

Oracle® Fusion Middleware

User's Guide for Oracle Business Intelligence Mobile for Apple iOS

11g Release 1 (11.1.1)

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Explains how to use Oracle Business Intelligence Mobile for Apple iOS to organize and present data for making critical and timely business decisions.

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

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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 a mobile device 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

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Related Documentation and Other Resources

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

See also the following related documents:

- The *Oracle Fusion Middleware Release Notes for Oracle Business Intelligence Mobile for Apple iOS and Google Android*
- 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.
- Go to the Product Information Center support note (Article ID 1267009.1) on My Oracle Support at <https://support.oracle.com>.

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 in Recent Minor Updates of Oracle BI Mobile 11g Release 1 \(11.1.1.7\)"](#)
- ["New Features for Oracle BI Mobile 11g Release 1 \(11.1.1.7\)"](#)
- ["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 in Recent Minor Updates of Oracle BI Mobile 11g Release 1 (11.1.1.7)

This section describes new features in recent updates of Oracle BI Mobile. Install the latest updated version of the application from the Apple App Store. See ["Getting Oracle BI Mobile for Your Apple iPad."](#)

Note: To take full advantage of the features described in this documentation, you must install or update to the latest version of Oracle BI Mobile available in the App Store.

End-user enhancements have been added in the following areas:

- **Alerts.** The user interface for alerts has been simplified. See ["Working with Alerts and Agents."](#)
- **Searching the catalog.** You now tap the Search icon in the navigation bar when you want to explore the Oracle BI Presentation Services catalog.
- **Support for external links in Oracle BI Mobile apps.** While viewing an app created in Oracle BI Mobile App Designer, when you click an external link, the URL now opens in the default browser on your device rather than in a web view.
- **User interface improvements.**
- **iPhone application.** Whether you are using Oracle BI Mobile on an iPad or an iPhone, there is now a single universal application that works on both devices.

- **Preconfigured demo server.** Upon launching Oracle BI Mobile, you can access a demonstration server to work with a version of the sample application. For more information, see ["Accessing the Oracle BI Mobile Demonstration Server."](#)
- **First Time Help.** When you begin using Oracle BI Mobile, you see an overlay with tips explaining how to navigate the application. To hide the help, tap anywhere on the screen. To view the help again later, tap the **Options** button and then tap **Show First Time Help**.
- **New Settings view.** By swiping right twice, you can easily access this new Settings "backstage" where you configure your server settings, choose the view you want the BI Mobile application to start on, set your email-sending preference, and personalize your wallpaper. See ["Navigating the Oracle BI Presentation Catalog and BI Content."](#)
- **Configured start-up content.** You can select a default view—or even a specific dashboard—to display when you log in to the Oracle BI Mobile application. See ["Configuring Start-up Content."](#)
- **New view: KPI Contribution Wheel.** See ["Working with Scorecard Content."](#)
- **Improved dashboard navigation.** You select pages to view within a dashboard no longer from a dropdown list, but from an overlay that appears showing the available pages. Alternatively, you can scroll left and right in the dashboard navigation bar, then tap to select a page. See ["Working with Analyses and Dashboards."](#)
- **Hide or show the prompts bar.** You can free up screen space by hiding the prompts bar when you have finished setting prompts. See ["Working with Prompts."](#)
- **Interacting with external content in Oracle BI Mobile.** With this new feature, you can work with files of format PDF and XLS. See ["Which BI Content is Viewable Using Oracle BI Mobile?"](#)

New Features for Oracle BI Mobile 11g Release 1 (11.1.1.7)

This section describes new features for Oracle BI EE 11g Release 1 (11.1.1.7). With this release, there is a brand-new application to install from the Apple App Store. See ["Getting Oracle BI Mobile for Your Apple iPad."](#)

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

- **Maximize views with double-tap gesture.** With this new feature, you can access on your iPad more data—even within dense dashboards—without the restrictions of the smaller form factor. You expand an individual view by double-tapping on it. The individual view then displays within the full screen of the iPad. This maximizing of views can be done on views accessed within a dashboard, and also when viewing an analysis independent of a dashboard. See ["Working with Analyses and Dashboards."](#)
- **New view and graph types.**
 - **Performance tiles.** This new view type is among the BI content that can be viewed in Oracle BI Mobile. For more information, see ["Working with Performance Tiles."](#)
 - **Waterfall graphs.** This new graph type is among the BI content that can be viewed in Oracle BI Mobile. See ["Working with Graphs."](#)

- **100% stacked graph as subtypes to the bar graph and the area graph.** This new graph subtype is among the BI content that can be viewed in Oracle BI Mobile. See ["Working with Graphs."](#)
- **Stacked graph as a new subtype to the area graph.** This new graph subtype is among the BI content that can be viewed in Oracle BI Mobile. See ["Working with Graphs."](#)
- **Fixed headers.** In analyses with fixed headers, you can use a single-finger drag gesture to scroll through data in all directions. See ["Working with Tables, Pivot Tables, and Trellis Views."](#)
- **Changing between landscape and portrait orientation while viewing Oracle BI content.** See ["Switching Screen Orientation Between Landscape and Portrait."](#)
- **Breadcrumbs.** You can see the navigation path you have taken while moving through the catalog as a trail of *breadcrumbs* (near the top of the screen by the **Back** arrow). In this way, you can see your current location and how you got there, then decide whether to use the **Back** arrow to navigate in reverse, or to use the **Home** icon to quickly return to the Home screen. See ["About Working with BI Content in the Mobile Application."](#)
- **Security toolkit.** The Oracle Business Intelligence Mobile Security Toolkit provides the ability to generate a signed version of the Oracle BI Mobile HD application. The toolkit includes the instructions and necessary content to build this application making use of Apple's Xcode and the IOS SDKs. The Oracle BI Mobile Security Toolkit will be updated on a regular basis in order to synchronize with the Oracle BI Mobile HD application available on the Apple App store. See ["Using the Security Toolkit for Mobile Device Management."](#)
- **Viewing of Oracle BI Publisher reports in dashboards.** See ["Working with Oracle BI Publisher Content."](#)
- **Integrated Full-Text Catalog Search.** As in the desktop version of Oracle BI EE, you can use full-text search to find catalog objects in Oracle BI Mobile based on attributes such as author and column name. This search is available after the administrator integrates Oracle BI Enterprise Edition with Oracle Endeca Server. See ["Performing Searches."](#)

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 Oracle BI Mobile Look Like?"](#)
- **Carousel-style display (for Recent and Favorites).** See ["Navigating and Switching Between the Carousel, List, and Grid Display Styles."](#)

- **List-style display.** See ["Navigating and Switching Between the Carousel, List, and Grid 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."](#)
- **Catalog navigation.** See ["Navigating the Oracle BI Presentation Catalog and BI Content."](#)
- **A toolbar and a Previous icon.** See ["Working with Back Arrow and the Previous Icon."](#)
- **Application launching via "mobile URLs,"** that is, either from email or from other applications (such as Oracle WebCenter). See ["Launching Oracle BI Mobile from a Mobile URL."](#)
- **Seeding the Oracle BI Mobile application with one or more servers for provisioning of servers by URL.** See ["Implementing 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 Oracle 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 Oracle 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 contribution 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 Oracle 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 and iPhone.

The chapter contains the following topics:

- ["What Can You Do with Oracle Business Intelligence Mobile?"](#)
- ["Which BI Content is Viewable Using Oracle BI 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 and iPhone.

Note: The Oracle BI Mobile application that you download from the Apple App Store is a universal application that works on both the iPad and the iPhone. For the sake of brevity, this guide focuses mainly on how to use the application on an iPad. In some cases, behavior of the application on an iPhone is slightly different. For such cases when the behavior of the application on an iPhone is sufficiently different to warrant special attention, guidance specific to the iPhone is provided.

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

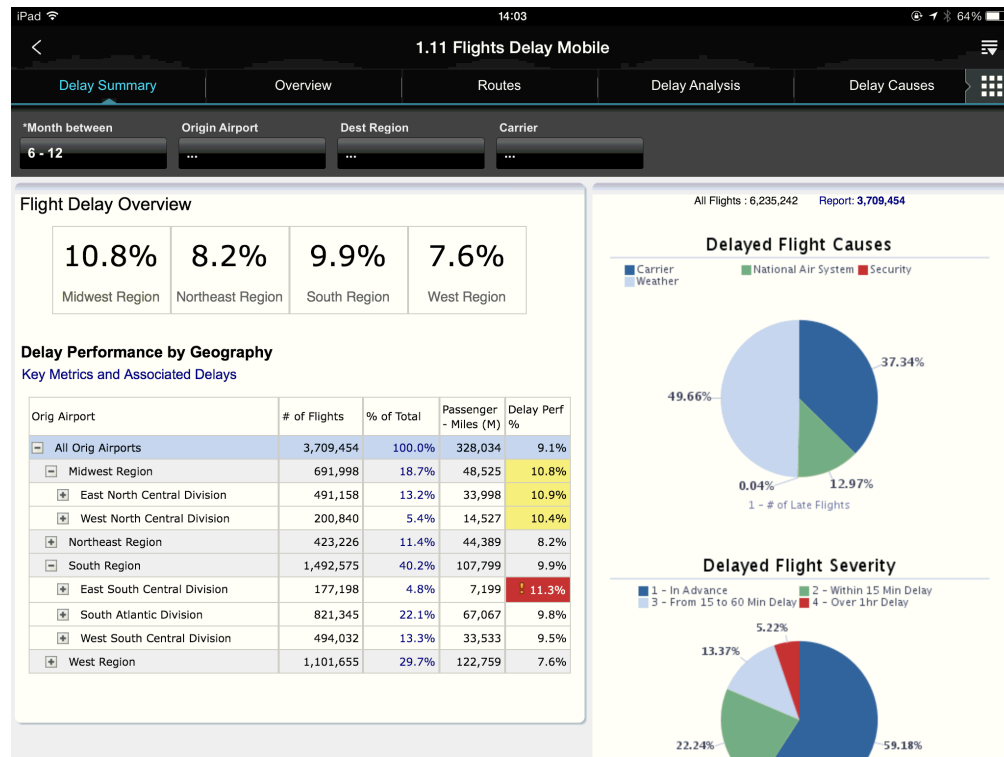
Viewing content on a mobile device requires a presentation that differs from how you view the same content on a desktop monitor. Oracle BI Mobile optimizes the presentation of your BI content for mobile viewing.

You download Oracle BI Mobile from Apple's App Store.

You can try out the application at any time by accessing the public demo server after installing Oracle BI Mobile. For more information, see ["Accessing the Oracle BI Mobile Demonstration Server."](#) Use of the application beyond the demo requires that you have access to an instance of Oracle BI EE that is configured and running.

[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"](#) and touch gestures that are useful are listed in [Appendix B, "Touch Gestures Used in Oracle BI Mobile."](#)

Which BI Content is Viewable Using Oracle BI Mobile?

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

Oracle BI Mobile supports the following object types:

- Dashboard
- Analysis
- Briefing book
- BI Publisher report
- Content delivered by agents
- Scorecard
- Oracle BI Mobile apps

For all supported object types, Oracle BI Mobile supports rendering of most report content, though content is sometimes altered to optimize for the mobile context.

With Oracle BI Mobile, you can view external content (of the formats PDF and XLS). When you open an XLS file, the file launches in a browser.

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. 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 Oracle 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 cannot show the layout correctly.

Getting Started with Oracle BI Mobile

This chapter describes how to acquire Oracle BI 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"
- "Accessing the Oracle BI Mobile Demonstration Server"
- "What Does Oracle BI Mobile Look Like?"
- "Configuring Oracle BI Mobile"

Getting Oracle BI Mobile for Your Apple iPad

To download Oracle BI 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 BI 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 Oracle BI Mobile for the First Time"
- "Returning to Oracle BI Mobile"
- "Launching Oracle BI Mobile from a Mobile URL"

Launching Oracle BI Mobile for the First Time

You open the Oracle BI Mobile application as you open any other iPad application, by tapping its icon in the Home screen. 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

Cancel	Server Settings	Save
Obtain these settings from an administrator		
Name	Settings Name	
Host	Server Name	
Port	443	
SSL		<input checked="" type="checkbox"/>
SSO		<input type="checkbox"/>
Username	Username	
Password	Password	
Save Password		<input checked="" type="checkbox"/>
Device Locale		<input checked="" type="checkbox"/>
Analytics Path	/analytics/saw.dll	
Publisher Path	/xmlpsrserver	

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 plus sign) to enter your initial server configuration settings.
The Server Settings screen is displayed.
 4. In the Server Settings screen, specify the following:
 - **Name.** Give the server connection a name. Once set, this name cannot be changed.
 - **Host.** Enter the name of the server to connect to. Enter either the IP address (for example: 192.168.1.1) or the fully qualified host name of the computer on which Oracle BI Presentation Services is running (for example, host1.example.com). Do not enter a stand-in URL, such as tinyurl.com/1234 that redirects to a server.
 - **Port.** Enter the port number (for example, 7001).
 - **SSL.** Tap the toggle to select **ON** or **OFF**. The Secure Sockets Layer (SSL) protocol is configured on the entry point for your Oracle Business Intelligence Presentation Services server by your system administrator. If SSL is configured on the server you are connecting to, toggle this setting to **ON**. System administrators are advised to configure SSL on the Oracle Business Intelligence Presentation Services server.
 - **SSO.** Tap the toggle to select **ON** or **OFF**. Single Sign-On (SSO) is configured on the entry point for your Oracle Business Intelligence Presentation Services server by your system administrator. If SSO is configured on the server you are connecting to, toggle this setting to **ON**.
 - **Username.** Use your standard username for connecting to Oracle BI EE.
 - **Password.** Use your standard password for connecting to Oracle BI EE.
 - **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 are prompted to enter your password each time you launch the application. The default setting is **ON**.
 - **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 Oracle BI 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 only used, however, 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 Oracle BI Mobile

When you have left Oracle BI Mobile and are returning, for example, after leaving it and working with other iPad applications, Oracle BI Mobile returns you to whichever view 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 Oracle BI Mobile 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 BI Mobile uses the same security definitions as configured on the server on which Oracle BI Presentation Services is running. The Oracle BI Mobile application signs in for you automatically as it launches. When your Presentation Services server is configured 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 use 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 Oracle Business Intelligence Presentation Services server. Oracle BI Mobile uses the same credentials as Presentation Services and does not require any new credentials.

