

Oracle® Fusion Middleware

User's Guide for Oracle Business Intelligence Mobile

11g Release 1 (11.1.1)

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Explains how to use the mobile application of Oracle Business Intelligence Enterprise Edition to organize and present data for making critical and timely business decisions.

Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Mobile, 11g Release 1 (11.1.1)

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Contents

Preface	vii
Audience	vii
Documentation Accessibility	vii
Related Documents	vii
Conventions	viii
New Features for Oracle Business Intelligence Mobile Users	ix
New Features for Oracle BI Mobile 11g Release 1 (11.1.1.6)	ix
New Features for Oracle BI Mobile 11g Release 1 (11.1.1.5)	xi
1 Introducing Oracle Business Intelligence Mobile	
What Can You Do with Oracle Business Intelligence Mobile?	1-1
Which BI Content is Viewable Using Oracle Business Intelligence Mobile?	1-2
Localization of BI Content	1-3
Bi-Directional Text and the BI Mobile Client Shell User Interface	1-3
2 Getting Started with Oracle Business Intelligence Mobile	
Getting Oracle BI Mobile for Your Apple iPad	2-1
Starting Oracle BI Mobile	2-2
Launching the Mobile Application for the First Time	2-2
Returning to the Mobile Application	2-4
Launching the Mobile Application from a Mobile URL	2-4
About Oracle BI Mobile User Credentials	2-4
What Does the Oracle BI Mobile Application Look Like?	2-4
Landscape Orientation	2-6
Switching Between Oracle BI Mobile and Other iPad Applications	2-6
Using the Online Help	2-6
Configuring Oracle BI Mobile	2-6
Adding, Modifying, and Removing Server Connections	2-7
Switching Between Servers	2-7
Server Provisioning Through URL	2-8
Setting Console Logging	2-8
Disabling Access to BI Mobile	2-9

3 Using Oracle Business Intelligence Mobile

Navigating the Oracle BI Presentation Catalog and BI Content on Your iPad	3-1
Opening an Object in the Catalog.....	3-2
Navigating the Carousel and List Display Styles.....	3-3
Navigating Directly to Dashboards.....	3-4
About Working with BI Content in the Mobile Application	3-4
Working with Favorites	3-6
Adding Favorites in Oracle BI Mobile	3-6
Synchronizing Mobile Favorites with Desktop Favorites	3-7
Working with Recent Items and Your History	3-7
Working with Local Content	3-7
Saving Content Locally	3-7
Viewing Local Content.....	3-8
Disabling Local Content.....	3-8
Performing Searches	3-9
Navigating the Search View	3-10
Adjusting Search Settings	3-10
Searching for BI Content	3-11
Sending BI Content in Email	3-12
Sending Local BI Content in Email.....	3-13
Sending BI Content Inline in Email	3-13
Printing BI Content	3-14

4 Working with BI Content

Working with Analyses and Dashboards	4-1
Which Objects Are Disabled When Embedded in Dashboards?	4-2
Working with Tables, Pivot Tables, and Trellis Views	4-3
About Tooltips in Trellis Views	4-3
Working with Graphs	4-3
Working with Prompts	4-4
What Do Prompts Look Like in Oracle Business Intelligence Mobile?.....	4-4
Setting Search Options for Prompts	4-7
Working with Map Views	4-8
Working with Oracle BI Publisher Content	4-10
Working with Scorecard Content	4-10
Working with Alerts and Agents	4-13
Working with Briefing Books	4-14

A User Interface Reference for Oracle BI Mobile

B Touch Gestures Used in Oracle BI Mobile

C Accessibility Features for Oracle BI Mobile

Using Accessibility Mode with Oracle BI Mobile.....	C-1
---	-----

Accessing Oracle BI Mobile Using the Apple iOS VoiceOver Screen Reader..... C-1

Index

Preface

The Oracle Business Intelligence Foundation Suite is a complete, open, and integrated solution for all enterprise business intelligence needs, including reporting, ad hoc queries, OLAP, dashboards, scorecards, and what-if analysis. The Oracle Business Intelligence Foundation Suite includes Oracle Business Intelligence Enterprise Edition.

Oracle Business Intelligence Enterprise Edition (Oracle BI EE) is a comprehensive set of enterprise business intelligence tools and infrastructure, including a scalable and efficient query and analysis server, an ad-hoc query and analysis tool, interactive dashboards, proactive intelligence and alerts, and an enterprise reporting engine.

This guide contains information about using Oracle BI Mobile to access, analyze, and share data from the iPad for viewing actionable intelligence and for making critical and timely business decisions.

Audience

This document is intended for anyone who plans to organize and present data for making critical and timely business decisions using Oracle Business Intelligence Mobile, such as a middle tier administrator, report specialist, departmental reporter, or information consumer. (This guide refers to report specialists and departmental reporters collectively as content designers, and to information consumers as end users.)

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

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Related Documents

See the Oracle Business Intelligence documentation library for a list of related Oracle Business Intelligence documents.

See also the following related documents:

- The Oracle Business Intelligence chapter in the *Oracle Fusion Middleware Release Notes* for your platform
- *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition*

In addition, go to the Oracle Learning Library for Oracle Business Intelligence-related online training resources.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

New Features for Oracle Business Intelligence Mobile Users

This preface describes new features and upgrade considerations in Oracle Business Intelligence Mobile 11g Release 1 (11.1.1).

This preface contains the following topics:

- ["New Features for Oracle BI Mobile 11g Release 1 \(11.1.1.6\)"](#)
- ["New Features for Oracle BI Mobile 11g Release 1 \(11.1.1.5\)"](#)

New Features for Oracle BI Mobile 11g Release 1 (11.1.1.6)

This section describes new features for Oracle BI EE 11g Release 1 (11.1.1.6). It contains the following topics:

- ["New Features for Oracle BI Mobile 11g Release 1 \(11.1.1.6.2\)"](#)
- ["New Features for Oracle BI Mobile 11g Release 1 \(11.1.1.6.0\)"](#)

New Features for Oracle BI Mobile 11g Release 1 (11.1.1.6.2)

Release 11.1.1.6.2 of Oracle Business Intelligence Mobile includes many new features encompassing user interaction, graph and gauge interactivity, availability of locally-saved BI content, map views, use of prompts, and much more.

This release provides end-user enhancements in the following areas:

- **Home page to serve as launch pad for content** (access to Recent, Favorites, Dashboards, Local Content, Search). See ["What Does the Oracle BI Mobile Application Look Like?"](#)
- **Carousel-style display (for Recent and Favorites)**. See ["Navigating the Carousel and List Display Styles"](#).
- **List-style display**. See ["Navigating the Carousel and List Display Styles"](#).
- **Dashboard explorer** (list of thumbnails) on Home page that lets you navigate the catalog for dashboards. See ["Navigating the Oracle BI Presentation Catalog and BI Content on Your iPad"](#).
- **Catalog navigation**. See ["Navigating the Oracle BI Presentation Catalog and BI Content on Your iPad"](#).
- **A toolbar and a Previous icon**. See ["Working with the Previous Icon"](#).

- **Application launching via "mobile URLs,"** that is, either from email or from other applications (such as Oracle WebCenter). See "[Launching the Mobile Application from a Mobile URL](#)".
- **Seeding the Oracle BI Mobile application with one or more servers for provisioning of servers by URL.** See "[Server Provisioning Through URL](#)".
- **Multitasking.** The Oracle BI Mobile application retains its state when you switch to and from other iPad applications. When you switch back to Oracle BI Mobile, you are returned directly to the screen from which you left the application. See "[Switching Between Oracle BI Mobile and Other iPad Applications](#)".
- **Touch interaction allowing tap-and-hold for navigating tables, pivot tables, and trellis views.** This enhancement brings the desktop application's right-click menu options into the BI Mobile application. See "[Working with Tables, Pivot Tables, and Trellis Views](#)".
- **Graph interactivity.** See "[Working with Graphs](#)".
- **Trellis view.** See "[Working with Tables, Pivot Tables, and Trellis Views](#)".
- **Synchronizing of BI Mobile favorites with Desktop favorites.** See "[Synchronizing Mobile Favorites with Desktop Favorites](#)".
- **Support for viewing and interacting with briefing books.** See "[Working with Briefing Books](#)".
- **Alerts.** See "[Working with Alerts and Agents](#)".
- **Search.** See "[Performing Searches](#)".
- **Scorecards.** When embedded in a dashboard page, scorecard views including KPI watchlists, smart watchlists, custom views, strategy maps, strategy trees, strategy wheels, and cause & effect maps may be viewed in their fully-interactive diagram or tabular formats. Scorecard views browsed from the catalog (and not on a dashboard) display in a simplified iPad-optimized table format. See "[Working with Scorecard Content](#)".
- **MapView.** See "[Working with Map Views](#)".
- **Printing BI content wirelessly.** See "[Printing BI Content](#)".
- **Rich email support, with attachments and with content embedding.** Support for two types of URLs that are embedded in emails: one is a regular URL that launches the BI content in a desktop browser, and the other is a URL that launches the BI content in the BI Mobile application). See "[Sending BI Content in Email](#)".
- **New layout for prompts.** A key subset of dashboard prompts has been redesigned to optimize the prompts for touch interaction. See "[Working with Prompts](#)".
- **A dashboard prompts bar.** See "[Working with Prompts](#)".
- **Graphs are no longer static,** they are interactive, and allow for interactions through gestures. See "[Working with Graphs](#)".
- **Offline, local storage of content on device memory with the ability to refresh data on-demand.** See "[Saving Content Locally](#)".
- **Offline mode for access to saved local content without an Internet connection.** See "[Viewing Local Content](#)".

New Features for Oracle BI Mobile 11g Release 1 (11.1.1.6.0)

There are no new features for Oracle Business Intelligence Mobile in Release 11.1.1.6.0.

New Features for Oracle BI Mobile 11g Release 1 (11.1.1.5)

Release 11.1.1.5 of Oracle Business Intelligence Enterprise Edition introduces Oracle Business Intelligence Mobile. Oracle BI Mobile includes many new features, including the following highlights:

- Platform support for the Apple iPhone and the Apple iPad.
- Your BI content is available for immediate consumption on your iPad, optimized for mobile viewing without the need to redesign any content.
- Support for the following BI EE objects: dashboards, analyses, BI Publisher reports, scorecards, and content delivered by agents.
- In analyses and dashboards, the Oracle BI Mobile application provides all analytic actions (such as drill, action link, prompts, and so on).
- For BI Publisher, the actions supported match those of the desktop (based on output type).
- In scorecards, the Oracle BI Mobile application provides a subset of analytic actions.

Introducing Oracle Business Intelligence Mobile

This chapter describes Oracle Business Intelligence Mobile, an application for the Apple iPad. The chapter contains the following topics:

- "What Can You Do with Oracle Business Intelligence Mobile?"
- "Which BI Content is Viewable Using Oracle Business Intelligence Mobile?"
- "Localization of BI Content"

What Can You Do with Oracle Business Intelligence Mobile?

Oracle Business Intelligence Mobile allows you to view and interact with Oracle BI content on the Apple iPad.

Using Oracle Business Intelligence Mobile, you can access and analyze all BI content such as analyses and dashboards, BI Publisher content, scorecard content, and content delivered by agents.

