

Oracle® Fusion Middleware

User's Guide for Oracle Business Intelligence Mobile

11g Release 1 (11.1.1)

E25318-01

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

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

E25318-01

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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 organize and present data 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.)

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Related Documents

For more information, see the following documents in the Oracle Business Intelligence Enterprise Edition 11g Release 1 (11.1.1) documentation set:

- 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*

Conventions

The following text conventions are used in this document:

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

New Features for Oracle Business Intelligence Mobile Users

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

This preface contains the following topics:

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

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

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 EE content is available for immediate consumption on your mobile device, optimized for mobile viewing without the need to redesign any content.
- Support for the following BI EE objects: dashboards, analyses, BI Publisher reports, agent-resultant reports, and scorecards.
- 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 actions.

Backward Compatibility of Oracle BI Mobile 11g Release 1 (11.1.1.6)

Release 11.1.1.6 of Oracle Business Intelligence Mobile is backward compatible with Release 11.1.1.5.x of Oracle Business Intelligence Enterprise Edition. The 11.1.1.6 BI Mobile application available from the Apple iTunes App Store works with 11.1.1.5 servers and also with 11.1.1.6 servers.

Introducing Oracle Business Intelligence Mobile

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

- "Which User Interface Graphics Are Used in Oracle Business Intelligence Mobile?"
- "What Is Oracle Business Intelligence Mobile?"

Which User Interface Graphics Are Used in Oracle Business Intelligence Mobile?

This chapter refers to Apple's user interface graphics as explained in [Table 1-1](#).

Table 1-1 Apple's User Interface Graphics








Icon Graphic	Naming in this Chapter and Function
	Home button
	Application icon for Oracle Business Intelligence Mobile. Appears on Home screen of device. Tap this to launch the application.
	Login button
	Accept button. Used for accepting the end-user license agreement.
	Desktop Layout icon (iPad). Near the Home button on the iPad, this icon changes the layout of BI content from mobile to desktop.
	Mobile Layout icon (iPad). Near the Home button on the iPad, this icon changes the layout of BI content from desktop to mobile.
	Menu icon. In navigation bar, this icon displays the Action menu for whichever screen you are viewing.

Table 1–1 (Cont.) Apple's User Interface Graphics








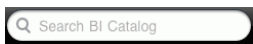





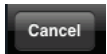






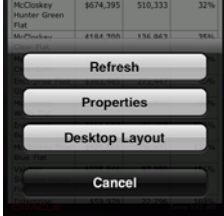
Icon Graphic	Naming in this Chapter and Function
	Menu icon (iPad). In navigation bar, this icon displays the child panel which contains the Action menu for whichever screen you are viewing.
	Checkmark. Indicates the selected server connection.
	Favorites icon. In tab bar, this icon displays the Favorites screen.
	Alerts icon. In tab bar, this icon displays the Alerts screen.
	Catalog icon. In tab bar, this icon displays the Catalog screen.
	Search icon. In tab bar, this icon displays the Search screen.
	Settings icon. In tab bar, this icon displays the Settings screen.
	Search field
	Add icon. Creates a new item.
	Next icon
	Next character. This icon appears on the right edge of a list item or property field. By tapping this, you navigate to the next level (for example, to the next level of a catalog hierarchy). A single tap anywhere on the item initiates the transition.
	Refresh icon. Refreshes content.
	Edit button.
	Cancel button.
	Save button.
	Done button.
	Delete icon
	Search Criteria icon. In the Search screen, tapping this icon displays the Search Criteria screen.

Table 1–1 (Cont.) Apple's User Interface Graphics

Icon Graphic	Naming in this Chapter and Function
	Badge visible on Alerts icon.
	Previous icon
	Action menu. Displays as an overlapping screen on top of whichever screen you are viewing.

What Is Oracle Business Intelligence Mobile?

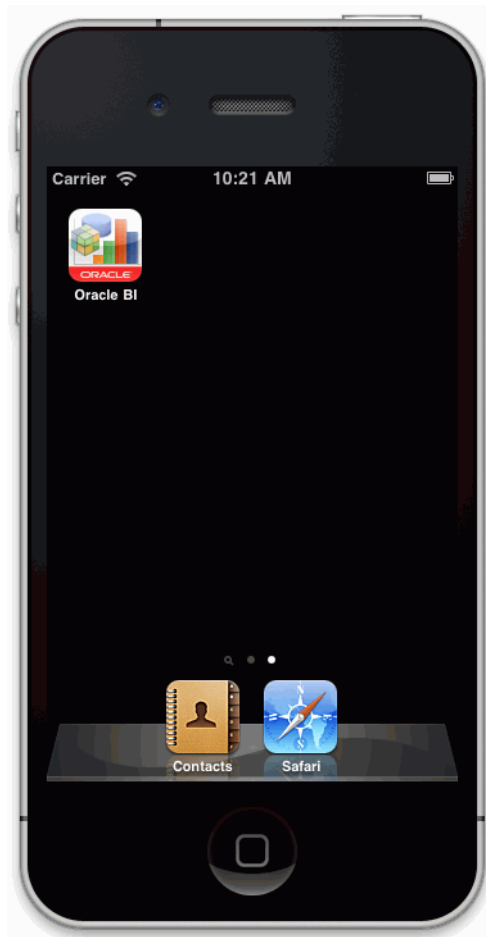
Oracle Business Intelligence Mobile allows you to view Oracle BI EE content on supported mobile devices such as the Apple iPhone and Apple iPad.

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

Viewing content on a mobile device requires a presentation that differs from how you view the same content on a desktop monitor. Oracle Business Intelligence Mobile optimizes the presentation of your BI content for mobile devices. Beyond the default presentation of content provided by the Oracle BI Mobile application, you can customize how you view dashboards and analyses by setting properties for layout display. You can mark certain content as favorites.

Oracle Business Intelligence Mobile for Apple iPhone and Apple iPad can be downloaded from the Apple iTunes App Store. Use of the application requires that you have access to an instance of Oracle BI EE that is configured and running.

Figure 1–1 Home Screen on iPhone with Oracle Business Intelligence Mobile Application Installed



Which BI Content is Viewable Using Oracle Business Intelligence Mobile?

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

Oracle Business Intelligence Mobile supports the following object types:

- Dashboard
- Analysis
- BI Publisher report
- Agent-resultant report
- Scorecard

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

Table 1–2 BI EE Objects Viewable in the Oracle BI Mobile Application

BI EE Object	Can be viewed in the Oracle BI Mobile application?	Can be delivered by an agent?
Analysis	Yes, including analytic actions	Yes
Dashboard Page	Yes, including analytic actions	Yes
Briefing Book	No Note: Users are unable to open a briefing book or view any content from a briefing book on the mobile application. However, briefing books' titles may appear in the mobile application in a user's catalog or in a list of favorites.	Only its alert is visible (in the Alerts list)
BI Publisher Report	Yes, including same actions as full-browser version (based on output type)	NA
Action	Yes	NA
Prompt	Yes	NA
Scorecard	Yes, including analytic actions	NA
Catalog Search Results	Yes	NA
Views: Tables	Yes, including drilling	NA
Views: Pivots	Yes, including drilling	NA
Views: Graphs	Yes, images only	NA
Views: Gauges	Yes	NA
Views: Maps	Yes, including interactive	NA

Localization of BI Content

You can use a setting—called Device Locale— within the Oracle BI Mobile application to determine how BI content is rendered on the mobile device. This setting affects only BI content, not the user interface language of the application shell.