Accessing the Oracle BI Mobile Demonstration Server

If you would like to test the Oracle BI Mobile application without having to set up a connection to one of your organization's Oracle BI Presentation Services servers, you can use Oracle BI Mobile to connect to a publicly available demo server. The Oracle BI Mobile demo server provides a full set of sample content with which you can work. As you navigate the application while connected to the demo server, you can gain an understanding of best practices for mobile dashboard design.

When you tap the Demo button in the initial server connections screen, you are taken directly to the demo server, with Oracle BI Mobile automatically managing the login credentials.

To access the demo server:

1. From the Home screen on your device, tap the Oracle BI HD application icon.
2. In the login screen tap **Demo**, as shown in [Figure 2-4](#).
The Recent view is displayed, along with the Navigation bar.
3. In the branding bar, tap the **Options** button and then tap **Show First Time Help** to view an overlay with tips for how to navigate the Oracle BI Mobile application.
4. (Optional) If you want to log out of the demo server, tap the **Options** button, then tap **Logout**.

Figure 2-4 Demo Server Button

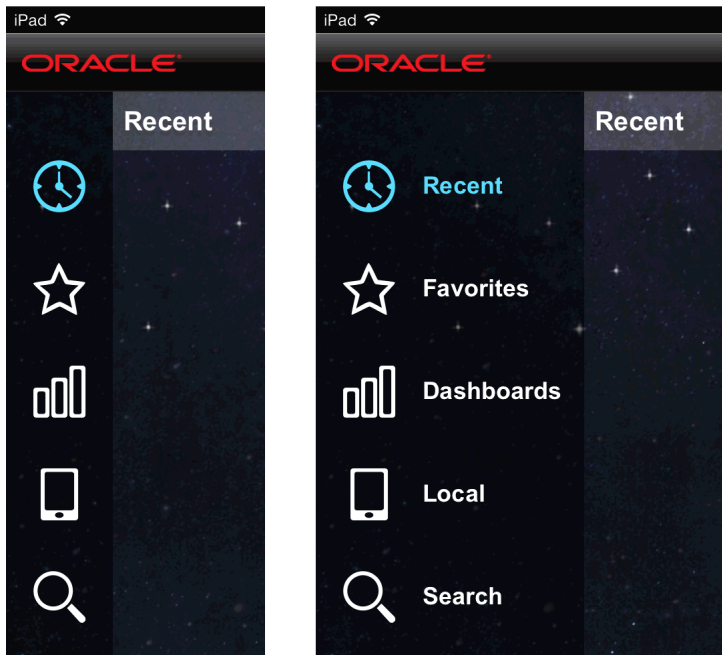


What Does Oracle BI Mobile Look Like?

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

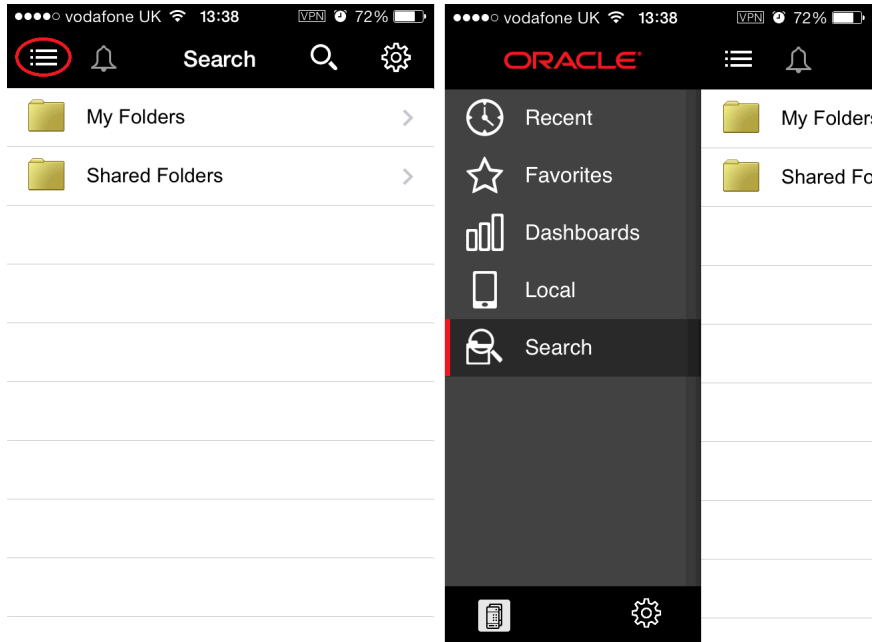
You navigate the Oracle BI Mobile application using the navigation bar, shown in [Figure 2-5](#). (If you swipe once to the right on the navigation bar, you can view the titles of each view, as shown in the second image of [Figure 2-5](#).) Tap the icon that represents the view you want to go to. In the Settings view, you can choose which view that you want your instance of Oracle BI Mobile to start on.

Figure 2-5 Navigation Bar Showing Icons Only and Icons with Titles



On the iPhone, tap the Navigation icon (circled in red in [Figure 2-6](#)) to access the navigation bar. The second image in [Figure 2-6](#) shows the navigation bar on the iPhone after the user has tapped the Navigation icon.

Figure 2-6 Navigation of Oracle BI Mobile on the iPhone



The navigation bar can take you to the various views within the Oracle BI Mobile application: Recent, Favorites, Dashboards, Local (for locally-saved 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 2–7 shows an instance of the Oracle BI Mobile application that launches into the Recent view.

Figure 2–7 The Recent View in Oracle BI Mobile



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.

Just below the Status bar, is the Display bar. The Display bar shows the title of the current view and contains buttons (the Carousel-style Display icon, the List-style Display icon, and the Grid Display icon) that change your view of BI content from a carousel-style display to a list-style display or a grid-style display (when you are in the Recent and Favorites views).

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 recently accessed items when you are in the Recent view.

At the left side of the application screen, the Navigation bar shows the views you can select when you want to work with Oracle BI Mobile. To hide the Navigation bar, swipe left. If the Navigation bar is hidden, swipe right to reveal it, and swipe right a second time to reveal the titles of the views. (If you swipe right a third time, you access the Settings view.)

Note: On the iPhone, you may find it easier to show and hide the Navigation bar by tapping the Navigation button rather than by swiping. The Navigation button is circled in red in [Figure 2–6](#).

Your device's Home button takes you out of Oracle BI 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."](#)

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 retains 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 in this fashion 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."](#)

Configuring Oracle BI Mobile

You use the Settings view in Oracle BI Mobile to manage your server configurations, choose the view you want the application to start on, or set your email-sending preference. You access the Settings view by tapping the **Options** icon in the branding bar. Another way to access the Settings view is by swiping right twice from the left side of the screen.

There are other configuration tasks your organization can perform:

- ["Adding, Modifying, and Removing Server Connections"](#)
- ["Switching Between Servers"](#)
- ["Configuring Start-up Content"](#)
- ["Considering Security When Using Oracle BI Mobile"](#)
- ["Implementing Server Provisioning Through URL"](#)
- ["Setting Up Access to the Oracle BI Presentation Services Server Through a Reverse Proxy Server"](#)
- ["Setting Console Logging"](#)

Adding, Modifying, and Removing Server Connections

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

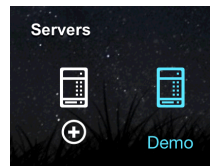
To add a server connection:

1. If you are viewing BI content, tap the **Previous** icon to go back to the Recent, Favorites, Dashboards, Local, or Search views.
2. In the branding bar, tap the **Options** icon, then tap **Settings**.

The Settings view is displayed.

3. In the Servers section of the Settings view (shown in [Figure 2–8](#)), tap the **Add Server** icon (the one with the plus sign).

Figure 2–8 Servers Section of Settings View



4. In the Server Settings screen, complete the fields. For further information, see the Server Settings screen fields described in "[Launching Oracle BI Mobile for the First Time.](#)"
5. Tap **Save**.

To modify or remove a server connection:

1. If you are viewing BI content, tap the **Previous** icon to go back to the Recent, Favorites, Dashboards, Local, or Search views.
2. In the branding bar, tap the **Options** icon, then tap **Settings**.
The Settings view is displayed.
3. In the Servers section of the Settings view (shown in [Figure 2–8](#)), double-tap the icon for the server connection you want to modify.
4. In the Server Settings screen, do one of the following:
 - To modify the server connection, make your changes. When finished, tap **Save**.
 - To remove a server connection, scroll down to see the **Delete Server** button, then tap it.

Switching Between Servers

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

To change your default server:

1. In the branding bar, tap the **Options** icon, then tap **Settings**.
The Settings view is displayed.
2. In the Servers section, shown in [Figure 2–8](#), tap the icon 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.

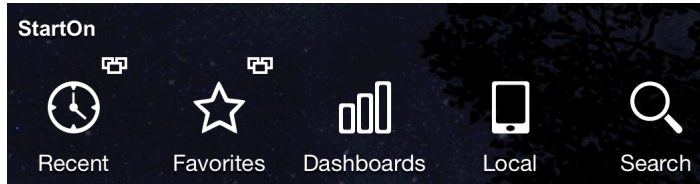
Configuring Start-up Content

By configuring a setting, you can select a default view—or even a specific dashboard—to display when you log in to the Oracle BI Mobile application. In this way, you or your organization's end users navigate automatically and directly to preferred BI content.

To set your start-up content:

1. In the branding bar, tap the **Options** icon.
2. Tap **Settings**.
3. In the Start On section of the Settings view, do one of the following:
 - To set the start-up view as your Recent items, Favorites, Dashboards, Local content, or the Search view, tap its associated icon, as shown in [Figure 2-9](#).
(Optional) If your start-up choice is Recent or Favorites, you then select your preferred view type: Carousel, List, or Grid.

Figure 2-9 Selecting a Start-up View



- To set a specific catalog object as your start-up content, tap the **Start-up Content** icon as shown in [Figure 2-10](#).

Figure 2-10 Selecting a Dashboard as Start-up Content



1. In the list of your dashboards, scroll to find the dashboard of your choice, then tap it.
2. Tap **Done**.
4. Log out (tap the **Options** icon, and then tap **Logout**).
When you log back in, the view or dashboard you have chosen is displayed immediately after authentication.

Considering Security When Using Oracle BI Mobile

This section discusses measures you can take to address security of your BI content. This information is organized as follows:

- ["Understanding Mobile Device Management"](#)
- ["Using the Security Toolkit for Mobile Device Management"](#)
- ["Using Passcode Lock to Protect Content Saved Locally"](#)
- ["Disabling Access to Oracle BI Mobile"](#)

For other sections that discuss security information, see ["Implementing Server Provisioning Through URL"](#) and ["Setting Up Access to the Oracle BI Presentation Services Server Through a Reverse Proxy Server."](#)

Understanding Mobile Device Management

When using the Oracle BI Mobile application, you connect to an Oracle BI server and benefit from the same security platform provided by the infrastructure of Oracle Fusion Middleware.

Oracle BI Mobile allows mobile users to connect to the Oracle BI server using Single Sign-On (SSO) and Secure Sockets Layer (SSL) technologies for secure and automated passing of credentials. For servers behind a firewall, you can connect with Oracle BI Mobile through a VPN. To better protect your BI content saved locally, you can use the passcode lock on your iPad.

If your organization requires greater levels of mobile device security, you may work with a mobile device management (MDM) vendor. MDM software can be used for monitoring and securing mobile devices beyond what is currently available with native operating systems. Your MDM vendor might provide additional capabilities such as enhanced data encryption, restricted sharing, wiping of data in case of loss or theft, geo-fencing, and management of local data. The Oracle BI Mobile Security Toolkit is designed to allow MDM vendors to work with the Oracle BI Mobile application to provide a solution that can be readily consumed by end users.

For more information, see "[Using the Security Toolkit for Mobile Device Management.](#)"

Using the Security Toolkit for Mobile Device Management

If your organization works with a security vendor or a mobile device management (MDM) vendor, you can consider using an additional security layer available for Oracle BI Mobile: the Oracle BI Mobile Security Toolkit. This toolkit can be integrated with other options that an MDM vendor builds into your security package.

The Oracle BI Mobile Security Toolkit provides a repackaged, unsigned and uncertified version of the Oracle BI Mobile application, delivered at the library level, that allows organizations to combine the Oracle BI mobile application with their chosen third-party mobile security solution. When the application is combined by the MDM vendor into one mobile security solution, it gets signed with your organization's corporate signature. You then have a fully functioning version of Oracle BI Mobile—which is certified for distribution outside of the Apple App Store—and which can be delivered internally as part of the chosen mobile application delivery mechanism.

The security toolkit for Oracle BI Mobile is delivered through Oracle Technology Network. It includes a license agreement for software vendors, and a FAQ with instructions for use. To find the FAQ and the toolkit, search on "security toolkit" in the Downloads section of Oracle Technology Network here:

<http://www.oracle.com/technetwork/middleware/bi-enterprise-edition/downloads/index.html>

Details for building an IOS application can be found at:

[http://developer.apple.com/library/ios/#referencelibrary/GettingStarted/RoadMapiOS/chapters/Introduction.html](http://developer.apple.com/library/ios/#referencelibrary/GettingStarted/roadMapiOS/chapters/Introduction.html)

Using Passcode Lock to Protect Content Saved Locally

As a user of Oracle BI Mobile, it is important to remember that any network security that your iPad connects through to access the Oracle BI server has no bearing on BI content saved locally onto your device. For that reason, using Passcode Lock (in the General section of your iPad's Settings screen) is vital for protecting local BI content in case of device loss or theft. For more information, see "[Saving Content Locally.](#)"

Also see "[Disabling Local Content](#)."

Disabling Access to Oracle 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 "Default Presentation Services Privilege Assignments" in *Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition*.

Implementing 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 accessing a URL that the administrator provides.