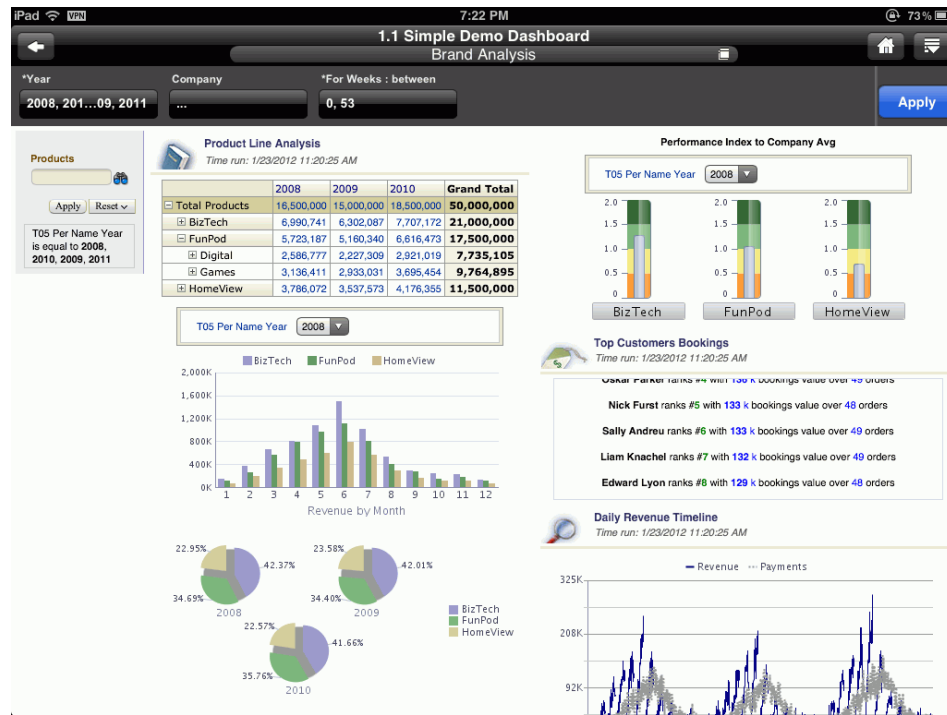
Viewing content on a mobile device requires a presentation that differs from how you view the same content on a desktop monitor. Oracle Business Intelligence Mobile optimizes the presentation of your BI content for the iPad.

You download Oracle Business Intelligence Mobile for Apple iPad from Apple's App Store. Use of the application requires that you have access to an instance of Oracle BI EE that is configured and running.

Note: The Oracle Business Intelligence Mobile application for the iPhone behaves differently than the application documented in this guide. For documentation on the iPhone application, see the 11.1.1.5 version of *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition*.

Figure 1–1 shows a simple dashboard on an iPad.

Figure 1–1 Oracle BI Mobile Dashboard on an iPad



Navigating the Oracle BI Mobile application is explained in "[Navigating the Oracle BI Presentation Catalog and BI Content on Your iPad](#)" and iPad touch gestures that are useful are listed in [Appendix B, "Touch Gestures Used in Oracle BI Mobile."](#)

Which BI Content is Viewable Using Oracle Business Intelligence Mobile?

All of your Oracle BI content is available for immediate consumption on your iPad. There is no need to move content to specially marked folders. Nor do you need to redesign any content specifically for viewing on the mobile devices.

Oracle Business Intelligence Mobile supports the following object types:

- Dashboard
- Analysis
- Briefing books
- BI Publisher report
- Content delivered by agents
- Scorecard

For all supported object types, Oracle Business Intelligence Mobile supports rendering of most report content, though content is sometimes altered to optimize for the mobile context. In analyses and dashboards, the Oracle BI Mobile application provides all analytic actions (such as drill, action link, prompts, and so on). For BI Publisher, the actions supported match those of the desktop (based on output type).

The Oracle BI Mobile application does not support rendering of RSS feeds or catalog views. External content or content that uses iFrame tags is not supported and is not guaranteed to be rendered correctly.

Localization of BI Content

You can use the Device Locale setting to determine how BI content is rendered on the iPad. You can specify localization of BI content through the Oracle BI Presentation Services server (with Device Locale set to OFF) or through the iOS default (Device Locale set to ON).

Localization of the application shell (that is, the Home page, the toolbar, and so on) is always controlled by the iOS.

Note: The standard behavior of Apple's mobile operating system requires that the application shell user interface be changed only through the Apple iOS Settings application and not by the Oracle BI Mobile application. The Device Locale toggle in the Oracle BI Mobile application changes the language of the BI content, but not the application shell user interface.

Bi-Directional Text and the BI Mobile Client Shell User Interface

It is important to note, if you intend to use the Oracle BI Mobile application with a right-to-left language such as Hebrew or Arabic, the client shell user interface will not show the layout correctly.

Getting Started with Oracle Business Intelligence Mobile

This chapter describes how to acquire Oracle Business Intelligence Mobile, set up user credentials, and configure the application (for example, adding a server connection and setting console logging).

The chapter contains the following topics:

- "Getting Oracle BI Mobile for Your Apple iPad"
- "Starting Oracle BI Mobile"
- "About Oracle BI Mobile User Credentials"
- "What Does the Oracle BI Mobile Application Look Like?"
- "Configuring Oracle BI Mobile"

Getting Oracle BI Mobile for Your Apple iPad

To download Oracle Business Intelligence Mobile, tap the App Store icon (shown in [Figure 2-1](#)) on your iPad's Home screen. Alternatively, you can download the application from your computer through iTunes and then synchronize your iPad.

Figure 2-1 Oracle Business Intelligence Icon in Apple's App Store



To download and install Oracle BI Mobile:

1. On your iPad, search the App Store for "Oracle".
2. Select the "Oracle BI HD" application, and tap the **Install** button.

Note: In Apple's App Store, Oracle Business Intelligence Mobile for iPad is referred to as "Oracle BI HD". This guide refers to the application as "Oracle Business Intelligence Mobile", and "Oracle BI Mobile".

Starting Oracle BI Mobile

You start the Oracle BI Mobile application from the Home screen on your device.

Note: If the BI Presentation Services server that you are connecting to is behind a firewall, you need to connect through a Virtual Private Network (VPN). See your administrator for more information.

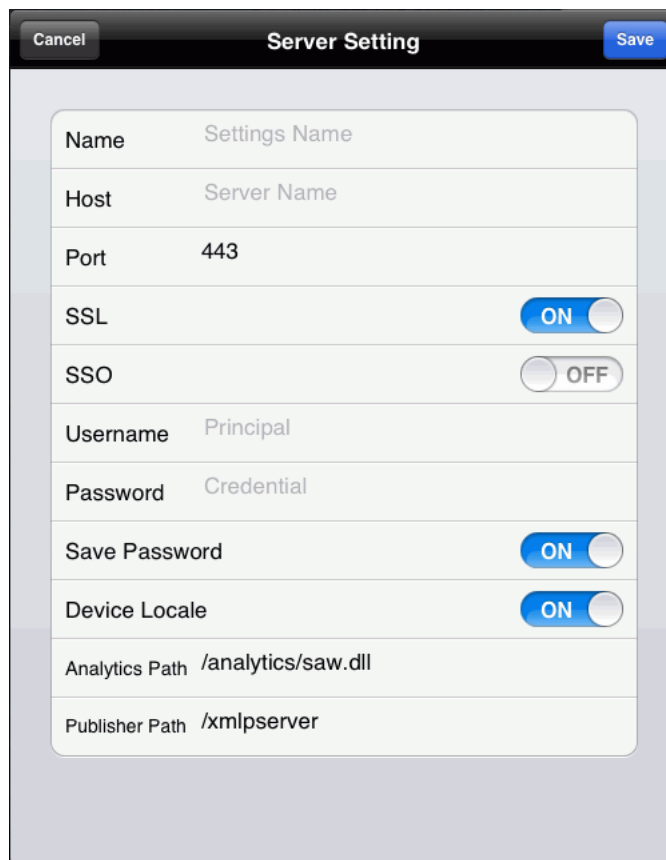
This section is organized as follows:

- "Launching the Mobile Application for the First Time"
- "Returning to the Mobile Application"
- "Launching the Mobile Application from a Mobile URL"

Launching the Mobile Application for the First Time

You start the Oracle Business Intelligence Mobile application as you would open any other iPad application. The first time you use the Oracle BI Mobile application, however, you are presented with the licensing screen, then a login page that provides an initial server setting screen in which you add your server configuration. [Figure 2–2](#) shows the Server Setting screen.

Figure 2–2 Server Setting Screen



Setting	Value
Name	Settings Name
Host	Server Name
Port	443
SSL	ON
SSO	OFF
Username	Principal
Password	Credential
Save Password	ON
Device Locale	ON
Analytics Path	/analytics/saw.dll
Publisher Path	/xmlpserver

To launch Oracle BI Mobile for the first time:

1. On your device's Home screen, tap the Oracle BI Mobile application icon, shown in [Figure 2-3](#).

Figure 2-3 Oracle BI Mobile Icon on the Home Screen



- The end-user licensing agreement screen is displayed.

 2. Scroll to read the licensing agreement, and if you agree to the terms, tap **Accept**.
The Login screen is displayed.
 3. Tap the **Add Server** row (with the blue **Add** icon) to enter your initial server configuration settings.
The Server Setting screen is displayed.
 4. In the Server Setting screen, specify the following:
 - **Name.** Settings Name. Once set, this name cannot be changed.
 - **Host.** Server Name. Enter either the IP address (for example: 192.168.1.1) or the fully qualified host name of the computer on which Presentation Services is running (for example, myname.us.oracle.com). If entering the name, ensure that you do not enter an alias or a redirecting URL; otherwise a connection cannot be made. For example, you cannot enter a URL that is a network alias, such as analytics.example.com, when the actual server URL is itfx1234.example.com. Similarly, do not enter a stand-in URL, such as tinyurl.com/1234, which redirects to a server.
 - **Port.** Enter the port number (for example, 7001).
 - **SSL.** Tap the toggle to select **ON** or **OFF**.
 - **SSO.** Tap the toggle to select **ON** or **OFF**.
 - **Username**
 - **Password**
 - **Save Password.** Tap the toggle to select **ON** or **OFF**. If set to **ON**, the password you enter in the Password field is saved as part of the configuration for the server. If set to **OFF**, you will be prompted to enter your password each time you launch the application.
 - **Device Locale.** Tap the toggle to select **ON** or **OFF**. If set to **ON**, the application uses the device's settings for user interface language and region format. If set to **OFF**, language and region formats are based on the user preferences for Presentation Services. This toggle affects BI content only; setting it to **OFF** has no bearing on the application shell user interface.
 - **Analytics Path.** For example, /analytics/saw.dll
 - **Publisher Path.** For example, /xmlpserver . This setting is mandatory; it is used, however, only if you access any BI Publisher content.
 5. Tap **Save**.
 6. Tap **Login**.

Once you are signed in, you can modify your server configuration or add a new server connection by tapping the **Options** icon (in the branding bar) and then **Settings**. For more information, see "[Configuring Oracle BI Mobile](#)".

Returning to the Mobile Application

When you have left Oracle BI Mobile and are coming back, for example, after leaving it and working with other iPad applications, Oracle BI Mobile returns you to whichever screen you were on when you left.

If your user state is no longer preserved, for example, if you have rebooted the device, or the iOS purged the session after a long delay, or the authentication has timed out, then Oracle BI Mobile automatically attempts to authenticate to the connection you last used.

Note: When no server connections are available, you can work with locally-saved content in offline mode by tapping the **Offline** button in the authentication screen. (You can even work in offline mode when server connections are available and have been defined.)

Launching the Mobile Application from a Mobile URL

Another way to launch the Oracle BI Mobile application is through "mobile URLs"—either from emails or from other applications (such as Oracle WebCenter).

Emails can be sent by the Oracle BI Mobile application that contain specially configured URLs that allow for the linked BI content to be opened in Oracle BI Mobile when viewed from a supported device such as the Apple iPad.

When you click a link to BI content that is in an email sent using Oracle BI Mobile, and the BI content opens in Oracle BI Mobile rather than in a browser, you are using an embedded URL to launch the mobile application.

For more information, see "[Sending BI Content in Email](#)".

