

Roambi ES for SAS[®] 9.2 and 9.3 User's Guide



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Roambi™ ES for SAS® 9.2 and 9.3: User's Guide

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Contents

<i>About This Document</i>	v
Chapter 1 • Publishing SAS Web Report Studio Reports to Roambi Views	1
Overview of Publishing Reports	2
Overview of Roambi Views	2
Before You Begin	6
Publish a Report to a Roambi View	8
Modify a Published Report	11
Options for Refining a Report	12
Example That Uses the Elements View	16
Example That Uses the CataList View and Has Two Report Sections	20
Chapter 2 • Viewing Published Reports on a Mobile Device	27
Overview of Viewing Reports on a Mobile Device	27
Software and Hardware Requirements for Viewing Reports	28
Overview of the Roambi Visualizer Interface	29
Establish a Connection to the Roambi Server	30
Download a Report	32
View a Report	32
Refreshing a Report	33
Tips for Viewing Report Objects	33
Appendix 1 • Refresh Options for Reports	37
Appendix 2 • Using the Roambi Batch Command Line Interface	41
About the Roambi Batch Command Line Interface	41
Running the Command Line Interface	42
Syntax	42
Examples	44
Using a Text File with the Roambi Batch CLI	45
Locating the Folder ID and Document ID for a File	46
Index	49

About This Document

Audience

This document first describes how to publish SAS Web Report Studio reports as Roambi files that can be downloaded on selected mobile devices. The document also describes how to view those reports on the device.

The audience for [Chapter 1, “Publishing SAS Web Report Studio Reports to Roambi Views,” on page 1](#) is the SAS Web Report Studio designer. Designers must be familiar with report structure and features in order to determine the best Roambi view to use for a report. Designers also can manipulate the report structure when they refine the report.

The audience for [Chapter 2, “Viewing Published Reports on a Mobile Device,” on page 27](#) is anyone who wants to view the reports.

Chapter 1

Publishing SAS Web Report Studio Reports to Roambi Views

Overview of Publishing Reports	2
Overview of Roambi Views	2
About the Cardex View	2
About the CataList View	3
About the Elements View	4
About the PieView	4
About the SuperList View	5
About the Trends View	5
Before You Begin	6
Supported and Unsupported SAS Web Report Studio Features	6
Roambi Features Supported in Each View	6
General Considerations and Restrictions	7
Publish a Report to a Roambi View	8
Step One: Select a Roambi View and Import a Report	8
Step Two: Refine the Report (Optional)	10
Step Three: Publish the Report	10
Modify a Published Report	11
Options for Refining a Report	12
The User Interface for Refining a Report	12
Main Steps to Refine a Report	12
Card Title Tab	13
Chart Options Tab	13
Charts Tab	13
Key Column	13
Layout Tab	13
List Layout Tab	14
Options Tab	15
Periods	15
Pie	16
Pie Values	16
Swipe Tab	16
Tab Title Tab	16
Titles Tab	16
Example That Uses the Elements View	16
About This Example	16
Source Report	17
Roambi Output	17
Publication Steps	18

Example That Uses the CataList View and Has Two Report Sections	20
About This Example	20
Source Report	20
Roambi Output	20
Publication Steps	23

Overview of Publishing Reports

Roambi ES for SAS enables you to create Roambi content based on SAS Web Report Studio reports. The results are interactive charts and graphs that can be viewed on selected mobile devices. You use a straight-forward process to import report data into one of several Roambi views. During this process, you can refine the view by changing titles, grouping data, changing the color scheme for graphics, and more. The final report is published as a Roambi (RBI) file.

To create and publish reports, you use the Roambi Publisher, which is included with Roambi ES for SAS. You should be knowledgeable about report structure and features in order to determine the best Roambi view to use for a report. You can also manipulate the report structure when you refine the report.

A batch utility is also available for updating or creating RBI files with new source data. Based on which arguments you use, you can replace an RBI file or create a new file. The new file can be in the current or in a different SAS metadata repository (Roambi Publisher calls these enterprise portals). For more information about the batch utility, see [Appendix 2, “Using the Roambi Batch Command Line Interface,” on page 41](#).

Note: If you are publishing reports that will be viewed on BlackBerry devices, see [“Known Report Limitations for BlackBerry Devices” on page 28](#).

See Also

- [“Software Required to View Reports on a Mobile Device” on page 28](#)
- [“Supported Mobile Devices” on page 28](#)

Overview of Roambi Views

A Roambi view is a template that produces a defined presentation of data. All views are suitable for SAS Web Report Studio list tables and crosstabulation tables. Graphs can also be used in some views. The following sections summarize the Roambi views that SAS supports. Each section states which type of report is best suited to the view and known restrictions for using the view. For general restrictions that apply to multiple views, see [“General Considerations and Restrictions” on page 7](#). When viewed on small devices, such as the iPhone, only one report object can be viewed at a time. Users can swipe to move from one report object to another.

About the Cardex View

The Cardex view makes it easy to find and access particular information, such as a customer name. Rather than scan rows of data, you can finger through the virtual cards that are organized and tabbed. You can also search the list. The Cardex view supports side-by-side comparison of records (iPad only).

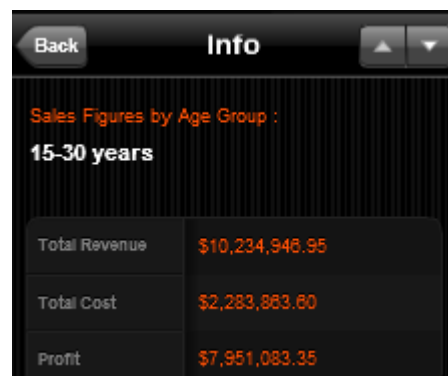
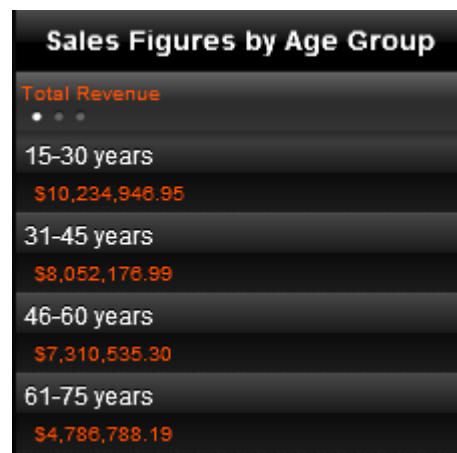


Use the Cardex view when you want to present data grouped by one dimension. That dimension defines the tabs. The Cardex view supports a maximum of 1,200 cards, where each card corresponds to a row in the report table. The view is not suitable for reports that present subtotals and grand totals.

About the CataList View

The CataList view provides comprehensive access to your data, from the highest level summary to the lowest level detail of any record. The view contains a summary card that shows the grand total row of the report table. You can drill down into the details from the first-level view. Multiple summary cards can be used to compare the items in your report by any available metric.

The first image below shows high-level sales totals. The second image is obtained by drilling down to the detail for one of the categories. You can view the other categories by using the navigation arrows. ▲ ▼



Use the CataList view when you want to present hierarchical information. The view organizes your data into hierarchical, categorized lists that enable you to drill down into the details. You can use group breaks to define the hierarchy.

This view is ideal for list tables and crosstabulation tables. Each break in the vertical axis defines the levels in the CataList view. Crosstabulation tables must contain subtotals for rows, columns, or both. The Roambi software does not compute totals.

The view supports micro charts that compare trends in your list. These can contain growth calculation and trending icons. For an example that shows micro charts, see “Example That Uses the CataList View and Has Two Report Sections” on page 20.

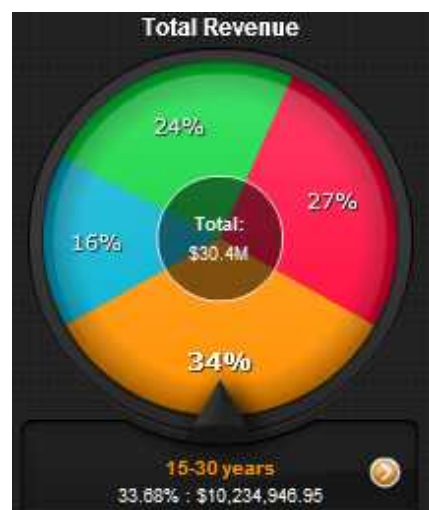
About the Elements View

The Elements view combines multiple tables, charts, and graphs into a single convenient dashboard. This view is useful for quick ad hoc comparisons and analysis. The Elements view most closely matches the original report.



About the PieView

The PieView provides a fully interactive, graphical summary of your data in any defined metric. Users can also conduct side-by-side comparisons of different data and charts (iPad only).



You can rotate the pie in order to view information about a different slice. You can also drill down into details.

Use the PieView when you want to compare numeric values between elements of one dimension. The values must already be summarized for each element of the dimension. The PieView shows up to 10 slices, the top nine items and a special slice called “Others” that groups the other items. You can configure a maximum of 12 PieViews per report.

About the SuperList View

The SuperList view provides enhanced features for viewing tables. You can navigate through rows while titles remain in place. The SuperList enables sorting, filtering, and column reordering. The view also provides instant charts that enable you to quickly find information.

Product Group	Total Revenue	Product Category
Eclipse CloL...	\$4,250,981.77	Clothes
Green Tomato	\$197,018.15	Clothes
Knitwear	\$1,347,309.10	Clothes
LSF	\$792,512.62	Clothes
Leisure	\$651,489.39	Clothes
Massif	\$272,034.50	Clothes
Orion	\$1,889,200.51	Clothes
Orion Clothing	\$544,694.10	Clothes
Osprey	\$394,763.70	Clothes

Use the SuperList view when you need to present tabular information and the input report table has a key column. The key column is the left-most column and is typically an identifier for the row. In the display, the product group is the key column.

About the Trends View

The Trends view provides a dashboard style interface that enables you to track the performance of important metrics over different periods of time. The view uses built-in trend line algorithms that make it especially useful for identifying trends in your data.

The following two displays show sales figures in dollars followed by sales percentages.

Eclipse Clothing		2002
Total Revenue		\$927,044.03
Total Cost		\$213,432.60
Profit		\$713,611.43
Eclipse Shoes		2002
Total Revenue		\$1,756,522.88
Total Cost		\$421,290.05
Profit		\$1,335,232.83

Eclipse Clothing		%
Total Revenue		+15.72%
Total Cost		+10.06%
Profit		+17.52%
Eclipse Shoes		%
Total Revenue		+19.31%
Total Cost		+19.90%
Profit		+19.12%

Use the Trends view when you need to analyze your key performance indicators across different periodicities. You can produce charts that enable analysis, comparisons, and trends to obtain accurate projections on the data. This view has no limits on data points.

For more information about limits that are imposed on the other views, see [“General Considerations and Restrictions” on page 7](#).

Before You Begin

This section contains information that is useful to know before you publish your reports as RBI files.

Supported and Unsupported SAS Web Report Studio Features

The following table shows which SAS Web Report Studio features are supported when you publish reports to Roambi, and which features are not supported.