This allows the Oracle BI Mobile application to configure itself for a user, by making use of the URL launch mechanism supported in iOS. Using Oracle BI Mobile, this launch mechanism can work for you when either you tap on a URL link within an email, when you type the URL into the Safari browser on the iPad, or when you tap a URL link on a web page. The mechanism then launches Oracle BI Mobile on your iPad and configures the required settings with the settings in an XML file that your administrator has edited and referenced as a URL in the syntax for the launch URL.

Where the Oracle BI Mobile schema on the device is "oraclebi", the syntax for the launch URL is the following:

```
oraclebi://oraclebusinessintelligencemobile/configure?xml=<URL to XML file>
```

Note: In this example syntax, the URL to the XML file might appear within an email, or it might be the address for a web page hosted on a web server, or it might be the URL for a wiki, or any number of other options.

As the schema for the configuration XML file, use Apple's standard plist format. Access the XML file here: <http://www.apple.com/DTDs/PropertyList-1.0.dtd>

For example, you can provide a snippet of HTML that reads "Click to configure Oracle Business Intelligence Mobile for iPad" as in the following example:

```
<a
href="oraclebi://oraclebusinessintelligencemobile/configure?xml=http://server.my.c
ompany.com:7001/obim_configuration.xml">Click to configure Oracle Business
Intelligence Mobile for iPad</a>
```

Note: You can have multiple server configurations inside the "servers" dictionary. You cannot provide user credentials in the XML configuration file.

[Example 2-1](#) shows a sample XML file for a seeded instance of Oracle BI Mobile.

Example 2-1 Sample XML File

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE plist PUBLIC "-//Apple//DTD PLIST 1.0//EN"
"http://www.apple.com/DTDs/PropertyList-1.0.dtd">
```

```

<plist version="1.0">
<dict>
  <key>obim</key>
  <dict>
    <key>servers</key>
    <array>
      <dict>
        <!-- Analytics Web App Context Path -->
        <key>analyticsPath</key>
        <string>/analytics/saw.dll</string>
        <!-- Machine Name including Domain or IP address -->
        <key>host</key>
        <string>host1.example.com</string>
        <!-- Use Device Locale -->
        <key>locale</key>
        <true/>
        <!-- Configuration name, any name-->
        <key>name</key>
        <string>host1</string>
        <!-- Analytics Web App Port -->
        <key>port</key>
        <integer>443</integer>
        <!-- use this server as default -->
        <key>selected</key>
        <false/>
        <!-- enable SSL -->
        <key>ssl</key>
        <true/>
        <!-- enable SSO -->
        <key>sso</key>
        <true/>
        <!-- Publisher Web App Context Path -->
        <key>xm1pPath</key>
        <string>/xm1pserver</string>
      </dict>
    </array>
    <key>version</key>
    <string>11.1.1.6.0</string>
  </dict>
</dict>
</plist>

```

[Table 2–1](#) provides the schema information for URL application launching.

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

Setting Up Access to the Oracle BI Presentation Services Server Through a Reverse Proxy Server

Use of a reverse proxy server can make content served by different servers appear as if coming from one single server. Use of a reverse proxy can also be an effective way of protecting your enterprise web infrastructure.

Your organization may consider configuring access to the Oracle BI Presentation Services server through a reverse proxy to protect it without the requirement of a VPN. To do this, you must first make your Oracle HTTP Server port open and available for public access—for example, by using port 80.

This topic explains how to set up controlled access to your web tier so that content from your Oracle BI Presentation Services folder is delivered instead by reverse proxy. You do this by modifying an Oracle HTTP Server web server configuration file.

Before you begin this procedure, ensure that you are familiar with the information in "Using a Text Editor to Update Oracle Business Intelligence Configuration Settings" in Oracle Fusion Middleware System Administrator's Guide for Oracle Business Intelligence Enterprise Edition.

To set up the reverse proxy access:

1. Log in to the middle tier computer as application user "oracle".
2. In the ORACLE_INSTANCE folder, find the mod_wl_ohs.conf configuration file, then open it in a text editor.
3. Add configuration settings as follows:
 - for a stand-alone instance of a proxy module, use [Example 2-2](#) to add settings.
 - for a clustered instance of a proxy module, use [Example 2-3](#) to add settings.
4. Save your changes to the mod_wl_ohs.conf file and exit the text editor.
5. Restart Oracle HTTP Server.

Example 2-2 Example Settings for a Stand-alone Instance of a Proxy Module

```
<Location /analytics>
  SetHandler weblogic-handler
  WebLogicHost <Host for Weblogic_Managed_Server>
  WebLogicPort <Port for Weblogic_Managed_Server>
  WLProxySSL ON
  WLProxySSLPassThrough ON
</Location>
```

Example 2-3 Example Settings for a Clustered Instance of a Proxy Module

