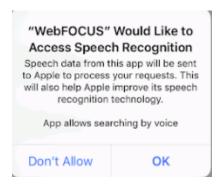
To perform a search, tap the menu icon to open the side bar, and then tap *Ask WebFoCUS*. Tap the search bar and enter your search term, for example, Canada. The WebFoCUS app will return all of the content related to your search term, and display the results as thumbnails, as shown in the following image.



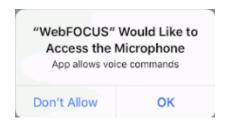
To interact with the voice query feature from your iOS device, you must also follow these steps:

- ☐ Connect to a WebFOCUS Release 8.2 Version 04 or higher environment.
- Ensure that the New Interface toggle is enabled.
- ☐ Enable access to speech recognition and the microphone settings on your device.

To enable these permissions, tap *Ask WebFOCUS* in the side bar and then tap the microphone. Your device will first prompt you to confirm giving the app access to speech recognition, as shown in the following image.



Tap *OK*. Your device will then prompt you to confirm giving the app access to the microphone, which will allow voice commands for your query, as shown in the following image.



Tap OK. Your mobile device is now ready to perform voice-enabled searches.

Interacting with Voice Queries

You can perform voice queries on any WebFOCUS content that is voice-enabled. To perform voice queries from the WebFOCUS app, tap the menu icon to open the side bar, and then tap *Ask WebFOCUS*.

Here, you can tap the microphone icon to begin to speak your query. Speaking a search term will return all of the results as thumbnails, similar to typing in that same term.

Depending on how the content was set up, you can do everything from run simple report, to having a more interactive conversation with WebFOCUS. You can ask a query, such as "Tell me the store inventory for Boston." WebFOCUS interprets your words, and responds to you by either visually opening a report, or "talking" to you to gather more information before it provides a response. Once content has defined intent phrases, the What can I ask? button becomes available in the Ask WebFOCUS interface. Once you click the What can I ask? button, all of the available intent phrases will display alphabetically.

To run these intent phrases, you can either click on one of these tiles, or tap the microphone and speak your query directly to the device.



The Fancy Stuff on iOS

These topics discuss adding and removing server connections, handling email content, and updating the WebFOCUS app.

In this chapter: Adding a Server Connection on iOS Reordering a Server Connection Removing a Server Connection From an iOS Device Opening an Email Attachment on an iOS Device Adding a Passcode on iOS WebFOCUS App Settings on iOS Configuring VPN on an iOS Device Updating the App on an iOS Device Supporting Single Sign On Applications on an iOS Device

Adding a Server Connection on iOS

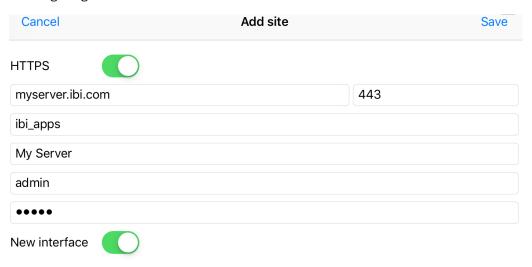
Tap the Sites button to return to the WebFOCUS Server list.

By default, you should already have access to the pre-configured mobilefaves.ibi.com demo server.

Note that you need active Wi-Fi and VPN connections to view your online content.

To connect your app to the WebFOCUS Server of your company, tap *Add* site.

Fill out the required fields that correspond to your existing WebFOCUS Server, as shown in the following image.



Note: Leave New interface set to On if connecting to a WebFOCUS Release 8.2 Version 04 or higher environment.

Tap Save to save the settings and continue.

The server you added is now shown in the Sites list.

Selecting the server takes you to all the content that you previously selected as Mobile Favorites from your WebFOCUS portal.

Note: As of WebFOCUS Release 8.2 Version 04, the existing Mobile Favorites folder on the WebFOCUS Home Page has been merged with the Favorites folder. All previously selected Mobile Favorites content can now be found in the Favorites folder.

Reordering a Server Connection

To reorder your server list, tap *Edit*.

Tap and hold the reorder icon next to the server you wish to move and drag the server name to the desired position, as shown in the following image.



Tap *Done* to complete the changes.

Removing a Server Connection From an iOS Device

To remove a server from the Sites list, tap Edit.

Tap the minus icon
next to the server you want to delete.

Tap Delete to delete the server, as shown in the following image.



Note: Alternatively, you can swipe the server to delete it.