Supported Features	Features That Are Not Supported
list tables	images
crosstabulation tables	SAS Stored Processes
graphs	text objects
multiple report objects (tables, graphs)	geographical maps
filters	externally created reports (created by SAS Enterprise Guide or the Output Delivery System)
prompts (not cascaded, not shared)	
data formatting	
sections (only one at a time per Roambi view)	
group breaks	
security, row-level security	

Roambi Features Supported in Each View

The following table specifies which Roambi features are supported in the individual views. As noted in the table, some features are supported only on iPad devices. In addition, support for some features is qualified for certain views. For example, with the Elements view, the sort feature is supported only for tables.

Feature	Cardex	CataList	Elements	PieView	SuperList	Trends
Bookmarks	Yes	Yes	Yes	Yes	Yes	Yes
Favorites	No	No	Yes	No	No	No
Search	Yes	Yes	No	No	No	No
Filter	Yes	No	No	No	Yes	No
Sort	No	Yes	Tables	No	Yes	No

Feature	Cardex	CataList	Elements	PieView	SuperList	Trends
Hierarchy	Two levels	Yes	Tables	No	No	Periods
Drill down	No	Yes	Tables	No	No	No
Interactive charts	Yes	Yes	Yes	Yes	Yes	Yes
Summary cards	Yes	Yes	No	No	No	No
Side-by-side comparison	iPad	Micro charts	iPad (blocks)*	iPad	No	No
Synchronized comparison	iPad	No	No	No	No	No
One-to-one mapping	No	No	Yes	No	Yes	No
Multiple sections	No	No	No	No	No	No
Multiple blocks (report objects)	No	No	Yes	No	No	No

* Roambi refers to individual report objects (tables and charts) as blocks.

General Considerations and Restrictions

List Tables and Crosstabulation Tables

Here are some considerations and restrictions for tables:

- Roambi supports up to 999 columns. If your report exceeds this number, you might need to filter the columns by using parameters. For example, if the horizontal axis measures data by year and month, you might filter the query to include only the year. If your purpose is to show a trend, then consider using the Trends view.
- If the report contains summary information, the report must calculate subtotals for rows, columns, or both. Roambi does not calculate subtotals.

Roambi Charts


Roambi charts support a maximum of 400 data points. If you need to show trend charts, consider using the Trends view. The Trends view does not limit the number of data points.

Report Sections

SAS Web Report Studio reports can have multiple sections, each with one or more report objects, such as tables and graphs. Multiple sections can be used to present different views of the data.

Roambi supports reports that have multiple sections, but only one section can be applied to a view at a time. If your report has two sections, you must create two views, one for each section.

Publish a Report to a Roambi View

Publication is a three-step process, described below. If you need help for any window, you can click  at the bottom of the window. In addition, Roambi provides comprehensive user guides, best practices, and use cases on its Web site at www.roambi.com/help-resources.html.

Step One: Select a Roambi View and Import a Report

1. Log on to SAS Management Console, select the **Folders** tab, and create a folder to contain published Roambi (RBI) files. This folder must be visible to the users who need to download the reports to their devices. You can create multiple, secured folders for different sets of users.
2. In your browser, launch the Roambi ES for SAS Publisher. The URL is in the form `http://RoambiServer:port/roambi/designer/`. For example, `http://myserver.com:8080/roambi/designer`.

Note: When referring to the Publisher, Roambi sometimes uses the words Publisher and Designer interchangeably in its documentation.

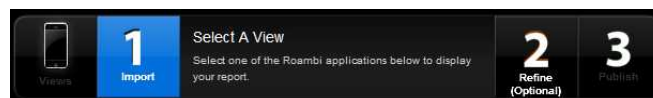
3. From the Roambi Publisher main window, open the type of view that you want to create. Roambi displays a window that contains a description of the view and a link to the best practices for that view.

TIP If this is the first time you are creating this view, it is recommended that you look at the best practices document.

4. Click **Select This View** when you are ready to create the view. The publisher window appears and displays the SAS metadata repository folder tree.

Note: If a logon page appears, enter your user name and password for a user who is defined in SAS metadata. The user must have permissions to see and execute the reports that are to be published. If more than one metadata repository (portal location) is available, select the repository to which you want to connect. When you are finished, click **Login**.

The Publisher window contains a navigation bar with buttons for the three stages of publication: importing, refining, and publishing. The button for the current stage is highlighted blue. Once you have imported the data into the view, buttons become available to refine the report and publish the report.



At any time, you can cancel the operation and return to the main Roambi window by clicking the **Views** button next to the **Import** button.

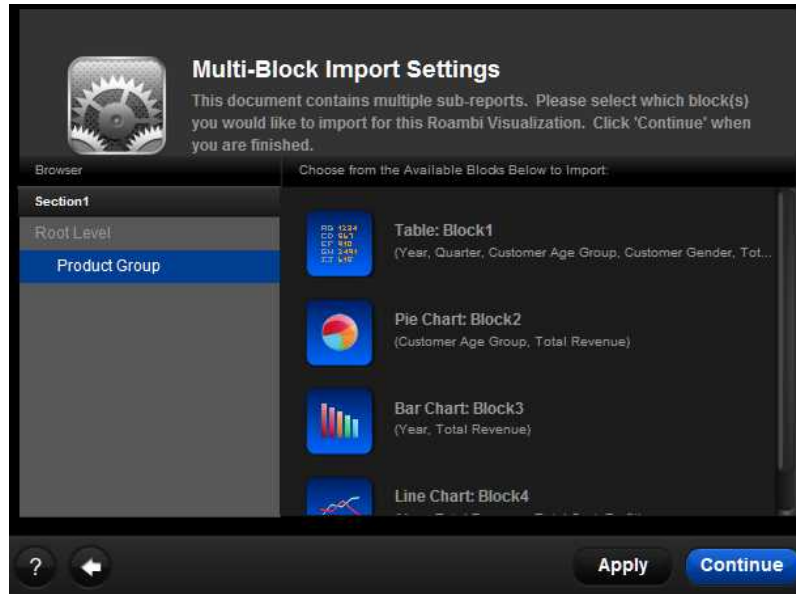


5. Navigate the folder tree until you find the report that you want to publish. Select the report.
6. Click **Import**. The report data is imported into the view.

If the report has prompts, a page appears in which you can specify the prompt values.

If the report contains multiple sections, a page appears in which you can select a section. Roambi views can have only one section. In the following display, the report contains one section, which is labeled Section1 in the left pane.

If the report (or report section) contains more than one report object, select the report objects that you want in the view. Roambi refers to these objects as blocks. A blue background indicates that the block is selected. All blocks are selected by default.



Note: Not all views support multiple blocks. For example, the CataList view accepts only one block. Therefore, only one block is selected by default.

7. Do either of the following:
 - To accept the default selections, click **Continue**. The report preview appears on the page.
 - To change the default selections, do the following:
 1. Click a block to deselect it. The report object is removed from the report. Clicking the block again reselects it.
 2. When the appropriate blocks are selected, click **Apply**.
 3. Click **Continue**.
8. If the window displays the **Regroup Data** option, you can select that option to transpose the report's header data. By default, summary card groups are created based on the data columns. Click the **Regroup Data** button to create groups based on body axis fields.
9. Do either of the following:
 - Click **PUBLISH** to publish the report now.
 - Click **Continue** to refine the report before you publish it.

Step Two: Refine the Report (Optional)

If you choose to refine the report, you can control what information is displayed in the summary cards. You can also group data columns, change column labels, change the color scheme for charts, and so on. For more information, see [“Options for Refining a Report” on page 12](#).

You can also refine a report after the report has been published. For more information, see [“Modify a Published Report” on page 11](#).

Step Three: Publish the Report

When you publish a report, the report is stored in the SAS metadata folder tree and can be accessed from a mobile device. Roambi provides several options for publishing the report (RBI file).

Display 1.1 The Publish Window

The publish window contains the following tabs:

Publish Options tab

contains general publishing options, such as the report title, summary, whether to send an e-mail, and other options.

The **Roambi Update** list box displays **None** by default. You have the following options:

- | | |
|-----------------------|--|
| <i>None</i> | The source SAS Web Report Studio report is not executed when the user downloads the RBI file to a device, or anytime after download. For both the device and the Roambi server, the data in the RBI file is the same as when the report was created. |
| <i>Manual Refresh</i> | When the device user downloads the RBI file, the source SAS Web Report Studio report is executed with the device user’s credentials. The device has the most recent data, possibly newer than the RBI |

file in the Roambi server. The device user can also refresh the report to obtain subsequent updates.

Auto Refresh When the device user downloads the RBI file, the source SAS Web Report Studio report is executed with the user's credentials. In addition, the RBI file is refreshed when the user starts the Roambi application and opens the report. The device user can also refresh the report to obtain subsequent updates.

For complete information about how reports are refreshed, see [“Refresh Options for Reports” on page 37](#). In addition, that topic contains refresh information for reports that are created in batch mode.

Change Location tab

displays the SAS metadata folder tree. Navigate to the folder where you want to store the report RBI file. The location defaults to the most recently accessed folder, which is the folder from which you selected the source report.

My Info tab

contains personal information, such as name, title, e-mail address, and so on.

When you have selected the report file location and specified the options that you want, click **PUBLISH**.

Modify a Published Report

1. From the Roambi Publisher window, open the **Open an Existing Roambi** view.
2. On the next window, click **Select This View**. The publisher window appears and displays the SAS metadata folder tree.

Note: If a logon page appears, enter your user name and password for a user who is defined in SAS metadata. The user must have permissions to see and execute the reports that are to be published. If more than one metadata repository (portal location) is available, select the repository to which you want to connect. When you are finished, click **Login**.

3. Navigate the folder tree until you find the report that you want to modify. Select the report.
4. Click **Import**. The report preview appears on the page.

TIP You can also open a report that was created during this session from the Publish Manager. Click the **Publish Manager** drop-down list box



in the upper right corner of the window, and select the report from the list.

5. Click **Continue** to refine the report. For more information, see [“Options for Refining a Report” on page 12](#).
6. Click **PUBLISH** to publish the report. You can either replace the existing RBI file or save the report to a new location. For information about publishing options, see [“Step Three: Publish the Report” on page 10](#).