```
<Location /analytics>
  SetHandler weblogic-handler
  WebLogicCluster <Host for Weblogic_Managed_Server1:PORT>,<Host for Weblogic_
Managed_Server2:PORT>,<Host for Weblogic_Managed_ServerN:PORT>
  WLProxySSL ON
  WLProxySSLPassThrough ON
</Location>
```


Setting Console Logging

If you want to capture console logs, for example to troubleshoot authentication issues, you can enable console logging for your iPad or iPhone in the device's Settings application.

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**.

To enable or disable console logging:

1. In the device's Home screen, tap the Settings icon to access device settings.

Note: The setting for console logging for Oracle BI Mobile is adjusted outside of the Oracle BI Mobile application, in the device's general Settings application.

2. In the left pane of Settings, swipe to scroll down in the list of applications till you locate the Oracle BI HD application, then tap it.
3. In the right pane, in the Console Logging row, tap the toggle to change the setting from **OFF** to **ON**.

Using Oracle BI Mobile

This chapter describes how to work with Oracle BI Mobile.

This chapter contains the following topics:

- ["Navigating the Oracle BI Presentation Catalog and BI Content"](#)
- ["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

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 a favorite, or saved locally, you navigate or search the catalog on the server.

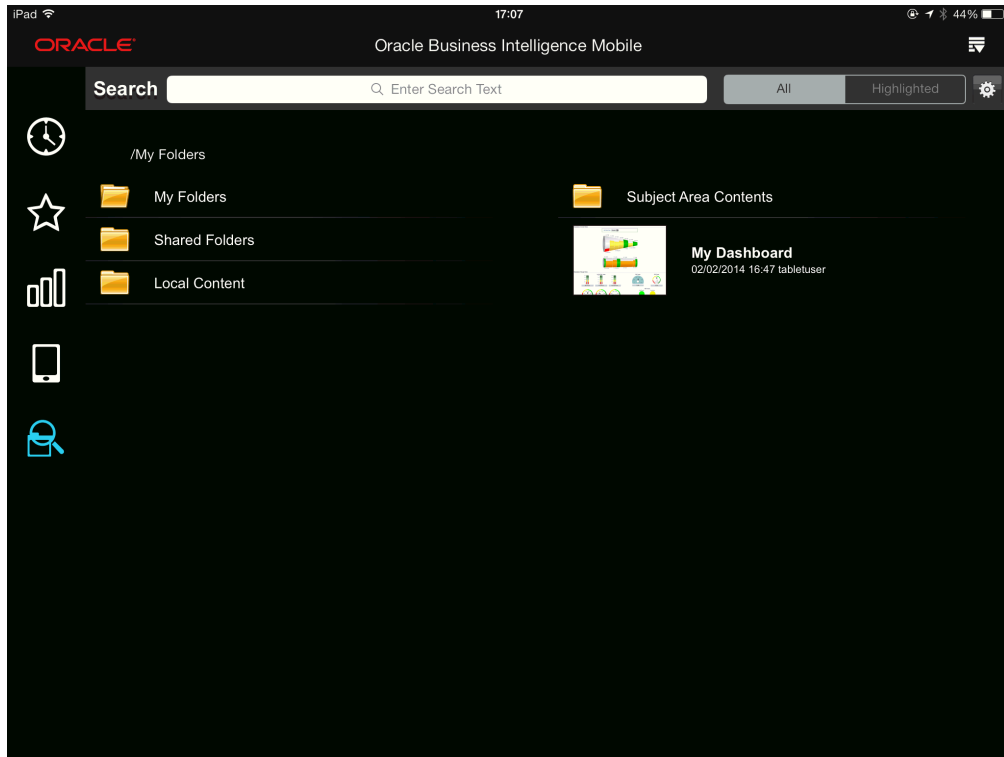
The Navigation bar allows you to move quickly between different screens. You can hide the Navigation bar by swiping left twice. To reveal the Navigation bar again, swipe right once from the left edge. Swipe a second time to reveal the view titles within the Navigation bar.

To access the Settings screen, swipe three times from the left edge—or tap the Options menu, then tap **Settings**.

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

Inside folders, generic icons represent content that you have not previously opened, while thumbnail images of the actual catalog objects represent BI content that you have previously opened.

Figure 3–1 Navigating the Catalog from the Search View



You use the **All/Highlighted** toggle at the top of the screen to specify which parts of the catalog to 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:

- ["Switching Screen Orientation Between Landscape and Portrait"](#)
- ["Opening an Object in the Catalog"](#)
- ["Navigating and Switching Between the Carousel, List, and Grid 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."](#)

Switching Screen Orientation Between Landscape and Portrait

While holding the iPad, you can quickly switch between landscape mode and portrait mode in order to view the Oracle BI Mobile application in whichever orientation best suits the display style or the format of Oracle BI content you are viewing. To switch the orientation, simply rotate the iPad in your hands.

Note: If you want to lock the screen orientation so that it does not automatically change while you are holding the iPad, use the switch on the side of the device.

When switching screen orientation, BI content is not re-sized to fit the chosen orientation. For this reason, when you build dashboards intended for mobile viewing, you should consider both the landscape and portrait layouts.

Opening an Object in the Catalog

You open an object in the Oracle BI Presentation Catalog on your iPad by tapping its thumbnail image. You see the catalog hierarchy in the Search view.

To open a catalog object:

1. In the navigation bar, tap the Search icon to navigate to the Search view.
2. 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 **Back** arrow to the left of the directory path (below the search bar).
3. When you find the object you want to open, tap it.

Navigating and Switching Between the Carousel, List, and Grid Display Styles

You can choose between three display styles for the Recent view and the Favorites view. That is, you can view your BI content in three different ways. You navigate each of these display styles as follows:

- **Carousel-style display.** In the carousel, to navigate to a favorite or recent 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 object you want to view, tap it to open it.
- **Grid-style display.** In a grid-style display, tap an object in the grid to open it. If there are more objects than can fit in the display, drag your finger up or down to view all objects within the grid.

To switch between display styles, tap the respective icon for the display you want. In the Display bar, below the **Options** icon, you can see a toggle with three display-style icons, one of which is highlighted: the **Carousel-style Display** icon, the **List-style Display** icon, and the **Grid-style Display** icon.

[Figure 3–2](#) shows the carousel-style display of the Recent view. Note that the toggle's highlighted icon is the **Carousel-style Display** icon.

Figure 3–2 Carousel-style Display of Recent View

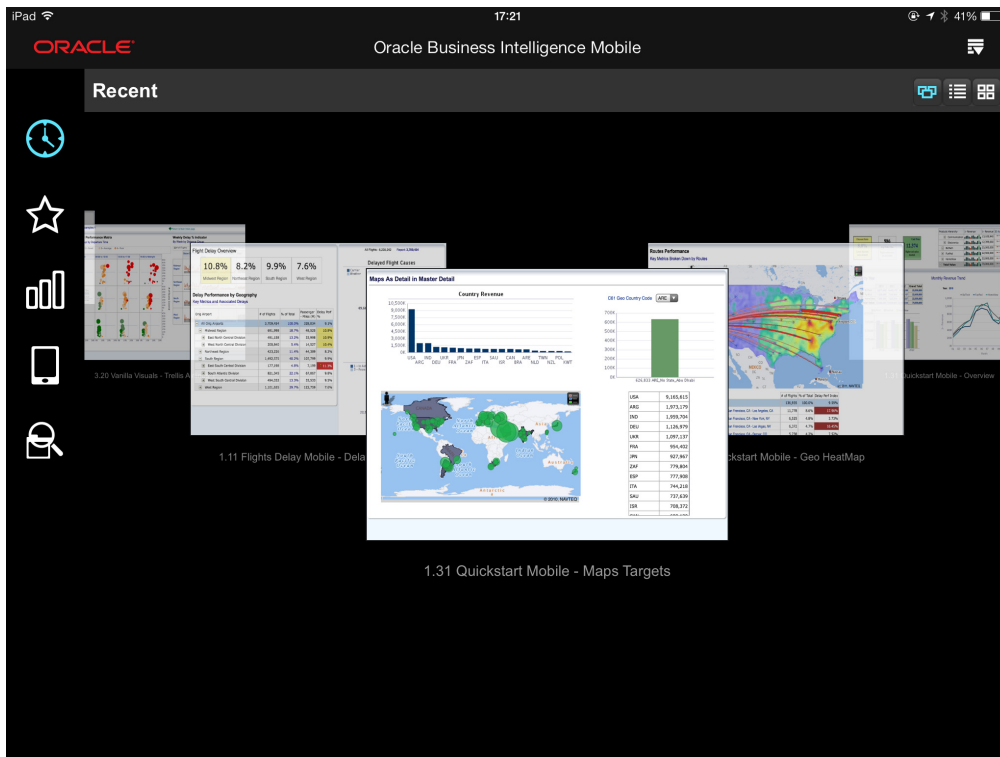


Figure 3–3 shows the list-style display of the Recent view. Note that the **List-style Display** icon is displayed in the toggle at the right edge of the Display bar.

Figure 3–3 List-style Display of Recent View

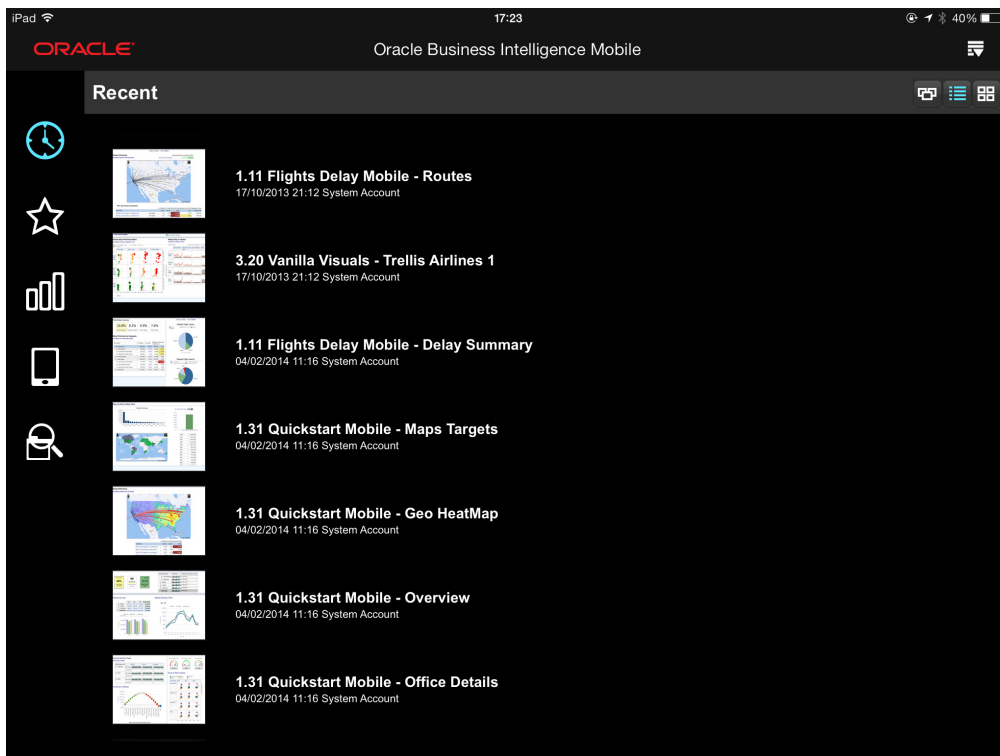
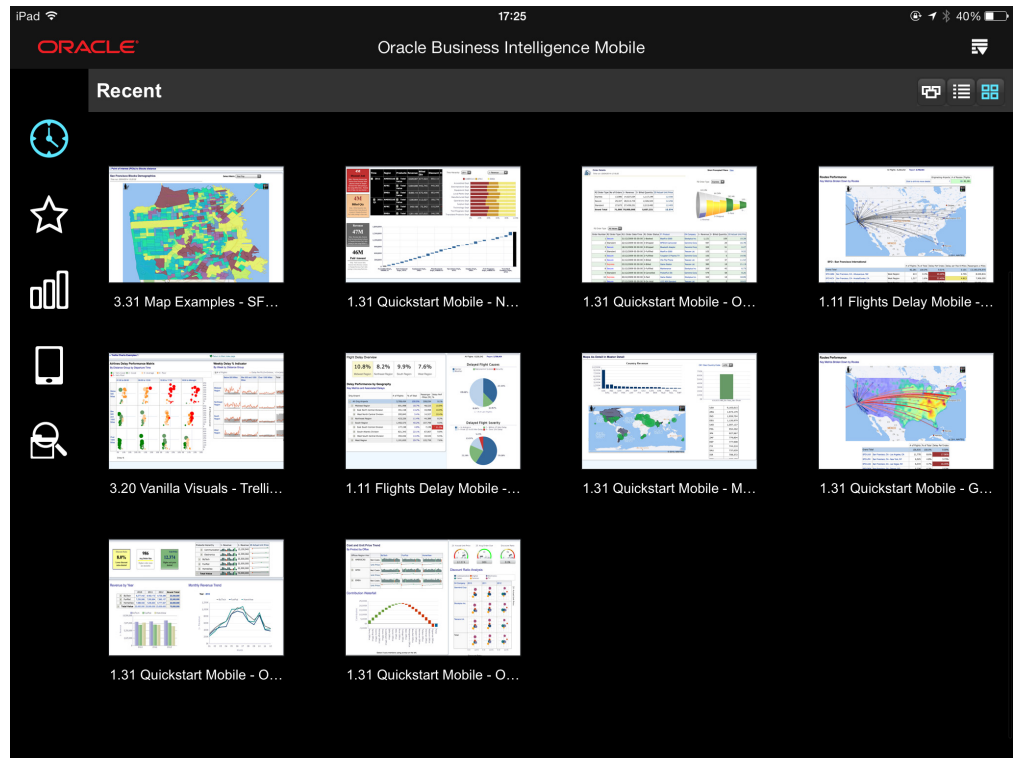


Figure 3–4 shows the grid-style display of the Recent view. Note that the **Grid-style Display** icon is displayed in the toggle at the right edge of the Display bar.

Figure 3–4 Grid-style Display of Recent 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 navigation bar, tap the **Dashboards** icon.

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 signed in to 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. You can double-tap on a view to expand it to the full screen. 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.

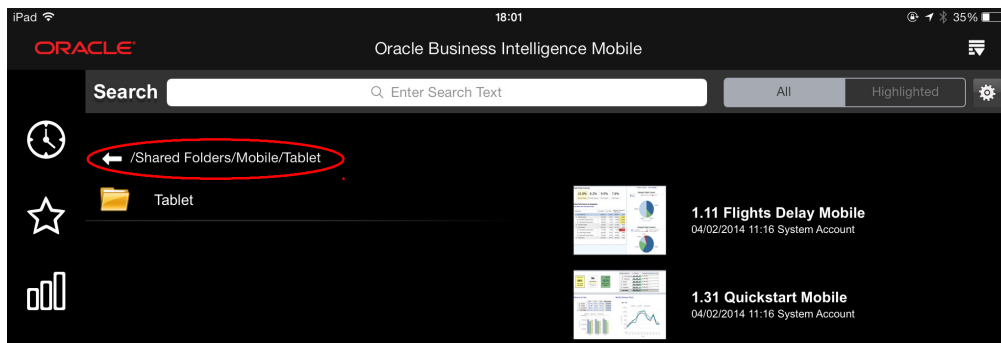
While viewing BI content, you can tap the **Options** icon in the title bar to access an Options menu. Menu items vary based on the type of BI content you are viewing.

For important information about how to protect your BI content, see "[Considering Security When Using Oracle BI Mobile.](#)"

Working with Back Arrow and the Previous Icon

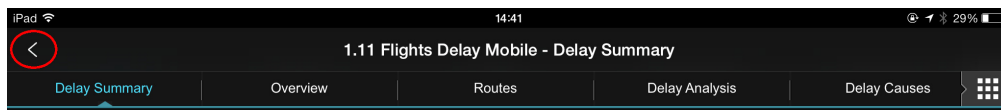
In [Figure 3-5](#), you can see an example of a recent history of navigating the catalog, as a trail of *breadcrumbs* circled in red. To navigate the catalog backward through your recent history, tap the **Back** arrow to the left of the breadcrumbs.

Figure 3-5 *Breadcrumbs Showing Navigation History along with Back Arrow*



When you have opened a catalog object, your screen includes a **Previous** icon at the top left in the title bar, as shown in [Figure 3-6](#).

Figure 3-6 *Previous Icon in Title Bar*



Tapping the **Previous** icon navigates you backward to your starting view, for example, to your Recent view if that is your default starting view.

Note: In Oracle BI Mobile apps, the title bar toggles off to allow the screen space to be dedicated to the app. To navigate backward from within an Oracle BI Mobile app, tap once in the iPad's status bar (where the current time displays) to reveal the **Previous** icon, then tap the **Previous** icon to navigate back. For more information on Oracle BI Mobile apps, see "[Working with Oracle BI Mobile Apps.](#)"

You can navigate backward from a drill, and you can navigate backward between external URLs (when there is a navigation link in the BI content).

Working with Tooltips

You can view tooltips within BI content by tapping individual items within the content, such as a bar in a graph.

A gesture called "tap-and-hold"—which is touching a menu option for about half a second—allows you in Oracle BI Mobile to view the full text of a tooltip if it extends