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 Business Intelligence Mobile application. The **Device Locale** toggle in the Oracle BI Mobile application changes the language of the BI content, but not the client shell user interface.

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

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

Getting Started with Oracle Business Intelligence Mobile

This chapter describes how to acquire and configure Oracle Business Intelligence Mobile. The chapter contains the following topics:

- ["Getting Oracle Business Intelligence Mobile for Your Apple iPhone or iPad"](#)
- ["Starting Oracle Business Intelligence Mobile"](#)
- ["Setting Up User Credentials"](#)
- ["What Does the Oracle Business Intelligence Mobile Application Look Like?"](#)
- ["Configuring Oracle Business Intelligence Mobile"](#)

Getting Oracle Business Intelligence Mobile for Your Apple iPhone or iPad

To download Oracle Business Intelligence Mobile, tap the App Store icon on your iPhone's or iPad's Home screen. Alternatively, you can download the application from your computer through iTunes and then synchronize your iPhone or iPad.

To download and install Oracle Business Intelligence Mobile:

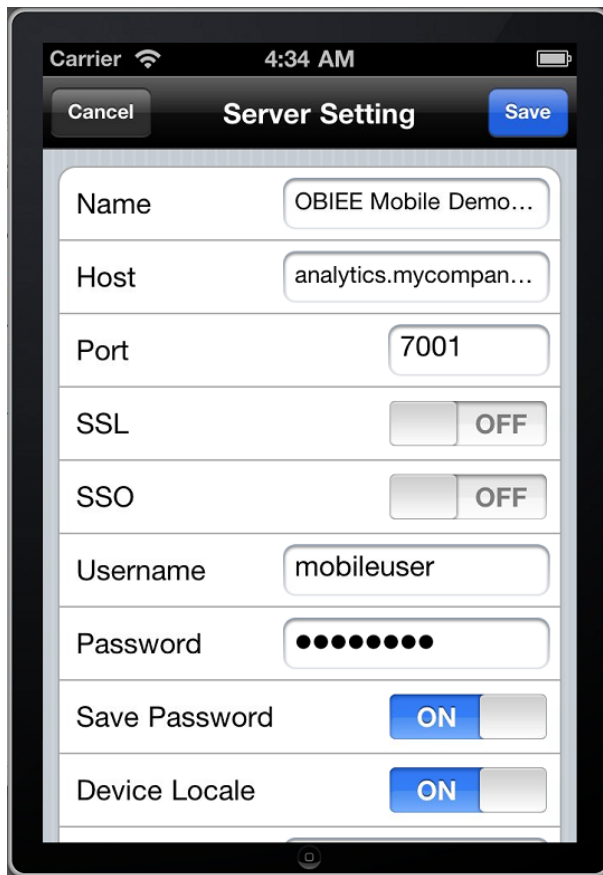
1. On your device, in iTunes, search the App Store for "Oracle".
2. Select the Oracle Business Intelligence Mobile application, and tap the **Install** button.

Starting Oracle Business Intelligence Mobile

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

Launching the Mobile Application from the Home Screen

You start the Oracle Business Intelligence Mobile application as you would open any other iPhone or iPad application. The first time you use the Oracle BI Mobile application, however, you are presented with the licensing screen, then a login page that provides an initial server setting screen in which you add your server configuration. The ["Server Setting screen"](#) is shown in [Figure 2-1](#).

Figure 2–1 Server Setting Screen on an iPhone

Note: Apple's iOS does not support self-signed certificates by default; the Oracle BI Mobile application must connect to an SSL-protected Oracle Business Intelligence Presentation Services server using a proper certificate, that is, a certificate issued by a certificate-issuing authority such as Verisign.

To launch Oracle Business Intelligence Mobile for the first time:

1. On your device's Home screen, tap the Oracle Business Intelligence Mobile application icon.
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 blue **Add** icon to enter your initial server configuration settings.
The "Server Setting screen" is displayed.
4. In the Server Setting screen, specify the following:
 - **Name.** Settings Name. Once set, this name cannot be changed.
 - **Host.** Enter either the IP address (for example: 192.168.1.1) or the fully qualified host name of the computer on which Presentation Services is running (for example, myname.us.oracle.com). If entering the name, ensure

that you do not enter an alias or a redirecting URL; otherwise a connection cannot be made. For example, you cannot enter a URL that is a network alias, such as `analytics.mycompany.com`, when the actual server URL is `itfx1234.mycompany.com`. Similarly, do not enter a stand-in URL, such as `tinyurl.com/1234`, which redirects to a server.

- **Port.** Enter the port number, for example, 7001
- **SSL.** A toggle to select ON or OFF.
- **SSO.** A toggle to select ON or OFF.
- **Username**
- **Password**
- **Save Password.** A 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 device. If set to OFF, you will be prompted to enter your password each time you launch the application.
- **Device Locale.** A toggle to select ON or OFF. If set to ON, the application uses the device's settings for user interface language and region format. If set to OFF, language and region formats are based on the user preferences for Presentation Services. This toggle affects BI content only; setting it to OFF has no bearing on the application shell user interface.
- **Analytics Path.** For example, `/analytics/saw.dll`
- **Publisher Path.** For example, `/xmlpsrserver`

5. Tap **Save**.

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

To start Oracle Business Intelligence Mobile after having launched the application once:

1. Tap its icon on the Home screen.

Setting Up User Credentials

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

Note: Specifying user credentials in the Oracle BI Mobile application does not change the credentials used on the Presentation Services server. Oracle Business Intelligence Mobile uses the same credentials as Presentation Services and does not require any new credentials. You use the same credentials to log in to the Oracle BI Mobile application as you do for the full-browser version of Oracle BI EE.

To set your user credentials:

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

The "Settings screen" is displayed.