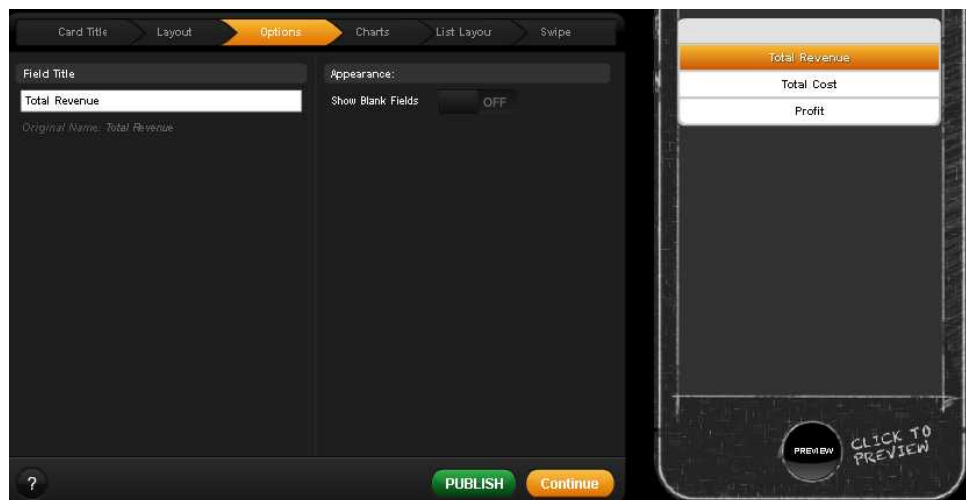
Options for Refining a Report

When you import a report, you can make modifications to the report. For example, you can control what information is displayed in summary cards. You can also group data columns, change column labels, change colors for charts, and so on.

The User Interface for Refining a Report

When you refine a report, Roambi loads an editor that looks similar to the following display, but that contains the data in your report.

Display 1.2 Editor for Refining a Report



The editor window is organized into the following three sections:

tabs (across the top of the editor)

enable you to modify different elements of the report. In the display, the **Options** tab is selected. The options are specific to the currently selected view.

main pane (left side of the window)

contains the items that you can modify. This pane interacts with the preview pane.

For example, to change the field title that is displayed for the Total Revenue column, select **Total Revenue** in the preview pane and then make your change.

preview pane (right side of the window)

enables you to preview your report by clicking the **PREVIEW** button. To continue refining the report, click the **REFINE** button. This pane interacts with the main pane of the editor.

If you need help while working in the editor, you can click **?** at the bottom of the window.

Main Steps to Refine a Report

1. Click any of the tabs to specify options. The available tabs vary among the different types of views.

2. When you finish refining the report, click **Publish**.

The following sections summarize what you can do on each tab. The actual tabs that are displayed vary depending on the Roambi view.

Card Title Tab

You can select a different data column to use for the labels that appear in summary cards. The preview on the right side of the window lists the columns in the report. The


 icon indicates the column that is currently used for the labels. Scroll to select a different column.

Chart Options Tab

This tab enables you to create and modify charts that are displayed in trend reports.

To specify a chart, select the chart that you want. After you specify a chart, the window displays options for modifying the chart. For example, you can specify a color scheme.

Charts Tab

This window enables you to create and modify charts that are displayed in summary cards of your reports. The data columns must be organized into groups.

To specify a chart for a group, select the group in the preview pane, and then select the chart that you want for the group. After you specify a chart, the window displays options for modifying the chart. For example, you can specify a color scheme.

The **Add a Series** option enables you to combine two groups.

Key Column

Select the column that you want to use as the key column of a SuperList view.

Product Group	Total Revenue	Product Category
Eclipse CloL...	\$4,250,981.77	Clothes
Green Tomato	\$197,018.15	Clothes
Knitwear	\$1,347,309.10	Clothes
LSF	\$792,512.62	Clothes
Leisure	\$651,489.39	Clothes
Massif	\$272,034.50	Clothes
Orion	\$1,889,200.51	Clothes
Orion Clothing	\$544,694.10	Clothes
Osprey	\$394,763.70	Clothes

The key column is the left-most column and is typically an identifier for the row. In the display, the product group is the key column.

Layout Tab


This tab enables you to control the information that is displayed in the summary cards and how that information is organized. The available columns are listed on the main

pane and in the preview pane. The following display shows three columns listed in the preview pane.




Total Revenue
Total Cost
Profit

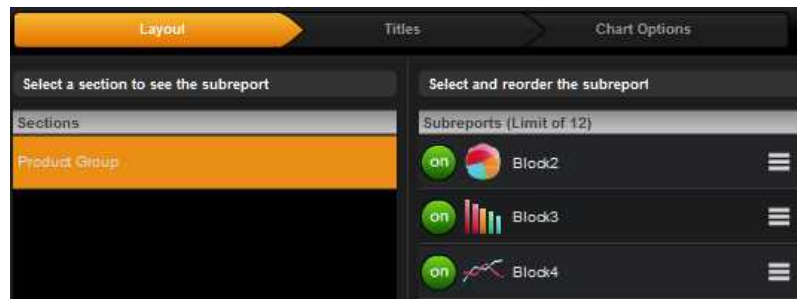
In the preview pane, you can do the following:

- To remove a column from the report, click to the left of the column name, and then click the remove  button.

To restore a column that you have removed, drag the column from the main pane to the preview pane.

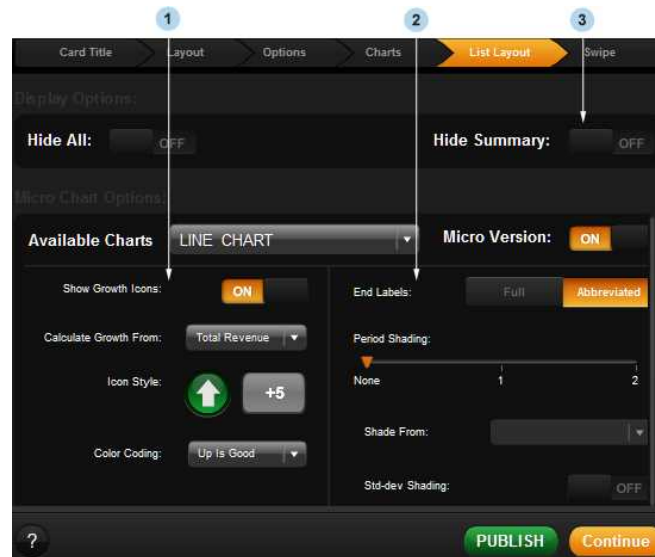
- To move a column, click to the right of the column name. Then click and drag the move  handle to the desired position.
- To create a group, drag one column onto another. Groups are indicated with orange bars.

If the report contains multiple report objects, you can specify the report objects that you want in the view. Roambi refers to these objects as blocks. Toggle the ON and OFF buttons to select blocks.



List Layout Tab

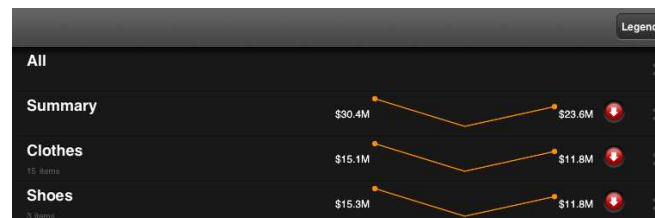
If you have selected a chart on the **Charts** tab, Roambi creates a micro version of the chart that provides a quick summary of the items in a list. On the **List Layout** tab, you can change the appearance of those micro charts.



- 1 You can add growth icons to the list. Growth icons indicate graphically the change for each list item relative to the first and last list items. You can specify options for growth icons, such as the icon style and the data column used to determine the icon's value.
- 2 You can customize the labels that appear on the right and left of the chart.
- 3 If the table contains summary information, then you can hide the summary item by changing **Hide Summary** to **ON**.

The **Hide All** option enables you to disable a list of all items. By default, device users can see all items in a single list.

For example, the following view provides information about product sales. By tapping **Summary**, users can drill down to summary details. By tapping **Clothes**, users can see the product groups for clothes. By tapping **Shoes**, users can see the product groups for shoes. By tapping **All**, users can see the product groups for both clothes and shoes.



Options Tab

This tab contains options that are specific to the Roambi view and the report that you are publishing. For example, if the report contains groups, you can change the name of a group. Select the group in the preview pane and change the name in the main pane.

Periods

You can select and reorder the time periods that you want in a Trends view. For example, instead of showing the year, quarter, and month, you might show only the year and quarter. Toggle the ON and OFF buttons to select blocks.

Other options enable you to specify attributes, such as the label, for each period.

Pie

You can customize how the slices in a PieView chart are labeled. In the preview pane, choose the data column that you want to use for labels.

Pie Values

You can specify which columns appear in a PieView chart.

Swipe Tab

You can configure what information is available to swipe through the list. Click an item in the preview pane to make it swipeable.

If an item in the summary card is swipeable, then it appears in the list view. Charts that you create on the **Charts** tab are automatically swipeable. You swipe items in the tree view by dragging your finger from right to left over the swipeable information.

Tab Title Tab

You can specify which column to use for the titles of the tabs in the Cardex view.

Titles Tab

You can specify the title for each block of a report. If the SAS Web Report Studio report objects have titles, then those titles are shown. Otherwise, the default titles are Block1, Block2, Block3, and so on.

Example That Uses the Elements View

About This Example

This example uses data from the fictional Orion Star retail chain. Orion Star products are organized in a hierarchy consisting of four levels:

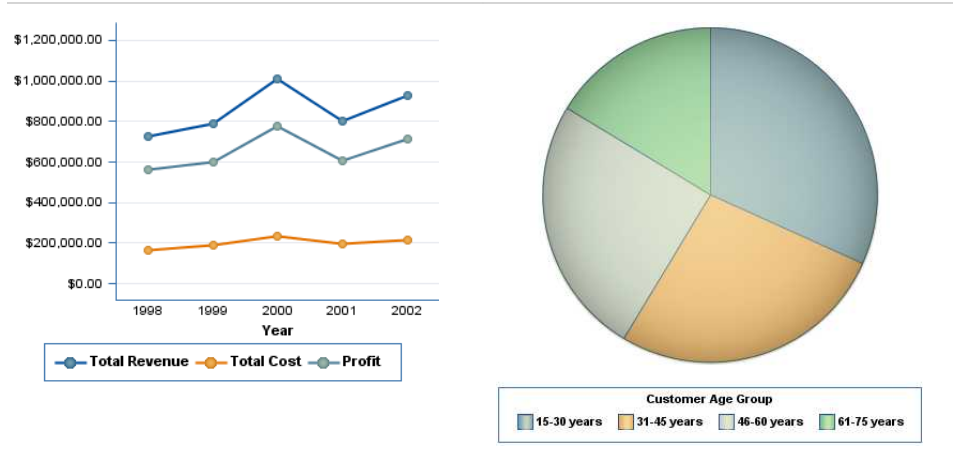
- product line (clothes and shoes)
- product category (clothes, shoes)
- product group (Eclipse Clothing, Green Tomato, Knitwear, Tracker Shoes, and so on)
- product (Big Guy men's fleece hood, Eclipse Signature cap, and so on)

Each product has a cost price and a sales price. All prices are in U.S. dollars.

The report consists of a table, a pie chart, a bar chart, and a line plot. The report presents data by product group.

Source Report

The SAS Web Report Studio report consists of a table, a pie chart, a bar chart, and a line plot. The two items of interest are the line plot and the pie chart.