About Oracle BI Mobile User Credentials

Oracle Business Intelligence Mobile uses the same security definitions as set up on the server on which Presentation Services is running. The Oracle BI Mobile application signs in for you automatically as it launches. When your Presentation Services server is set up with single sign-on (SSO), the Oracle BI Mobile application prompts you for your login credentials. You use the same user name and password to connect from a mobile device as you would when logging into Oracle BI EE from a Web browser.

Note: Specifying user credentials in the Oracle BI Mobile application does not change the credentials used on the Presentation Services server. Oracle BI Mobile uses the same credentials as Presentation Services and does not require any new credentials.

What Does the Oracle BI Mobile Application Look Like?

Oracle Business Intelligence Mobile is launched from the Home screen of your device, where all your other installed applications appear as icons.

The start page for the Oracle BI Mobile application on the iPad is the Home page. The Home page is your central hub for initiating navigation and the place you return to after you complete a task.

The Home page is made up of several views: Recent, Favorites, Dashboards, Local Content, and Search. If you have previously launched Oracle BI Mobile and have opened BI content, your recently viewed items are displayed for you in the Recent view.

Figure 2–4 shows the Home page.

Figure 2–4 Home Page



The top bar, called the Status bar, shows you information about your device, including cell signal strength, the current network connection, and battery charge.

Below the Status bar is the branding bar, which includes the **Options** icon. Tap the **Options** icon to see information and options that include Settings, Logout, Help (this guide), and so on.

At the upper edge of the application screen, just below the Status bar, is the Navigation bar. The Navigation bar displays the title of the current view and contains a button that changes your view of BI content from a carousel-style display to a list-style display (when you are in the Recent and Favorites screens).

The main screen shows the contents of the current view, such as the list of your dashboards when you are in the Dashboards view, or a carousel-style display of your recent items when you are in the Recent view.

At the bottom of the application screen, the Tab bar shows the views you can select when you want to work with the Oracle BI Mobile application.

Your device's Home button takes you out of Oracle Business Intelligence Mobile, back to the Home screen where you can find the Oracle BI Mobile icon along with the other application icons on your device.

For a list of unlabeled icons and their names, see [Appendix A, "User Interface Reference for Oracle BI Mobile."](#)

For a list of iPad gestures that are useful in the Oracle BI Mobile application, see [Appendix B, "Touch Gestures Used in Oracle BI Mobile."](#)

Landscape Orientation

You always use Oracle BI Mobile in the landscape orientation. The application is landscaped-locked—available in both "landscape-left" and "landscape-right" orientations. The portrait orientation is not available.

Switching Between Oracle BI Mobile and Other iPad Applications

If you are using an Apple device that supports multitasking (that is, a device running iOS 4.2 or later), you can switch from Oracle BI Mobile to a different iPad application, and the Oracle BI Mobile application will retain its state. You return to the exact user interface state that you were in when you placed the application in the background (by switching to a different application).

The standard iPad multitasking gesture is a four-finger or five-finger swipe. Swipe like this from the bottom of your screen to reveal the multitasking bar so that you can move between iPad applications. For more information on useful gestures within Oracle BI Mobile, see [Appendix B, "Touch Gestures Used in Oracle BI Mobile."](#)

Using the Online Help

When you are reading this guide online (that is, not as a PDF), you navigate the documentation using icons that behave in the standard Back, Forward, Refresh, and Stop ways of a browser. [Figure 2-5](#) shows the **Back**, **Forward**, **Refresh**, and **Stop-loading** icons respectively.

Figure 2-5 Navigation Icons for Using the Online Help



Configuring Oracle BI Mobile

You use the Settings screen in Oracle Business Intelligence Mobile to manage your server configurations, enable console logging, or access this documentation online. You access the Settings screen by tapping the **Options** icon in the branding bar.

See the following sections for the tasks that you can perform in the Settings screen:

- [Adding, Modifying, and Removing Server Connections](#)
- [Switching Between Servers](#)
- [Server Provisioning Through URL](#)
- [Setting Console Logging](#)
- [Disabling Access to BI Mobile](#)

Note: In the Settings screen, you can also adjust your setting for sending inline content in emails. For more information, see "[Sending BI Content Inline in Email](#)".

Adding, Modifying, and Removing Server Connections

If you need to connect to more than one Oracle BI Presentation Services instance, you will want to configure multiple server connections. You can use the Settings screen to add, modify, and remove server connections.

To add a server connection:

1. In the branding bar, tap the **Options** icon, then tap **Settings**.
The Settings screen is displayed.
2. Tap the **Add Server** row (with the blue **Add** icon).
3. In the Server Setting screen, complete the fields. For further information, see the Server Setting screen fields described in "[Launching the Mobile Application for the First Time](#)".
4. Tap **Save**.

To modify a server connection:

1. In the branding bar, tap the **Options** icon, then tap **Settings**.
The Settings screen is displayed.
2. In the row for the server connection you want to modify, tap the blue **Next** icon.
3. In the Server Setting screen, make your changes.
4. Tap **Save**.

To remove a server connection:

1. In the branding bar, tap the **Options** icon, then tap **Settings**.
The Settings screen is displayed.
2. In the row for the server connection you want to remove, tap the blue **Next** icon.
3. Scroll down to the red **Delete Server** button, and tap it.

Note: The default server connection cannot be deleted. The default server is the one that has the green checkmark next to it. If you want to delete a server connection that is set as the default, first log out, then switch to a new default server. See "[Switching Between Servers](#)".

4. Tap **Done**.

Switching Between Servers

You can change the server you connect to by default, which will re-launch the application.

To change your default server:

1. In the branding bar, tap the **Options** icon, then tap **Settings**.
2. Tap the row for the server connection to which you want to switch.

3. In the confirmation dialog, tap **OK**.

The Oracle BI Mobile application relaunches, with a connection to the new server.

Server Provisioning Through URL

Server provisioning through URL is the facility to "seed" the Oracle BI Mobile application with one or more servers and their settings by going to an administrator-provided URL in the Safari browser on the iPad.

Table 2–1 provides URL application launching schema information.

Table 2–1 URL Application Launch Schema

Item	Details
URL Identifier	com.oracle.obimobile
URL Schema	oraclebimobile
Share application launch syntax	oraclebimobile://
Server Configuration URL	oraclebimobile://com.oracle.obimobile/configure?xml=http://<server:port>/conf_file.xml

Oracle BI Mobile can configure itself via the URL launch mechanism supported in iOS.

Setting Console Logging

If you want to capture console logs, for example to troubleshoot authentication issues, you can enable console logging for your iPad in the Settings screen.

Console logging can be useful when it is necessary to debug issues on mobile devices. Console logging can slow down the performance of the Oracle BI Mobile application, however, since it requires that numerous messages are written to console logs on the device. You can access these device logs using the iPhone Configuration Utility available from Apple. Search Apple's developer website for the utility, or visit: http://developer.apple.com/library/ios/#featuredarticles/FA_iPhone_Configuration_Utility/Introduction/Introduction.html

Because console logging impacts application performance, the default setting is **OFF**. Figure 2–6 shows the Console Logging toggle.

Figure 2–6 Console Logging Setting in the Settings Screen



To enable or disable console logging:

1. In the branding bar, tap the Options menu, then tap **Settings**.

The Settings screen is displayed.

2. In the Settings screen, in the Console Logging row, tap **ON** or **OFF**.

Disabling Access to BI Mobile

Administrators can disable access to the Oracle BI Mobile application. In the desktop version of Oracle BI EE, in the Manage Privileges page, an administrator disables access by restricting the privilege called "Access to Mobile." For more information, see *Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition*.

Using Oracle Business Intelligence Mobile

This chapter describes how to work with Oracle Business Intelligence Mobile.

This chapter contains the following topics:

- ["Navigating the Oracle BI Presentation Catalog and BI Content on Your iPad"](#)
- ["Working with Favorites"](#)
- ["Working with Recent Items and Your History"](#)
- ["Working with Local Content"](#)
- ["Performing Searches"](#)
- ["Sending BI Content in Email"](#)
- ["Printing BI Content"](#)

Note: This chapter discusses working with Oracle BI Mobile and BI content in general terms. For details about working with Oracle BI Mobile in regard to specific BI catalog objects, see [Chapter 4, "Working with BI Content."](#)

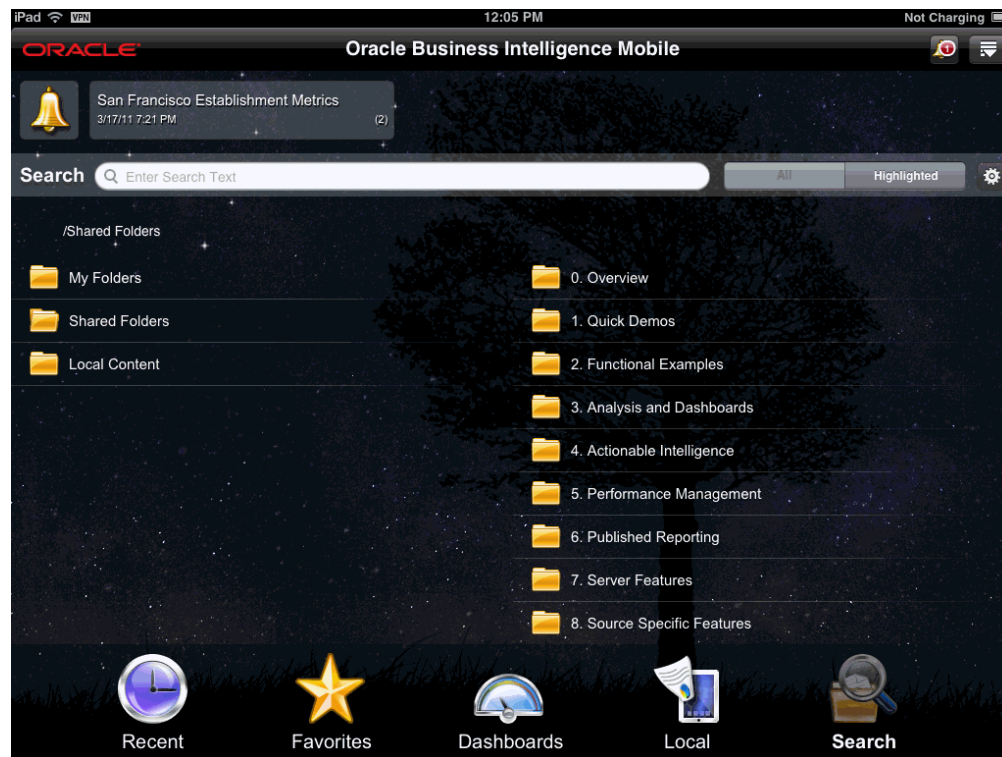
Navigating the Oracle BI Presentation Catalog and BI Content on Your iPad

You navigate BI content on your device by sliding or scrolling through your favorite objects and your recently viewed objects, and by directly accessing dashboards in a special dashboards hierarchy view. To access BI content that you have not already viewed, marked as favorite, or saved locally, you navigate or search the catalog on the server.

[Figure 3-1](#) shows the Search screen. With the **All** toggle selected, you can see the hierarchy of folders in the catalog.

Inside folders, you see generic icons representing their content. When you have already opened BI content on the iPad, thumbnail images of the actual catalog objects replace the generic icons.

Figure 3–1 Navigating the Catalog from the Search Screen



You use the **All/Highlighted** toggle at the top of the screen to specify which parts of the catalog will be included in your search. When you set the toggle to **All**, the search is performed in all folders (Local, Shared Folders, My Folders). When you set the toggle to **Highlighted**, the search is performed in the context of the folder that is highlighted in the catalog list.

