Oracle® Fusion Middleware

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

11*g* Release 1 (11.1.1)

E25318-12

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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.

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

E25318-12

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Preface

This guide contains information about using Oracle Business Intelligence Mobile (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.

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 BI Enterprise Edition (Oracle BI EE).

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.

Audience

This document is intended for anyone who plans to organize and present data for making critical and timely business decisions using , 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 that have purchased support 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:

- *Oracle Fusion Middleware Release Notes for Oracle Business Intelligence Mobile for Apple iOS and Google Android*

- Oracle Business Intelligence information in the Oracle Fusion Middleware release notes for your platform

- *User's Guide for Oracle Business Intelligence Enterprise Edition*

In addition, the Oracle Learning Library contains Oracle Business Intelligence-related online training resources.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	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 (Oracle BI Mobile) 11 *g* Release 1 (11.1.1).

Topics:

New Features in Recent Minor Updates of Oracle BI Mobile 11*g* Release 1 (11.1.1.7)

This section describes new features in recent updates of Oracle Business Intelligence Mobile (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. 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 Oracle 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 11*g* Release 1 (11.1.1.7)

This topic describes the new features for Oracle BI Enterprise Edition (Oracle BI EE) 11*g* 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 Business Intelligence Mobile (Oracle BI Mobile). 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 (Oracle BI 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 EE with Oracle Endeca Server. See Performing Searches.

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

There are no new features for Oracle Business Intelligence Mobile (Oracle BI Mobile) in Release 11.1.1.6.0. Release 11.1.1.6.2 of Oracle BI 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 section describes new features for Oracle BI Enterprise Edition (Oracle BI EE) 11*g* Release 1 (11.1.1.6).

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 BI 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 the 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**. If you are using an iPad that supports multitasking (that is, a device running iOS 4.2 or later), then you can wirelessly print BI content. 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. While viewing BI content, tap the **Options** button and then tap **Print**. 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.

- **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).

- **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 Working with Local Content.

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

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

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

Release 11.1.1.5 of Oracle BI Enterprise Edition (Oracle BI EE) introduces Oracle BI 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 Oracle 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 Oracle 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.

1

Introducing Oracle Business Intelligence Mobile

This section describes Oracle Business Intelligence Mobile (Oracle BI Mobile), an application for the Apple iPad and iPhone.

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 BI Mobile?

Oracle BI Mobile allows you to view and interact with Oracle BI content on applicable mobile devices.

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 can try out the application at any time by accessing the public demo server after installing Oracle BI Mobile. 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 Enterprise Edition (Oracle BI EE) that is configured and running.

The following image displays a simple dashboard on an Android device:
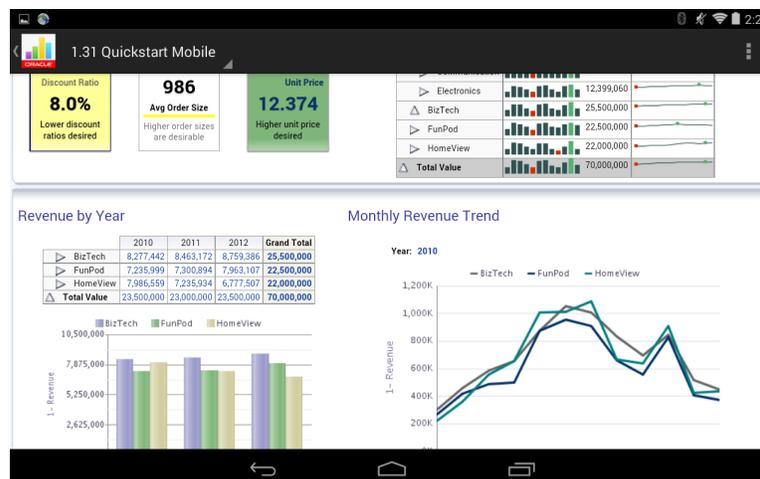
The following image displays a simple dashboard on an iPad:
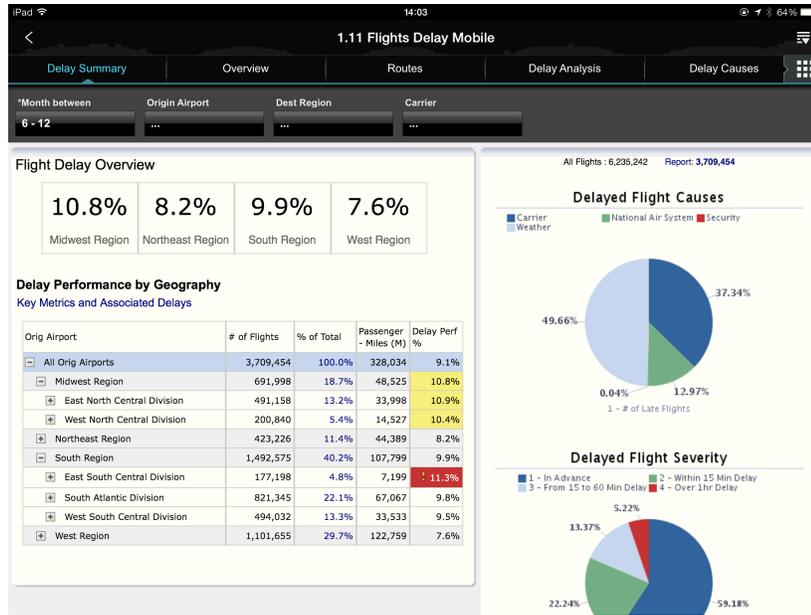
Which BI Content is Viewable Using Oracle BI Mobile?

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 format PDF. When you open a PDF file, you are prompted to choose the application in which to view it.

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).