Opening an Email Attachment on an iOS Device

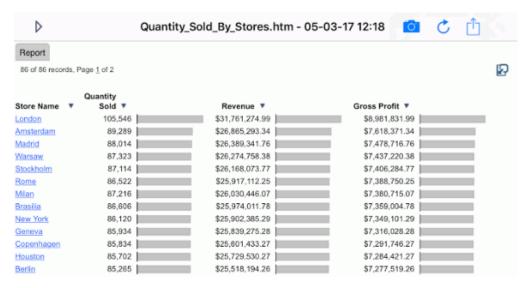
Content can be sent to you through email and can be viewed using the WebFOCUS app.

To open the attached content, tap and hold the attachment for the email.

The app can open different kinds of content.

Tap Import with WebFOCUS to open the content in the WebFOCUS app.

The WebFOCUS app automatically launches and displays the content, as shown in the following image.



Email content is automatically saved and can be viewed in the app in the Default channel.

Tap the right arrow icon to see a list of available content.

If you tap emails, any saved email content is listed.

Adding a Passcode on iOS

To add a security passcode that must be entered every time you open the WebFOCUS app, tap *WebFOCUS* in the Settings section of your iPad or iPhone.

Tap Passcode to toggle passcode security.

When you access the WebFOCUS app, you will be asked to set a passcode. Enter the passcode and then verify it by typing the passcode again.

Once the passcode is entered, you will have to enter it each time you access the WebFOCUS app.

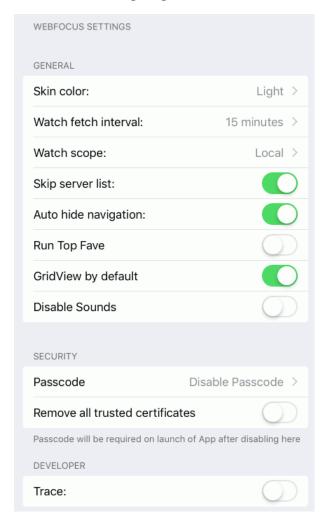
To disable the passcode, either tap *Disable* from the Passcode menu or toggle the passcode to *Off* in the WebFOCUS section of your iPad or iPhone settings.

Enter the passcode again to disable the passcode.

To change a passcode, tap *Change*, enter your current passcode, and then set a new passcode.

WebFOCUS App Settings on iOS

In the Settings section of your iPad or iPhone, tap WebFOCUS to open the app settings, as shown in the following image.



In the General grouping:

- ☐ Tap Skin color to change the app color to Light or Dark.
- ☐ Tap Watch fetch interval to indicate how often to refresh the watchlist values.

	Tap Watch scope to indicate whether the watchlist is personal and local or on the server. Set this to local if more than one user is accessing the WebFOCUS app under the same WebFOCUS user ID. This feature requires the WebFOCUS Report Library option.		
	Tap Skip server list to allow the WebFOCUS app to skip past the server list and go right to the content list. The WebFOCUS app remembers the last server used for content.		
	Tap Auto hide navigation to toggle whether navigation is hidden automatically. This allows you to view the content full screen without having to hide the content list each time.		
	Tap Run Top Fave to automatically run the first report in the first folder on the first server.		
	Tap GridView by default to use grid view, by default.		
	Tap Disable Sounds to disable the sounds used in the WebFOCUS app.		
In	In the Security grouping:		
	Tap <i>Passcode</i> to enable additional security in accessing the WebFOCUS app. Once enabled, every time you access the WebFOCUS app, you will have to enter a passcode.		
	Note: If you already have Passcode enabled and then disable it from the settings section, when you access the WebFOCUS app, you will still have to enter in the passcode one more time to disable it.		
	Tap Remove all trusted certificates to remove all stored trusted certificates from the cache.		
In	the Developer grouping:		
	Tap <i>Trace</i> to turn traces on or off.		
In	the Info grouping, the version number of the WebFOCUS app is listed.		

Configuring VPN on an iOS Device

To use the WebFOCUS app, you must have a Wi-Fi or 3G connection. In the Settings section of your iPad or iPhone, tap *Wi-Fi* and turn Wi-Fi *ON* and tap a network from the available networks on your device.

Once you are connected, tap the VPN toggle button on the Settings page.

On the VPN screen, tap Add VPN Configuration.

Enter your authentication credentials.

Fill in the required fields based on the VPN settings of your organization and tap Save. If your WebFOCUS environment is located behind a corporate firewall, you need to use VPN on your device to access it.

Your VPN screen should now list an active connection with a check mark and you should make sure that the VPN and Wi-Fi icons are displayed.

If you have already selected content as Favorites from your WebFOCUS portal, you should now be ready to start using your WebFOCUS app.

Updating the App on an iOS Device

If an update is available for the WebFOCUS app, you will see a number on the App Store icon, indicating the number of updates available.

To update the app:

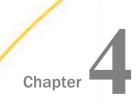
- 1. Tap the App Store icon.
- Tap Update All to download updated versions of all apps to your mobile device, including WebFOCUS app.