2. In the Settings screen, in the Server Configuration list, tap the server that you want to access.

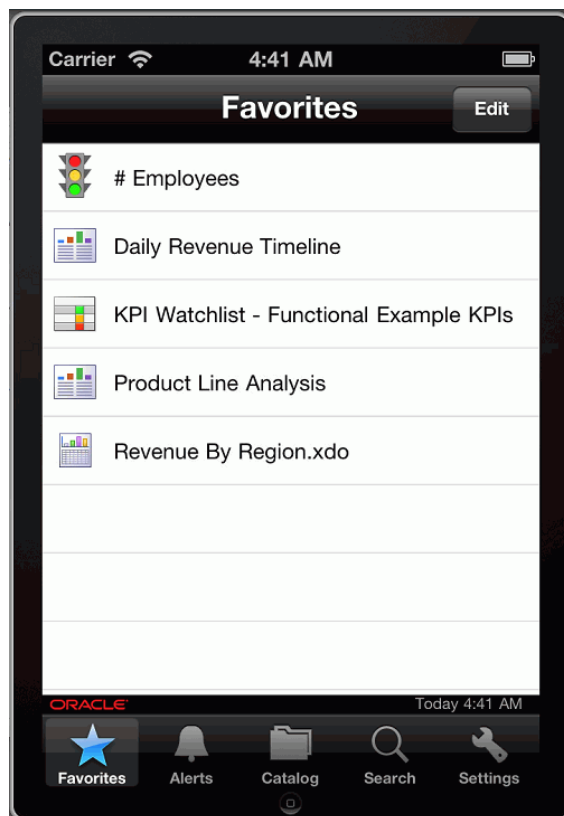
The "Server Setting screen" is displayed.

3. In the Server Setting screen, in the **Username** and **Password** fields, enter the login credentials you want to use for your session.
4. (Optional) Tap the **Save Password** toggle to set to ON or OFF. If you choose not to save the password with the connection details, you will be prompted for the password when you next launch the Oracle BI Mobile application.
5. Tap **Save**.

What Does the Oracle Business Intelligence Mobile Application Look Like?

The start page for the Oracle BI Mobile application is the Favorites screen. Oracle Business Intelligence Mobile is launched from the Home screen, where all your other application icons also appear. The Oracle Business Intelligence Mobile application on an iPhone is shown in [Figure 2–2](#).

Figure 2–2 Oracle Business Intelligence Mobile Start Page



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

At the upper edge of the application screen, just below the Status bar, is the Navigation bar. The Navigation bar displays the title of the current view and often

contains controls that manage the view's contents, in addition to navigational controls when appropriate.

The main screen shows the contents of the current view, such as the list of your favorites, when you are in the Favorites screen.

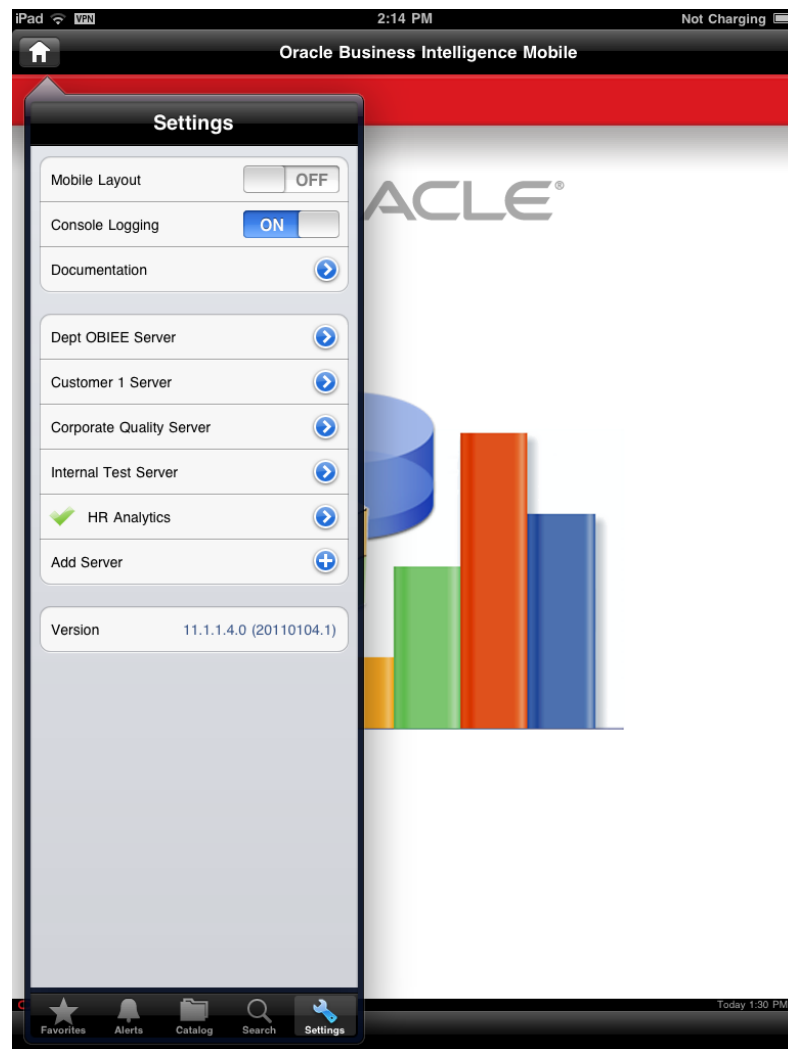
Below the main screen is the branding bar, which includes the time of last screen refresh from the server on which Presentation Services is running.

Below the branding bar is the Tab bar, showing the screens you can select when you want to work with the Oracle BI Mobile application.

The Home button is centered at the bottom of the device below the Tab bar. Pressing the Home button takes you out of Oracle Business Intelligence Mobile, back to the Home screen for your device.

The application renders slightly differently on an iPad. [Figure 2-3](#) provides an example, showing how the Settings screen appears in a *child panel* that overlays the branding background. On the iPad, the Tab bar appears at the bottom of this child panel. You access the child panel by tapping the Menu icon (on the iPad, this is the house icon) in the navigation bar.

Figure 2-3 Settings Screen on an iPad

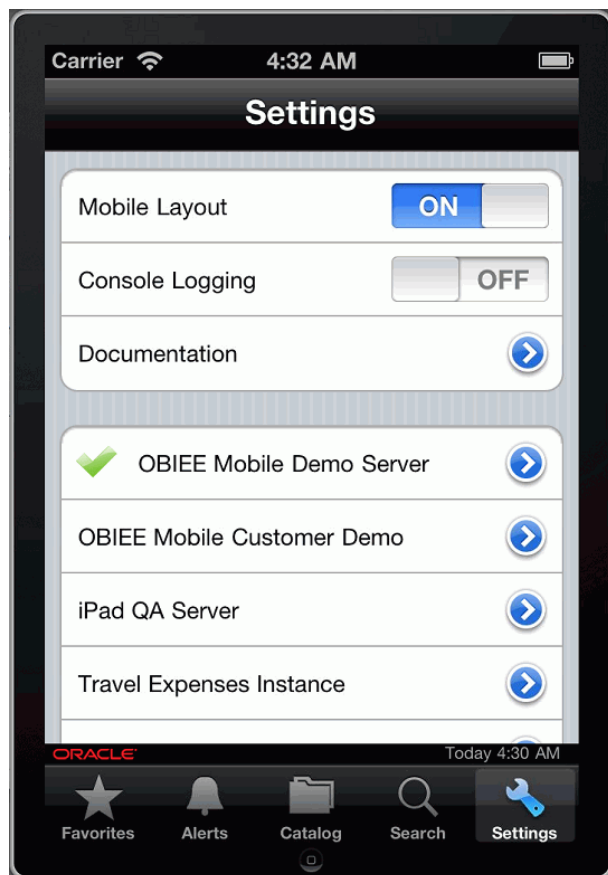


Configuring Oracle Business Intelligence Mobile

You use the Settings screen in Oracle Business Intelligence Mobile to manage your server configurations, set the default layout for dashboards and analyses, enable console logging, or access this documentation online. You access the Settings screen by tapping **Settings** in the tab bar.