In analyses and dashboards, the Oracle BI Mobile application provides all analytic actions (such as drill, action link, prompts, and so on). For Oracle BI Mobile, 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.

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Getting Started with Oracle BI Mobile

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

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

Use these instructions to download Oracle BI Mobile.

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

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 Mobile 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 Homescreen on your device.

> **Note:**
>
> If the Oracle 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 can 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.

Cancel	Server Settings	Save
	General	Advanced
Device Locale		⬤
Analytics Path	/analytics/saw.dll	
Publisher Path	/xmlpserver	
MAD Path	/mobile	
VA Path	/va	
	Share Connection	
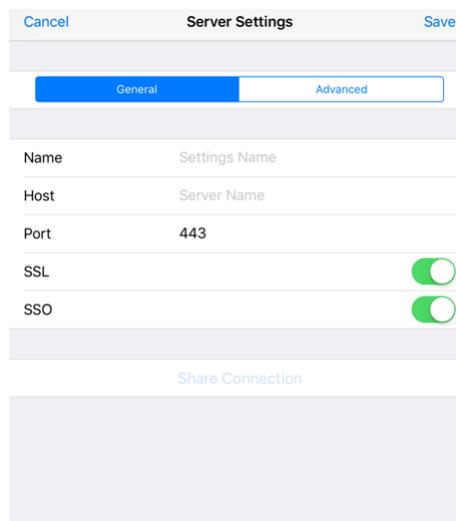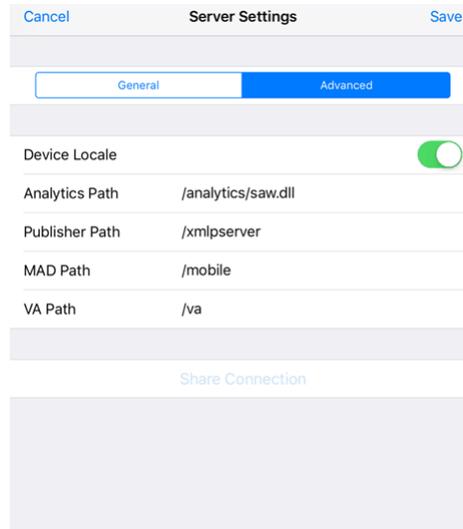
To launch Oracle BI Mobile for the first time:

1. On your device's Home screen, tap the **Oracle BI 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. Enter your initial server configuration settings as follows:

 a. For iPad, tap the icon with the plus sign in the Servers region.

 b. For iPhone, tap the plus sign in the title area of the Connection screen.

 The Server Settings screen is displayed.

4. In the Server Settings screen, specify the following:

 General tab

 • **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 BI 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 BI 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 BI 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 Enterprise Edition (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`.

Advanced tab

- **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 Oracle BI Publisher content.

- **MAD Path**: For example, `/mobile`.

- **VA Path**: For example, `/va`.

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**. 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.

> **Tip:**
>
> 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

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.

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. See Sharing BI Content

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 BI 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

The Oracle BI Mobile demo server provides a full set of sample content with which you can work.

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. 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**.

   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**.

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.

Navigation of Oracle BI Mobile on iPad

You navigate the Oracle BI Mobile application using the **Navigation** bar. If you swipe once to the right on the **Navigation** bar, you can view the titles of each view. Tap the icon that represents the view you want to go to. In the Settings view, you can choose the view that you want your instance of Oracle BI Mobile to start on.
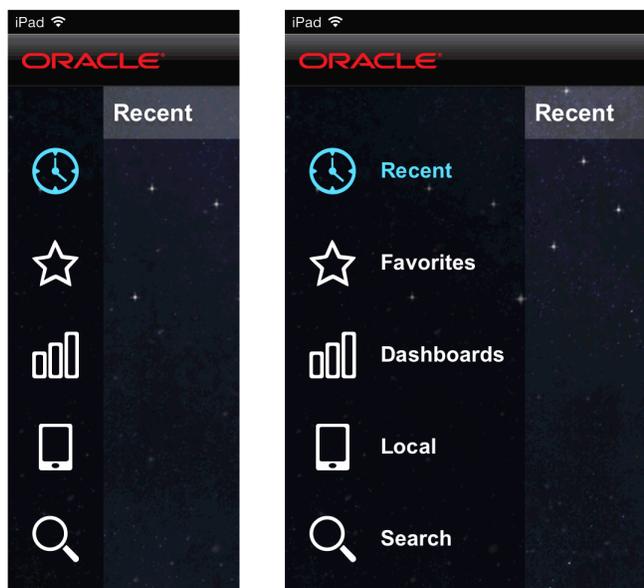
Navigation of Oracle BI Mobile on iPhone

On the iPhone, tap the **Navigation** icon (circled in red in the following image) to access the **Navigation** bar. The second image displays the navigation bar on the iPhone after you have tapped the **Navigation** icon.
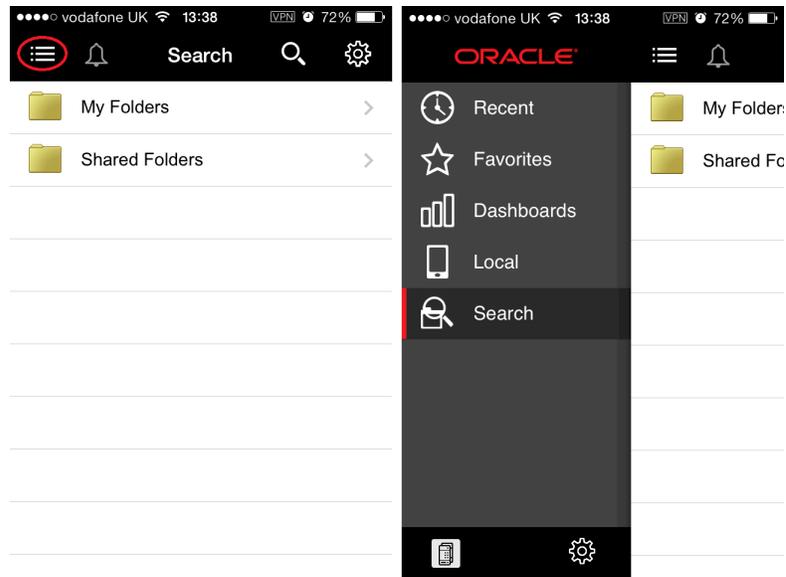
The **Navigation** bar can take you to the various views within the Oracle BI Mobile application: Recent, Favorites, Dashboards, Local (for locally-saved content), and Search. If you have previously launched Oracle BI Mobile and have opened BI content, your recently viewed items are displayed for you in the Recent view.