This section includes the following topics:

- ["Opening an Object in the Catalog"](#)
- ["Navigating the Carousel and List Display Styles"](#)
- ["Navigating Directly to Dashboards"](#)
- ["About Working with BI Content in the Mobile Application"](#)

For information on gestures that you use to interact with the application, see [Appendix B, "Touch Gestures Used in Oracle BI Mobile."](#)

Opening an Object in the Catalog

You navigate the Oracle BI Presentation Catalog on your iPad using the device's standard list navigation for folders.

To navigate to an object and open it:

1. In a list of folders, perform one of the following actions:
 - To see the contents of a folder, tap the folder in the catalog list.
 - To go up a folder level, tap the arrow to left of the directory path (below the search bar).
2. When you find the object you want to open, tap it.

Navigating the Carousel and List Display Styles

You can choose between two display styles for the Recent view and the Favorites view. That is, you can view your BI content in two different ways. These display styles are the following:

- **Carousel-style display.** In the carousel, to navigate to a favorite object, you can swipe to move to the next item (to the side of the highlighted item), or you can tap the next item to move to it. Then tap it to open it. To open a highlighted folder, tap it or use the spread-fingers gesture. To close a folder, use the pinch gesture; this takes you to the upper-level folder above the folder you closed.
- **List-style display.** In a list-style display, drag your finger up or down to navigate the list of objects, and when you see the item you want to view, tap it to open it.

To change from the carousel-style display to the list-style display, or vice versa, tap the respective icon. In the navigation bar, below the **Options** icon, you can see this carousel/list toggle. When you are in the carousel-style display, the toggle shows the **List-style Display** icon, and when you are in list-style display, the toggle shows the **Carousel-style Display** icon.

Figure 3–2 shows the carousel-style display of the Favorites view. Note that at the right edge of the navigation bar, there is the **List-style Display** icon.

Figure 3–2 *Carousel-style Display of Favorites View*



Figure 3–3 shows the list-style display of the Favorites view. Note that at the right edge of the navigation bar, there is a **Carousel-style Display** icon.

Figure 3–3 List-style Display of Favorites View



Navigating Directly to Dashboards

You can access your dashboards on your mobile device as quickly and easily as you can in your desktop version of Oracle BI EE. The Dashboards screen displays a list of all the top-level dashboards to which you have access.

To open a dashboard:

1. In the tab bar, tap **Dashboards**.

A list of your top-level dashboards is displayed for you to scroll through. This set of dashboards is identical to the list you see when logged into Oracle BI EE with the desktop application.

2. Tap a dashboard.

About Working with BI Content in the Mobile Application

There are significant differences in how users interact with applications when the user interface is touch-based rather than mouse-based.

In the content area of your iPad's screen, you can view BI content using standard iPad browser interactions, such as panning. The right-click functionality of the desktop application is accessed using a tap-and-hold gesture. As with many iPad applications, there is no dragging of content in Oracle BI Mobile.

See [Appendix B, "Touch Gestures Used in Oracle BI Mobile"](#) for information on the various interactions you can do in the Oracle BI Mobile application.

While viewing BI content, you can tap the **Options** icon in the title bar to access an Options menu. Menu items vary based on the type of BI content you are viewing.

Working with the Previous Icon

When you have opened a catalog object, your screen includes a **Previous** icon and a **Home** icon. Tapping the **Home** icon takes you directly back to the Home page; it is essentially a shortcut that enables you to skip the navigation hierarchy when navigating backward.

Tapping the **Previous** icon navigates you in a backward sequence through the objects you have viewed while interacting with a dashboard, and then at the end of that navigation, to the Home page.

You can navigate backward between external URLs (when there is a navigation link in the BI content), and backward to a different dashboard page explicitly (through the title bar).

You cannot reverse-navigate from the base point of navigation, so when you are in the following views, there is no **Previous** icon to take you backward:

- Favorites
- Recent
- Dashboard
- Catalog
- Search
- Local Content

Refreshing BI Content

If the Refresh option is available, then you can refresh the data associated with the open BI content. The Refresh option updates the data associated with the object you are viewing; the Refresh option does *not* update any other modifications that may have happened to the report while you have had it open.

To refresh BI content:

1. Open the object.
2. Tap the **Options** icon and then tap **Refresh**.

The query is rerun and the content is refreshed.

Viewing Properties of BI Content

You can view read-only properties about your BI content, including type, description, owner, file location, and last-modified date. In addition, for alerts you can view alert definition fields (Last Run, General, Schedule, Condition, Content, Recipients, Destination, Actions).

To view properties for BI content:

1. Tap the **Options** icon and then tap **Properties**.
2. Review the catalog information.
3. When finished, tap **Done**.

Applying Saved Customizations

You can apply any saved dashboard customizations (defined in the desktop version of Oracle BI EE) when viewing dashboards in the Oracle BI Mobile application.

The **Apply Customizations** option is visible in the Options menu only for dashboards in which the user has saved some customizations (through the desktop application).

For information on saving dashboard customizations, see "What Are Saved Customizations for Dashboard Pages?" in *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition*.

Working with Favorites

Use the Oracle BI EE favorites feature on your iPad to add as favorite any BI content that you view regularly or want to view again at another time. If you already have favorites added from your use of the desktop version of Oracle BI EE, these favorites will pre-populate your favorites list when you begin using BI Mobile.

Your Favorites view shows all content you have added as favorite on your device and for your given server configuration. This means that you could configure another mobile device to the same server for the same user, and the user would see the same set of favorites.

Your desktop favorites and your mobile favorites are always in sync. Changes made in either place on a given server will be visible to you in both contexts.

In the Oracle BI Mobile application, you can navigate your Favorites hierarchy. While viewing a favorite, you can remove it from your favorites list. To organize your favorites, use the desktop application).

For general information on how favorites work in Oracle BI EE, see "What Are Favorites?" and that topic's related topics in *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition*.

This section includes the following topics:

- ["Adding Favorites in Oracle BI Mobile"](#)
- ["Synchronizing Mobile Favorites with Desktop Favorites"](#)

Adding Favorites in Oracle BI Mobile

When viewing BI content, you will find it useful to add objects to your favorites list to enable you to quickly return to them later.

You access the Favorites screen by tapping **Favorites** in the tab bar.

To add a catalog object as a favorite:

1. While viewing the BI content, in the navigation bar where the object's title appears, tap the **Options** icon.
2. In the Action menu, tap **Add to Favorites**.

Note: The **Add to Favorites** button does not appear in the Action menu for BI content that is already in your favorites list.

The BI content is added to your list of favorites.

To open a favorite:

1. In the tab bar, tap **Favorites**.

The Favorites screen is displayed.

2. (Optional) Tap the **List-style Display** icon or the **Carousel-style Display** icon to change the view from a list of favorites to a carousel.
3. Tap the favorite you want to open.

Synchronizing Mobile Favorites with Desktop Favorites

Synchronization of favorites happens at login. When you connect to a BI Presentation Services server from your mobile device, your mobile favorites automatically synchronize with your desktop favorites. Any favorites you have added from your mobile device are automatically added to the "root" category. Any favorites you have added while logged in from the desktop are automatically synchronized to the device.

To move favorites between folders or organize them differently, you must first log in to the desktop Oracle BI EE application. For more information on organizing favorites, see *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition*.

Working with Recent Items and Your History

Just like with your favorites, the list of your recent items is synchronized with the desktop version, and this happens at login. When you connect to a BI Presentation Services server from your iPad, your mobile list of recent items automatically synchronizes with your desktop recent items.

Local BI content does not appear in your recent items list, because your locally saved catalog objects are not available from the desktop version.

Working with Local Content

In Oracle BI Mobile, a local-content version of a catalog object is like a briefing book. It is a separate copy of the BI content, for which only the data can be refreshed.

You can work with BI content saved locally to your iPad whether you have a server connection or not.

This section is organized as follows:

- [Saving Content Locally](#)
- [Viewing Local Content](#)
- [Disabling Local Content](#)

Saving Content Locally

You can save local versions of BI content to your mobile device. You can save analyses, dashboards, briefing books, and BI Publisher reports.

To save BI content locally:

1. While viewing BI content, tap the **Options** icon.
2. Tap **Save to Local**.
3. (Optional) Give the BI content a new name.
4. Tap **OK**.

Note: There are security measures you can take with your iPad, outside of Oracle BI Mobile, that can enhance the security of your BI content and your organization's data. For example, you can enforce device security policies with regard to password protection. You can also remotely wipe the device clean in case of theft or loss.

Viewing Local Content

In the Server Connection screen, you can go straight to your Local Content without connecting to a BI Presentation Services server.

To view local content:

1. (Optional) In the Server Connections screen, tap **Offline**.
You do not need to be offline to view local content. Take this step if you want to see *only* local content (that is, no live content from a BI Presentation Services server).
2. In the Local view, swipe to scroll through your local content.
3. Tap the thumbnail for the BI object you want to view.

When viewing BI content that is saved locally, you can readily see that the content you are viewing is a local copy rather than live content, because "Local Copy" appears immediately after the name.

You can refresh your Local content while in online mode to fetch data changes from the server.

To refresh your local content:

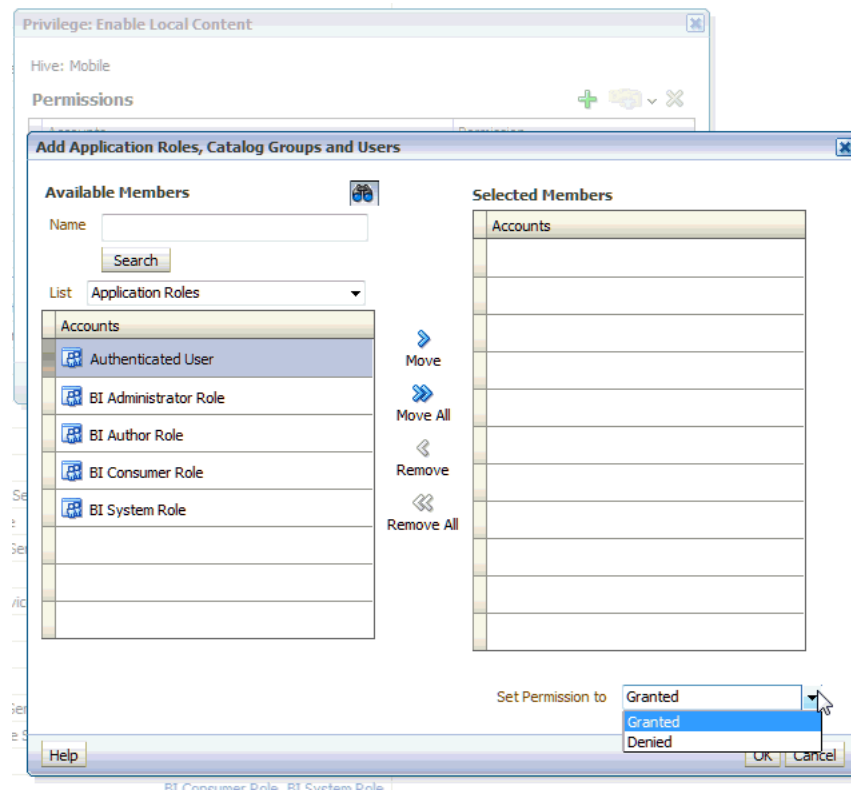
- If you are in Offline mode and you want to refresh BI content you are viewing locally:
 1. Tap the **Back** button to return to the Home page.
 2. Tap the **Options** icon, and then tap **Login [your BI Presentation Services server]**.
 3. Tap **Local**, and return to the BI content you were viewing.
 4. Tap the **Options** icon, and then tap **Refresh**.
The timestamp on the BI object thumbnail, when in the Local view, shows the time that you refreshed it from the server.
- If you are in Online mode and you want to refresh BI content you are viewing locally:
 1. Tap the **Options** icon, then tap **Refresh**.

Disabling Local Content

In the desktop version of Oracle BI EE, administrators can disable access to the save-locally feature. This is done in the Security area of the Administration: Manage Privileges page, by restricting the privilege called "Enable Local Content." For more information, see *Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition*.