The Settings screen is shown in [Figure 2-4](#).

Figure 2-4 Settings Screen on an iPhone



See the following sections for the tasks performed in the Settings screen:

- [Adding, Modifying, and Removing Server Connections](#)
- [Switching Between Servers](#)
- [Specifying the Layout for Oracle Business Intelligence Mobile](#)
- [Setting Console Logging](#)

Adding, Modifying, and Removing Server Connections

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

To add or modify a server connection:

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

The "Settings screen" is displayed.

2. Add or modify a server connection as follows:

- If you are adding a new server connection, next to **Add Server**, tap the blue **Add** icon.
- If you are modifying a server connection, next to the server name, tap the blue **Next** icon.

The "Server Setting screen" is displayed.

3. In the Server Setting screen, specify the following:

- **Name.** Settings Name. Once set, this name cannot be changed.
- **Host.** Enter either the IP address (for example: 192.168.1.1) or the fully qualified host name of the computer on which Presentation Services is running (for example, myname.us.oracle.com). If entering the name, ensure that you do not enter an alias or a redirecting URL; otherwise a connection cannot be made. For example, you cannot enter a URL that is a network alias, such as analytics.mycompany.com, when the actual server URL is itfx1234.mycompany.com. Similarly, do not enter a stand-in URL, such as tinyurl.com/1234, which redirects to a server.
- **Port.** Enter the port number, for example, 7001.
- **SSL.** A toggle to select **ON** or **OFF**.
- **SSO.** A toggle to select **ON** or **OFF**.
- **Username**
- **Password**
- **Save Password.** A 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 device. If set to **OFF**, you will be prompted to enter your password each time you launch the application.
- **Device Locale.** A toggle to select **ON** or **OFF**. If set to **ON**, the application uses the device's settings for user interface language and region format. If set to **OFF**, language and region formats are based on the user preferences for Presentation Services. This toggle affects BI content only; setting it to **OFF** has no bearing on the application shell user interface.
- **Analytics Path.** For example, /analytics/saw.dll
- **Publisher Path.** For example, /xmlpsrver

4. Tap **Save**.

To remove a server connection:

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

The "Settings screen" is displayed.

2. In the Settings screen, select the server connection you want to remove.

3. Next to the server connection name, tap the blue **Next** icon.

4. Scroll down to find the red **Delete** button, and tap it.

Note: The default server connection cannot be deleted.

5. Tap **Done**.

Switching Between Servers

You can switch between Presentation Services servers in the Settings screen.

To switch between servers:

1. In the tab bar, tap **Settings**.
The "Settings screen" is displayed.
2. In the Settings screen, select the server connection to which you want to switch.
3. In the confirmation dialog, tap **OK**.
4. Press the device's Home button to exit the application.
5. Relaunch the application.

You are now connected to the newly selected BI Presentation Services server.

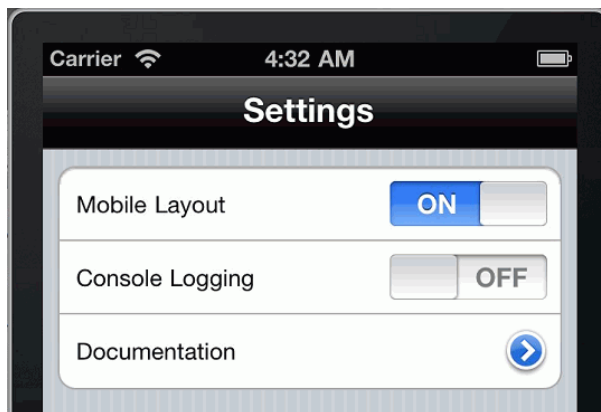
Specifying the Layout for Oracle Business Intelligence Mobile

Using the Mobile Layout setting in the Settings screen, you can control the default layout of a dashboard or analysis report—that is, how it displays when opened. (The layout of a report can also be changed after it is open, by tapping the **Properties** button on the Action menu for the report.)

The Mobile Layout property does not affect other object types, such as BI Publisher reports, scorecard content, or alerts.

When Mobile Layout is set to OFF, the layout of the dashboard or analysis is the same as that of the full-browser version. When Mobile Layout is set to ON, the layout is optimized for the mobile device's screen: all the views are stacked vertically and sized to fit the screen horizontally as much as possible.

Figure 2–5 Mobile Layout Setting in the Settings Screen



To set your preferred viewing layout for dashboards and analyses:

1. In the tab bar, tap **Settings**.
The "Settings screen" is displayed.
2. In the Settings screen, in the Mobile Layout row, tap **ON** or **OFF**.

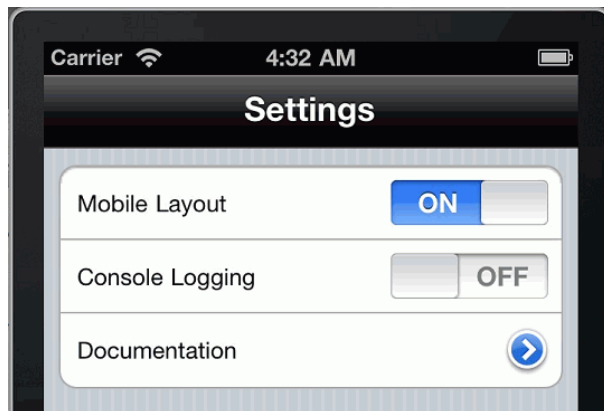
Setting Console Logging

You can enable console logging for your device in the Settings screen.

Console logging can be useful when it is necessary to debug issues on mobile devices. Console logging can slow down the performance of the Oracle BI Mobile application, however, since it requires that numerous messages are written to console logs on the device. (You can access these device logs using the iPhone configuration utility available from Apple.)

Because console logging impacts application performance, the default setting is OFF.

Figure 2–6 Console Logging Setting in the Settings Screen



To enable or disable console logging:

1. In the tab bar, tap **Settings**.
The "Settings screen" is displayed.
2. In the Settings screen, in the Console Logging row, tap **ON** or **OFF**.

Using Oracle Business Intelligence Mobile

This chapter describes how to work with Oracle Business Intelligence Mobile. The chapter contains the following topics:

- "Working with Favorites"
- "Working with Alerts"
- "Working with the Oracle BI Presentation Catalog"
- "Performing Searches"
- "Working with BI Content"

Working with Favorites

Use the Oracle BI Mobile application's bookmark feature to mark as favorite any BI content that you view regularly or want to view again at another time.

Before you have marked any content as a favorite, the Favorites screen shows a list pre-populated with your default dashboard (if you have a default dashboard).