Recent View in Oracle BI Mobile

The following image displays an instance of the Oracle BI Mobile application that launches in the Recent view.

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, then 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, then 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 the section **Navigation of Oracle BI Mobile on the iPhone**.

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 iPad gestures that are useful in the Oracle BI Mobile application, see User Interface Reference for 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.

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

- Sharing Connections

- 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, tap the **Add Server** icon (the one with the plus sign).
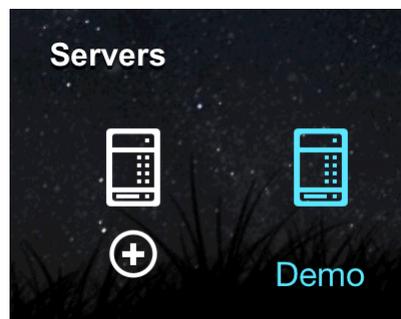
4. In the Server Settings screen, complete the fields. See the Server Settings screen fields described in Launching Oracle BI Mobile for the First Time.

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, double-tap the icon for the server connection that 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, 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.

Sharing Connections

You can share your connections with other users of the Oracle BI Mobile app.

Use the **Share Connection** button when editing or creating connections. This shares an URL that enables another user to add that same connection to their app

Configuring Start-up Content

Configure a setting to select a default view or 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. (Optional) If your start-up choice is Recent or Favorites, then select your preferred view type as `Carousel`, `List`, or `Grid`.
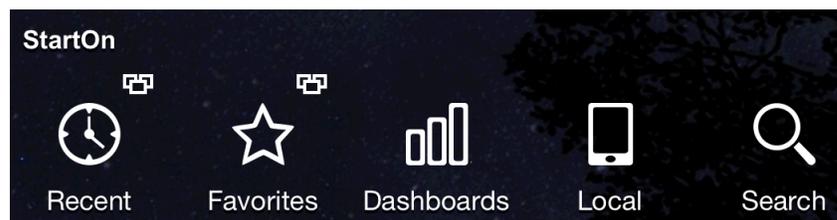
- To set a specific catalog object as your start-up content, tap the **Start-up Content** icon.
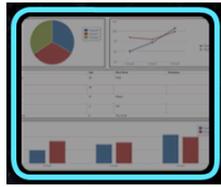
  a. In the list of your dashboards, scroll to find the dashboard of your choice, then tap it.

  b. 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

You can take certain measures to address security of your BI content.

Topics:

- 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

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. See Using the Security Toolkit for Mobile Device Management.

Using the Oracle BI Mobile Security Toolkit for Mobile Device Management

The Oracle BI Mobile Security Toolkit provides a repackaged, unsigned, and uncertified version of the Oracle BI Mobile application, delivered at the library level.

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 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.

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. See Saving Content Locally and 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**. See Default Presentation Services Privilege Assignments in *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 `oraclebimobile`, the syntax for the launch URL is the following:

```
oraclebimobile://com.oracle.obimobile/configure?xml=http://
myserver:myport.mycompany.com/conf.xml
```

Another example of the syntax, with variables for your organization's server configuration details in brackets, is the following:

```
oraclebimobile://com.oracle.obimobile/configure?xml=http://
[server]:[port]/[path]/[filename].xml
```

Use the sample provided in the example as a model to create your own `conf.xml` file. Your own version of the configuration file can be used to send configuration details to Oracle BI Mobile. When launched on the device, the file's properties are then applied to the user's Oracle BI Mobile application.

When using this XML file to implement server provisioning through URL, you are utilizing the URL launch mechanism supported in iOS.

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

The XML file you create should use Apple's standard property list (plist) format.

Example: Sample `conf.xml` File

```
<plist version="1.0">
<dict>
<key>obim</key>
<dict>
<key>servers</key>
<array>
<dict>
<key>analyticsPath</key>
<string>/analytics/saw.dll</string>
<key>host</key>
<string>hostname.company.com</string>
<key>locale</key>
<true/>
<key>name</key>
<string>Friendly Server Name</string>
<key>port</key>
<integer>7780</integer>
<key>ssl</key>
<false/>
<key>sso</key>
<false/>
<key>xmlpPath</key>
<string>/xmlpserver</string>
</dict>
<dict>
<key>analyticsPath</key>
<string>/analytics/saw.dll</string>
<key>host</key>
<string>newhostname.company.com</string>
```

```
<key>locale</key>
<true/>
<key>name</key>
<string>Friendly Server Name 2</string>
<key>port</key>
<integer>7780</integer>
<key>ssl</key>
<false/>
<key>sso</key>
<false/>
<key>xmlpPath</key>
<string>/xmlpserver</string>
</dict>
</array>
<key>settings</key>
<dict>
<key>debug</key>
<false/>
<key>optimized</key>
<true/>
</dict>
</dict>
</dict>
</plist>
```

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 *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 the following to add settings:

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

```
            WLProxySSLPassThrough ON
        </Location>
```

- For a clustered instance of a proxy module, use the following to add settings.

```
<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>
```

4. Save your changes to the **mod_wl_ohs.conf** file and exit the text editor. Restart Oracle HTTP Server.

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.