Figure 3–4 shows how the Enable Content Privilege can be disabled on a per-user basis, or by role, such as BI Consumer.

Figure 3–4 Disabling Local Content in Oracle BI EE



Performing Searches

Oracle Business Intelligence Mobile provides the same search behaviors as the desktop version of Oracle BI EE. In the Oracle BI Mobile application, you can search on catalog object name, catalog object type, and description. The search is restricted to objects you can view with Oracle Business Intelligence Mobile.

The Search view displays the search directory below the search criteria field. When the **All/Highlighted** toggle is set to **Highlighted**, the search directory represents the base directory from which your search will be performed. If the toggle is set to **All**, the search will be performed across all folders (My Folders, Shared Folders, Local Content).

You can change your search options using the Search Settings screen. The Search Settings screen is accessed from the Search screen. For more information, see ["Adjusting Search Settings"](#).

Figure 3–5 shows the Search view.

Figure 3–5 Search View



Navigating the Search View

The Search view has a toggle for **All** and **Highlighted**, and your search is performed either in a specific location within the catalog (that becomes highlighted when you choose it) or within the entire catalog, depending on which tab you select.

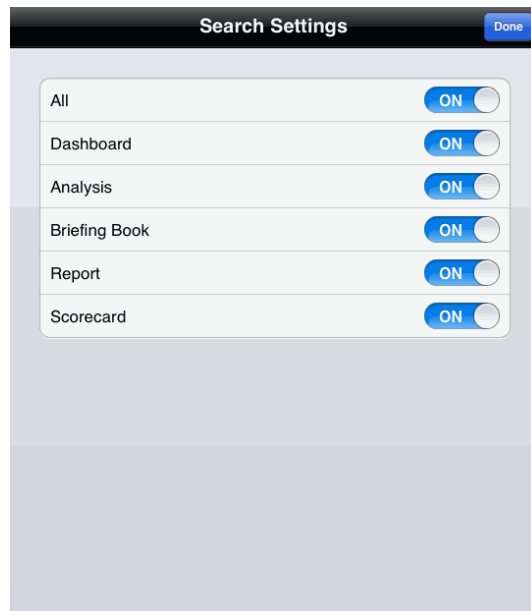
If you perform a search within a specific, highlighted location, and then want to expand your search to the entire catalog, you can tap **Continue searching in other folders...** to do so. This option appears below the last entry in the search result list.

You can cancel a search that is in progress by tapping the **Cancel** button.

Note: Your local BI content is included in searches performed from the Search view. To search *only* among BI content saved locally, use the **Search** field in the Local view.

Adjusting Search Settings

You access the search options set up for your device using the Search Settings dialog. It is here that you set the catalog object types you want to include in searches. [Figure 3–6](#) shows the Search Settings dialog.

Figure 3–6 Search Settings Dialog**To adjust the search settings:**

1. To the right of the **Search** field, tap the gear icon.
2. In the Search Settings dialog, tap the **ON/OFF** toggles for each type of catalog object you want to include or exclude in searches.
3. When you are finished, tap **Done**.

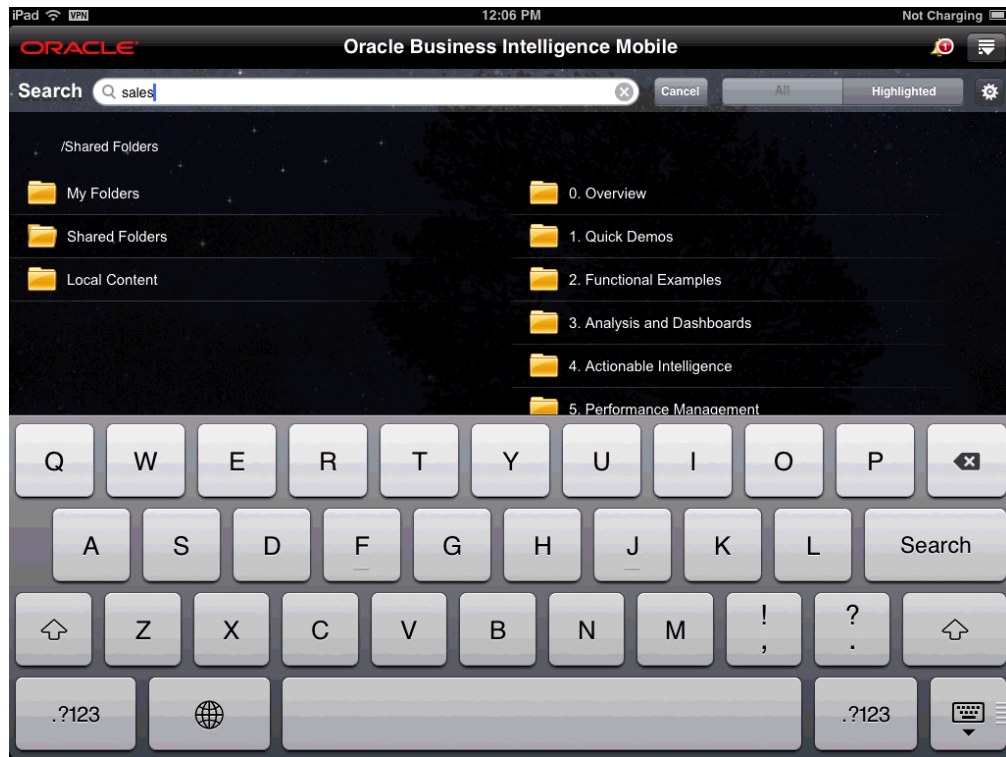
Searching for BI Content

In the Oracle BI Mobile application, you search for BI content in the Search view.

To search for BI content:

1. In the tab bar, tap **Search**.
The Search view is displayed.
2. In the **Search** field at the top of the Search view, enter your search criteria. An example of criteria is "UPC*" to search all content for which the content name begins with "UPC".

The syntax of the search string is identical to that of the desktop version of Oracle BI EE, including usage of special characters. Search criteria are case-insensitive. See the reference topic about the Search pane in *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition*.
3. Tap the **Search** button in the keyboard, as shown in [Figure 3–7](#).
Your search is performed on the server and the search results are displayed in a list. Tap a row to open BI content.

Figure 3–7 Initiating a Search by Tapping the Search Button in the Keyboard

Sending BI Content in Email

If you have set up an email account on your iPad, you can embed links to BI content in emails you send. You can also send BI content as attachments to emails.

While you are viewing BI content, you can use the Options menu to send the BI content in any of the following ways:

- **Send email with only links.** When you tap the **Options** icon and then choose the email option you prefer, an email window is launched, with links to the BI content embedded in the body of the email. The links are two URL types: one is a regular browser-launchable URL pointing to the content, and the other is a URL that launches the content in the recipient's instance of the Oracle BI Mobile application. Your recipient receives the two URLs, and then chooses how to view the BI content.

Note that some BI content linked to with a browser-launchable URL may not display correctly, depending on the recipient's browser. For example, if you send a link to BI content that includes a graph, and your recipient is using a browser such as Microsoft Internet Explorer 7.0, the graph will not display correctly. The BI content should ideally be launched in a browser such as Microsoft Internet Explorer 9 (or higher), Mozilla Firefox, or Google Chrome.

- **Send email with an attachment.** Choosing this option enables you to keep the size of the email smaller than if you include inline content. Depending on the email client your recipient is using, the attachment you send may be unviewable, or images and text may be displayed incorrectly.
- **Send email with an attachment and with inline content.** It is important to note that having the BI content included inline in the email can add to the size of the attachment. Also, BI content sent inline in emails may display incorrectly in older

email clients. You determine whether inline content is included or not included using the **Email Inline Content** setting in the Settings screen, as described in ["Sending BI Content Inline in Email"](#).

To send BI content in an email:

1. While viewing the BI content, tap the **Options** icon, then tap one of the following:
 - **Email (links only)**
An email is created, embedded with links to the content. No actual content is attached.
 - **Email (with attachment)**
An email is created, embedded with the BI content as an attachment.
2. Enter the recipient's email address, and any accompanying message.
3. Tap **Send**.

Sending Local BI Content in Email

When you send local BI content in an email, there are no links to embed. The content is always added either as an attachment or as inline content, or both. This is governed by the **Email Inline Content** setting in the Settings screen. Even if the **Email Inline Content** setting is OFF, and the **Email (with attachment)** choice is not selected, the local BI content is still added to the email as an attachment.

To send local BI content in an email:

1. While viewing local BI content, tap the **Options** icon, then tap **Email (with attachment)**.
2. Enter the recipient's email address, and any accompanying message.
An email is created, embedded with the local BI content as an attachment.
3. Tap **Send**.

Sending BI Content Inline in Email

You can send BI content in an email from within the Oracle BI Mobile application using the **Email Inline Content** setting.

Depending on the email client your recipient is using, the inline BI content you send may be unviewable, or images and text may be displayed incorrectly. It is best to avoid using the **Email Inline Content** setting unless you know that the recipient's email client displays inline content. Certain older email clients may not be able to display inline content containing HTML and images.

To send BI content inline in an email:

1. In the branding bar, tap the Options menu, then tap **Settings**.
The Settings screen is displayed.
2. In the Settings screen, in the Email Inline Content row, tap **ON**.
After you modify this setting and when you email BI content, whether you embed a link to the content or you embed the content itself as an attachment, the content is included inline in the email as well.

Printing BI Content

If you are using an iPad that supports multitasking (that is, a device running iOS 4.2 or later), you can wirelessly print BI content.

Note: For the printer discovery and execution of print jobs provided by the Apple iOS, you must have an AirPrint-enabled printer connected to the same wireless network as your iOS device.

To print BI content:

1. While viewing BI content, tap the **Options** icon.
2. Tap **Print**.

Note: The XML format is not supported for printing. While you can view FO-formatted XML (XSL-FO) using Oracle BI Mobile, XML data cannot be printed from your mobile device.

Working with BI Content

This chapter covers details of using the Oracle Business Intelligence Mobile application to work with specific object types within the catalog.

This chapter includes the following topics:

- "Working with Analyses and Dashboards"
- "Working with Tables, Pivot Tables, and Trellis Views"
- "Working with Graphs"
- "Working with Prompts"
- "Working with Map Views"
- "Working with Oracle BI Publisher Content"
- "Working with Scorecard Content"
- "Working with Alerts and Agents"
- "Working with Briefing Books"

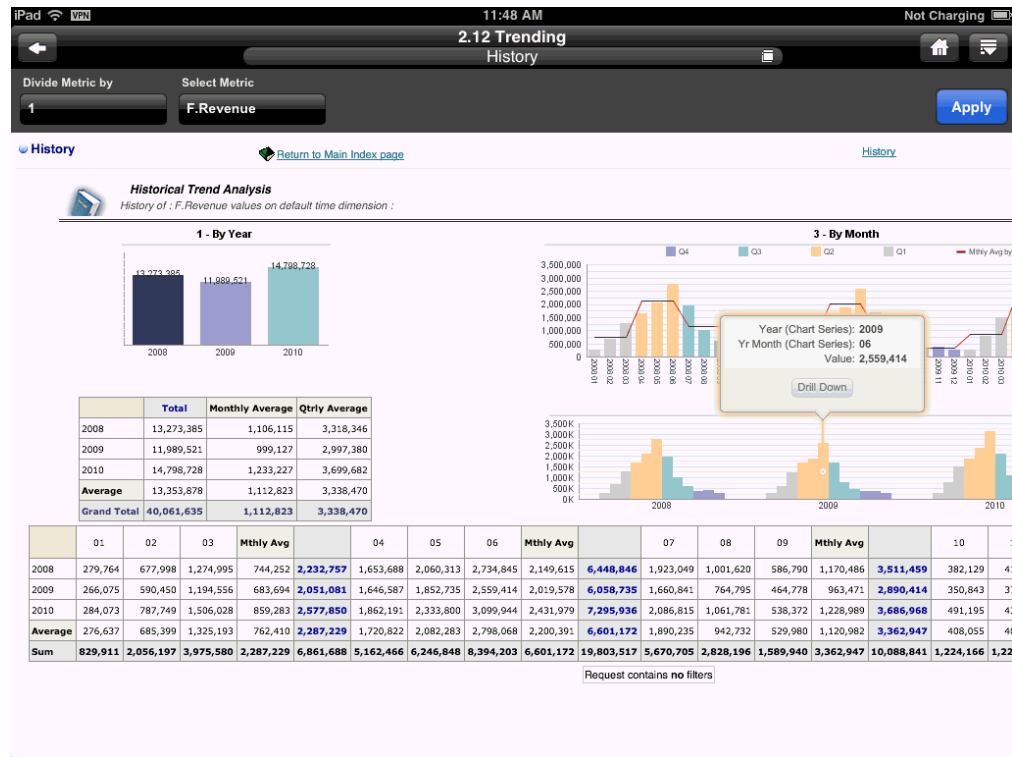
Working with Analyses and Dashboards

With Oracle Business Intelligence Mobile, you can see the vast majority of views provided by the desktop version of Oracle BI EE. You can perform all analytic actions in the Oracle BI Mobile application: prompts, drills, action links, and so on. You can interact with the data by filtering and sorting.