Roambi Output

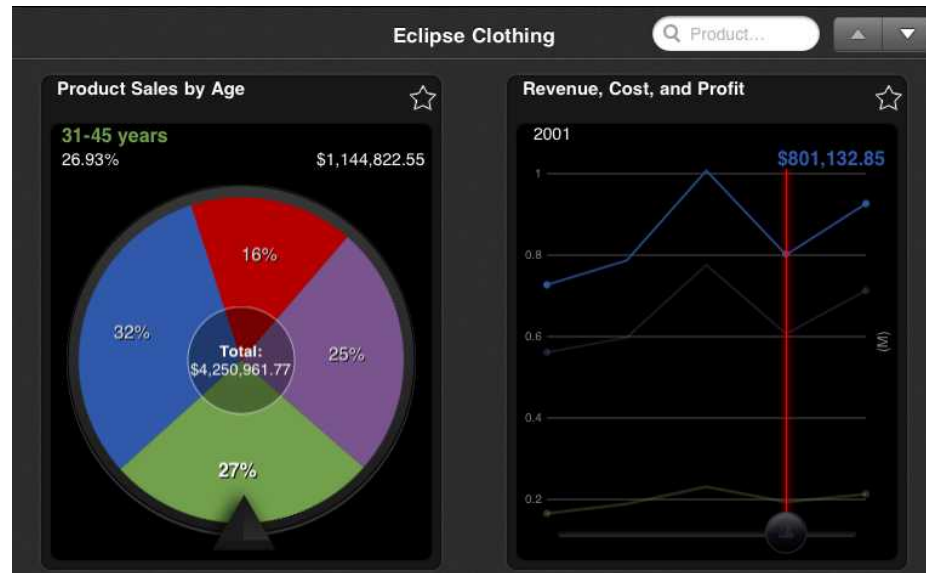
Here is how the RBI file appears on an iPad. When viewed on small devices, such as the iPhone, only one report object can be viewed at a time. Users can swipe to move from the pie to the line plot, and vice versa.

Display 1.3 RBI File on an iPad



The device user can rotate the pie in order to view information about a different slice. For the line plot, users can drag the vertical slider to obtain a different measure. The following display shows both changes to the plots.

Display 1.4 Pie and Line Charts Shown with a Different Metric



The display show sales information for the Eclipse Clothing product group. Device users can use the arrow buttons on the window to scroll through the different product groups in the category (31–45 years).

Publication Steps

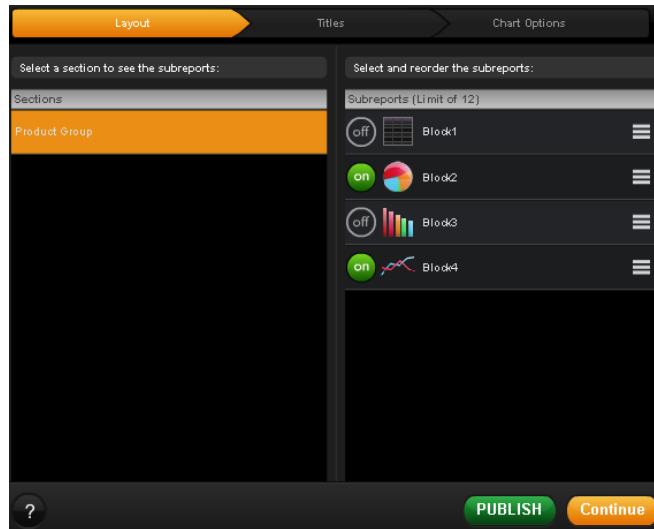
Here are the high-level steps for publishing the report.

1. The SAS Web Report Studio report was imported into the Roambi Elements view using the instructions found in “[Step One: Select a Roambi View and Import a Report](#)” on page 8.
2. The report contained four report objects, all of which were selected by default. This example retained the defaults.



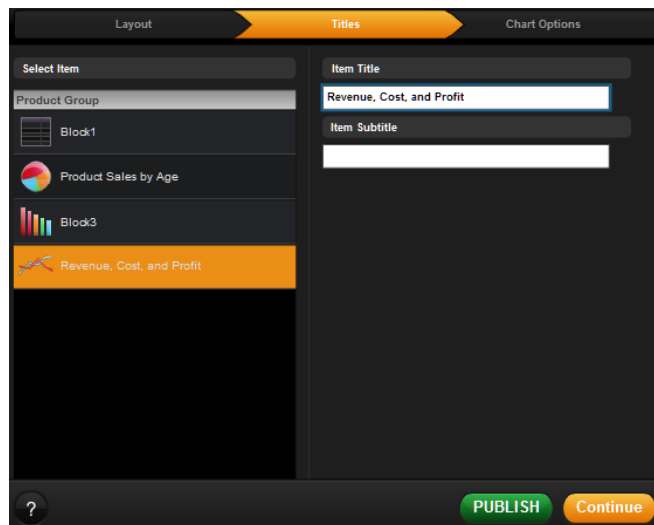
3. The report was refined after clicking **Continue**.
4. Though the original report contained a table and three graphs, this example used only two graphs.

In the **Layout** tab, the table and the bar chart were disabled by changing the **ON** button to **OFF**.



5. The **Titles** tab shows the title for each block. By default, the titles were Block1, Block2, Block3, and Block4. (These were the default titles because the source report objects did not have titles. Otherwise, the source report object titles would be shown as the defaults.)

To change a title for a block, the example selected the block and entered the new title in the **Item Title** text box. The titles were changed for the pie chart and the line plot.



6. The report was published using the information found in [“Step Three: Publish the Report”](#) on page 10.

Example That Uses the CataList View and Has Two Report Sections

About This Example

This example uses data from the fictional Orion Star retail chain. For more information about this data, see “[Example That Uses the Elements View](#)” on page 16.

The report contains two sections, each with a crosstabulation table. The first section shows sales by product. The second section shows sales by year and also includes a bar chart. The items of interest are the tables in the two sections.

Source Report

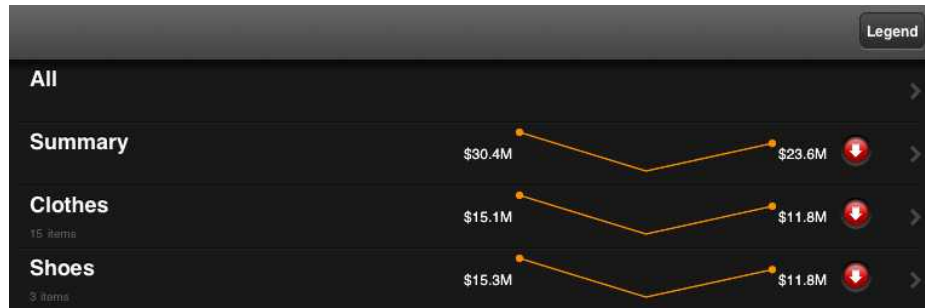
Here are the tables from the two sections of the SAS Web Report Studio report.

Table for Sales by Product					Table for Sales by Year				
Product Category	Product Group	Total Revenue	Total Cost	Profit	Year	Total Revenue	Total Cost	Profit	
Clothes	Eclipse Clothing	\$4,250,961.77	\$994,237.45	\$3,256,724.32	1998	\$5,117,419.63	\$1,137,043.80	\$3,980,375.83	
	Green Tomato	\$197,016.15	\$37,677.80	\$159,338.35	1999	\$5,827,410.14	\$1,300,843.00	\$4,526,567.14	
	Knitwear	\$1,347,309.10	\$273,878.05	\$1,073,431.05	2000	\$6,934,465.81	\$1,545,289.45	\$5,389,176.36	
	LSF	\$792,512.62	\$183,549.75	\$608,962.87	2001	\$5,721,237.67	\$1,289,822.55	\$4,431,415.12	
	Leisure	\$651,489.39	\$136,894.80	\$514,594.59	2002	\$6,764,225.17	\$1,492,854.10	\$5,271,371.08	
	Massif	\$272,034.50	\$61,421.00	\$210,613.50	Total	\$30,364,758.42	\$6,765,852.90	\$23,598,905.53	
	Orion	\$1,689,200.51	\$383,116.70	\$1,306,083.81					
	Orion Clothing	\$544,694.10	\$126,604.60	\$418,089.50					
	Osprey	\$394,763.70	\$76,797.10	\$317,966.60					
	Shorts	\$77,530.19	\$16,787.70	\$60,742.49					
	Stockings & Socks	\$90,915.46	\$18,603.75	\$72,311.71					
	Street Wear	\$823,335.29	\$157,763.95	\$665,571.34					
	T-Shirts	\$200,307.42	\$44,542.75	\$155,764.67					
	Tracker Clothes	\$3,280,871.63	\$706,973.25	\$2,573,898.38					
	Twain	\$464,479.42	\$101,855.40	\$362,624.03					
	Subtotal		\$15,077,421.25	\$3,320,704.05	\$11,756,717.21				
	Shoes	Eclipse Shoes	\$8,021,893.55	\$1,921,500.10	\$6,100,393.45				
Shoes		\$3,655,413.33	\$778,315.55	\$2,877,097.78					
Tracker Shoes		\$3,610,030.29	\$745,333.20	\$2,864,697.09					
Subtotal			\$15,287,337.17	\$3,445,148.85	\$11,842,188.32				
Total	Subtotal		\$30,364,758.43	\$6,765,852.90	\$23,598,905.53				

Roambi Output

Sales by Product

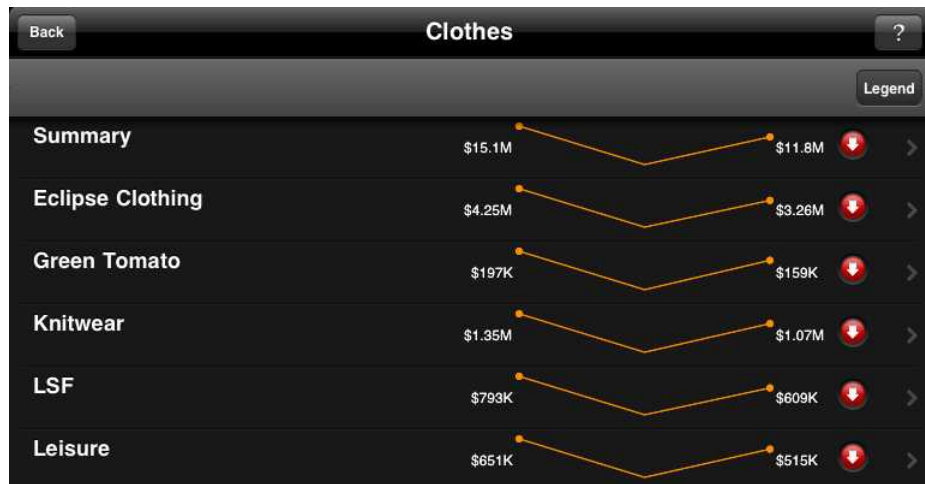
Here is how the Sales by Product Group RBI file appears on an iPad. This is the high-level view.



The initial window corresponds to the Product Category column of the original report.