beyond the size of the popup. If in a tooltip, a menu item's text exceeds the width of the context menu, tapping and holding the item opens a popup that displays the entire text of the menu option.

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 object 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, author, 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 in the Properties overlay.
3. When finished, drag down on the Properties overlay with one finger to hide it.

Applying and Clearing Dashboard Customizations

As you interact with BI content on your iPad, you can apply dashboard customizations from the desktop application, and also clear dashboard customizations.

When you use the **Apply Customization** feature, you get the latest list of currently available selections—including any customizations newly saved or changed on the Oracle BI Presentation Services server by others.

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*.

To apply a saved customization:

1. While viewing the analysis, tap the **Options** icon and then tap **Apply Customization**.

If a saved customization is available for the dashboard, you see its name in a list.

2. In the list of available saved customizations, tap the customization you want to apply.

The customization is applied to the dashboard page.

To clear a customization:

1. While viewing the dashboard, tap the **Options** icon and then tap **Clear Customization**.

Note: You can also use the **Clear Customization** option to quickly restore to the defaults any prompts you have adjusted in a dashboard.

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 pre-populate your favorites list when you begin using Oracle 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 if you configure another mobile device to the same server for the same user, the user sees 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 are 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 may 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 navigation bar.

To add a catalog object as a favorite:

1. While viewing the BI content, in the title bar where the object's title displays, tap the **Options** icon.
2. Tap **Add to Favorites**.

The BI content is added to your list of favorites.

To open a favorite:

1. In the navigation bar, tap the **Favorites** icon (the star).
The Favorites screen is displayed.
2. (Optional) Change the display style to list, carousel, or grid by tapping the respective display icon in the toggle.
3. Tap the favorite you want to open.

To remove a favorite:

1. While viewing the BI content, in the title bar where the object's title displays, tap the **Options** icon.

2. Tap **Delete from Favorites**.

The BI content is removed from your list of favorites.

Note: On the iPhone, to remove a favorite, in the Favorites list, swipe the favorite to the left, then tap **Remove**.

Synchronizing Mobile Favorites with Desktop Favorites

Synchronization of favorites happens at login. When you connect to an Oracle 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, see "Organizing Favorites" in *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 an Oracle 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 display 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](#)
- [Securing BI Content Saved Locally](#)
- [Disabling Local Content](#)

Saving Content Locally

You can save local versions of BI content to your mobile device. You can save analyses, dashboards, scorecards, 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. Tap **OK**.

Note: If you are saving BI content locally to your device, it is strongly recommended that you use the iPad's Passcode Lock feature. Make sure this setting is ON in the iPad's Settings screen, General section.

Viewing Local Content

In the Server Connection screen, you can directly access your Local Content without connecting to an Oracle BI Presentation Services server.

To view local content:

1. (Optional) In the login 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" displays immediately after the name.

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

To delete local content:

1. In the Local view, find the thumbnail image for the catalog object you want to delete.
2. Swipe left across the row containing the thumbnail image.
3. Tap **Delete**.

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 **Previous** icon to return to the Local view.
 2. Tap the **Options** icon, and then tap **Login [your BI Presentation Services server]**.
 3. Tap the **Local** icon, 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**.

Securing BI Content Saved Locally

As described in "[Understanding Mobile Device Management](#)," there is a security toolkit available for the Oracle BI Mobile application that allows you to add additional protection to your BI content, including locally saved BI content.

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 remotely wipe the device clean in case of theft or loss.

While the location of locally saved BI content may be obvious, note that local content in Oracle BI Mobile is *device-local*. This means it is not just viewed locally, but it is actually physically located on the iPad and therefore it is accessible to anyone able to access the iPad. For this reason—when you are working with Oracle BI Mobile and saving content locally—a passcode lock on your iPad is vital to your organization's data security.

The use of a SSL connection, or a SSO and SSL connection, has no bearing on the security of your locally-saved BI content. Connecting to a secure Oracle BI EE online environment has nothing to do with offline content.

To set the iPad's Passcode Lock setting to ON:

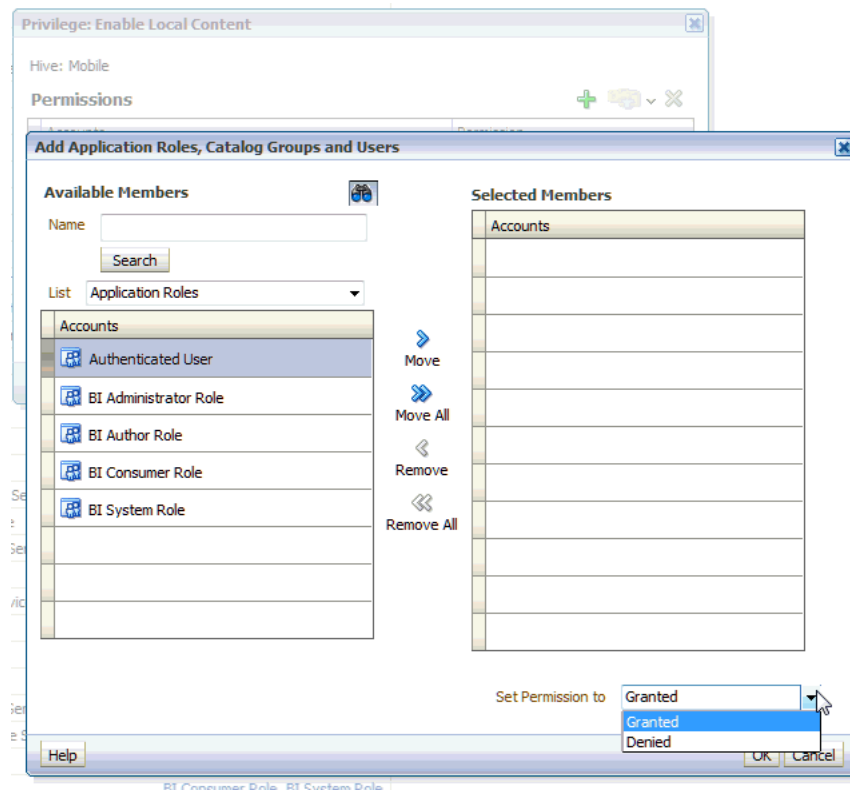
1. In the iPad's home screen, tap the **Settings** icon.
2. In the General section, find the Passcode Lock row and toggle the setting to **ON**.

Note: Your administrator should enforce passcode locks on your organization's Oracle BI Mobile iPads, unless they disable local content entirely on the server side, using the Local Content privilege. For more information, see "[Disabling Local Content](#)."

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 "Default Presentation Services Privilege Assignments" in *Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition*.

[Figure 3-7](#) shows how the Enable Content Privilege can be disabled on a per-user basis, or by role, such as BI Consumer.

Figure 3–7 Disabling Local Content in Oracle BI EE

For more information on security of your BI content, see "[Considering Security When Using Oracle BI Mobile.](#)"

Performing Searches

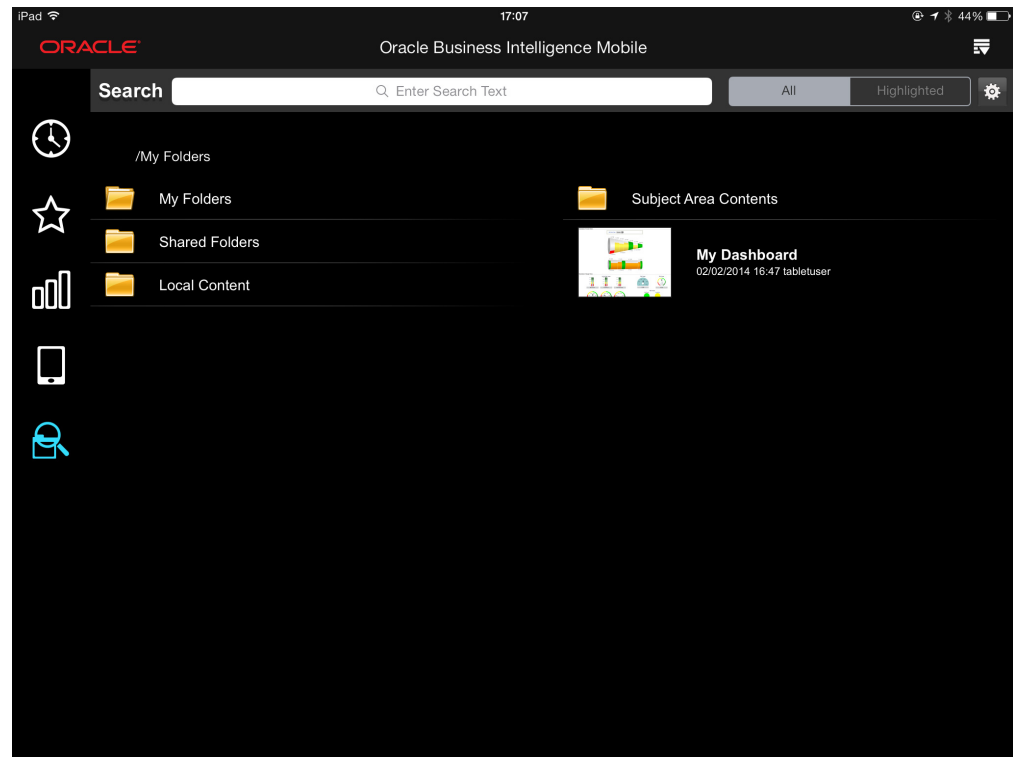
Oracle BI Mobile provides the same basic search behaviors as the desktop version of Oracle BI EE. In the Oracle BI Mobile application, you can search on catalog object name, catalog object type, location, and description. The results list of the search is restricted to objects you can view with Oracle BI Mobile. The results list is comprised of thumbnail images, each accompanied by the object name and date it was last modified.

If your administrator has integrated your desktop version of Oracle BI EE with Oracle Secure Enterprise Search, or with Oracle Endeca Server, you can perform full-text catalog searches in addition to basic catalog searches. (For Endeca searches, however, unlike in the desktop version, you cannot filter the data based on attributes, nor can you narrow the search results or sort them based on relevance.) For information on full-text catalog search, see "How Can I Search for Objects" in *Oracle Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition*.

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 is performed. If the toggle is set to **All**, the search is performed across all folders (My Folders, Shared Folders, Local Content).

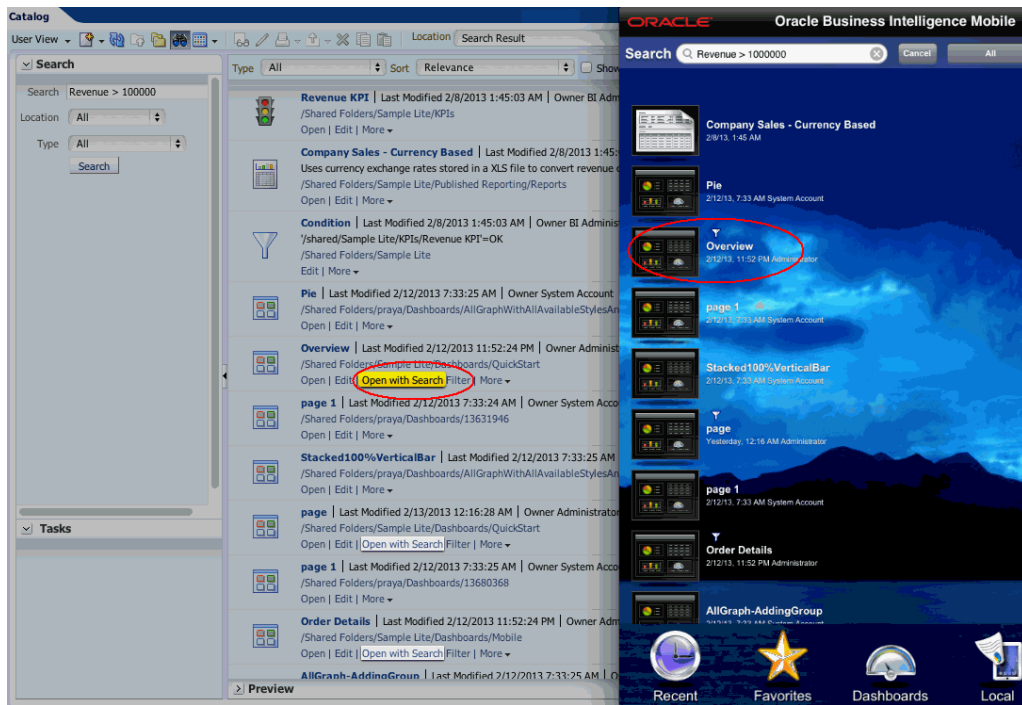