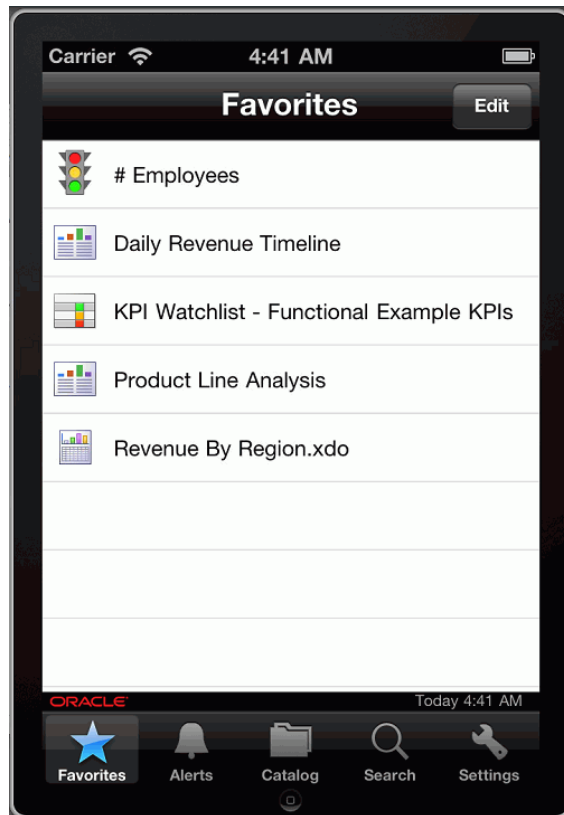
Your Favorites screen shows all content you have marked as favorite on your device and for your given server configuration. This means that you could configure another mobile device to the same server for the same user, and the user would see the same set of favorites.

The Favorites screen, which is the default start screen for iPhone users, is shown in [Figure 3-1](#).

This section includes the following topics:

- "Marking Favorites"
- "Opening Favorites"
- "Removing Favorites"

Figure 3–1 Favorites Screen on an iPhone



Marking Favorites

While viewing BI content, mark it as a favorite if you intend to return to it later.

To mark BI content as a favorite:

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

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

The BI content is added to your Favorites list.

Opening Favorites

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

To open a favorite:

1. In the tab bar, tap **Favorites**.
The "[Favorites screen](#)" is displayed.
2. In the Favorites list, tap the favorite you want to open.

Removing Favorites

You can remove a favorite in the same way that you delete in general on your iPhone or iPad.

To remove a favorite:

1. In the Favorites list, tap **Edit**.
2. At the left side of the favorite, tap the red **Delete** icon.

Alternatively, you can swipe the favorite and then tap the red **Delete** icon that appears as a result of your swiping.

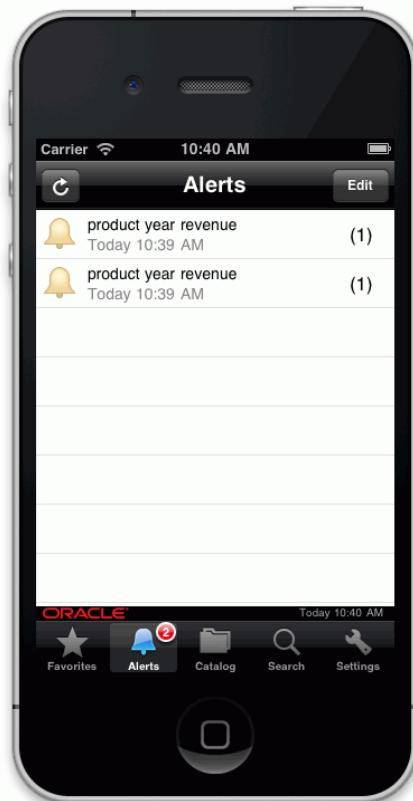
Working with Alerts

When you have alerts to view, a badge (a red-circled number) appears on the **Alerts** icon in the tab bar. The number displayed in the badge varies according to the total number of unread alerts you have. On your mobile device, you can view the same agent-generated list of alerts you would view in the full-browser version of Oracle BI EE. Each alert in your list provides the associated object's name and its last execution time.

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

The Alerts screen is shown in [Figure 3–2](#). This section includes the following topics:

- "Opening Alerts"
- "Clearing Alerts"

Figure 3–2 Alerts Screen on an iPhone

Opening Alerts

You open BI content associated with alerts in the Alerts screen.

To open the BI content associated with an alert:

1. In the tab bar, tap **Alerts**.
The "[Alerts screen](#)" is displayed.
2. In the list of your alerts, tap the row of a particular alert.
The BI content associated with the alert is displayed.

Note: Alerts for all BI content can be displayed in Oracle Business Intelligence Mobile. The Oracle BI Mobile application, however, can render only certain types of BI content. If the BI content associated with an alert is of a type not supported in the Oracle BI Mobile application (such as a Briefing Book), its alert is included in your list of alerts, but you cannot open it. For a list of BI content supported by the Oracle BI Mobile application, see "[Which BI Content is Viewable Using Oracle Business Intelligence Mobile?](#)"

Clearing Alerts

You can clear an alert by swiping its row or by tapping its **Edit** button. When you clear an alert instance in the mobile environment, its elimination is synchronized with the

full-browser version of Oracle BI EE. Likewise, when you clear an alert instance in the full-browser environment, its elimination is synchronized in the mobile environment.

To clear an alert:

1. In the Alerts list, tap **Edit**.
2. At the left side of the alert, tap the red **Delete** icon.

Alternatively, you can swipe the alert and then tap the red **Delete** icon that appears as a result of your swiping.

[[NOTES for 11.1.1.6 rev below, iPad]]

Two ways to clear alerts:

1. Multi-Delete: Touch & hold anywhere inside container, Delete icon appears on upper-left corner of thumbnail for deletion. Outside of Alert region becomes inactive; Tap anywhere to exit the edit mode.
2. Single Delete: Swipe up on anywhere inside container. The container will move up to disappear, meanwhile the alert on the right next to it (if there is one) moves to the position where the one you just removed.

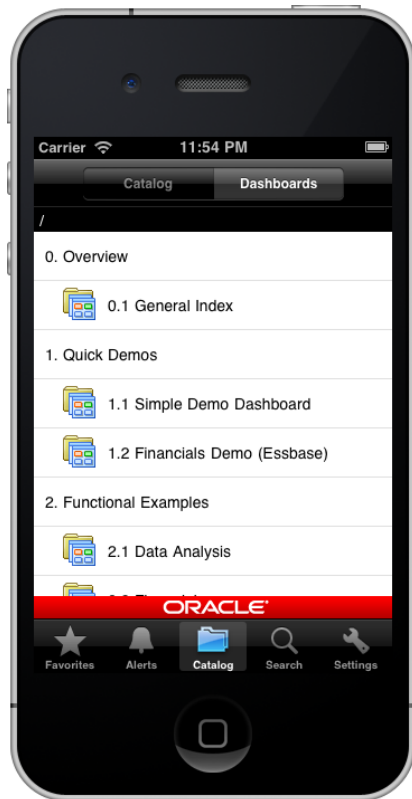
Working with the Oracle BI Presentation Catalog

The Oracle BI Mobile application allows you to view the following objects from the BI Catalog:

- Dashboards
- Analyses
- BI Publisher reports
- Agents
- Scorecards

The Catalog screen is shown in [Table 3–3](#). This section includes the following topics:

- ["Navigating the Catalog"](#)
- ["Opening an Object in the Catalog"](#)
- ["Navigating Directly to Dashboards"](#)

Figure 3–3 Catalog Navigation on an iPhone

Navigating the Catalog

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

To navigate the catalog:

1. In the tab bar, tap **Catalog**.
The "[Catalog screen](#)" is displayed.
2. 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 **Previous** icon in the navigation bar.