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.

As the 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 of Settings, in the **Console Logging** row, tap the toggle to change the setting from OFF to ON.

3

Using Oracle BI Mobile

Use these references to work with Oracle Business Intelligence Mobile (Oracle BI Mobile).

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

- Sharing BI Content

> **Note:**
>
> This section 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 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**.

The following image displays 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.
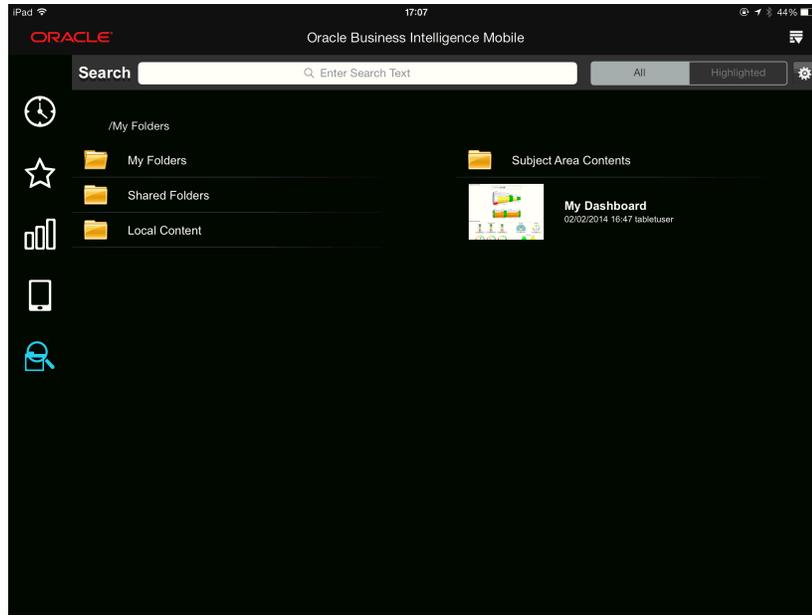
You use the **All/Highlighted** toggle at the top of the screen to specify which parts of the catalog to be included in your search. When you set the toggle to **All**, the search is performed in all folders (Local, Shared Folders, My Folders). When you set the toggle to **Highlighted**, the search is 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 Touch Gestures Used in Oracle BI Mobile .

Switching Screen Orientation Between Landscape and Portrait

While holding the iPad, you can quickly switch between the landscape mode and the 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 between the landscape mode and the portrait mode, simply rotate the iPad in your hands.

> **Tip:**
>
> 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 that you want to open, tap it.

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

You can choose between three display styles (carousel-style display, list-style display, grid-style display) 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.

The following image shows the carousel-style display of the Recent view. Note that the toggle's highlighted icon is the **Carousel-style Display** icon.
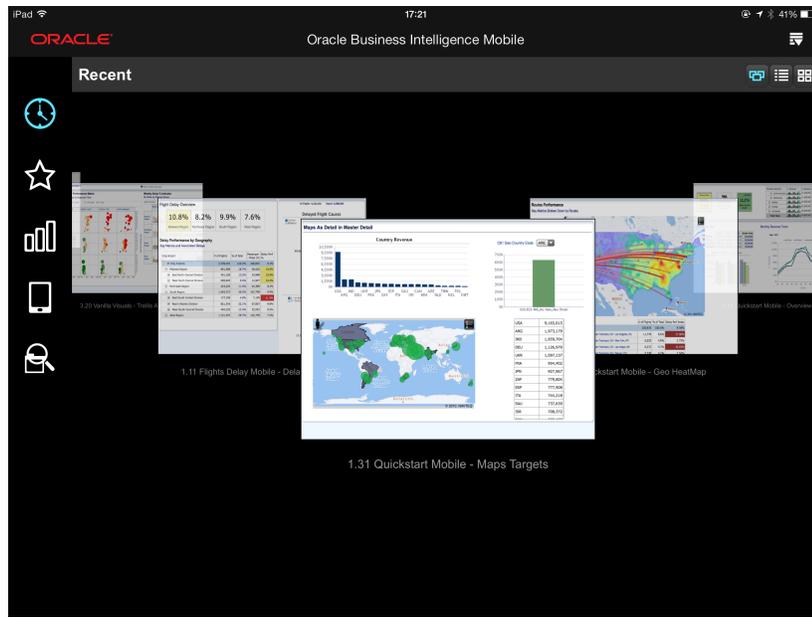
The following image shows the list-style display of the Recent view. Note that the **List-style Display** icon is displayed in the toggle at the right edge of the **Display** bar.
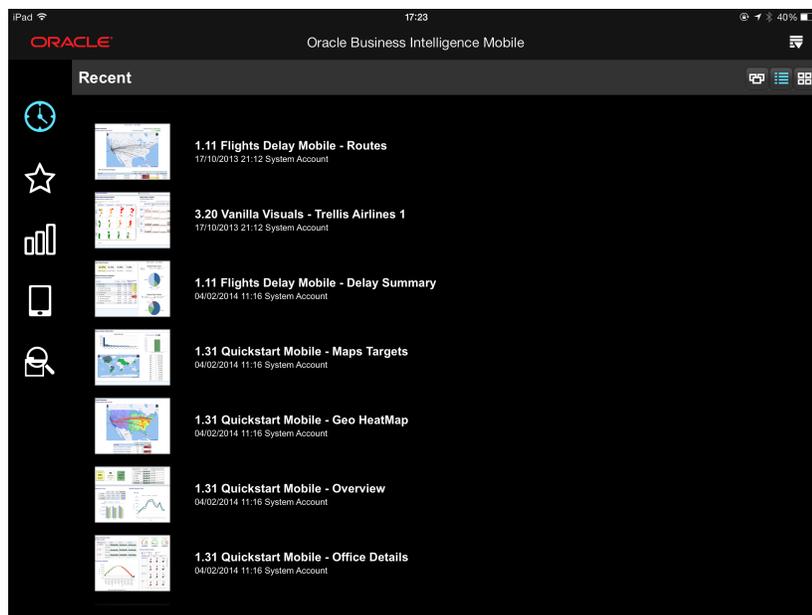
The following image shows the grid-style display of the Recent view. Note that the **Grid-style Display** icon is displayed in the toggle at the right edge of the **Display** bar.
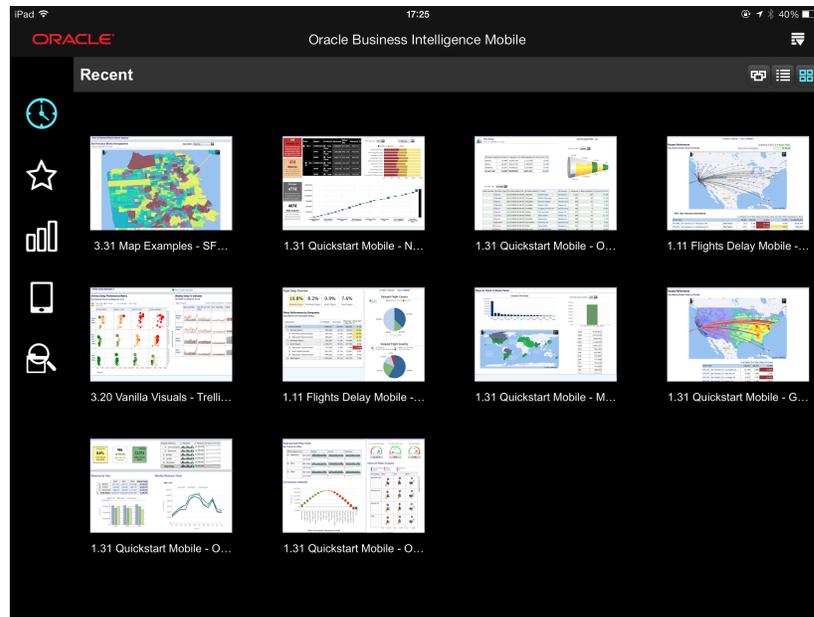
Navigating Directly to Dashboards