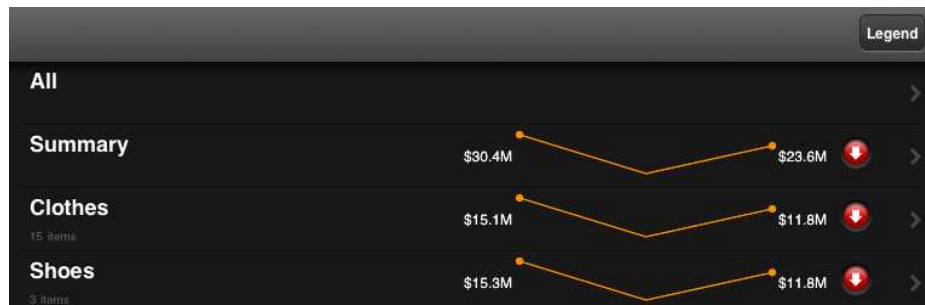
By tapping **Clothes**, users can see the product groups for clothes. By tapping **Shoes**, users can see the product groups for shoes. By tapping **All**, users can see the product groups for both clothes and shoes.

The following display shows the product groups for clothes.

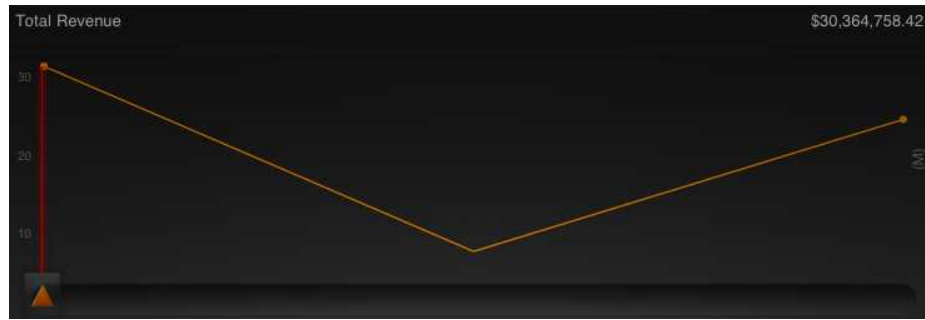


From this window, users can drill down to sales totals for any product group. Users can also see subtotals for all clothing sales by tapping **Summary**.

From the high-level view, the **Summary** link enables users to drill down to summary details.



The Total Revenue column summary is shown by default.



Device users can move the vertical slider to a different point in the line in order to see a summary for the Total Cost and Profit columns. This information corresponds to the totals row of the original report, shown below.

Shoes	Shoes	\$3,655,413.33	\$778,315.55	\$2,877,097.78
	Tracker Shoes	\$3,610,030.29	\$745,333.20	\$2,864,697.09
	Subtotal	\$15,287,337.17	\$3,445,148.85	\$11,842,188.32
Total	Subtotal	\$30,364,758.43	\$6,765,852.90	\$23,598,905.53

Note: The subtotal for shoes is available from the product group listing for shoes.

Sales by Time

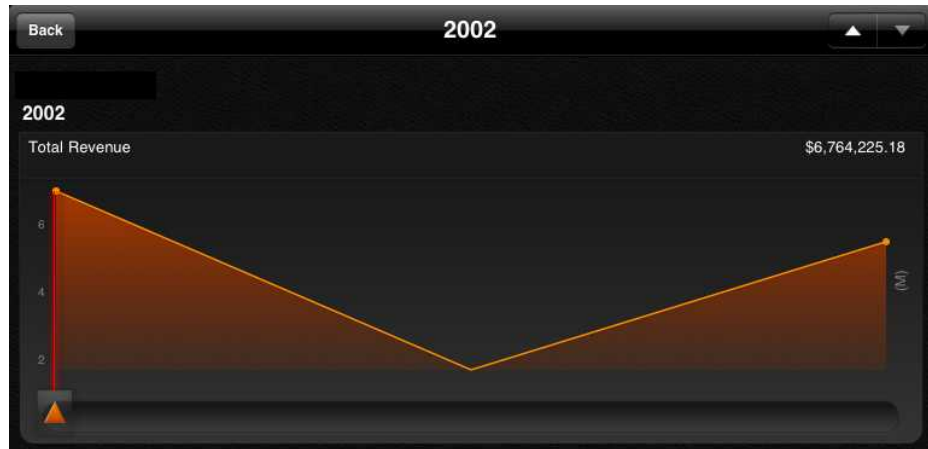
Here is how the Sales by Time RBI file appears on an iPad.



This window provides a summary of the original report.

	Total Revenue	Total Cost	Profit
Year			
1998	\$5,117,419.63	\$1,137,043.80	\$3,980,375.83
1999	\$5,827,410.14	\$1,300,843.00	\$4,526,567.14
2000	\$6,934,465.81	\$1,545,289.45	\$5,389,176.36
2001	\$5,721,237.67	\$1,289,822.55	\$4,431,415.12
2002	\$6,764,225.17	\$1,492,854.10	\$5,271,371.08
Total	\$30,364,758.42	\$6,765,852.90	\$23,598,905.53

From the main window, users can tap a year to drill down to the sales details. The following display shows sales revenue for the year 2002.



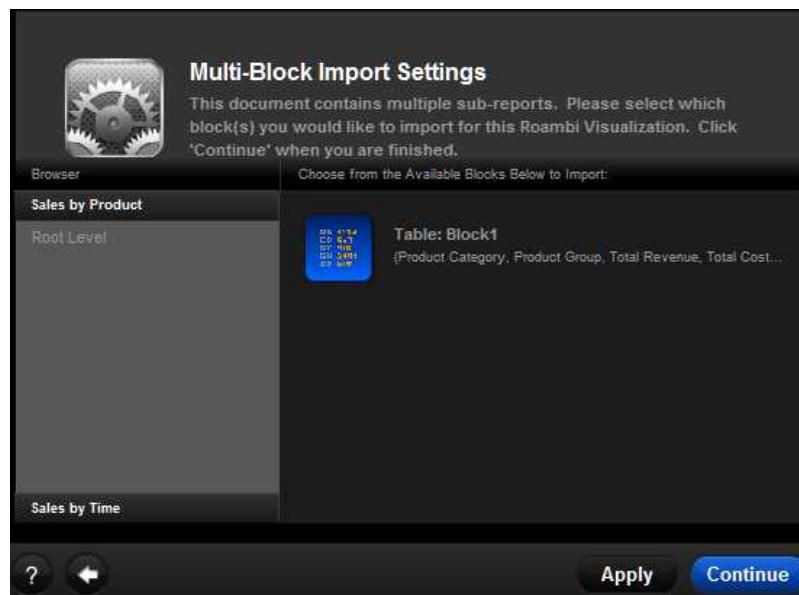
Users can move the vertical slider to a different point in the line in order to see a summary for the Total Cost and Profit columns. Users can also click the navigation arrows at the top of the window to see the sales details for different years.

Publication Steps

Here are the high-level steps for publishing the report.

1. The SAS Web Report Studio report was imported into the Roambi CataList view using the instructions found in “[Step One: Select a Roambi View and Import a Report](#)” on page 8.
2. The report contained multiple blocks that correspond to the two sections and the report objects. The first section, Sales by Product, was selected by default. The second section, Sales by Time, was not selected. The Sales by Product section contains one table, which was also selected by default.

This example retained the default settings.



3. The report was refined after clicking **Continue**.
4. On the **Charts** tab, the example specified a line chart to be displayed on the summaries.

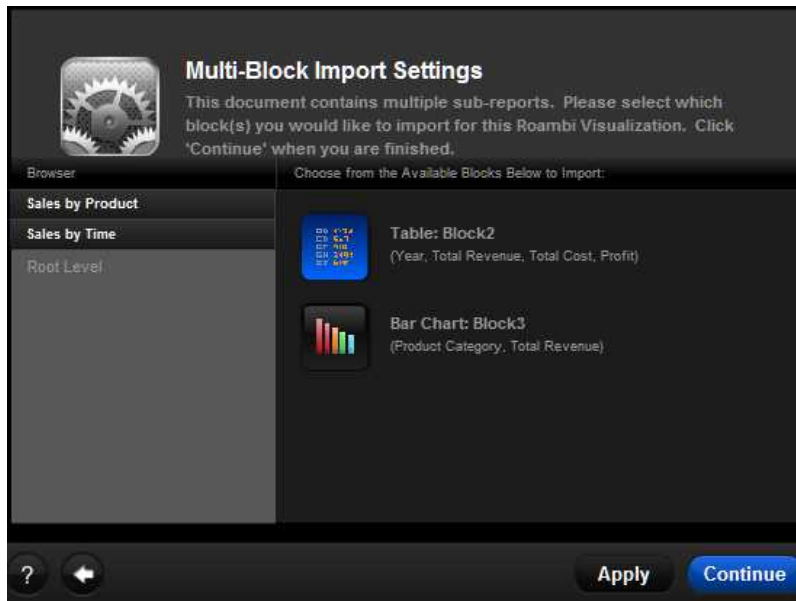


5. On the **List Layout** tab, the example specified growth icons by changing the **Show Growth Icons** value to **ON**.



The example retained all the other defaults for the growth icon.

6. The report was published using the information found in “[Step Three: Publish the Report](#)” on page 10.
7. The example created a second CataList view and imported the same report as in [step 1 on page 23](#).
8. For this view, the example selected the **Sales by Time** section, and then selected the table for that section. The selections were applied by clicking the **Apply** button.



9. The report was refined after clicking **Continue**.
10. On the **Charts** tab, the example specified an area chart to be displayed on the summaries.



11. On the **List Layout** tab, the example specified growth icons by changing the **Show Growth Icons** value to **ON**.



The example retained all the other defaults for the growth icon.

12. The report was published using the information found in [“Step Three: Publish the Report”](#) on page 10.

Chapter 2

Viewing Published Reports on a Mobile Device

Overview of Viewing Reports on a Mobile Device	27
Introduction to Viewing Reports	27
Main Steps for Viewing Reports	28
About the Examples in This Chapter	28
Software and Hardware Requirements for Viewing Reports	28
Supported Mobile Devices	28
Software Required to View Reports on a Mobile Device	28
Known Report Limitations for BlackBerry Devices	28
Overview of the Roambi Visualizer Interface	29
The Roambi Main Window	29
The Connect Window	30
Establish a Connection to the Roambi Server	30
Download a Report	32
View a Report	32
Refreshing a Report	33
Tips for Viewing Report Objects	33

Overview of Viewing Reports on a Mobile Device

Introduction to Viewing Reports

After SAS Web Report Studio reports have been published to Roambi (RBI) files, you can use Roambi software to view the reports on a mobile device. This chapter describes the following:

- what software is required to view reports
- how to establish a connection to the Roambi server
- how to download and view reports
- what you need to know about refreshing a report when the underlying SAS Web Report Studio data is updated
- tips for navigating reports to obtain the information that you need

Note: To publish the SAS reports, report designers import the report data into one of several predefined Roambi views. For more information about these views, see [“Overview of Roambi Views” on page 2](#).

Main Steps for Viewing Reports

Here are the high-level steps to access and view reports.