You can change your search options using the Search Settings screen. The Search Settings screen is accessed from the Search view using the gear icon beside the **All/Highlighted** toggle. For more information, see "[Adjusting Search Settings.](#)"

[Figure 3–8](#) shows the Search view.

Figure 3–8 Search View

If your desktop version of Oracle BI EE is integrated with Oracle Endeca Server, on some dashboard icons in your search results list, you may see a tiny funnel icon, as circled in red in [Figure 3–9](#). The funnel icon indicates that the object has been set (in the desktop version) to enable opening with a search filter applied. (In the desktop version, you click **Open with Search Filter** to open the dashboard in this way.) In Oracle BI Mobile, when you open a dashboard that has this funnel icon, the dashboard opens and applies the search criteria values (of the applied search filter) as prompt values to the dashboard.

Figure 3–9 Funnel Icon in Oracle BI Mobile Representing "Open with Search Filter" in Oracle BI EE

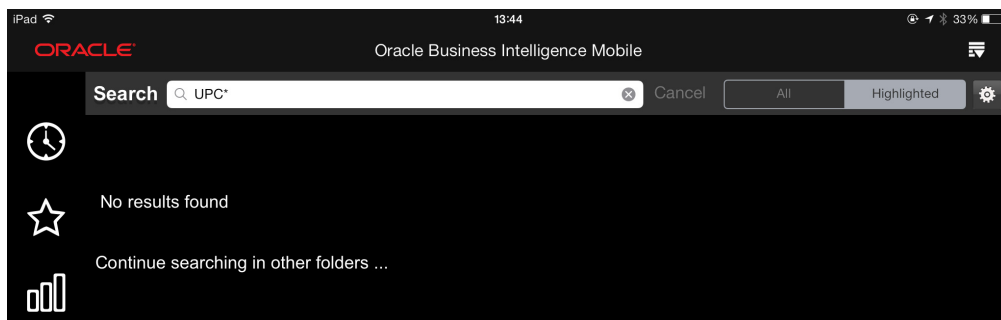


Navigating the Search View

The Search view has a toggle for **All** and **Highlighted**, and your search is performed either in a specific location within the catalog (that you highlight) or within the entire catalog, depending on which setting 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 displays below the last entry in the search result list, or below the "No results found" message. See [Figure 3–10](#).

Figure 3–10 Continuing a Search in Other Folders



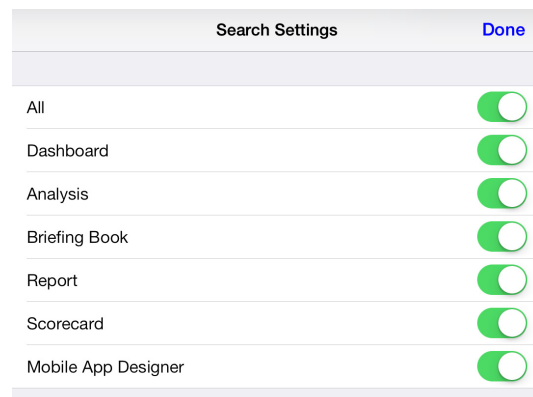
You can cancel a search that is in progress by tapping the **Cancel** button.

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 specified for your device using the Search Settings dialog. You use this dialog to set the catalog object types you want to include in searches. [Figure 3–11](#) shows the Search Settings dialog.

Figure 3–11 Search Settings Dialog



To adjust the search settings:

1. To the right of the **Search** field and the **All/Highlighted** toggle, tap the **Search Settings** icon (the gear).
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.

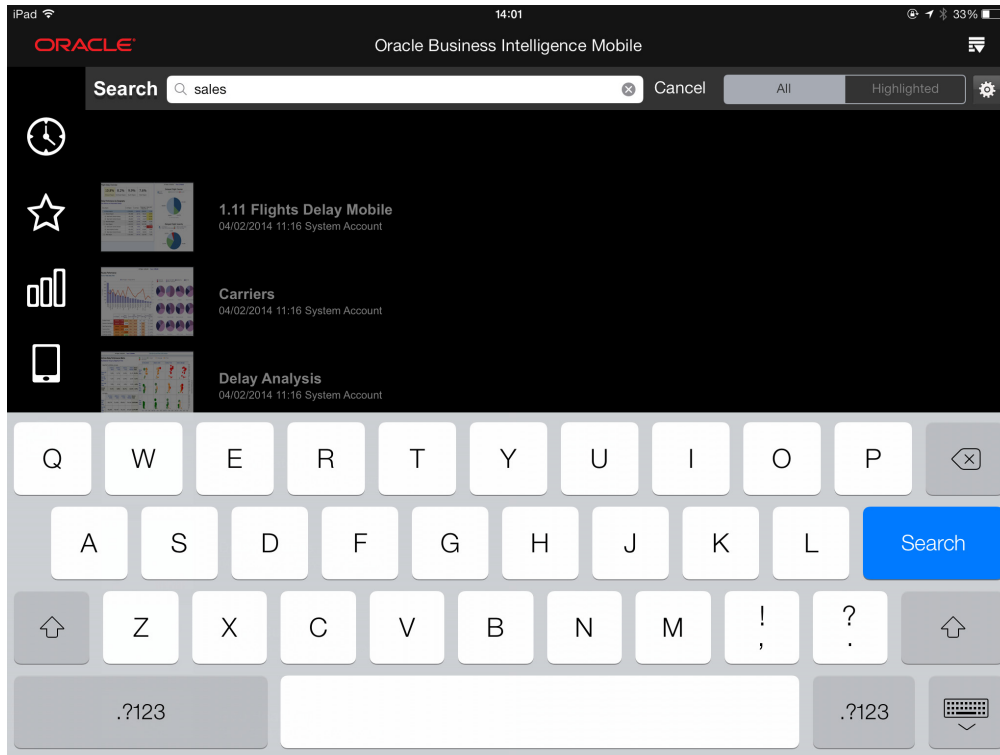
To search for BI content:

1. In the navigation bar, tap the **Search** icon.
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 "Search pane" topic 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 3–12](#).

Your search is performed on the server, and the search results are displayed in a list. Tap a row to open BI content.

Figure 3–12 Initiating a Search by Tapping the Search Button in the Keyboard



When you view the list of thumbnails that comprise your search results, the enclosing folder of an object is not obvious.

To determine the location of an object in the catalog:

1. While viewing the catalog object, tap the **Options** icon.
2. Tap **Properties**.
The object's location is specified in the **Location** row of the Properties overlay.
3. On the Properties overlay, swipe down with one finger to return to the object.

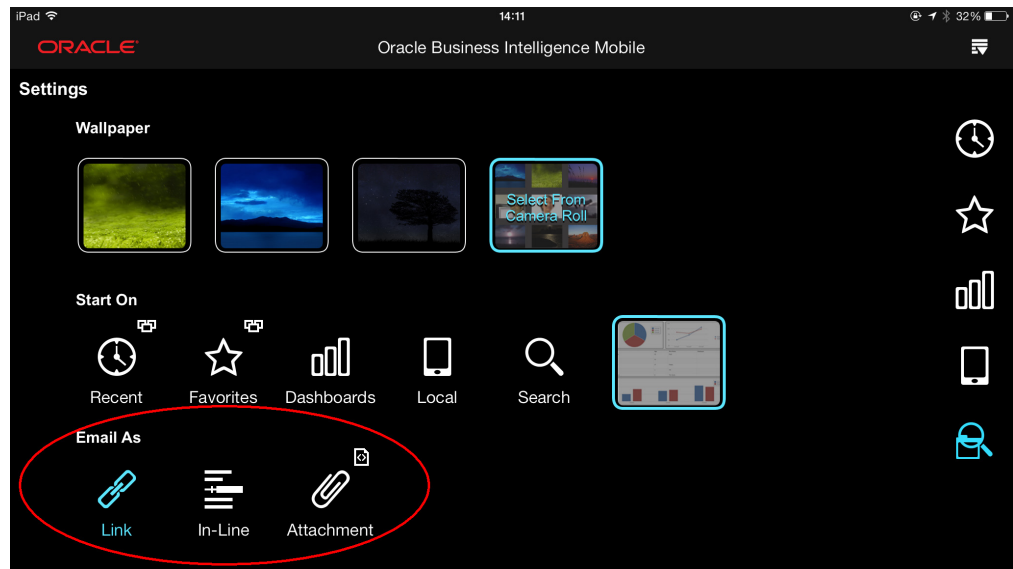
Sending BI Content in Email

If you have configured 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, or as inline content in the emails.

While you are viewing BI content, you can send it in email.

You specify the way in which you want to email BI content in the Email As section of the Settings screen, shown in [Figure 3–13](#).

Figure 3–13 Settings Screen Showing Email Settings

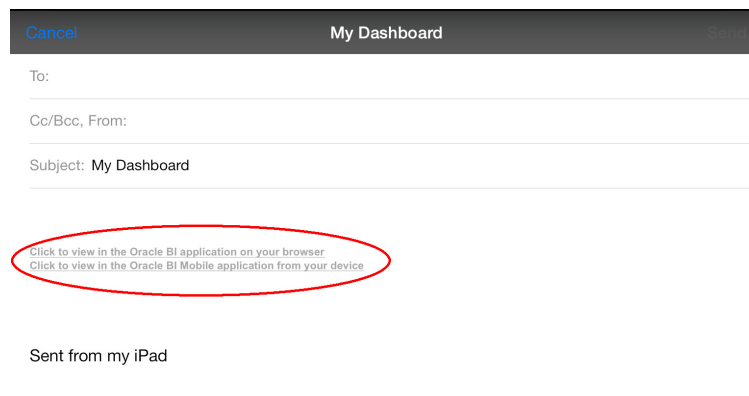


You can send BI content in several ways. You must decide which method of sending BI content is best for you, noting the various constraints you face when you have no control over your recipient's email client or web browser. Your choices of how to send BI content in email are the following:

- Send email with links.** When this is your send-email setting and you tap **Email**, an email window is launched, with links to the BI content embedded in the body of the email, as shown in [Figure 3–14](#). The links are two URL types: one is a URL that points to the content and launches a browser to open it, 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 URL that launches a browser 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 or 8, 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.

Figure 3–14 Sending BI Content as Embedded URLs in Email

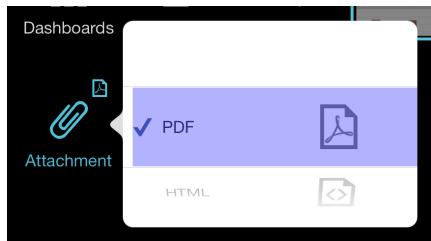


- **Send email with an attachment.** You can choose either the HTML or PDF format for the attachment. Depending on the email client your recipient is using, the attachment you send may be unviewable, or images and text may be displayed incorrectly.
- **Send email with the BI content inline.** BI content sent inline in emails may display incorrectly in older email clients. See ["Sending BI Content Inline in Email."](#)

To specify how your BI content is emailed:

1. In the branding bar, tap the **Options** icon, then tap **Settings**.
The Settings screen is displayed.
2. In the Email As section, tap one of:
 - **Link**
 - **In-Line**
 - **Attachment**
3. (Optional) If you selected **Link** as your sending preference, then your recipient will receive two links in the email and can then choose whether to view the link through a browser or view the link through Oracle BI Mobile. (Using the first of these two options, your recipient can view the BI content even without having access to Oracle BI Mobile.)
4. (Optional) If you selected **Attachment** as your sending preference, tap **PDF** or **HTML** to choose the attachment format. as shown in [Figure 3–15](#).

Figure 3–15 Email as Attachment (PDF or HTML)



5. (Optional) If you set your sending preference to **Inline**, make sure you understand how this affects your recipient's experience of the BI content by reading ["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 **Email**. Based on your email-sending preferences specified in the Settings screen, your draft email is created with embedded links, with an attachment, or with the BI content displayed inline in the email.
2. Enter the recipient's email address, and any accompanying message.
3. Tap **Send**.

Sending Local BI Content in Email

When you send locally-saved BI content in an email, there are no links to embed. The content is always added as an attachment.

To send local BI content in an email:

1. While viewing local BI content, tap the **Options** icon, then tap **Email**.
2. Enter the recipient's email address, and any accompanying message.
An email is created, embedded with the local BI content as an attachment. The format of the attachment is either PDF or HTML, depending on your setting in the Settings screen.
3. Tap **Send**.

Sending BI Content Inline in Email

You can send BI content inline in emails by using the **In-Line** display preference in the Settings screen.

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 **In-Line** display preference 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** icon, then tap **Settings**.
The Settings screen is displayed.
2. In the Email As section, tap **Inline**.
3. Navigate to the BI content you want to send in an email.
4. While viewing the BI content, tap the **Options** icon, then tap **Email**.
Your draft email is created with the BI content displayed inline in the email.
5. Enter the recipient's email address, and any accompanying message.
6. Tap **Send**.

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 BI Mobile application to work with specific object types within the catalog.

This chapter includes the following topics:

- "Working with Analyses and Dashboards"
- "Working with Prompts"
- "Working with Map Views"
- "Working with Oracle BI Mobile Apps"
- "Working with Oracle BI Publisher Content"
- "Working with Scorecard Content"
- "Working with Alerts and Agents"
- "Working with Briefing Books"