Supporting Single Sign On Applications on an iOS Device

Basic Authentication	
IWA/NTLM	
SiteMinder	
Tivoli	

The WebFOCUS app supports the following types of authentication:

Supporting Single Sign On Applications on an iOS Device



Mobile Legacy UI Basics on iOS

These topics discuss how to navigate the WebFOCUS app for opening, viewing, and saving content.

In this chapter:

- Understanding the Content List on an iOS Device
- Navigating to Content on an iOS Device
- Navigating Within Content on an iOS Device
- Using the Tools Menu
- Content Watchlists
- Content List Icons

Understanding the Content List on an iOS Device

The Content List appears to the left of the screen after you tap the Split mode icon 📃 and allows you to tap open folders to view content, as shown in the following image.

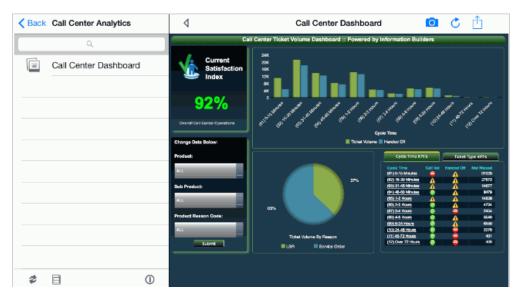


To refresh the Content List, tap the Refresh icon .



Navigating to Content on an iOS Device

To navigate to the Content List, tap an item. Tapping a folder opens the contents of the folder. Tapping a content item opens the content to the right of the Content List, as shown in the following image.



Navigating Within Content on an iOS Device

To navigate within content, tap the Navigation icon



- ☐ Tap Back to navigate to the previous page.
- ☐ Tap Forward to navigate to the next page.
- ☐ Tap Stop to stop the loading the current page.
- ☐ Tap Reload to reload the current page.
- ☐ Tap Close to close the web viewer.

Note: The Navigation menu only shows the relevant options.

Using the Tools Menu

The Tools menu enables you to perform actions, such as saving, sharing, or printing content.

This menu is available by tapping the Tools icon _____, located above the web viewer.

Note: If any of the options in the Tools menu are disabled, you do not have access to that function. For more information on changing these settings, contact your WebFOCUS administrator, or see the *Configuring Privileges* section of the *WebFOCUS Security and Administration* manual.

Saving Content on Your Device

Active Technologies reports and PDFs can be saved on your iPad or iPhone for future reading.

Saving makes the content accessible from the app even when you have no access to Wi-Fi or 3G.

To save content, tap the Tools icon, then tap Save.

Before saving, you may want to give the saved content a relevant name and add some comments.

Tap Save to save the content.

A confirmation message displays.

Sharing Content by Email

You can email content from your iPad or iPhone.

Tap the Tools icon and then tap *Email* to email the content that you are viewing on your WebFOCUS app. You have the option to send Content Only, Screenshot Only, or All of the content.

The WebFOCUS app launches the iPad or iPhone email app with the content attached, as shown in the following image. In this example, a screenshot of the content is displayed.

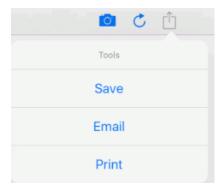


Fill out the email form, then tap Send.

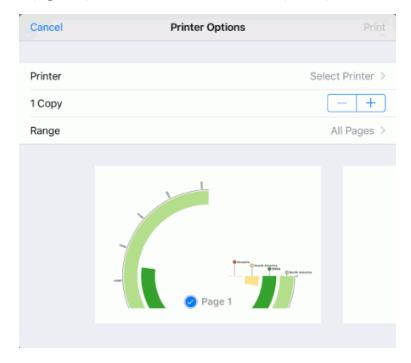
Open the email message on your mobile device to view the content. If the screenshot is not embedded within the email, tap the image attachment icon to open the image.

Printing Content

To print content, tap the Tools icon , as shown in the following image.



Tap *Print* to open the Printer Options menu, where you can select the printer, enter the range of pages to print, and indicate the number of copies to print, as shown in the following image.



Content Watchlists

Note: This feature requires that the WebFOCUS Report Library option is configured to notify you of updated content.

If an update is available to content in your Watchlist, you will see an icon indicating the number of updates available.

You will also see a numbered badge next to the server in your server list. The number corresponds to the number of updates available to you.

Watchlist content is automatically updated as new versions become available, as shown in the following image.



The Watch folder in your folder list is also updated. The number in the badge represents the number of updates available, as shown in the following image.