You can interact with graphs, drilling and zooming directly in the graph.

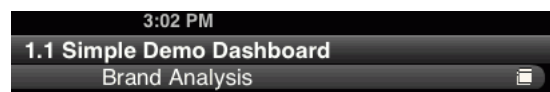
Figure 4-1 shows an example of BI content on an iPad.

Figure 4–1 BI Content on an iPad



When a dashboard has multiple pages, tap the page icon (at the right side of the page-title area) to access a list of the available pages and tap again to navigate to one of them. See Figure 4–2.

Figure 4–2 Dashboard Page Icon



Which Objects Are Disabled When Embedded in Dashboards?

Certain objects, when embedded in dashboard pages in the desktop version of Oracle BI EE, are disabled for display in the mobile application. The following objects are suppressed from dashboard pages in Oracle BI Mobile:

- Portal header
- Report links
- Edit link in empty home dashboard
- Embedded content (iframe) view
- Alerts view
- Logical SQL view
- Create Segment view
- Create Target List view
- Briefing books

- Folder view

Working with Tables, Pivot Tables, and Trellis Views

Oracle BI Mobile provides the same set of context-menu actions that are available in Oracle BI EE, but in the mobile application you use the tap-and-hold gesture rather than the right-click of a mouse. For example, to sort data, tap and hold on the column header to access the mobile version of the desktop application's right-click menu and then select **Sort**.

Note: Because there is no usage of right-click on an iPad, this guide refers to the "right-click menu" as the "context menu."

About Tooltips in Trellis Views

A trellis is a form of graph nested in a pivot table. Trellis views support tooltips only for the entire graph in the cell as a whole; so you cannot get a tooltip for each individual item in the trellis graph.

Tooltips appear differently in trellis views depending on whether the trellis is a simple trellis or an advanced trellis. In a simple trellis, you can get a tooltip for each individual bar (group and series). You can also drag the tooltip using the tap-and-drag gesture. In an advanced trellis, you can get only one single tooltip for the entire graph.

Working with Graphs

User interaction with graphs is different in Oracle BI Mobile from what you are used to with the desktop version of Oracle BI EE.

In the desktop version of Oracle BI EE, you can initiate actions using the mouse: a left-click (for example—drill, action-link, master-detail), or hovering the mouse (to show a tooltip).

In Oracle BI Mobile, where the user interaction is touch-based rather than mouse-based, gestures perform the actions. A tap gesture launches a tooltip (as does hovering the mouse in the desktop version), and the tooltip includes a button that can initiate the desktop version's left-click action.

The tooltips and menus that appear on graph markers provide a layer to perform actions on the graph data. When there is only one action available for a marker, that action's button is readily visible in the tooltip layer. When there are multiple actions available, you see an **Options** button in the tooltip layer.

To dismiss a tooltip:

1. Do one of the following:
 - Tap an empty area of the graph.
 - Tap on a different graph marker. (This launches a new tooltip.)

Note: If an analysis includes graphs for sectioned pivot table views, these graphs do not support any interactions in Oracle BI Mobile.

Working with Prompts

In the Oracle BI Mobile application, dashboard prompts are rendered in a manner that is optimized for the mobile context and for finger gestures. While nearly all functionality of the desktop version is available, it is rendered differently.

Supported prompt types include column prompts, variable prompts, and currency prompts. Most input options are supported, including text, radio button, checkbox, and so on.

Image map prompts and hierarchical prompts are rendered inside the BI content, while other supported prompts are rendered in the prompts bar.

What Do Prompts Look Like in Oracle Business Intelligence Mobile?

Figure 4–3 shows the prompts bar. The **Apply** button is enabled here because all required fields have values entered. When required fields still need entries, the **Apply** button is disabled.

Figure 4–3 Prompts Bar

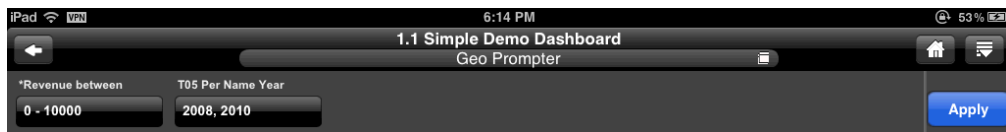


Figure 4–4 shows the same prompts bar as above, along with a prompt for selecting display years.

Figure 4–4 Prompt in a Dashboard



What are Simple Prompts and Advanced Prompts?

There are two variants of prompts that can be used in Oracle BI Mobile: simple prompts and advanced prompts:

- **Simple prompt.** Displays when there is a small number of entries in the prompt list. The simple prompt is optimized for the user's quick selection of items from the list.
- **Advanced prompt.** Displays when there is a relatively large number of entries. Additional options are included that support filtering of the larger list.

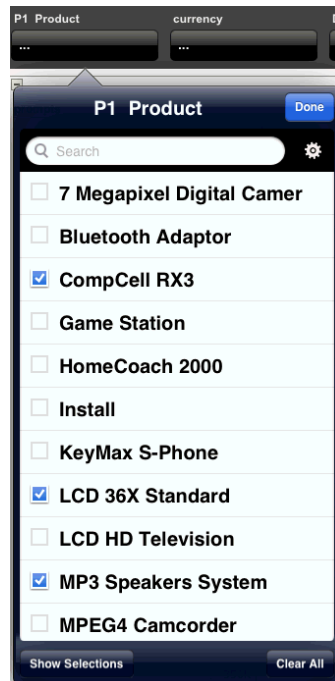
Figure 4–5 shows a simple list prompt that accepts multiple entries from the user.

Figure 4–5 Simple Prompt Showing Checkbox Input Option



Figure 4–6 shows an advanced list prompt that includes a Search field.

Figure 4–6 Advanced Prompt Showing Search Field

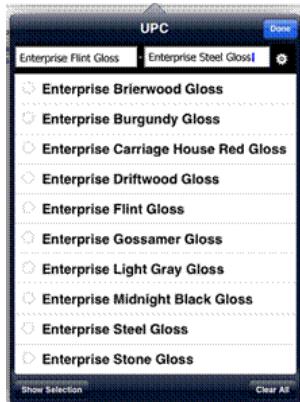


The **Show Selections** button is a toggle that switches to **Show All**. When you tap **Show Selections**, only the list items you have selected are shown to you rather than the entire list provided by **Show All**. The **Clear All** button enables you to clear all your selections at once.

How Do List Prompts with Text Boxes Work?

Figure 4-7 shows a list prompt that includes the Between operator (a hyphen) and two text boxes.

Figure 4-7 List Prompt with Between Operator



To work with text boxes in list prompts:

1. Note the following:
 - Selecting an item from the list adds it to the text box that has focus.
 - Tapping the other text box moves the focus there.

What Do Slider Prompts and Date Prompts Look Like?

Figure 4-8 shows a slider prompt.

Figure 4-8 Slider Prompt Showing Operator LESS THAN OR EQUAL TO

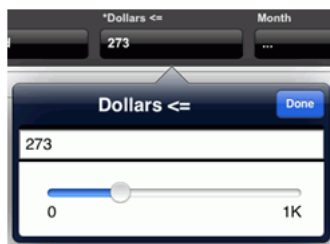


Figure 4-9 shows a date prompt.

Figure 4–9 Date Prompt Displayed with Spinbox

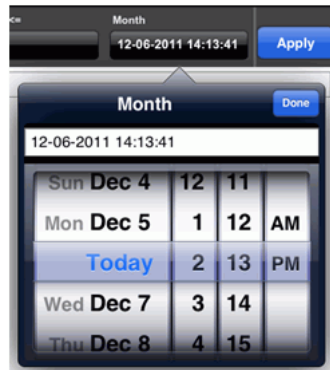
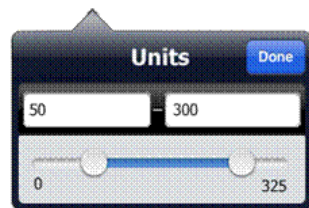


Figure 4–10 shows a double-thumb slider prompt using a Between operator (a hyphen) to show a range of units from 50 to 300.

Figure 4–10 Slider Prompt with Between Operator

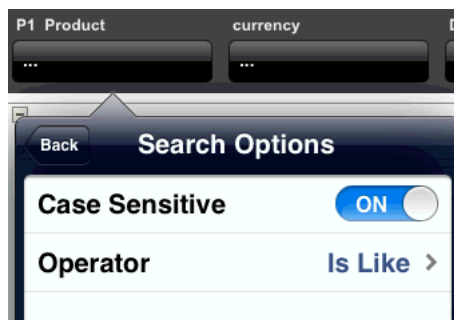


Setting Search Options for Prompts

The Search field in a list prompt filters the visible list of items.

Figure 4–11 shows the Search Options dialog where you can specify details including the search operator, and whether your search is to be case-sensitive.

Figure 4–11 Search Options Dialog for Prompts



To specify search options for a prompt:

1. In the prompt dialog, tap the gear icon.
2. Select a search operator:
 - In the Search Options dialog, tap the Operator row.
 - Tap the operator you want to use, for example **Is Like**.

Your selection of a search operator returns you to the Search Options dialog.

3. Specify whether you want the search to be case-sensitive by tapping the **Case Sensitive** toggle to **ON** or **OFF**.
4. Tap **Back** to return to the prompt dialog, then tap **Done**.

Working with Map Views

This section complements "Working with Map Views on Dashboard Pages" in *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition*. This section explains how to work with maps in the BI Mobile application, as the methods differ. If you are new to viewing maps in Oracle BI EE, you should begin with "Working with Map Views on Dashboard Pages" in *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition* before learning the gestures described here.

Oracle BI Mobile provides interactive map-view functionality that is optimized for the iPad.

Use touch gestures to work with maps on your iPad, as follows:

- **Double-tapping.** To render the map as a single visualization using the entire screen, double-tap on it.
- **Panning.** To pan, drag the map around with one finger.
- **Zooming.** To zoom, use the standard two-finger gesture of pinching and spreading.
- **Drilling.** To drill or display a popup with options, use a single tap.
- **Modifying thresholds for slider formats.** To edit the text for a slider threshold, tap the text and use the keyboard.
- **Showing or hiding formats.** To show or hide a format, tap to check it or uncheck it.

Note: You can work only with visible formats and you cannot change which formats are available.