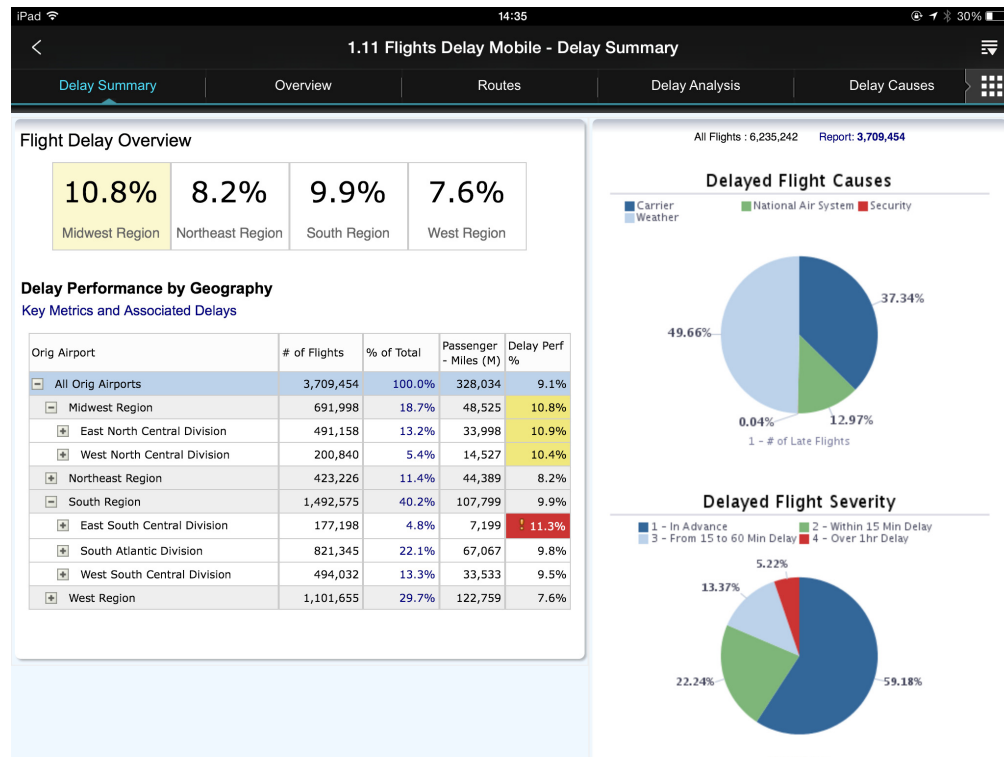
Working with Analyses and Dashboards

With Oracle BI 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.

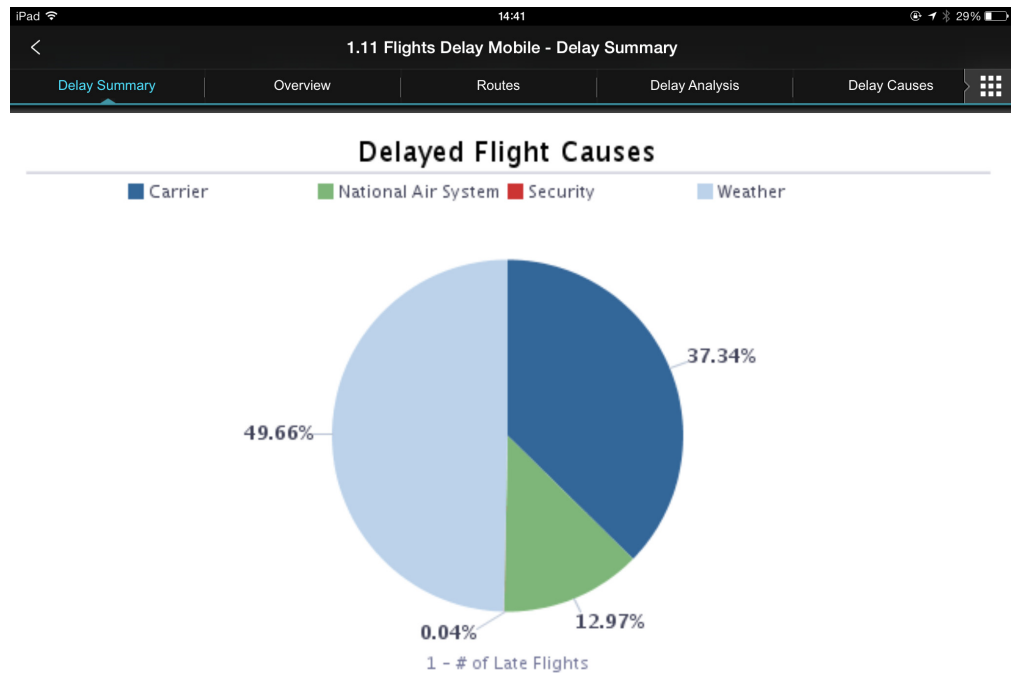
Figure 4–1 BI Content on an iPad



When a dashboard has multiple pages, tap the page icon (at the right side of the page-title area) to access an overlay showing the available pages and tap again to navigate to one of them. You can also swipe through the page titles to find the page you want, and then tap it to open it.

You can maximize an individual view within a dashboard by double-tapping on it. The individual view then displays within the full screen of the iPad. When viewing an analysis independent of a dashboard, you can double-tap on it to expand the view to full-screen display. To revert back to the non-maximized view, repeat the double-tap gesture, or click the **Previous** icon in the title bar.

Figure 4–2 shows an example of a graph from the dashboard shown in Figure 4–1, expanded to use the full screen of the iPad.

Figure 4–2 Graph View in Full Screen (Maximized)

Note: Double-tapping on a view to maximize it works on most view types. Exceptions include gauges, simple trellis views, and performance tiles.

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

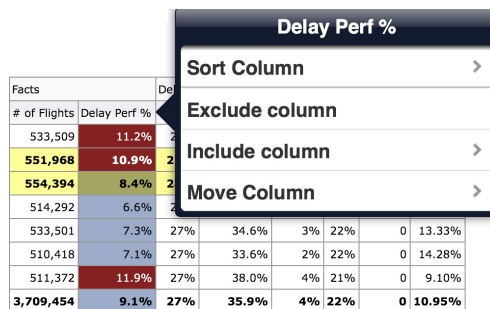
Working with Tables, Pivot Tables, and Trellis Views

In Oracle BI Mobile, a tap on a cell in a table and pivot table provides the same set of actions as a left-click of the mouse in the desktop version of Oracle BI EE. As for right-click actions, Oracle BI Mobile provides the same actions that are available in Oracle BI EE, except in the mobile application you use the tap-and-hold gesture rather than the right-click of the mouse.

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

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 Column**, as shown in [Figure 4-3](#).

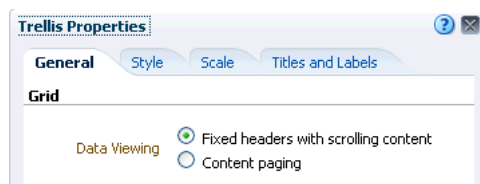
Figure 4-3 Tap-and-Hold Gesture Instead of Right-Click of Mouse



Facts	# of Flights	Delay Perf %	De
	533,509	11.2%	2
	551,968	10.9%	2
	554,394	8.4%	2
	514,292	6.6%	2
	533,501	7.3%	27%
	510,418	7.1%	27%
	511,372	11.9%	27%
	3,709,454	9.1%	27%

In tables, pivot tables, and trellis views, when Data Viewing is set to "fixed headers" in the Properties dialog (see [Figure 4-4](#)) for an analysis, you can use a single-finger drag gesture to scroll through data in all directions.

Figure 4-4 Data Viewing Properties for Fixed Headers and Content Paging



Working with Graphs

User interaction with graphs is different in Oracle BI Mobile from that of 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.

How Do Tooltips Display in Graphs?

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 display 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.)

In some cases—for example, in a graph with bars much thinner than the finger with which you tap and drag—you may need to nudge a tooltip to an adjacent bar so that the tooltip you want is the one that is actually displayed.

To move a tooltip:

1. Drag the tooltip to an adjacent bar.

The tooltip now displays the value or action for the bar to which you have moved it.

How Do Legends Display in Graphs, Funnel Graphs, and Gauges?

The display of a graph, funnel graph, or gauge legend is different on a mobile device than it is on a desktop:

- On a desktop (where the graph or gauge format is Flash), the legend list is scrollable and the legend text does not wrap.
- On a mobile device (where the graph or gauge format is PNG), the legend list is not scrollable and the legend text can wrap.

Working with Performance Tiles

Performance tiles work in Oracle BI Mobile in the same way as any other view, and they display in the mobile application as they do in the desktop version of Oracle BI EE. To interact with performance tiles in Oracle BI Mobile:

- You can access an action link on a performance tile by tapping the performance tile.
- You can tap and hold on the performance tile to display the full text of a tooltip.

Working with Prompts

In Oracle BI Mobile, 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 (shown in [Figure 4-5](#)).

What Do Prompts Look Like in Oracle BI Mobile?

Figure 4-5 shows the prompts bar, which displays across the top portion of the screen.

Figure 4-5 Prompts Bar

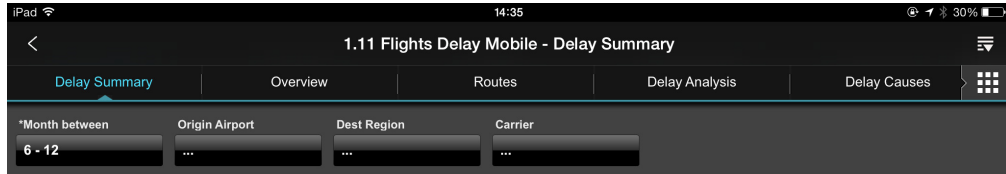
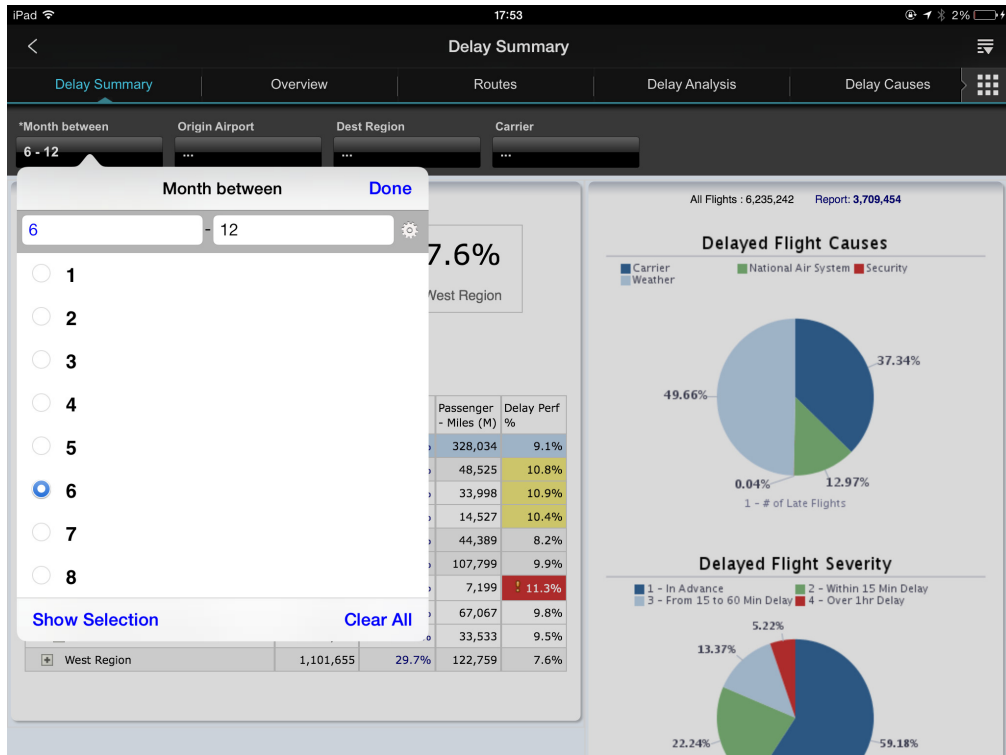
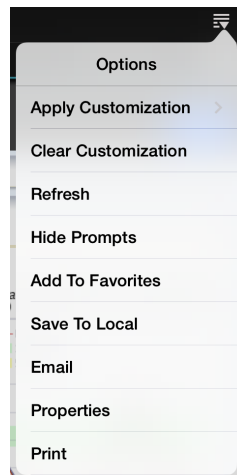


Figure 4-6 shows the same prompts bar as in Figure 4-5, along with a prompt for selecting display months.

Figure 4-6 Prompt in a Dashboard



You can hide the prompts bar by tapping the **Options** icon then tapping **Hide Prompts**, as shown in Figure 4-7. To make the prompts bar visible again, tap **Show Prompts**.

Figure 4–7 Hide and Show the Prompts Bar

What are Simple Prompts and Advanced Prompts?

Oracle BI Mobile uses two variants of prompts, as described in the following list:

- **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.

Note: In Oracle BI Mobile, in a prompt list with a large number of items, viewing the complete list, beyond 256 entries, is different than on the desktop version. To view beyond 256 entries in a prompt list, you tap "Display the next 256 members" at the end of the list.

Figure 4–8 shows a simple list prompt that accepts a single entry from the user.

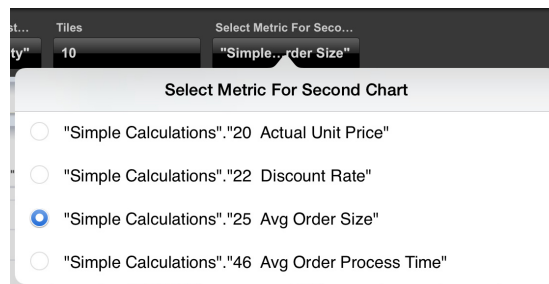
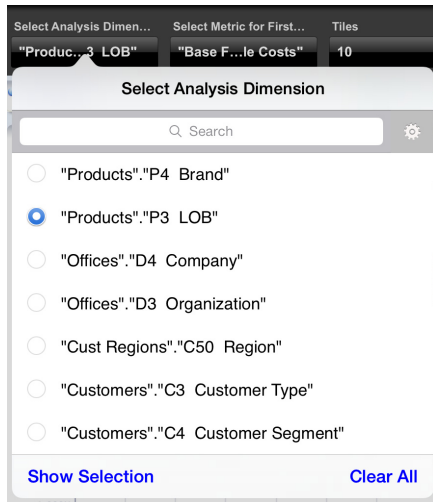
Figure 4–8 Simple Prompt

Figure 4–9 shows an advanced list prompt that includes a **Search** field.

Figure 4–9 Advanced Prompt

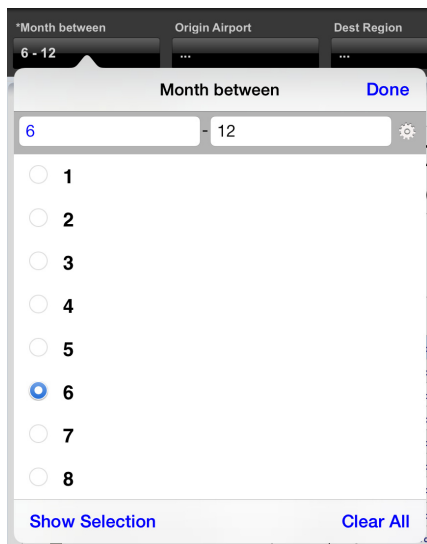


The **Show Selections** button is a toggle that switches to **Show All**. When you tap **Show Selections**, only the list items you have selected are displayed rather than the entire list provided by **Show All**. The **Clear All** button enables you to clear all your selections at once.

Working with Text Boxes in List Prompts

Figure 4–10 shows a list prompt that includes the Between operator (a hyphen) and two text boxes.

Figure 4–10 List Prompt with Between Operator



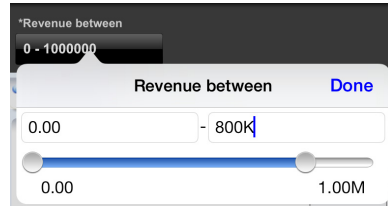
To work with text boxes in list prompts:

1. With the focus on the first text box, select an item from the list to add it.
2. Tap the second text box to move the focus there, then select an item from the list to add it.

What Do Slider Prompts Look Like?

Figure 4–11 shows a double-thumb slider prompt using a Between operator (a hyphen) to show a range of revenue totals.

Figure 4–11 *Slider Prompt with Between Operator*



Working with Changeable Prompt Operators

In the desktop version of Oracle BI EE, a prompt can be defined such that the end user is able to vary the prompt's operator, from within the dashboard. In the desktop version of this feature, a list of operators displays in a dropdown next to the prompt, as shown in Figure 4–12 and Figure 4–13. From the dropdown, the desktop user selects the desired operator (for example, "contains").

Figure 4–12 *Changeable Prompt Operator in the Desktop Version of Oracle BI EE*

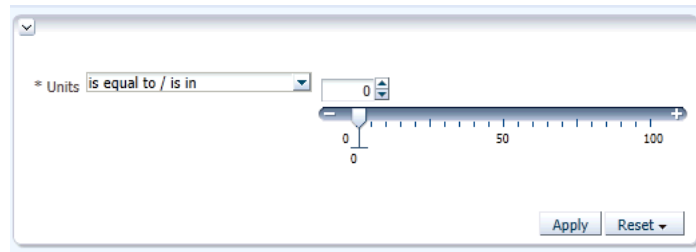
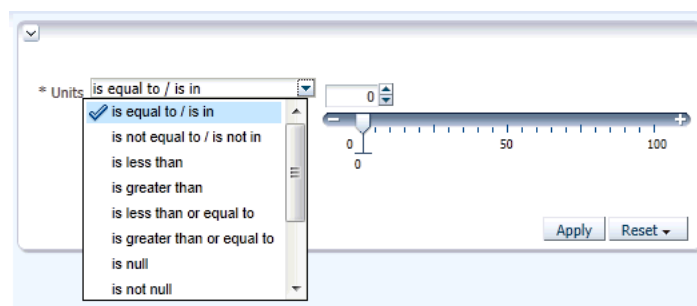
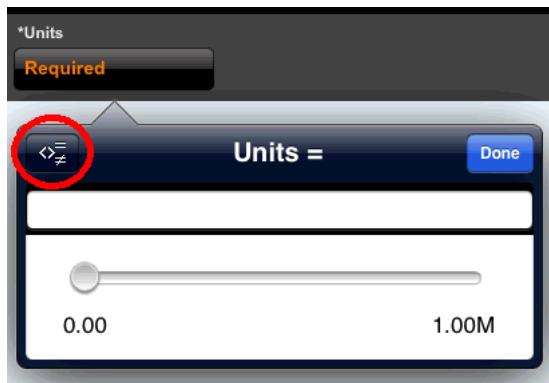


Figure 4–13 *Changeable Prompt Operator in the Desktop Version, Dropdown Displayed*



In Oracle BI Mobile, changeable prompt operators display differently, as shown in Figure 4–14. There is a single button (circled in red in the figure) displayed in the top left of the prompt box. With each tap you do, you toggle to the next operator in the list.

Figure 4–14 Changeable Prompt Operator in Oracle BI Mobile

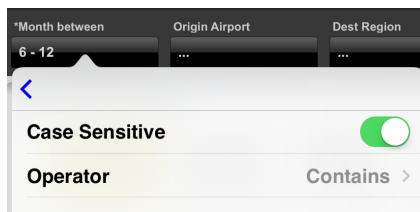
To vary the prompt operator in a changeable prompt:

1. Tap the changeable prompt operator button at the top left of the prompt box.
2. Continue tapping until the prompt you want to use is chosen.

Setting Search Options for Prompts