You can access your dashboards on your mobile device as quickly and easily as you can in your desktop version of Oracle BI Enterprise Edition (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 Oracle BI 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.

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

Working with the Back Arrow and the Previous Icon

Tapping the **Back** arrow and **Previous** icon navigates you backward to your previous / starting view as applicable.

Here is 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:
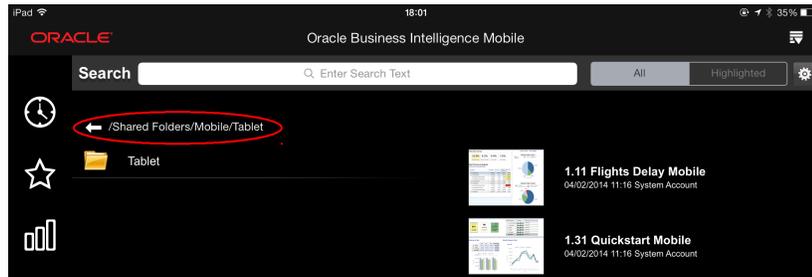
When you have opened a catalog object, your screen includes a **Previous** icon at the top left in the title bar.
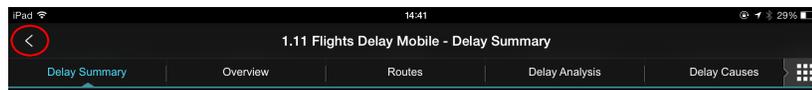
Tapping the **Previous** icon navigates you backward to your starting view, for example, to your Recent view if that is your default starting view.

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. 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 that 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.

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.

This section includes the following topics:

- Adding Favorites in Oracle BI Mobile

- Synchronizing Mobile Favorites with Desktop Favorites

Adding Favorites in Oracle BI Mobile

Use these instructions to open favorites list and add to or remove objects from your favorites list.

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. See Organizing Favorites in *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

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

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.

Topics:

- Saving Content Locally

- Working with 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 Oracle 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

Use these instructions to view, delete, and refresh your 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 an Oracle 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

The Oracle BI Mobile Security Toolkit enables 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. See Disabling Local Content .

Disabling Local Content

In the desktop version of Oracle BI EE, administrators can disable access to the Save-Locally feature.

To disable the Save-Locally feature, go to the Administration: Manage Privileges page and restrict the privilege called **Enable Local Content**. See Default Presentation Services Privilege Assignments in *Security Guide for Oracle Business Intelligence Enterprise Edition*.