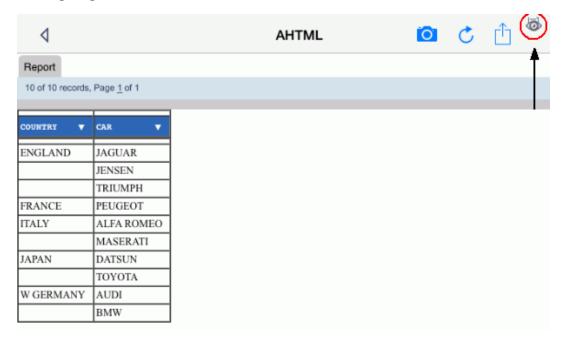


In the previous image, there was one update to a report available. Tap the content to view the updated content, as shown in the following image.



The updated content is displayed and the new content indicator icon disappears.

Content can be watched or unwatched. Note the icon on top of the report, as shown in the following image.



- ☐ This icon means content is not currently being watched.
- ☐ This icon means content is currently being watched.

Tapping the Watch icon for content not being watched will set it to watched. The icon will then change to .

The Watchlist contains content that you are subscribed to.

Watchlist content is automatically updated as new versions become available.

Content List Icons

The following table lists the available icons that can be found in the Content List.

Icon	Description
HTTP	Appears next to the server name, host, and port number and indicates that the server is selectable.
	This is a folder. Tap to view the folder contents.
ad	This is selectable content. Tap to open the content.
	This is a saved item. Tap to view the saved content.
>	Indicates there is saved content available in the folder you have selected. Tap to view the saved content.



Mobile Favorites on iOS

Additional Resources on iOS

These topics introduce additional WebFOCUS app resources that are available online.

In this chapter: Subscribing to WebFOCUS Reports Using the WebFOCUS App Watch Feature WebFOCUS Customer-Branded Versions: An Offering From Information Builders

Subscribing to WebFOCUS Reports Using the WebFOCUS App Watch Feature

The WebFOCUS app provides the native consumption of WebFOCUS content on Apple mobile devices. This allows for normal access to WebFOCUS reports, opening email attachments, such as active reports and active dashboards, as well as subscribing to reports when new versions become available. The WebFOCUS app provides easy access to both online and offline content that is otherwise difficult to access in the Apple enclosed and secure ecosystem.

Making all BI content available through WebFOCUS is as easy as right-clicking any report from within the WebFOCUS Home Page and adding it as a Favorite or adding a FAVES tag to it once it is in the Favorites folder. However, when it comes to subscribing to a report so that it can be pushed to the WebFOCUS app, some preliminary steps must be completed. This includes scheduling the WebFOCUS report with ReportCaster, adding the report to the Report Library, and then exposing the Report Library item on the Home Page.

For more information about Mobile Faves, see *Technical Memo 4714: WebFOCUS Mobile:* Subscribing to WebFOCUS Reports Using the Mobile Faves App Watch Feature.

WebFOCUS Customer-Branded Versions: An Offering From Information Builders

The Information Builders WebFOCUS app provides native listing, viewing, organizing, storage, subscription, and emailing of WebFOCUS content on iPad and iPhone devices. This app works well with WebFOCUS Mobile solutions, allowing for native access to the portable, viewanywhere WebFOCUS content. You can use the app, installed directly to your device from the Apple App Store, to assist delivery of your content to your employees, partners, and customers.

The WebFOCUS Customer-Branded offering now lets you deploy a custom-branded version of the WebFOCUS app. The custom-branded version gives you all the power of the Information Builders Mobile WebFOCUS app, with your enterprise branding in place in the app. As a result, your partners and customers can see an app that comes directly from you.

For more information, see the Mobile Faves Branding Package Developer's Guide.

Mobile Favorites on iOS

Mobile Favorites are reports, graphs, hyperlinks, and any other item type, except Reporting Objects, that are added to the Mobile tab in the Favorites list in Dashboard. Adding items to Mobile Favorites enables you to display the items on mobile devices. Items can be added to Mobile Favorites from a Domain Tree, Role Tree, List block, Folder block, Tree block, or Domains search result. To add items to your Mobile Favorites list, right-click the item and select *Add to Mobile Favorites*. All items that are listed in the Mobile tab of your Favorites list will be displayed on the Mobile Favorites launch page when you log in from a mobile device. Note that you can only view Mobile Favorites for the Managed Reporting user ID and password you use to log in.

Note: As of WebFOCUS Release 8.2 Version 04, the existing Mobile Favorites folder on the WebFOCUS Home Page has been merged with the Favorites folder. Existing Mobile Favorites from previous releases were migrated automatically into the Favorites folder and given a localized Mobile Faves tag. To add new favorites in the app, right-click the item and click *Add to Favorites*. Then, click the *Favorites* folder, right-click the item you want to view in the Mobile Faves app, and click *Properties*. In the Properties pane, click the *Advanced* tab and enter *FAVES* in the Tags box. Once you save your changes, these items will be displayed on the Mobile Faves launch page.

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