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

Figure 4–15 shows the Search Options dialog where you can specify details including the search operator, and whether your search is to be case-sensitive.

Figure 4–15 Search Options Dialog for Prompts

To specify search options for a prompt:

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

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 **Previous** 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 Oracle 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 in this section.

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 4–16 shows a map view.

Figure 4–16 Map View

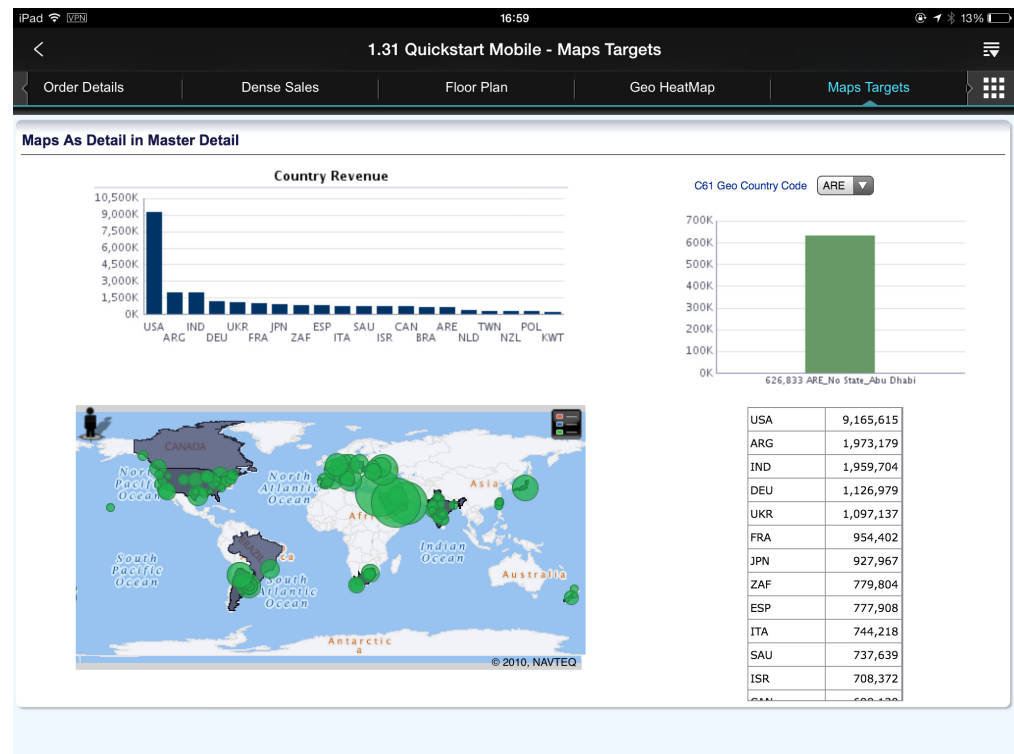
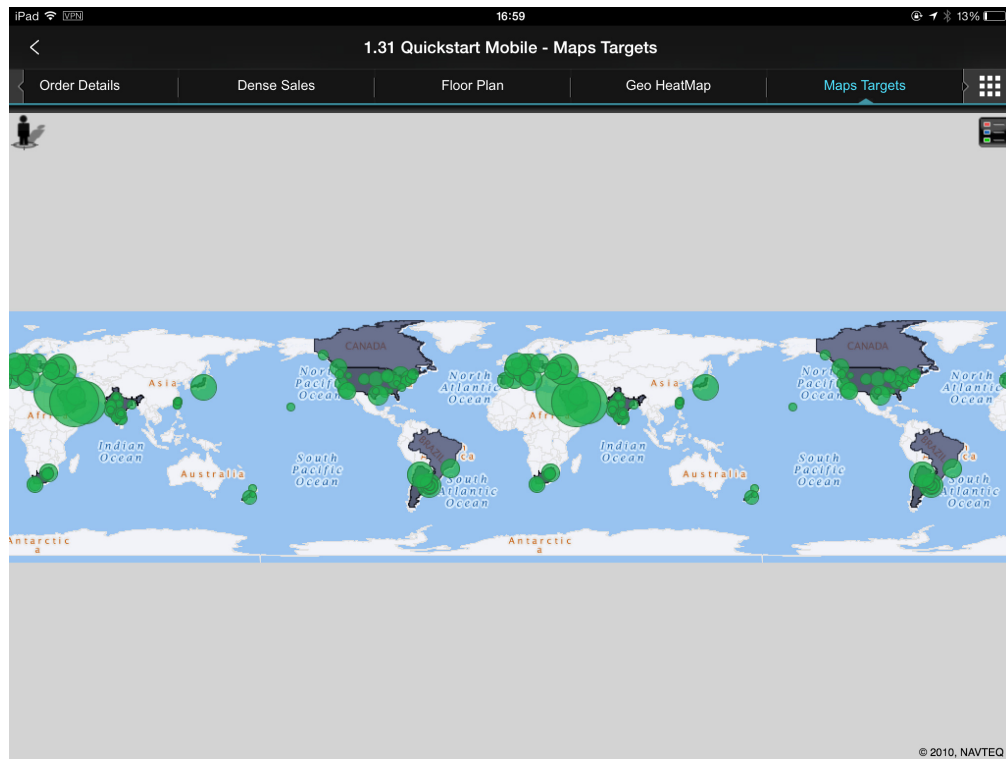


Figure 4–17 shows the same map view expanded to fill the entire screen.

Figure 4–17 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 4–18](#).

Figure 4–18 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 4–19](#).

Figure 4–19 My Location Icon, in Inactive State

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

The **My Location** icon displays 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.
2. Tap **Remove**.

Working with Oracle BI Mobile Apps

You can view Oracle BI Mobile apps in the Oracle BI Mobile application. The Oracle BI mobile apps appear in the catalog, just like other BI content. When you tap the thumbnail for an Oracle BI Mobile app, the mobile app is launched and you can navigate within it.

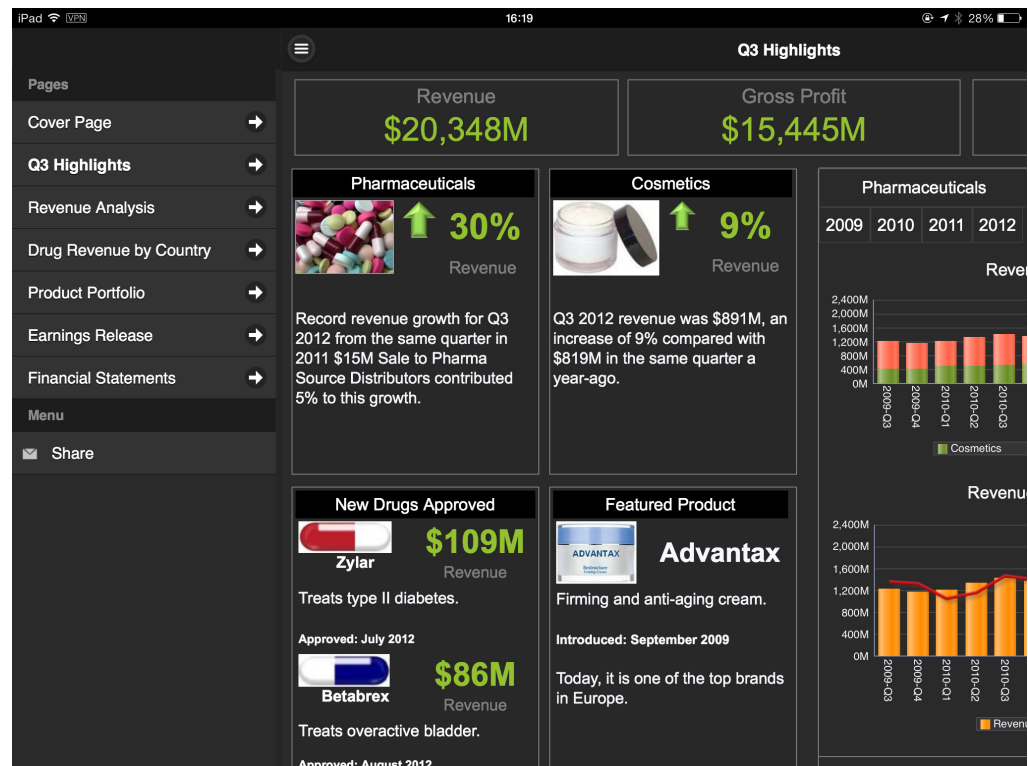
To return to Oracle BI Mobile from the Oracle BI mobile app:

1. Tap once in the iPad's status bar (where the current time displays) to reveal the **Previous** icon.
2. Tap the **Previous** icon.

Note: Another way to navigate back from the Oracle mobile app to Oracle BI Mobile is to swipe from the left of the screen to reveal the navigation bar, then tap one of the navigation icons.

An example of viewing an Oracle BI Mobile app on an iPad is shown in [Figure 4–20](#).

Figure 4–20 Oracle BI Mobile App



Working with Oracle BI Publisher Content

You view Oracle BI Publisher content in the Oracle BI Mobile application in the same way you view it in the desktop version of Oracle BI EE. You can open reports directly from the Oracle BI Presentation Catalog and you can view them in dashboards.

Viewing of BI Publisher content is interactive in the Oracle BI Mobile application. You can apply parameters for BI Publisher reports.

You can save BI Publisher reports as local content, and when connected to the Oracle Business Intelligence Presentation Services server, you can refresh their data. You can email locally saved reports as static attachments, but not as embedded content.

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, KPI contribution 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 4-23](#).)

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.

You can view and interact with a KPI contribution wheel in a dashboard. Tap and hold a KPI node on a scorecard diagram, KPI watchlist, or smart watchlist, and then tap **View as KPI Contribution Wheel**.

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

[Figure 4-21](#) and [Figure 4-22](#) 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 4–21 Strategy Tree As Viewed in the Desktop Version of Oracle BI EE

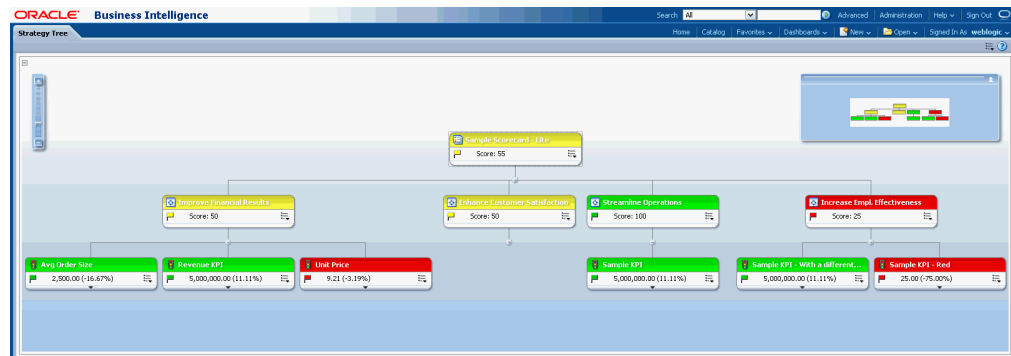


Figure 4–22 Strategy Tree As Viewed in Oracle BI Mobile

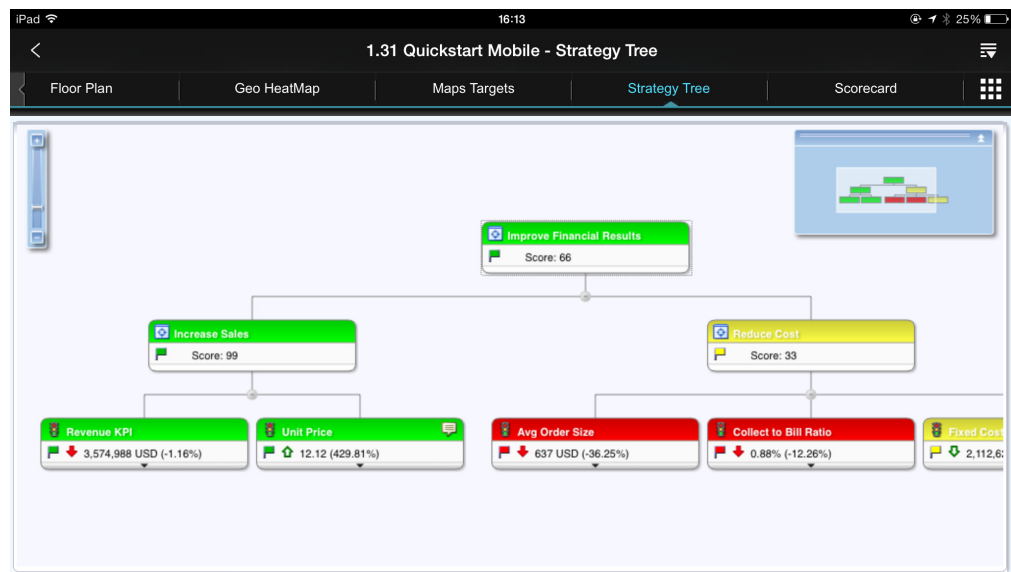


Figure 4–23 shows a DHTML view of a strategy tree. This is how the strategy tree is displayed when opened in Oracle BI Mobile from the catalog, as an object not embedded in a dashboard.

Figure 4–23 Scorecard Content in a Simplified Table Format

Strategy Tree: Eden Inc. Scorecard	
Eden Inc. Scorecard	
Improve Financial Results	
Increase Sales	
Revenue KPI	>
Avg Revenue per FTE	>
Billed Qty	>
Reduce Cost	
Avg Order Size	>
Collect to Bill Ratio	>
Enhance Customer Satisfaction	
% Early Shipped	>
Fulfillment Days	>
Streamline Operations	
Fulfillment Days	>
# Orders	>
Increase Empl. Effectiveness	
# Employees	>

Working with Alerts and Agents

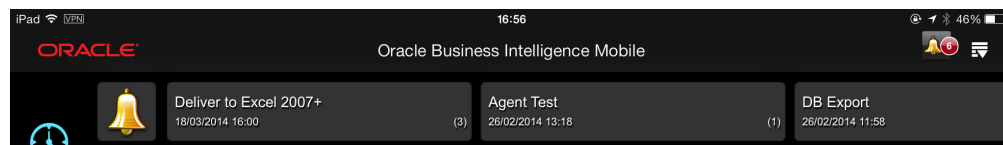
In terms of user interface elements provided by Apple iOS, an "alert" is the popup that displays to provide important information before you take an action and that has a short title and an **OK** button to exit out of it. This guide refers only to alerts as understood as a part of Oracle Business Intelligence, 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 BI 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 4–24](#), displays your current alerts. The most recent displays at the left. The Alerts bar also displays the **Alerts** icon (a bell) 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 4–24 Alerts Bar**To hide the Alerts bar:**

1. Do one of the following:
 - Tap the **Alerts** icon (the bell).
 - Tap the **New Alerts** icon (the red-circled number overlapping a small bell).

When the Alerts bar is not visible, the **New Alerts** icon displays to the left of the **Options** 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:

1. In the Alerts bar, tap and hold until the **Close** control (an X) displays in the upper-right corner of the alert thumbnail. (At this point you can clear multiple alerts if you wish, because all your alerts display the **Close** control.) Tap the **Close** control. When finished, tap outside the Alerts bar to exit the clearing mode.

When all your alerts have been cleared, the Alerts 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 bar 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 items (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
	Recent icon
	Favorites icon
	Dashboards icon
	Local Content icon
	Search icon
	Start-up Content icon
	Alerts icon
	New Alerts icon
	All/Highlighted toggle
	Options icon

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

Icon	Name
	Search Settings icon
	Navigation icon (iPhone)
	Add Server icon
	List-style Display icon
	Carousel-style Display icon
	Grid-style Display icon
	Previous icon
	Back arrow
	Dashboard page icon
	Legend icon
	Changeable prompt operator button
	Funnel icon, which displays in some search results to represent dashboard objects that open with an applied search filter (specified in the desktop version of Oracle BI EE) rendering that search filter's criteria values as prompt values to the dashboard.

Touch Gestures Used in Oracle BI Mobile

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

Use the touch gestures listed in [Table B-1](#) to work with Oracle BI 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> <p>In a tooltip, if a menu item's text exceeds the width of the context menu, tap and hold the item to view the entire text of the menu option.</p>
Double-Tap	Tap twice quickly.	<p>In a view, double-tap to expand the view to fill the entire screen.</p> <p>In a scorecard, double-tap on a node within a scorecard strategy contribution wheel to re-focus the diagram on that node.</p>

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

Gesture	How to Perform	What It Does
Drag (One-Finger)	Drag one finger.	To pan the entire view, drag one finger. To pan in a map, drag one finger. 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.) In a list or menu, drag up or down to scroll. In a data table, drag up, down, left, or right to scroll. In a dashboard, drag to scroll.
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 contribution wheel, pinch to increase or decrease the number of concentric rings displayed.
Swipe	Swipe quickly to the right or left.	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 accessibility features you can use with Oracle BI Mobile.

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 the Settings icon.
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.

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