The given example shows how the **Enable Content Privilege** can be disabled on a per-user basis, or by role, such as BI Consumer.
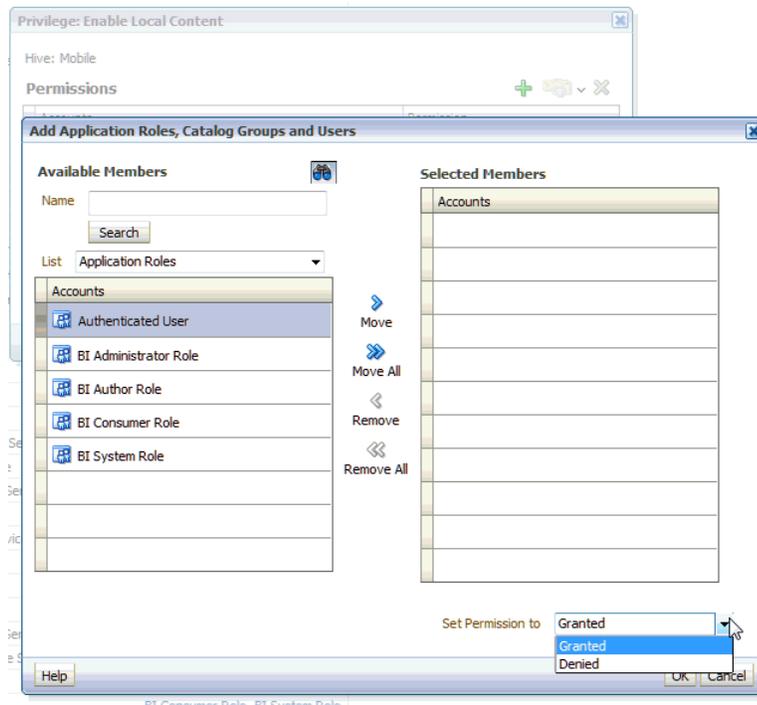
Performing Searches

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, then 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.

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).
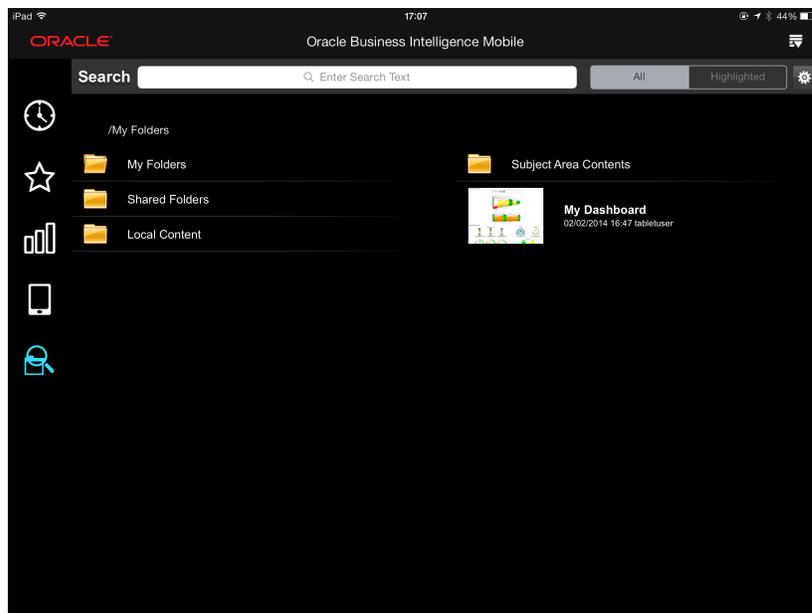
You can change your search options using the Search Settings screen. The Search Settings screen is accessed from the Search view using the **Gear** icon beside the **All/ Highlighted** toggle. See Adjusting Search Settings.

If your desktop version of Oracle BI EE is integrated with Oracle Endeca Server, then on some dashboard icons in your search results list, you may see a tiny **Funnel** icon, as circled in red in the following image. 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.
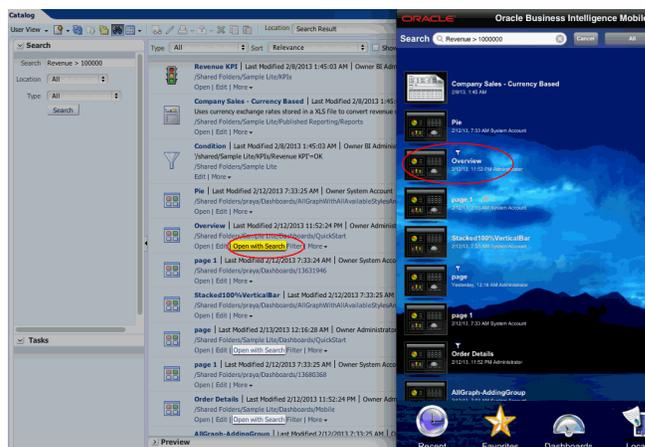
Navigating the Search View

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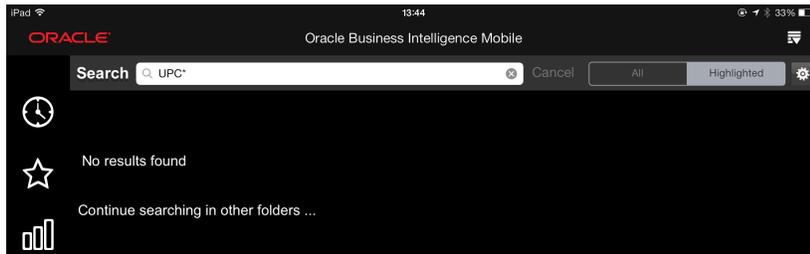
You can cancel a search that is in progress by tapping the **Cancel** button.