Opening an Object in the Catalog

Access the Catalog screen to open an object on your mobile device.

To open an object:

1. In the tab bar, tap **Catalog**.
The "[Catalog screen](#)" is displayed.
2. In the Catalog list, tap a folder or successive folders until you have navigated to the object you want.
3. In the Catalog list, tap the object's row.

Navigating Directly to Dashboards

You can access your dashboards on your mobile device as quickly and easily as you can find them with your desktop browser. The Dashboards tab of the Catalog screen displays a list of all the top-level dashboards to which you have access.

To open a dashboard:

1. In the tab bar, tap **Catalog**.
The "[Catalog screen](#)" is displayed.
2. In the navigation bar, tap **Dashboards**.
Your top-level dashboards are displayed in a list. This list of dashboards is identical to the list you see when logged into Oracle BI EE with the desktop application.
3. In the dashboards list, tap a dashboard or a dashboard page.

Performing Searches

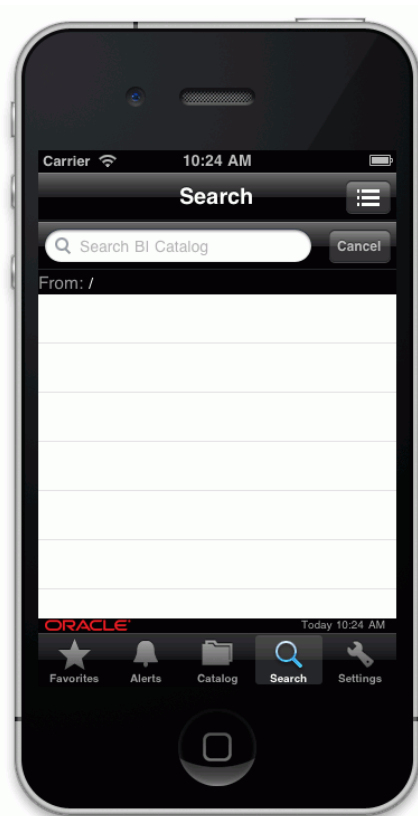
Oracle Business Intelligence Mobile provides the same search behaviors as the full-browser version of Oracle BI EE. When you search with the Oracle BI Mobile application, a keyword search is performed on catalog object names and descriptions. The search is restricted to objects you can view with Oracle Business Intelligence Mobile.

The Search screen displays the search directory below the search criteria field. The search directory represents the base directory from which your search will be performed. The display path for each search result entry is displayed in the search result's row (with the path starting from the search directory).

You can change your search options using the Search Criteria screen. The Search Criteria screen is accessed from the Search screen. For more information, see [Setting Properties for Searches](#).

The Search screen is shown in [Figure 3-4](#).

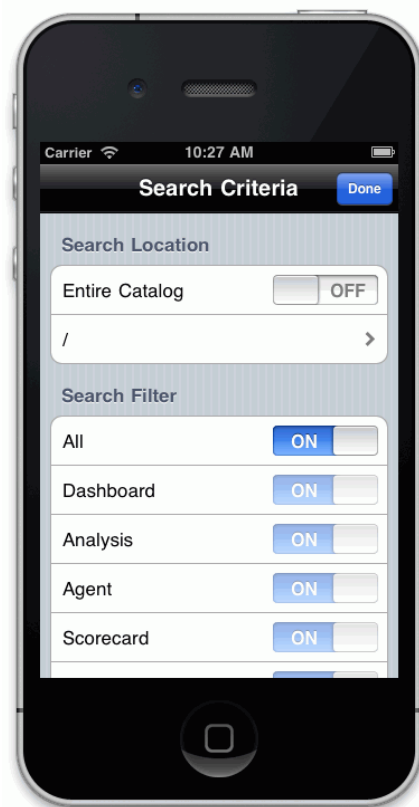
Figure 3–4 Search Screen on an iPhone



Setting Properties for Searches

You access the search options set up for your device using the Search Criteria icon in the Search screen. Tapping the Search Criteria icon brings you to the Search Criteria screen. The Search Criteria screen is shown in [Figure 3–5](#).

Figure 3–5 Search Criteria Screen on an iPhone



To set your search criteria:

1. In the tab bar, tap **Search**.
The "Search screen" is displayed.
2. In the Search screen, tap the **Search Criteria** icon.
The "Search Criteria screen" is displayed.
3. In the Search Location list, do one of the following to set the base search path:
 - Change the base search path by tapping the **Next** character and using the "Search Location screen" to select a folder to search.
 - Tap **ON** to search the entire catalog.
4. In the Search Filter list, specify which catalog objects should be searched by tapping **ON** or **OFF** in the rows of object types.
5. When you are finished, tap **Done** in the navigation bar.

Searching for BI Content

You search for BI content in the "Search screen".

To search Oracle BI EE using the Oracle BI Mobile application:

1. In the tab bar, tap **Search**.
The "Search screen" is displayed.

2. In the **Search** field at the top of the Search screen, 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 full-browser version of Oracle BI EE, including usage of special characters. Search criteria are case-insensitive.

3. Tap the **Search** button.

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

Working with BI Content

In the content area of your device's screen, you can view BI content using the standard iPhone and iPad browser interactions, such as panning and zooming. You can rotate the screen to obtain a fuller view, hiding the top and bottom bars. As with any iPhone or iPad application, there is no dragging of content and no right-click functionality.

Reviewing the standard iPhone and iPad browser interactions, the interactions you can do include the following:

- To scroll, drag up or down.
- To scroll quickly, flick.
- To quickly scroll to the top of a list or view, tap the Status bar at the top of the screen.
- To pan the entire view, drag one finger.
- To scroll a dropdown list, drag two fingers.
- To zoom in or out, pinch your fingers together or apart.
- To zoom in once, do a single tap.
- To zoom out once, do a double tap.

Viewing BI Content

While viewing BI content, you can tap the Menu icon in the title bar to access an Action menu. Menu items vary based on the type of BI content you are viewing. This section describes the actions you can take from the Action menu:

- **Refresh.** See "[Refreshing BI Content](#)".
- **Properties.** See "[Viewing Properties of BI Content](#)".
- **Apply Customizations.** See "[Applying Saved Customizations](#)".
- **Desktop Layout.** See "[Specifying the Layout for BI Content](#)".
- **Mobile Layout.** See "[Specifying the Layout for BI Content](#)".
- **Add Favorite.** See "[Adding BI Content to Favorites](#)".