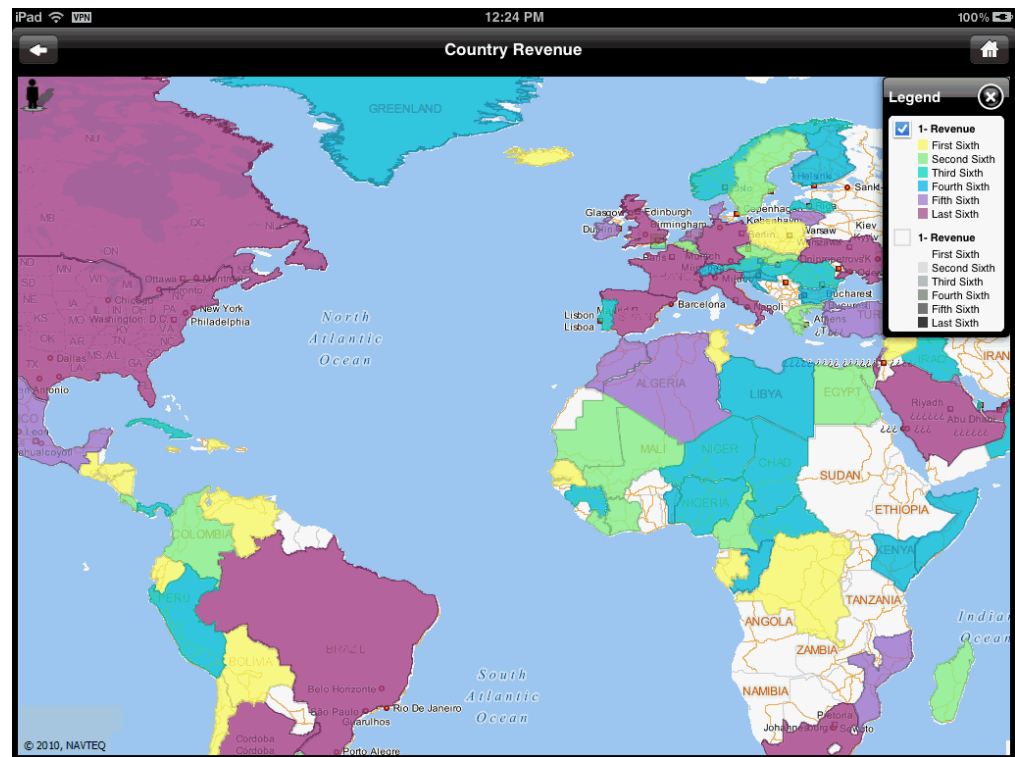
Figure 4–12 shows a map view.

Figure 4–12 Map View



Figure 4–13 shows the same map view expanded to fill the entire screen.

Figure 4–13 Map View in Full Screen



You can move back and forth between the expanded and unexpanded map views.

To return to the unexpanded map view:

1. Tap the **Previous** icon (at the top left of the screen).

You can display a legend for the map.

To view the map legend:

1. Tap the legend icon, shown in [Figure 4–14](#).

Figure 4–14 Legend Icon



The My Location feature enables you to find your current location on a map and place a pin on it.

To view your location:

1. Tap the **My Location** icon, shown in [Figure 4–15](#).

Figure 4–15 My Location Icon, in Inactive State



2. If prompted to allow the application to use your location, tap **Allow**.

The My Location icon appears inactive while the application searches for your location.

If your location can be found, a pin is displayed at the position where the device calculates your location to be.

If your location cannot be found, a message is displayed.

To remove your location pin:

1. Tap the pin icon.
2. Tap **Remove**.

Working with Oracle BI Publisher Content

You view Oracle BI Publisher content in the Oracle BI Mobile application in much the same way you view it in the desktop version of Oracle BI EE: you can open it directly from the Oracle BI Presentation Catalog. Viewing of BI Publisher content is interactive in the Oracle BI Mobile application. You can apply parameters for BI Publisher reports as well.

You can view read-only catalog information about the active report in the Login screen.

Working with Scorecard Content

In dashboards, you view scorecard content in the Oracle BI Mobile application in much the same way as you view it in the desktop application. When scorecard objects are embedded in a dashboard, you can see a fully interactive and complete view of

scorecard content on the iPad. You can view KPI watchlists, smart watchlists, custom views, strategy maps, strategy trees, strategy wheels, and cause & effect maps.

Note: For interactive use on an iPad, it is strongly recommended that scorecard views be embedded in a dashboard rather than requiring that the mobile user open the files directly from the catalog.

You can also open scorecard content (except smart watchlists) directly from the Oracle BI Presentation Catalog; this displays the content in a simplified table format. (See [Figure 4–18](#).)

In Oracle BI Mobile, a subset of the context menu options are available. You can access the context menu in a watchlist or for a diagram node by using the tap-and-hold gesture.

To zoom in or out in all of the scorecard graphical diagrams (except for the strategy wheel), use the pinch gesture. In the strategy wheel, use the pinch gesture to increase or decrease the number of concentric rings displayed.

[Figure 4–16](#) and [Figure 4–17](#) show two versions of a strategy tree—the first is on the desktop version of Oracle BI EE, and the second is the same strategy tree viewed in Oracle BI Mobile.

Figure 4–16 Strategy Tree As Viewed in the Desktop Version of Oracle BI EE

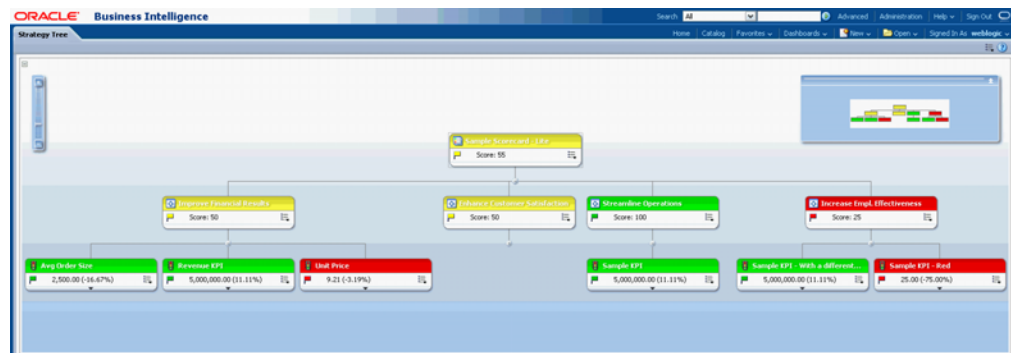


Figure 4–17 Strategy Tree As Viewed in Oracle BI Mobile

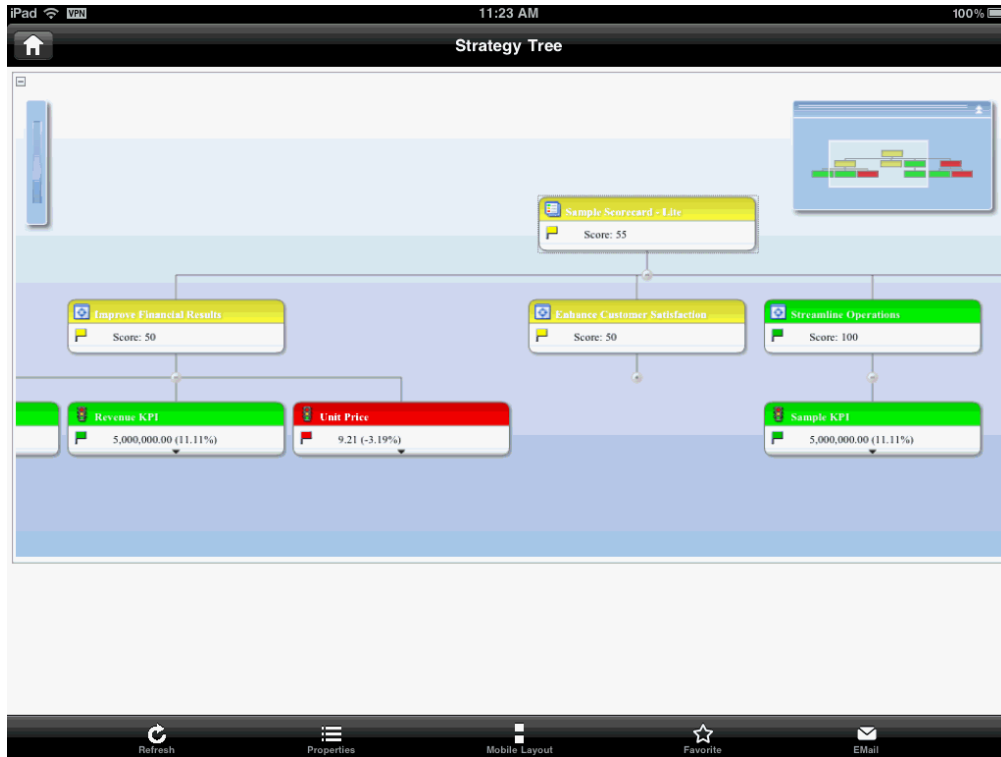
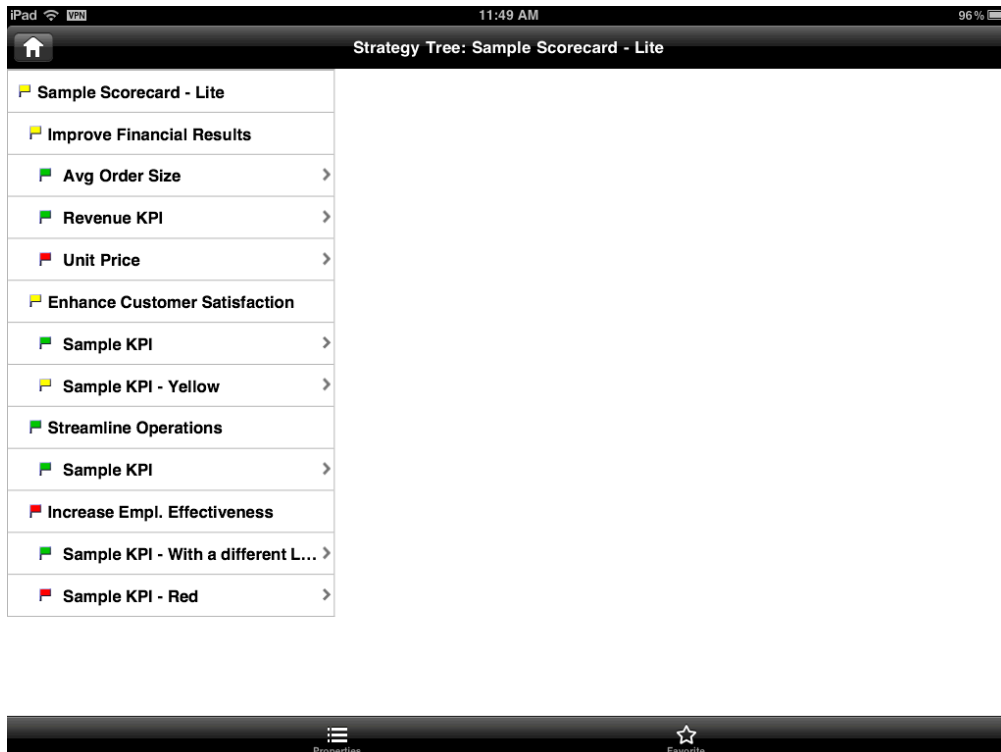


Figure 4–18 shows a DHTML view of a strategy tree. This is how the strategy tree is displayed when opened in Oracle BI Mobile from the catalog.

Figure 4–18 Scorecard Content in a Simplified Table Format



Working with Alerts and Agents

In terms of user interface elements provided by Apple iOS, an "alert" is the popup that displays to provide important information before you take an action and that has a short title and an **OK** button to exit out of it. This guide refers only to alerts as understood as a part of Oracle Business Intelligence, that is: a notification generated by an agent that delivers personalized and actionable content to specified recipients and to subscribers to the agent.

