Transactions and Multimedia: Embed Write-Back Functionality and Multimedia to Mobilize Workflows

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Introduction
MicroStrategy Mobile Applications - Insight Into Action

Analytics
- Grids and graphs
- Data visualizations and exploration
- Mapping
- Business Intelligence

Multimedia
- Video streaming, RSS Feeds
- SharePoint files
- Mobile information channels

Transactions
- Write-back
- Commentary
- Mobile front-end to ERP/CRM
- Surveys

WORKFLOW APPS
Transaction Services
Workflow enabling capabilities

Touch-based inputs
- Transactional input forms
- Flexible drag-and-drop design
- Change/add new data
- Text, number, calendar, switches, stepper, sliders, widgets

Offline transactions
- Approve, submit, and edit information in absence of cellular or wifi signal
- Transactions are queued for submission when you next connect

Image capture
- Capture and upload images
- Retailers - storefront product displays
- Insurance agents - claims images
- Business-visual records
What is a Workflow App?
What Is A Workflow App?
A software application which supports a business process
What Do Workflow Apps Allow You To Do?

Benefits include:

- Provides users with two-way interactive mobile experience with ability for other users to immediately benefit from a user’s inputs and insights

- Enhances existing transactional systems by providing a mechanism for remote data collection

- Can serve as a mobile front end to CRM/ERP system

- Enables what-if analysis

- Turns insight into action through mobile intelligence
Workflow Actions
What can you do?

Receive information

Take action
Mobile Workflow Apps in the Enterprise

Appointment scheduling
- Schedule services
- Collect customer data
- Cancel and reschedule

Financial management
- Manage exposure
- Approve transfers
- Update amounts/dates

Remote data collection
- Empower sales force
- Capture product state
- Capture event information
Transaction Services Component Objects
Support for Existing Transactions Systems
Connect to custom operational or ERP/CRM using X-Query

Connect to

Custom operational

- Finance/accounting
- Human resources
- Manufacturing
- Supply chain management
- Project management
- Customer relationship management
- Data services
- Access control

xQuery for web services or SQL database transactions

Packaged ERP/CRM

xQuery for web services

Packaged ERP/CRM includes:

- Finance/accounting
- Human resources
- Manufacturing
- Supply chain management
- Project management
- Customer relationship management
- Data services
- Access control
Web Services:
- Provide data access via Web
- Provide API to manipulate data
- WSDL: Web Services Description Language
- Salesforce.com: public web services provider
- Inhouse web services in C# against table in SQL Server 2005

XQuery:
- Query against XML data
- XQuery to Web Services is similar as SQL to WH
- Request: access web services and send a request
- Response: parse response in XML format from web services
- Transformation: Transform XML response to MSTR XML Schema
Components Of Transaction Services - Grid/Graph, Data Entry

Transaction report feeds document via grid/panel stack object

1. Transaction report

2. Document with grid object
   - Report Dataset
   - Transaction Panel Stack
Components Of Transaction Services - Transaction
Connect the grid/graph to the transaction inputs, add action

3 Configured transaction and input control on grid/panel stack

4 Action Selector Button targets Grid/Panel Stack
Components Of Transaction Services - Document

Data entry form - mobile user view

Input control from grid / panel stack configured transaction

Action selector
Transaction Input Controls
Transaction Input Controls
Transaction Input Controls
Transaction Input Controls: Barcode Scanner

Access the barcode scanner by tapping the input control object on your device

**Example:** Scan a QR code to insert product information into the transaction
Increased Efficiency with New Search in Data Driven Input Control

- Quickly find and select desired input within long element lists

- Available on data-driven input controls
Signature Capture
Signature Capture
Transaction Embedded Widgets
Take Surveys
Survey Widget

Connect to database or Survey Monkey or Survey Gizmo via web services
Upload Photos Instantly
Photo uploader widget

Upload images from your mobile devices to a central location

Streamlined workflow to add multiple photos to the transaction
Components Of Photo Uploader Widget

Transaction report feeds widget and table stores uploaded photo information

1. Create a table to store the data
2. Transaction report
Components Of Photo Uploader Widget

Connect the grid/graph to the transaction inputs, add action

Configure the transaction

Take and view photos
- Photo data uploaded to table
- Image Viewer widget displays photos
Streamline document creation and transaction configuration

Provides a structure to group and organize your transaction input controls

- The table grouping can be placed in a dynamic pop up info window/view
Transaction Table Object

Development object
Transaction Table Object
User view
Offline Transactions Capabilities
Take Action When Offline

Offline mode

Cache documents on the mobile server

- In offline mode, the Mobile app cannot connect to the Mobile server
- Offline Mode indicator appears at the top of the screen
Offline Mode
Submitting transaction with no network connectivity

Transactions cannot be submitted in offline mode, they are sent to a queue

• A banner appears when you click the action selector button
Offline Mode
Alert badges indicated pending transactions in queue

An alert badge appears to indicate the transaction has been submitted to the queue

Transactions in the queue are submitted when the device is back online
Offline Mode
Visual indicator on app navigation bar indicates pending transactions queue detail

Click the icon to view the Transaction Queue

• The Transaction Queue displays pending and failed submissions

• Tap a document to view more details
Offline Mode
Reconnected - pending transactions queue submitted/cleared

When the Mobile app is reconnected, the transactions are submitted, and the pending queue is cleared

• Transactions that failed remain in the queue after re-connection
Offline Mode
Disable offline transactions

Provide the flexibility to control whether transaction can be submitted or not when offline

Configurable through web property
Offline Mode
Demo
Local Transactions

Online workflow

INTELLIGENCE SERVER

OVER THE AIR

TRANSACTION WRITEBACK

DATASET → VIEWS → SLICES → SLICES → DOCUMENTS

1

2

MicroStrategy
Local Transactions
Offline workflow

OVER THE AIR

INTELLIGENCE SERVER

QUEUED WHEN OFFLINE

DATASET

VIEW

SLICES

DOCUMENTS

TRANSACTION WRITE-BACK

Offline workflow
Local Transactions
Enable Local Transactions
Submit transactions locally in offline mode

Configure the local transaction

• Map input objects to a table on the mobile client

Enable local transactions

• Transaction submitted locally to see changes
• Transactions still send to queue to be written to data warehouse
Transaction Services in Library
MicroStrategy Library apps
Collaborate and share using native extensions

Consume your transaction services document in MicroStrategy Library

Collaborative discussion threads for real-time and contextual idea exchange

Proactive alerts and push notifications for both web and mobile users
Multimedia Widget
Engage your audience

Directly deliver multimedia content to users via mobile app

Access anything from promotional videos, product endorsements to training brochures, sales presentations when and where needed

Add multimedia in your apps using HTML containers and the plug-and-play multimedia widget
Multimedia Widget
Browsing and viewing of a web folder

Support file types:

• Audio and video files
• ePub files
• Excel
• HTML
• Image
• PDF
• Plain text
• Powerpoint
• Word
Multimedia Widget: Requirements

- Setup WebDav

- Set up WebDav directory

- Configure XQuery database instance to retrieve web folder contents

- Create XQuery Freeform SQL Report

- Create a document within the Multimedia Widget
Multimedia Widget: Requirements
Involves two types of WebDAV interactions
Multimedia Widget

Light theme
Multimedia Widget
Interactive and user friendly interface

Arrange documents as per your preferences

Create custom folder and save your favorite files
Multimedia Widget

Share dialog box directly allows sharing of multimedia files
Multimedia Widget
Thank you