1. Establish a connection to the Roambi server. This is a one-time task that you must perform before you can access reports that reside on that server.
2. Connect to the Roambi server and download the report. You must download a report before you can view it.
3. After you have downloaded a report, you can open and view the report.

About the Examples in This Chapter

The examples in this chapter were created using the Apple iPad. Though specific instructions might differ for the other supported devices, the general concepts are the same. In addition, the Roambi Visualizer interface varies a little among the supported devices, but the core functionality is largely the same.

Software and Hardware Requirements for Viewing Reports

Supported Mobile Devices

You can view the reports on the following devices:

- Apple iPad
- Apple iPhone
- Apple iPod Touch
- BlackBerry Bold and BlackBerry Torch Smartphones

Software Required to View Reports on a Mobile Device

To view reports on a mobile device, you must install Roambi Visualizer on the device. The method used to download and install the Visualizer varies with the device. For example, to download the software on an iPad, use the App Store and search for Roambi.

For information about Roambi, see www.roambi.com/.

Known Report Limitations for BlackBerry Devices

BlackBerry Smartphones have the following limitations:

- Reports that were created in the Cardex view or the PieView are displayed using the CataList view.

- Reports can have a maximum of 256 columns.
- The Elements view is not supported.

See Also

“Overview of Roambi Views” on page 2

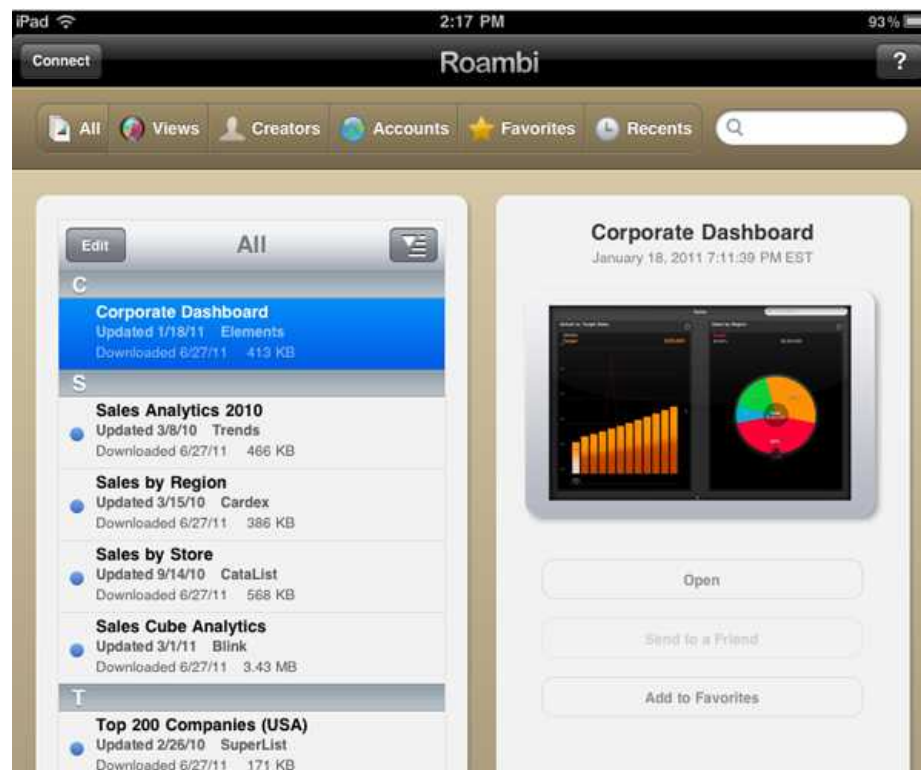
Overview of the Roambi Visualizer Interface

The Roambi Visualizer has two primary windows: Roambi main window and the Connect window. You can use these windows to view reports and to connect to the Roambi server.

The Roambi Main Window

Here is an example (partial view) of the Roambi main window, which displays the items in your library. Once you download a report, the report is stored in the library.

Display 2.1 Roambi Main Window



From this window, you can do the following:

- select a report in the list. The selected report is displayed in the right pane. From there, you can open the report.
- delete reports from the list.
- sort the list by title, file size, download date, or update date.

- perform other tasks that are available from the menu bar, such as adding accounts and managing favorites.

Note: You can tap the **Connect** button in the upper left corner to open the Connect window.

The Connect Window

Here is an example (partial view) of the Connect window, which enables you to set up connections to Roambi ES servers and to download reports.

Display 2.2 Connect Window



From this window, you can do the following:

- select a portal in the **Accounts** list. The right pane displays the file folder content of the portal.
- navigate the folders in the right pane until you reach a report of interest. You can then download the report, or you can view the report if it is already downloaded.
- remove and add portals

Note: You can tap the **Library** button in the upper left corner to open the Roambi main window.

Establish a Connection to the Roambi Server

Before you can access reports, you must be able to connect to the Roambi server on which the reports reside. There is a one-time task that you must perform to establish a connection.

To establish a connection to the Roambi server:

1. If you are in the main Roambi window, tap the **Connect** button in the upper left corner.



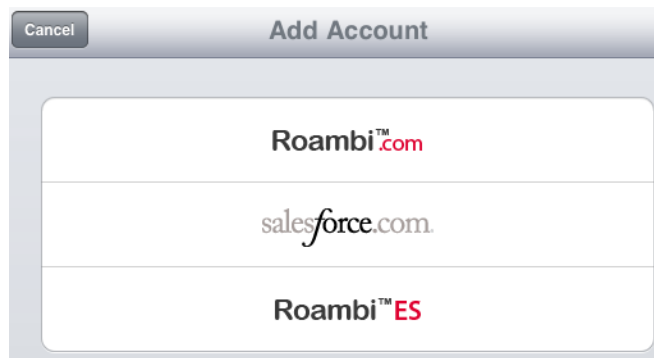
The Connect window appears.

2. In the **Accounts** pane, tap the plus button.



The Add Account window appears.

3. Tap **Roambi ES**.



The Add Account window displays a **Roambi Server URL** text box.

4. Type the URL for the Roambi ES server deployment.

The URL looks similar to the following.

`http://RoambiServer:Port/roambi/SourceManager`

You must provide your server name and port. The following display shows an example.



Tap **DONE** on the keypad. The Add Account window expands to show the available portal or portals on the server. The window also contains text boxes for entering the credentials to connect to the portal.

5. If more than one portal is listed, select the portal to which you want to connect. The portal name is determined by the administrator who configured the server. If you have any questions about a portal, contact your administrator.
6. Provide the user name and password for connecting to the portal, and tap **DONE** on the keypad.
7. Tap **Save** in the Add Account window. After the credentials are verified, the new account is added and a connection is established with the Roambi server.

Download a Report

Before you can download a report from the Roambi server, you must be able to connect to that server. If you have not already established a connection, see “[Establish a Connection to the Roambi Server](#)” on page 30.

1. If you are in the main Roambi window, tap the **Connect** button in the upper left corner.

A rectangular button with a dark background and the word "Connect" in white text.

The Connect window appears.

2. In the left pane, select the portal that is associated with the connection that you created previously. For example, the portal might be named SAS Web Report Studio. The right pane displays the SAS folders that you have permission to access in that portal.
3. Tap to expand the folders until you reach the folder that contains the reports that have been published for you.
4. Beneath the report that you want to download, tap the **Tap to Download** link. An example report is shown below.

A report card showing the title "Sales Figures by Age", the creation date "Created 6/28/11", the creator "CataList", and a "Tap To Download" link followed by "140 KB".

Sales Figures by Age
Created 6/28/11 CataList
[Tap To Download](#) 140 KB

After you tap the link, the link text changes to “Downloading.” When the file is downloaded, a small blue circle appears next to the report name, indicating that the report is newly downloaded.

A report card showing the title "Sales Figures by Age", the update date "Updated 6/28/11", the creator "CataList", and the download date and size "Downloaded 6/28/11 138 KB". A small blue circle is next to the title.

Sales Figures by Age
Updated 6/28/11 CataList
Downloaded 6/28/11 138 KB

You can now tap the report to view it. In addition, the report is added to your report library in the Roambi main window.

View a Report

After you have downloaded a report, you can open your report library and view the report.

1. If you are in the Connect window, tap the **Library** button in the upper left corner.

A rectangular button with a dark background and the word "Library" in white text.

The Roambi main window appears.

2. Locate the report in the list.



By default, reports are listed alphabetically. You can sort the list by title, file size, download date, or update date. To do this, click the sort button, shown here, and specify how you want to sort the list.



3. Tap the name of the report. The right pane displays options for viewing the report. You can do the following:
 - open the report
 - e-mail the report (if your account has been set up for e-mail)
 - bookmark the report
4. Tap **Open**. The report opens in a report window.

Refreshing a Report

Refreshing a report involves executing the original SAS Web Report Studio report to obtain the most current data. When a report is published as a Roambi (RBI) file, the report is saved with one of the following refresh options:

Manual refresh	When you download the RBI file to your device, the source SAS Web Report Studio report is executed with your credentials. You can also refresh the report afterward to obtain subsequent updates. To refresh a report, tap the Refresh button  in the report window.
Automatic refresh	When you download the RBI file to your device, the source SAS Web Report Studio report is executed with your credentials. In addition, the RBI file is refreshed each time you start the Roambi Visualizer and open the report. You can also refresh the report manually by tapping the Refresh button  in the report window.
No refresh	The report data on your device is the same as when the report was created. The SAS Web Report Studio report is not executed after that time. You do not have an option to update the report (there is no Refresh button).

After a refresh, Roambi displays a message indicating that an update is available. You can choose to open the updated file now or later.

Note: The message indicates that the report has been updated even if there has been no change to the content.

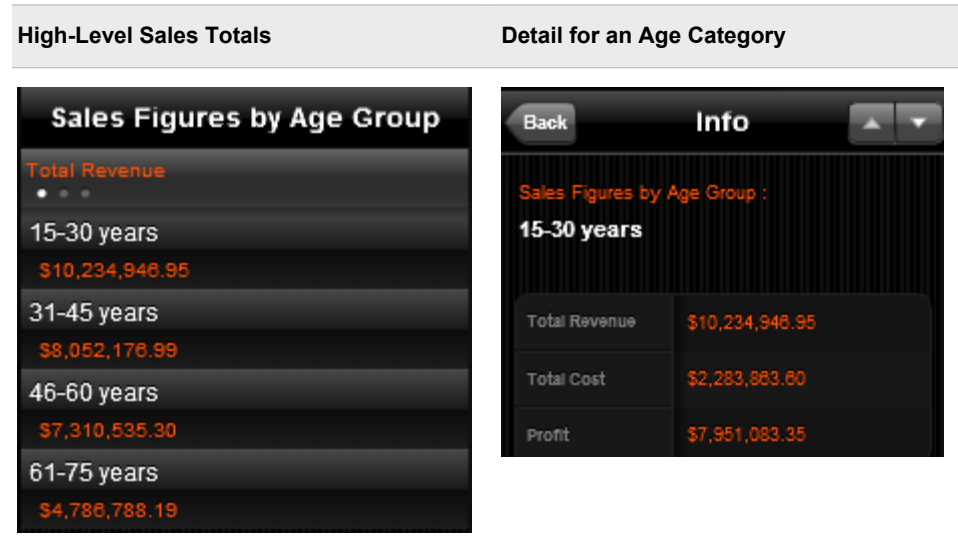
For complete information about how reports are refreshed, see [“Refresh Options for Reports” on page 37](#).