Refreshing BI Content

You can refresh analyses and dashboards while viewing them on the mobile device.

To refresh BI content:

1. Tap the Menu icon in the title bar while viewing content.

Note: On the iPad, the Menu icon is in the navigation bar.

2. In the Action menu, tap **Refresh**.

The query is rerun and the content is refreshed.

Viewing Properties of BI Content

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

To view properties for BI content:

1. Tap the Menu icon in the title bar while viewing content.

Note: On the iPad, the Menu icon is in the navigation bar.

2. In the Action menu, tap **Properties**.
3. Review the catalog information.
4. When finished, tap **Done**.

Applying Saved Customizations

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

To apply saved customizations to a dashboard:

1. Tap the Menu icon in the title bar while viewing content.

Note: On the iPad, the Menu icon is in the navigation bar.

2. In the Action menu, tap **Apply Customizations**.
3. In the picker view that is displayed, tap the named customization that you would like to apply to the current dashboard.

The dashboard is shown with the prompt settings or drill state that was saved to the named customization.

Specifying the Layout for BI Content

By default, when you view BI content, the catalog object you see is displayed for the active analysis or dashboard according to what has already been specified in the Oracle BI Mobile application's layout setting. You have the option to change this layout of columns by making a change in the Action menu as described in this section.

You can move from a layout that is optimized for a small screen (single column view) to a full dashboard layout.

When viewing BI content, you can easily move from the default layout to the full dashboard view.

To specify the layout for BI content:

1. Tap the Menu icon in the title bar while viewing content.

Note: On the iPad, the Menu icon is in the navigation bar.

2. In the Action menu, perform one of these actions:
 - To specify full dashboard layout, tap **Restore Layout**.
 - To specify the default device-optimized layout, tap **Mobile Layout**.

Adding BI Content to Favorites

While viewing BI content, you can mark it as a favorite with two taps. If the BI content has already been added to your favorites list, you do not see the **Add to Favorites** option in the Action menu for the BI content.

To add BI content to your list of favorites:

1. Tap the Menu icon in the title bar while viewing content.

Note: On the iPad, the Menu icon is in the navigation bar.

2. In the Action menu, tap **Add to Favorites**.

Note: BI content can be removed from favorites only in the Favorites screen. See "[Removing Favorites](#)".

Emailing BI Content

If you have set up an email account on your iPhone or iPad, you can embed links to dashboards and analyses in your emails. The Oracle Business Intelligence Mobile application allows you to email a link to the BI content you are viewing.

When viewing an analysis or a dashboard page, tap the Email icon to launch an email window; a link to the analysis or dashboard is then embedded in the body of the email.

On the iPad, the Email icon appears at the bottom of the Oracle BI Mobile application.

On the iPhone, tap the Menu icon to access the Email icon.

Working with Analyses and Dashboards

On the iPhone, by default, analysis and dashboard content is displayed in a manner optimized for the mobile device. Content is stacked vertically, and sized to fit the screen horizontally. In this default display, called Mobile Layout, a single column layout is used. You can disable the default display setting to view analysis and dashboard content as defined in Oracle BI EE.

On the iPad, by default, analysis and dashboard content is displayed as it was designed for the full-browser version of BI EE.

These initial default settings can be changed in two places, depending on whether you want to reset the default behavior for general use or simply change the view for the currently open analysis or dashboard. To change the display setting for viewing of BI content, see [Specifying the Layout for Oracle Business Intelligence Mobile](#).

With Oracle Business Intelligence Mobile, you can see all the same views provided by the full-browser 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 view graphs as static images. Graphs are not interactive in the Oracle BI Mobile application. That is, you cannot perform actions such as drill or zoom directly on the graphs.

In gauges, use of the slider prompt is slightly different. You cannot change slider prompts by interactively dragging, so instead, you tap the text value and textually change it.

A typical view of BI content on an iPhone is shown in [Figure 3-6](#).

Figure 3-6 BI Content on an iPhone

Top UPCs			
Products	Sales Measures		
UPC	Dollars	Year Ago Dollars	% Chg Year Ago Dollars
McCloskey Hunter Green Flat	\$674,395	510,333	32%
McCloskey Clear Flat	\$184,700	136,963	35%
McCloskey Clear Satin	\$324,847	238,020	36%
Enterprise Flint Gloss	\$383,485	273,447	40%
McCloskey White Flat	\$234,464	160,925	46%
Enterprise Burgundy Gloss	\$161,607	72,769	122%
McCloskey True Blue Flat	\$425,801	190,871	123%
Valspar Siamese Kitten Flat	\$225,546	87,950	156%
Enterprise	\$50,978	22,206	160%

A typical view of BI content on an iPad is shown in [Figure 3-7](#).

Figure 3–7 BI Content on an iPad

P1 Product	TDS Per Name Year	1- Revenue
V5x Flip Phone	2008	1199416.82
	2009	1083839.07
	2010	1374161.19
CompCell RX3	2008	654557.32
	2009	700340.41
	2010	905588.01
Touch-Screen T5	2008	898946.32
	2009	739113.36
	2010	966298.45
KeyMax 5-Phone	2008	780569.79
	2009	755319.68
	2010	827265.96
SoundX Nano 4Gb	2008	827196.83
	2009	734276.76
	2010	915511.24
MicroPod 60Gb	2008	1733901.78
	2009	1469915.73
	2010	1735066.22
Bluetooth Adaptor	2008	574316.82
	2009	504000.72
	2010	606173.61
MP3 Speakers System	2008	321835.08
	2009	315281.75
	2010	377107.08
MPEG4 Camcorder	2008	1252952.84
	2009	1209342.73
	2010	1532744.35
7 Megapixel Digital Camer	2008	1333823.91
	2009	1017965.94
	2010	1388274.80

Working with Oracle BI Publisher Content

You view Oracle BI Publisher content in the Oracle BI Mobile application in much the same way you view it in the full-browser version of Oracle BI EE: you can open it straight from the Oracle BI catalog. Viewing of BI Publisher content is interactive in the Oracle BI Mobile application. You can apply parameters for BI Publisher reports as well.

You can view read-only catalog information about the active report in the ["Login screen"](#). For more information, see ["Applying Saved Customizations"](#).

Working with Scorecard Content

You view scorecard content in the Oracle BI Mobile application differently from how you view it in the full-browser version of Oracle BI EE. The main differences are that in the Oracle BI Mobile application, you view scorecard content in a tabular format, and drilling is not supported.

You can open scorecard content straight from the Oracle BI Presentation Catalog. You can view KPIs. In dashboards, all Flash-based views (such as Strategy Map, Strategy Tree, Cause & Effect Map, Custom View) are rendered in tables as watchlists.

Working with Alerts and Agents

You can view your list of active alerts in the Alerts screen. The list has all the same entries as the full-browser version.