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 can 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.
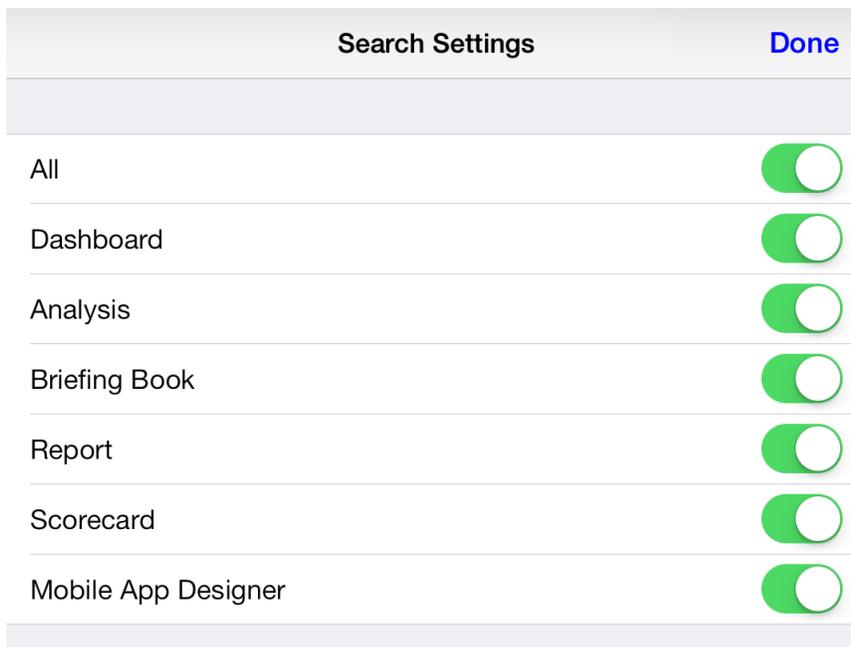
To adjust the search settings:

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

Use these instructions to search for BI content and to determine the location of an object in the catalog.

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 *User's Guide for Oracle Business Intelligence Enterprise Edition*.

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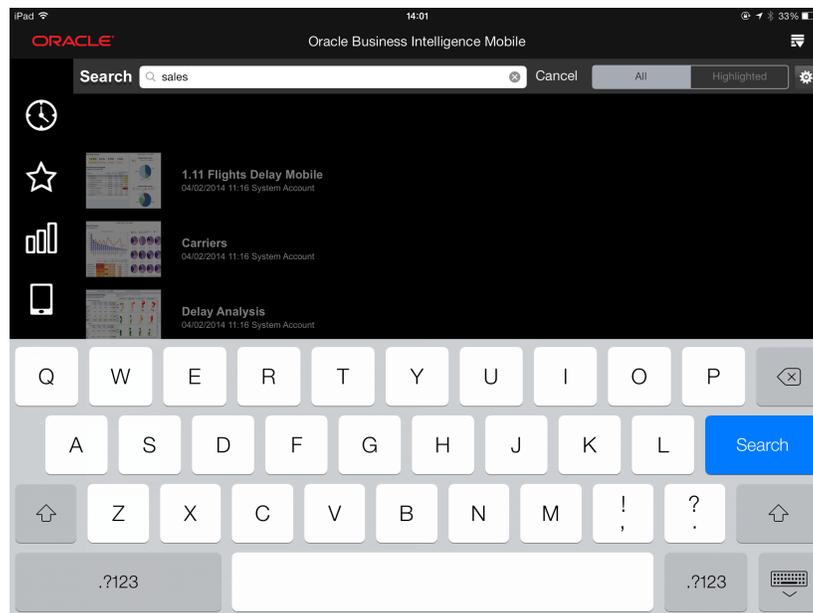
   Your search is performed on the server, and the search results are displayed in a list. Tap a row to open BI content.

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 **Search** icon.

2. Tap **Properties**.

   The object's location is specified in the **Location** row of the **Properties** overlay.

3. For location paths that are long, tap the **Next** icon to view the full path.

4. On the **Properties** overlay, swipe down with one finger to return to the object.

Using Spotlight Search

You can search for media, apps, emails, contacts, messages, reminders, calendar events, and similar content anywhere on your device by swiping down on the Home screen icons or swiping right from the Home screen.

These swiping actions take you to the Spotlight **Search** field. For spotlight search to work with Oracle BI Mobile, you have to have opened the report one time in Oracle BI Mobile. Once opened, Oracle BI Mobile adds a reference to that report into spotlight search and then that report can be found and opened outside the Oracle BI Mobile app.

Sharing BI Content

Share links to reports, images, PDFs, and HTML files based on the user options, content type, and native apps installed on your device.

The default sharing options are based on your share-type setting in the applicable app. The Share dialog is the default iOS Share dialog and the apps displayed in this dialog are based on what is installed on your device.

To share BI content:

1. While viewing BI content, tap the **Share** icon.

   The Share dialog is displayed.

2. Select the apps to which you want to share your content.

4

Working with BI Content

These references provide information for using the Oracle Business Intelligence Mobile (Oracle BI Mobile) application to work with specific object types within the catalog.

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 Enterprise Edition (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.

The following image displays an example of BI content on an iPad:
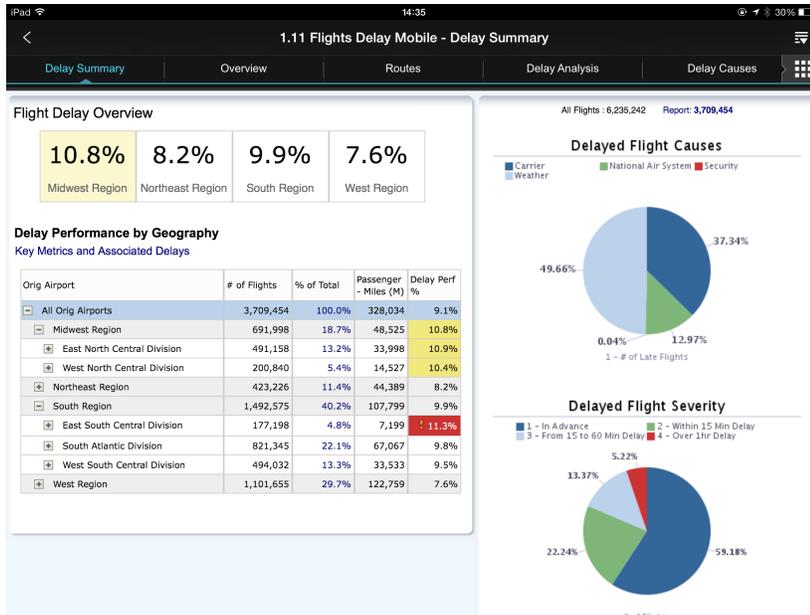
When a dashboard has multiple pages, tap the **Page** icon (at the right side of the page-title area) to access an overlay showing the available pages and tap again to navigate to one of them. You can also swipe through the page titles to find the page you want, and then tap it to open it.