Tips for Viewing Report Objects

Some reports provide a high-level summary list that shows the grand total row of the report table. Typically, you can drill down into the details from the high-level view.

The image below (on the left side) shows high-level sales totals. In the high-level view, you can do the following:

- tap **Total Revenue** to see details about total revenue, cost, and profit.
- tap one of the age categories to see details about that category. The image on the right shows this detail view.



In the detail view, you can see the other age categories by using the navigation arrows.

Note: Reports can have more than two drill-down levels.

Some reports contain pie charts. You can rotate the pie in order to view information about a different slice. In the following example, the pie is rotated to display sales for a different age group.




Other reports have a line plot with a vertical slider.



You can drag the vertical slider to a different data point in order to obtain a different measure. In the example, dragging the slider shows total revenue for a different year. The Cardex view makes it easy to access particular information, such as a customer name.



With a Cardex report, you can do the following:

- finger through the virtual cards to find the information that you need
- drag information from a card to another pane in order to compare records side-by-side (iPad only)
- search and filter the list by tapping the search button  on the report window

See Also

“Overview of Roambi Views” on page 2

Appendix 1

Refresh Options for Reports

The following tables show how reports (RBI files) are refreshed on the mobile device. The first table is for reports that are created using the Roambi Publisher interface. The second table is for reports that are created in batch mode.

Table A1.1 Refresh Options for Reports Published Using the Roambi Publisher Interface

Refresh Option	Client Action on the Mobile Device	Comments
None	Download the report	The source SAS Web Report Studio report is not executed. For both the device and the Roambi server, the report data is the same as when the report was created.
	Refresh the report	The action is not available.
	Open the report	The device user opens the downloaded report.
	Open the Roambi application	No change to the report.
Manual Refresh	Download the report	The source SAS Web Report Studio report is executed with the user's credentials.* The device has the most recent data, possibly newer than the RBI file in the Roambi server.
	Refresh the report	The source SAS Web Report Studio report is executed with the user's credentials.* The device has the most recent data, possibly newer than the RBI file in the Roambi server.
	Open the report	The device user opens the downloaded report.
	Open the Roambi application	No change to the report.

Refresh Option	Client Action on the Mobile Device	Comments
Auto Refresh	Download the report	The source SAS Web Report Studio report is executed with the user's credentials.* The device has the most recent data, possibly newer than the RBI file in the Roambi server.
	Refresh the report	The source SAS Web Report Studio report is executed with the user's credentials.* The device has the most recent data, possibly newer than the RBI file in the Roambi server.
	Open the report	The device user opens the downloaded report.
	Open the Roambi application	A refresh is triggered when the report is opened. The source SAS Web Report Studio report is executed with the user's credentials. The device has the most recent data, possibly newer than the RBI file in the Roambi server.

* It does not matter whether the SAS Web Report Studio report was saved to be refreshed automatically or manually.

The refresh behavior is different for reports that are published in batch mode.

Note: RBI files created in batch mode with the *-connected* option behave like manually published RBI files. (See the previous table.) Row-level security is applied based on the credentials that are used in the batch command.

For more information about the batch utility, see [Appendix 2, “Using the Roambi Batch Command Line Interface,”](#) on page 41.

Table A1.2 Refresh Options for Reports Published in Batch Mode

Refresh Option	Client Action on the Mobile Device	Comments
None	Download the report	The source SAS Web Report Studio report is not executed. For both the device and the Roambi server, the report data is the same as when the report was created.
	Refresh the report	The action is not available.
	Open the report	The device user opens the downloaded report.
	Open the Roambi application	No change to the report.

Refresh Option	Client Action on the Mobile Device	Comments
Manual Refresh	Download the report	The source SAS Web Report Studio report is not executed. For both the device and the Roambi server, the report data is the same as when the report was created.
	Refresh the report	The source SAS Web Report Studio report is not executed. If the RBI file in the server has a newer timestamp, then the new RBI file is downloaded to the device.
	Open the report	The device user opens the downloaded report.
	Open the Roambi application	No change to the report.
Auto Refresh	Download the report	The source SAS Web Report Studio report is not executed. For both the device and the Roambi server, the report data is the same as when the report was created.
	Refresh the report	The source SAS Web Report Studio report is not executed. If the RBI file in the server has a newer timestamp, then the new RBI file is downloaded to the device.
	Open the report	The device user opens the downloaded report.
	Open the Roambi application	A refresh is triggered when the report is opened. The source SAS Web Report Studio report is not executed. If the RBI file in the server has a newer timestamp, then the new RBI file is downloaded to the device.

Appendix 2

Using the Roambi Batch Command Line Interface

About the Roambi Batch Command Line Interface	41
Running the Command Line Interface	42
Syntax	42
Examples	44
Update and Replace an RBI File	44
Copy an RBI File to a New Portal Folder	44
Create a New RBI File on a Different Portal	44
Create a New RBI File on the Same Portal	45
Using a Text File with the Roambi Batch CLI	45
Locating the Folder ID and Document ID for a File	46

About the Roambi Batch Command Line Interface

The Roambi Batch command line interface (CLI) enables you to programmatically update Roambi (RBI) files with new source data. You can also create new RBI files based on existing RBI files but using a new report. Based on which arguments you use, you can replace an RBI file or create a new file. The new file can be created in the current or in a different SAS metadata repository. (Roambi Publisher refers to metadata repositories as enterprise portals.)

Aside from providing an efficient way to create and update RBI files, using the CLI has these advantages:

- RBI files that are created in batch mode do not execute the underlying SAS Web Report Studio reports when the RBI files are downloaded to mobile devices. The result is less load on the server. After users download an RBI file, they can refresh the report on their device.
- The CLI provides an effective way to migrate reports to a production environment. Development or test RBI files can be updated to use production data.

Running the Command Line Interface

The Batch folder created during installation contains the `roambi-batch.jar` file needed to execute the batch commands. You can copy this file into the `roambi/WEB-INF/lib` directory or run the `java` command from the batch folder.

Here is the command line to execute the Roambi Batch CLI and obtain the list of supported arguments:

```
java -jar roambi-batch.jar -h
```

When you use the CLI to update an RBI file, you provide the following information:

- Roambi server URL
- source portal
- RBI file that you want to update
- logon credentials
- SAS Web Report Studio report that contains the new data

To create a new RBI file, you also provide destination details about the file.

Syntax

Here is the syntax for the Roambi Batch CLI:

```
java -jar roambi-batch.jar -server http://RoambiServer:Port  
-src_rbi rbiID -src_portal Enterprise_Portal -src_data newSourceDataID  
-src_username userName -src_password password  
<arguments>
```

Note: As an alternative to providing the arguments in the command, you can specify a file that contains the arguments. For more information, see [“Using a Text File with the Roambi Batch CLI” on page 45](#).

-dst_data report

specifies the SAS Web Report Studio report to use when creating or updating the RBI file. If the report is in a different metadata repository (enterprise portal), then you must also specify the `-dst_portal` argument.

-dst_folder destination folder for the new RBI file

specifies the destination folder identifier for the destination RBI file. This identifier is unique to the destination portal. For more information, see [“Locating the Folder ID and Document ID for a File” on page 46](#).

-dst_password destination portal password

specifies the password for authentication to the destination portal. This argument is used in conjunction with `-dst_username`.

-dst_portal destination portal

specifies the destination portal name (metadata repository), if different from the source portal. The portal name corresponds to the portal ID that is configured on the Roambi server. If the destination portal is not set, then Roambi defaults to the source portal.

- dst_rbi destination RBI file**
specifies the destination RBI filename. Supply this argument if you are creating a new RBI file.
- dst_session destination portal session**
specifies the destination session to authenticate on the destination portal.
- dst_token destination portal token**
specifies the destination token to authenticate on the destination portal.
- dst_username destination portal user name**
specifies the user name to authenticate on the destination portal. This argument is required only if the destination token or the destination session has not been set. This argument is used in conjunction with `-dst_password`.
- server Roambi ES URL**
specifies the URL for the Roambi server (for example, `http://myserver:8080`)
- src_data source data**
specifies the new source report identifier for the source RBI file. This identifier is unique to the portal in which the source data resides. For more information, see [“Locating the Folder ID and Document ID for a File” on page 46](#).
- src_data_params source data report parameters**
specifies the parameters for the source data report. The parameters must be in XML tags. Use the following structure:

```
<parameters>
  <parameter name="aaa" value="123"/>
  <parameter name="bbb" value="jkl; xyz"/>
</parameters>
```


For an example, see [“Create a New RBI File on the Same Portal ” on page 45](#).
- src_password source portal password**
specifies the password for authentication to the source portal. This argument is used in conjunction with `-src_username`.
- src_portal source portal of RBI file and data**
specifies the source portal name. This argument corresponds to the portal ID as configured in the Roambi server.
- src_rbi source RBI file**
specifies the identifier for the source RBI file. The identifier is unique to the specific portal in which the RBI file resides. If no destination RBI file is specified, then the source RBI is updated. If a destination RBI file is specified, then the source RBI file is used as a template and is unchanged after the batch command executes. For more information, see [“Locating the Folder ID and Document ID for a File” on page 46](#).
- src_session source portal session**
specifies the source portal session, if available, for authentication to that portal.
- src_token source portal token**
specifies the source token to authenticate to the source portal.
- src_username source portal username**
specifies the user name to authenticate on the source portal. This argument is required only if the source token or the source session has not been set. This argument is used in conjunction with `-src_password`.
- connected**
specifies that the created RBI file maintains its connection to the source report so that row-level security can be maintained.

-del_params

disables the parameters feature in the device. This option is used when the source report has parameters. When a Roambi view is created using the Batch CLI, the parameters are provided in the batch command and cannot be changed by the user in the device. As a best practice, it is recommended to use this option when the source report has parameters. In this way, you avoid an error message that happens when the user tries to add a new parameter set in an RBI file created with the CLI.

-h

prints all command line arguments.

-logfile *log file location*

specifies the path to the log file.

-overwrite

enables batch updated RBI files to be synchronized with the devices when the manual or auto Sync Folders features are enabled.

Examples

In the following examples, the RBI file ID and folder ID must be replaced with actual ID values. For more information, see [“Locating the Folder ID and Document ID for a File” on page 46](#).