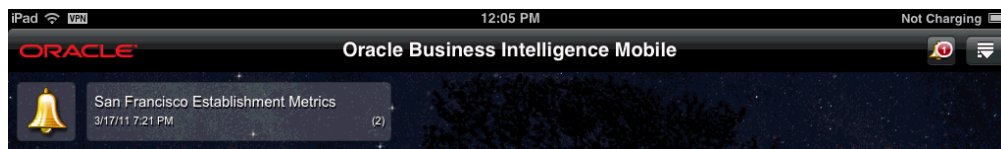
On your mobile device, you can view the same agent-generated list of active alerts you view in the desktop version of Oracle BI EE. Each alert in your list provides the associated object's name and its last execution time.

The Oracle Business Intelligence Mobile application checks for alerts on application startup and again periodically when you are working with the application or have it open.

The Alerts bar, shown in [Figure 4-19](#), displays your current alerts. The most recent appears at the left. The Alerts bar also displays a bell icon that shows the number of current alerts. You can scroll through multiple alerts. You can clear alerts. You can hide the Alerts bar.

The associated alert output (analyses and dashboard pages) for your active alerts can be opened from the Alerts bar on your mobile device as well. As with the desktop version of the alert output, these are non-interactive reports.

Figure 4-19 Alerts Bar



To hide the Alerts bar:

1. Do one of the following:
 - Tap the bell icon.
 - In the Alerts bar, swipe upward.

When the Alerts bar is not visible, the **Alert** icon appears to the left of the **Home** icon on the title bar.

You can open BI content associated with alerts.

To open the BI content associated with an alert:

1. In the Alerts bar, tap the alert.

The BI content associated with the alert is displayed.

You can clear an individual alert or multiple alerts at once.

When you clear an alert in the mobile environment, its elimination is synchronized with the desktop version of Oracle BI EE. Likewise, when you clear an alert in the desktop environment, its elimination is synchronized in the mobile environment.

To clear an alert, do one of the following:

- In the Alert bar, swipe upward with two fingers on the alert you want to clear.

- In the Alert bar, tap and hold until the Close control (an X) appears in the upper-left corner of the alert thumbnail. Tap the Close control. When finished, tap outside the Alert bar to exit the clearing mode.

When all your alerts have been cleared, the Alert bar disappears.

As with the desktop version of Oracle BI EE, you can execute agents in the Oracle BI Mobile application through a schedule.

To run an agent from the Alerts bar:

1. In the Alerts bar, tap the alert associated with the agent you want to run.
2. In the alert's view, tap **Run Agent**.
3. Tap **Done**.

The agent executes, and when complete, a success or failure message displays. When execution is successful, the Alerts screen is updated appropriately.

Working with Briefing Books

You can view briefing books interactively.

You can save them locally to your device. You can email briefing books, and print briefing books.

User Interface Reference for Oracle BI Mobile

This appendix contains reference information and graphics for user interface item (icons, buttons, and so on) used in the Oracle BI Mobile application.

[Table A-1](#) identifies those icons and buttons within the Oracle BI Mobile application that are not labeled in the application user interface but that are referred to in this guide.

Table A-1 *User Interface Graphics Used in Oracle BI Mobile*












Icon	Name
	Alerts icon
	All/Highlighted toggle
	Options icon
	Search Settings icon
	Home icon
	Add icon
	Next icon
	List-style Display icon
	Carousel-style Display icon
	Previous icon
	Dashboard page icon

Table A-1 (Cont.) User Interface Graphics Used in Oracle BI Mobile

Icon	Name
	Legend icon

Touch Gestures Used in Oracle BI Mobile

This appendix describes the gestures you can use on your iPad to access the various functionality of Oracle BI Mobile.

Use the touch gestures listed in [Table B-1](#) to work with Oracle Business Intelligence Mobile.

Table B-1 *Gestures Used to Interact with Oracle BI Mobile*

Gesture	How to Perform	What It Does
Tap	Tap the screen with a single finger.	<p>This gesture is generally equivalent to a left-click in the desktop version of the application.</p> <p>Tap on a bar (or other marker) in a graph to display a tooltip (equivalent to hover, in the desktop version) with a button containing the corresponding left-click action.</p> <p>Tap on a control or item to select it or press it.</p>
Tap and Hold	Tap an area and hold your finger in place.	<p>In a table, pivot table, or trellis, tap and hold to access a list of available options or a tooltip.</p> <p>In a scorecard, tap and hold on a scorecard diagram node or watchlist table cell to access the context menu.</p>
Double Tap	Tap twice quickly.	<p>In a map, double tap to expand the map to fill the entire screen.</p> <p>In a scorecard, double tap on a node within a scorecard strategy wheel to re-focus the diagram on that node.</p>
Drag (One-Finger)	Drag one finger.	<p>To pan the entire view, drag one finger.</p> <p>To pan in a map, drag one finger.</p> <p>To reposition a tooltip in a graph, drag it. (Note that dragging of tooltips is not allowed in the following graph types: line bar graph, pie graph, pareto graph, scatter graph, bubble graph, radar graph, gauge, funnel graph.)</p> <p>In a list or menu, drag up or down to scroll.</p>

Table B-1 (Cont.) Gestures Used to Interact with Oracle BI Mobile

Gesture	How to Perform	What It Does
Drag (Two-Finger)	Drag two fingers.	In a scorecard, to scroll a watchlist, drag two fingers. To scroll a dropdown list, if a one-finger drag does not work, drag two fingers.
Flick	Flick a finger quickly across the screen.	Flick to scroll or pan quickly.
Pinch	Pinch two fingers together or apart.	In a map, pinch to zoom out or in. In most scorecard diagrams, pinch to zoom out or in. In a scorecard strategy wheel, pinch to increase or decrease the number of concentric rings displayed.
Swipe	Swipe quickly to the right.	In a list, swipe on an item to delete it.
Four-Finger Swipe	Swipe up with four fingers to reveal the multitasking bar. Swipe down with four fingers to hide the multitasking bar.	This is a multitasking gesture. This gesture reveals the multitasking bar so that you can move between iPad applications.

Accessibility Features for Oracle BI Mobile

This appendix describes the Apple iOS accessibility features you can use to view and interact with your BI content.

This appendix is organized as follows:

- ["Using Accessibility Mode with Oracle BI Mobile"](#)
- ["Accessing Oracle BI Mobile Using the Apple iOS VoiceOver Screen Reader"](#)

Using Accessibility Mode with Oracle BI Mobile

When accessibility mode is enabled for a user in Oracle BI EE (the desktop version), BI content is accessible using the following features of the underlying Apple iOS:

- VoiceOver
- White on Black
- Zoom

You can enable accessibility mode for a user in the user's saved preferences (navigate to My Account and select the Preferences tab). For more information, see "Accessibility Features" in *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition*.

When you have VoiceOver set to **ON** in your iPad's settings, data within a graph is rendered differently in the Oracle BI Mobile application. The graph's data is rendered as a graph-converted pivot table. For more information, see ["Accessing Oracle BI Mobile Using the Apple iOS VoiceOver Screen Reader"](#).

When you have VoiceOver set to **ON** in your iPad's settings, access to the carousel-style display (in the Recent view and the Favorites view) is disabled. When VoiceOver is set to **OFF**, the carousel-style display returns.

Accessing Oracle BI Mobile Using the Apple iOS VoiceOver Screen Reader

You can use the Apple iOS VoiceOver utility to have BI content read to you and to hear the status of gestures you make as descriptions spoken to you.

To set the iPad for accessibility:

1. If you are currently logged in to the Oracle BI Mobile application, log out.
2. On the iPad's home screen, tap **Settings**.
3. In the General section, scroll down and tap **Accessibility**.

4. In the Vision section, tap **VoiceOver**.
5. Tap the **ON/OFF** toggle to switch it to **ON**.

The device is now ready for accessibility using VoiceOver and you can now log back in to Oracle BI Mobile.

Note: When using Apple iOS VoiceOver, you must restart any open applications before the VoiceOver features can be enabled successfully for those applications.

Index

A

- Action menu
 - actions, 3-4
- agents, 4-13
 - running, 4-14
- alerts, 4-13
 - clearing, 4-13
 - opening, 4-13
 - working with, 4-13
- Alerts bar, 4-13
- All/Highlighted toggle, 3-2, 3-9
- analyses
 - working with, 4-1

B

- BI content
 - disabling the Local Content privilege, 3-8
 - emailing, 3-12
 - in Oracle Business Intelligence Mobile, 4-1
 - localizing, 1-3
 - on iPad, 4-2
 - opening from the catalog, 3-2
 - printing, 3-14
 - refreshing, 3-5
 - saving locally, 3-7
 - sending BI content in email as an attachment, 3-12
 - sending BI content in email as links only, 3-12
 - sending BI content in email inline and as an attachment, 3-12
 - sending BI content inline in email, 3-13
 - sending local BI content in email, 3-13
 - viewable using Oracle Business Intelligence Mobile, 1-2
 - viewing locally, 3-8
 - viewing properties, 3-5
 - viewing properties of, 3-5
- BI Publisher content
 - working with, 4-10
- bi-directional text, 1-3
- branding bar, 2-5
- briefing books
 - working with, 4-14

C

- catalog
 - navigating, 3-1
- console logging, 2-6
 - disabling, 2-8
 - enabling, 2-8
 - setting, 2-8
 - using for debugging, 2-8
- Console Logging setting, 2-8

D

- dashboards
 - dashboard page icon, 4-2
 - navigating directly to, 3-4
 - objects that are disabled when embedded, 4-2
 - working with, 4-1
- Device Locale setting, 1-3
- display
 - carousel-style, 2-5, 3-3
 - list-style, 2-5, 3-3

F

- favorites
 - adding, 3-6
 - opening, 3-6
 - pre-populated list, 3-6
 - removing, 3-6
 - synchronization of desktop with mobile, 3-6, 3-7
 - working with in Oracle Business Intelligence Mobile, 3-6
- Favorites screen, 3-6

G

- gestures
 - reference, B-1
 - touch-based interface rather than mouse-based, 3-4
- graphs
 - viewing, 4-1
 - working with, 4-3

H

Home button, 2-6

I

icons

reference of user interface graphics, A-1

L

landscape orientation, 2-6

M

main screen, 2-5

map views

full-screen, 4-9

returning to the unexpanded view, 4-10

working with, 4-8

multitasking, 2-6

N

Navigation bar, 2-5

O

online help

navigation, 2-6

Options icon, 2-5, 3-4

Options menu, 3-4

Oracle BI Presentation Catalog, 3-1

Oracle Business Intelligence Mobile

about, 1-1

appearance, 2-4

configuring, 2-6

disabling access, 2-9

downloading and installing, 2-1

favorites, 3-6

Local content, 3-7

Recent items, 3-7

server connections, 2-7

starting, 2-2

P

pivot tables

working with, 4-3

Previous icon, 3-5

prompts

about advanced prompts, 4-5

about simple prompts, 4-5

appearance, 4-4

date prompts, 4-6

list prompts with text boxes, 4-6

search options, 4-7

slider prompts, 4-6

working with, 4-4

R

right-click menu, 3-4

S

saved customizations

applying to dashboards, 3-5

scorecards

working with, 4-10

search, 3-11

adjusting search settings, 3-10

performing searches, 3-9

Search button in keyboard, 3-12

Search screen, 3-9

navigating, 3-10

server connections

adding, 2-7

modifying, 2-7

removing, 2-7

Server Setting screen, 2-2

servers

switching between, 2-7

Settings screen, 2-6

setting console logging, 2-8

Status bar, 2-5

T

Tab bar, 2-5

tables

working with, 4-3

trellis views

tooltips, 4-3

working with, 4-3

U

user credentials

Oracle Business Intelligence Mobile, 2-4

Presentation Services, 2-4