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

For more information, see:

- ["Opening Alerts"](#)

As with the full-browser version, you can execute agents in the Oracle BI Mobile application through a schedule, or explicitly from the catalog entry for the agent.

To run an agent from the catalog:

1. In the Catalog screen, navigate to the agent you want to run.
2. Tap the agent to access an Action menu.
3. In the Action menu, tap **Run Agent**.

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

A

User Interface Reference for Oracle Business Intelligence Mobile

This appendix contains comprehensive reference information for each user interface item (dialogs, panes, editors, and so on). Topics are provided in alphabetical order by user interface item.

Alerts screen

Use this screen to:

- View a list of your alerts
- View the content for an alert
- Clear an alert

For more information, see:

- ["Working with Alerts"](#)

Components

Alerts

Displays a list of your active alerts, including the name as well as the last delivery date and time.

To view the latest occurrence of an alert, tap its row. The alert is displayed, and you can view its properties as well as its content.

Refresh

Use this icon to refresh your list of active alerts.

Edit

Use this button to display a delete icon for the alert.

Delete

Use this icon to clear the alert and remove it from the alerts list.

Done

Use this button to finish editing and return to the alerts list.

BI Content screen

Use this screen to:

- View BI content.
- Interact with BI Content (for example: drill, use action links, and so on).
- Access the Action menu in order to refresh BI content, see its properties, or change its layout.

For more information, see:

- ["Working with BI Content"](#)

Components

Title

Use this title in the navigation bar to see the catalog object's name. For dashboard content, when there are multiple dashboard pages, the page name displays just below the dashboard name in the title. In this context, tapping the title displays a spinner control (picker view) from which to navigate to one of the dashboard's pages.

Previous

Use this icon to navigate backward.

Menu

Use this icon to access the Action menu.

Refresh

Use this icon to refresh the BI content.

Properties

Displays the Object Properties screen, where you view read-only information about the content.

Desktop Layout

Use this button in the Action menu to change the layout from the *Optimized for Mobile* option to the layout of the full-browser version of Oracle BI EE.

Optimize Layout

Use this button in the Action menu to specify the default device-optimized layout.

Catalog screen

Use this screen to view, navigate, and open catalog objects.

For more information, see:

- ["Working with the Oracle BI Presentation Catalog"](#)

Components

Catalog

Use this tab to navigate the catalog.

Dashboards

Use this tab to navigate the catalog specifically for dashboards.

Previous

Use this icon to navigate backward.

Navigation path

Use this to see the full path of the folder to which you have navigated.

Agents: Action menu

Use this list to view your catalog objects.

Run Agent

Use this button to execute the current agent.

Add to Favorites

Use this button to add the current agent to your favorites.

Properties

Use this list to view agent properties.

Favorites screen

Use this screen to:

- View your list of favorite catalog objects.
- Open a favorite catalog object.
- Remove a favorite.

For more information, see:

- ["Working with Favorites"](#)

Components

Favorites

Use this list to view your favorite catalog objects.

Edit

Use this button display a delete icon for the favorite.

Delete

Use this icon to delete the favorite and remove it from the favorites list.

Done

Use this button to finish editing and return to the favorites list.

Login screen

Use this screen to log in to the Oracle BI Mobile application and add a server configuration.

For more information, see:

- ["Starting Oracle Business Intelligence Mobile"](#)

Components

Add

Use this blue icon to add a server configuration.

Login

Use this button to log in to the Oracle BI Mobile application.

Object Properties screen

Use this screen to view information about selected BI content.

For more information, see:

- ["Viewing BI Content"](#)

Components

Properties

Use this list to view read-only information about the object including its type, owner, last modified date, location, and description.

Done

Use this button to leave the screen and navigate back to the BI content you were viewing.

Search screen

Use this screen to:

- Enter a search term.
- View the file location you are searching.
- Access the Search Criteria screen.

For more information, see:

- ["Performing Searches"](#)

Components

Search Criteria icon

Displays the ["Search Criteria screen"](#), where you specify the criteria for the search.

Search

Use this field to enter the term for which to search.

Cancel

Use this button to cancel the search.

Navigation path

Use this path to view the file location to be searched.

Search Criteria screen

Use this screen to specify criteria for your search and to access the Search Location screen.

For more information, see:

- ["Performing Searches"](#)

Components

Search Location

Displays the ["Search Location screen"](#), where you select the folder you want to search.

Entire Catalog

Use this toggle (select ON or OFF) to set whether the entire catalog is to be included in the search. If the root folder to be searched is specified (in the row below), the Entire Catalog switch is set to OFF.

/

Use this root folder button to access the ["Search Location screen"](#) screen.

Search Filter

Use this list to limit the search to a particular content type.

On/Off

Use these toggles to control searching on dashboards, analyses, agents, scorecards, and reports.

Search Location screen

Use this screen to locate the folder on which you want to perform a search.

For more information, see:

- ["Performing Searches"](#)

Components

Search Location

Use this list to select a folder for searching or to navigate further within the selected folder.

Next

Use this blue arrow icon to navigate further down in folders while looking for your chosen search location.

Previous

Use this icon to navigate backward.

Done

Use this button to end your selecting of a search location.

Server Setting screen

Use this screen to configure your server settings and modify other options.

For more information, see:

- ["Configuring Oracle Business Intelligence Mobile"](#)

Components

Name

Use this to give the server setting a name. Once set, this name cannot be changed.

Host

Use this to specify either the IP address or the fully qualified host name of the computer on which Presentation Services is running.

Port

Use this field to specify the port number for the server, for example, 7001.

SSL

Use this toggle to select ON or OFF.

SSO

Use this toggle to select ON or OFF.

Username

Use this field to enter your username for the server connection.

Password

Use this field to enter the password for the server connection.

Save Password

Use this 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 device. If set to OFF, you will be prompted to enter your password each time you launch the application.

Device Locale

Use this toggle to select ON or OFF. If set to ON, the application uses the device's settings for user interface language and region format. If set to OFF, language and region formats are based on the user preferences for Presentation Services. This toggle affects BI content only; setting it to OFF has no bearing on the application shell user interface.

Analytics Path

Use this field to specify the Analytics path, for example, /analytics/saw.dll

Publisher Path

Use this field to specify the Publisher path, for example /xmlpserver

Delete Server

Use this button to delete the current server connection.

Settings screen

Use this screen to configure your settings and modify other options.

For more information, see:

- ["Configuring Oracle Business Intelligence Mobile"](#)

Components

Mobile Layout

Use this toggle to change the layout of BI content on your device from *Optimize Layout* (for mobile viewing) to *Desktop Layout* (full-browser version).

Console Logging

Use this toggle to activate or deactivate console logging.

Documentation

Use the blue Next icon in this row to access documentation on Oracle Business Intelligence Mobile (this guide) as well as other documentation for Oracle BI EE.

Server Configuration

Use this list to select the server for Presentation Services.

Version

Use this information to see which version of Oracle BI EE the Oracle BI Mobile application is accessing.

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