Update and Replace an RBI File

The following example updates and replaces an RBI file with new source data on the same portal.

```
java -jar roambi-batch.jar -server http://myserver:8080
-src_rbi rbiID -src_portal Enterprise_Portal_1 -src_data newSourceDataID
-src_username Administrator -src_password password123
```

Copy an RBI File to a New Portal Folder

The following example copies an RBI file to a new portal folder on the same portal.

```
java -jar roambi-batch.jar -server http://myserver:8080
-src_rbi rbiID -src_portal Enterprise_Portal_1 -dst_folder newFolderID
-src_username Administrator -src_password password123
```

Create a New RBI File on a Different Portal

The following example creates a new RBI file on a different portal.

```
java -jar roambi-batch.jar -server http://myserver:8080
-src_rbi rbiID -src_portal Enterprise_Portal_1 -src_data newSourceDataID
-src_username Administrator -src_password password123
-dst_portal Enterprise_Portal_2 -dst_folder newFolderId -dst_rbi newRbiID
-dst_username admin -dst_password 321password
```

Create a New RBI File on the Same Portal

The following example creates a new RBI file in the same folder on the same portal. The new RBI file has a new name and source data parameters .

```
java -jar roambi-batch.jar -server http://myserver:8080
-src_rbi rbiID -src_portal Enterprise_Portal_1 -src_data newSourceDataID
-src_username Administrator -src_password password123 -dst_rbi newRbiID
-src_data_params
"<parameters><parameter name=\"Quarter:\" value=\"Q3\"/></parameters>"
```

Using a Text File with the Roambi Batch CLI

You can add your command arguments to a text file. Here is the form that you use for the command:

```
java -jar roambi-batch.jar -arg_file fileName
```

For example, suppose this was your original command.

Note: In the example, the RBI file ID and source data ID must be replaced with actual ID values. For more information, see [“Locating the Folder ID and Document ID for a File” on page 46](#).

```
java -jar roambi-batch.jar -server http://myserver:8080
-src_rbi rbiID -src_portal Enterprise_Portal -src_data newSourceDataID
-src_username Administrator -src_password password123 -dst_rbi newRbiName
-src_data_params
"<parameters><parameter name=\"Quarter:\" value=\"Q3\"/></parameters>"
```

When you use a text file for your arguments, the command is shortened to this:

```
java -jar roambi-batch.jar -arg_file arguments.txt
```

The arguments.txt file contains the following:

```
-server http://myserver:8080
-src_rbi rbiID
-src_portal Enterprise_Portal
-src_data newSourceDataID
-src_username Administrator
-src_password password123
-dst_rbi newRbiName
-src_data_params <parameters><parameter name="Quarter:" value="Q3"/>
</parameters>
```

Note the following about the text file:

- Each argument-value pair must be on its own line separated by a carriage return.
- The XML for the parameters does not require escape characters for the quotation marks.
- The text file can have any name.

Locating the Folder ID and Document ID for a File

For the batch command to locate the source files, you must specify the Document ID generated by the Roambi server for each element found in the portal. In order to locate the Document ID for the source Roambi files as well as for the source report file, follow these steps:

1. To locate the ID files, in your browser enter the URL for the Roambi server. The URL is in the form **`http://RoambiServer:port/roambi/SourceManager`** (for example, **`http://myserver.com:8080/roambi/SourceManager`**).

The Web page displays a document tree that is similar to the following:

```
<Sources>
<Source>
  <Name>myserver Web Report Studio</Name>
  <Id>myserver_Web_Report_Studio</Id>
  <Description>SAS Web Report Studio</Description>
  <RequiredParameters>
    <RequiredParameter>
      <Name>User Name</Name>
      <Id>user_name</Id>
      <ShowAsDescription>true</ShowAsDescription>
      <Placeholder>User Name</Placeholder>
    </RequiredParameter>
    <RequiredParameter>
      <Name>Password</Name>
      <Id>password</Id>
      <IsSecure>true</IsSecure>
      <ShowAsDescription>true</ShowAsDescription>
      <Placeholder>Password</Placeholder>
    </RequiredParameter>
  </RequiredParameters>
  <HasDefaultPublishDir>YES</HasDefaultPublishDir>
  <IsAssociated>YES</IsAssociated>
  <AllowsDuplicateFileNames>YES</AllowsDuplicateFileNames>
</Source>
</Sources>
```

2. Locate the portal name. The portal name corresponds to the `<Name>` tag under the `<Source>` section. Each portal has its own `<Source>` section.
3. Log on to the portal by entering the URL with credentials. The URL is in the form **`http://RoambiServer:port/roambi/SourceManager/portalName?user_name=username&password=password`**.

If the portal name has spaces, replace the spaces with underscores (`_`).

For example: **`http://myserver.com:8080/roambi/SourceManager/myserver_Web_Report_Studio?user_name=Admin&password=123pass`**

The Web page displays a document tree that is similar to the following (partial view):

```
<Folder>
<Contents>
  <Content>
```

```

    <Id>IDstring</Id>
    <Type>Folder</Type>
    <DisplayName>My Folder</DisplayName>
    <UUID>UUIDstring</UUID>
    <IsFolder>true</IsFolder>
    <Title>My Folder </Title>
    . . .
  </Content>
<Content>
  <Id>IDstring</Id>
  <Type>Folder</Type>
  <DisplayName>Shared Data</DisplayName>
  <Description>Shared libraries, tables, cubes, and information maps</Description>
  <UUID>UUIDstring</UUID>
  <IsFolder>true</IsFolder>
  <Title>Shared Data</Title>
  . . .
</Content>
</Contents>
</Folder>

```

<Content> defines the beginning of a folder definition.

4. To navigate to a folder, do the following:
 - a. Locate the folder name.
 - b. Copy the folder <ID> to the system clipboard.
 - c. In the URL, insert a slash (/) after the portal ID (in this example, myserver_Web_Report_Studio).
 - d. Paste the folder <ID> after the slash.

Here is an example folder <ID>.

```

<ID>
%252Fcontent%252Ffolder%255B%2540name%253D%2527QA%2BTesting%2BReports%2527%255D
</ID>

```

The previous <ID> tag was inserted into this URL:

```

http://myserver.com:8080/roambi/SourceManager/
myserver_Web_Report_Studio/%252Fcontent%252Ffolder%255B
%2540name%253D%2527QA%2BTesting%2BReports%2527%255D?
user_name=Admin&password=123pass

```

This URL displays the contents of the folder. The folder might contain nested folders.

5. Continue navigating in this way until you locate the RBI file that you want to use, and copy the ID.

The same process applies for the source Roambi file and destination folder.

Note: For the destination file, be sure to provide the new filename.

Here is an example batch command with ID values used as arguments:

```

java -jar roambi-batch.jar -server http://myserver
-src_rbi 6418b99b-c782-455b-83cb-00bdc50dc7e7 -src_portal SAS_ID
-src_data 18772a1b-1e6c-474e-941d-6de0e7f10c97
-src_username Admin -src_password 123pass

```

48 Appendix 2 • *Using the Roambi Batch Command Line Interface*

```
-dst_portal SAS_DEST -dst_folder 90e2ba7d-62f9-4efe-8af1-dc8f0dbad9c0_folder  
-dst_rbi batchTesting1  
-dst_username Admin -dst_password 123pass  
-src_data_params "<parameters><parameter name=\"ReportYear\" value=\"2010\"/>  
</parameters>"
```

Index

B

batch CLI 41
 examples 44
 locating the folder and document ID 46
 refresh setting for a report 37
 running the CLI 42
 syntax 42
 using a text file 45
BlackBerry device limitations 28
blocks in a report 8

C

card, summary 3
Card Title tab, Roambi Publisher 13
Cardex view 2
CataList view 3
 example 20
Chart Options tab, Roambi Publisher 13
Charts tab, Roambi Publisher 13
CLI
 See [batch CLI](#)
command line interface
 See [batch CLI](#)
Connect window, Roambi Visualizer 29
connecting to the Roambi server
 downloading a report 32
 establish a connection 30

D

devices
 See [mobile devices](#)
document ID for the batch CLI 46
downloading a report to a mobile device
 32

E

Elements view 4
 example 16

establishing a connection to the Roambi
 server 30

example

 CataList view 20
 Elements view 16
examples for the batch CLI 44

F

features
 Roambi 6
 Web Report Studio 6
folder ID for the batch CLI 46

I

importing a report to Roambi 8

K

Key Column tab, Roambi Publisher 13

L

Layout tab, Roambi Publisher 13
library, Roambi Visualizer 29
limitations for publishing reports 7
limitations on BlackBerry devices 28
List Layout tab, Roambi Publisher 14

M

mobile devices
 BlackBerry limitations 28
 supported devices 28
modifying a published report 11

N

navigating reports on a mobile device 33

O

- open a report on a mobile device 32
- Options tab, Roambi Publisher 15
- overview
 - publishing reports to Roambi views 2
 - viewing reports on a mobile device 27

P

- periodicities 15
- Periods tab, Roambi Publisher 15
- Pie tab, Roambi Publisher 16
- Pie Values tab, Roambi Publisher 16
- Pie view 4
- prompts in a report 8
- publishing a report 10
- publishing a report to a Roambi view 8
 - restrictions 7
- publishing overview 2

R

- RBI file 2
- RBI file ID for the batch CLI 46
- refining a report 10, 12
 - Card Title tab 13
 - Chart Options tab 13
 - Charts tab 13
 - Key Column tab 13
 - Layout tab 13
 - List Layout tab 14
 - Options tab 15
 - Periods tab 15
 - Pie tab 16
 - Pie Values tab 16
 - Swipe tab 16
 - Tab Title tab 16
 - Titles tab 16
- refresh setting for a report 10, 37
- refreshing a report on a mobile device 33
- report blocks 8
- report library, Roambi Visualizer 29
- report prompts 8
- report sections 7, 8
- reports
 - limitations on BlackBerry devices 28
 - modifying 11
 - overview of viewing on a mobile device 27
 - publishing to a Roambi view 8
 - software required for viewing on a mobile device 28
- requirements for viewing reports on a mobile device 28
- restrictions for publishing reports 7
- Roambi Batch

See batch CLI

- Roambi features in each view 6
- Roambi views 2
 - publishing a Web Report Studio report 8
 - supported features 6
- Roambi Visualizer interface 29

S

- sections in a report 7, 8
- software required to view reports on a mobile device 28
- Summary card 3
- SuperList view 5
- supported features
 - Roambi 6
 - Web Report Studio 6
- supported mobile devices 28
- supported Roambi features in each view 6
- supported Web Report Studio features 6
- Swipe tab, Roambi Publisher 16
- syntax for the batch CLI 42

T

- Tab Title tab, Roambi Publisher 16
- text file for the batch CLI 45
- tips for viewing reports on a mobile device 33
- Titles tab, Roambi Publisher 16
- Trends view 5

U

- unsupported features
 - Roambi 6
 - Web Report Studio 6

V

- viewing reports
 - supported mobile devices 28
- viewing reports on a mobile device
 - downloading a report 32
 - limitations on BlackBerry devices 28
 - opening a report 32
 - overview 27
 - refreshing a report 33
 - software requirements 28
 - tips for viewing reports 33
- views 2
 - publishing a Web Report Studio report 8
 - supported Roambi features 6

W
Web Report Studio features [6](#)