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.

The following image displays an example of a graph from the dashboard shown in the earlier image, expanded to use the full screen of the iPad.
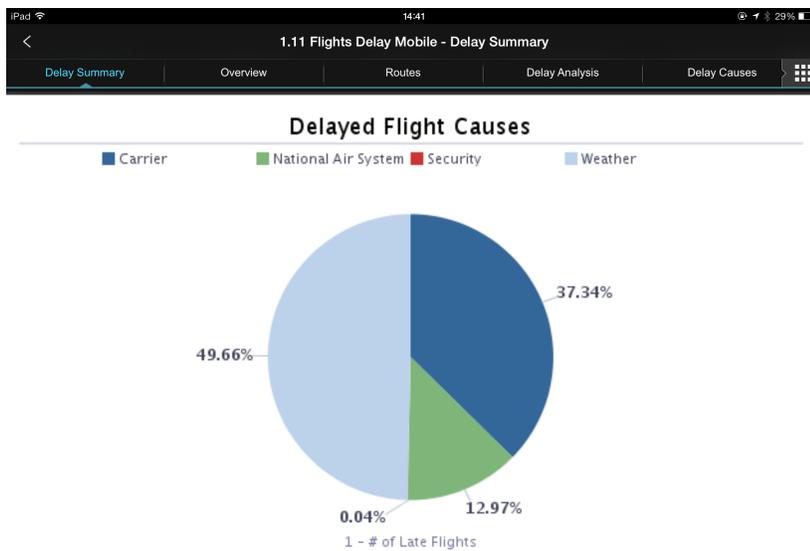
> **Note:**
>
> Double-tapping on a view to maximize it works on most view types. Exceptions include gauges, simple trellis views, and performance tiles.

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 the 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**.

Facts	Del						
# of Flights	Delay Perf %						
533,509	11.2%						
551,968	10.9%						
554,394	8.4%						
514,292	6.6%						
533,501	7.3%	27%	34.6%	3%	22%	0	13.33%
510,418	7.1%	27%	33.6%	2%	22%	0	14.28%
511,372	11.9%	27%	38.0%	4%	21%	0	9.10%
3,709,454	9.1%	27%	35.9%	4%	22%	0	10.95%

In tables, pivot tables, and trellis views, when **Data Viewing** is set to `fixed headers` in the Properties dialog for an analysis, you can use a single-finger drag gesture to scroll through data in all directions.
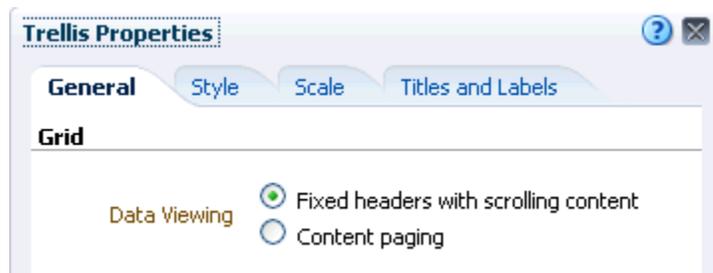
Working with Graphs

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, do one of the following:

1. Tap an empty area of the graph.

2. 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, 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.

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. See What Do Prompts Look Like in Oracle BI Mobile?.

What Do Prompts Look Like in Oracle BI Mobile?

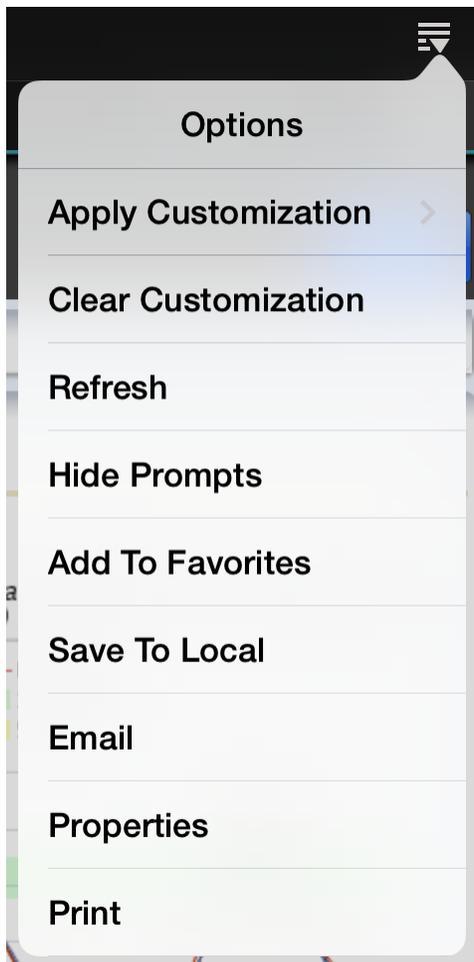The supported prompts are rendered in the **Prompts** bar.

The **Prompts** bar displays across the top portion of the screen.
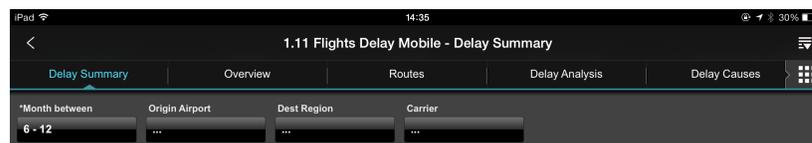
The following image displays the **Prompts** bar along with a prompt for selecting display months.
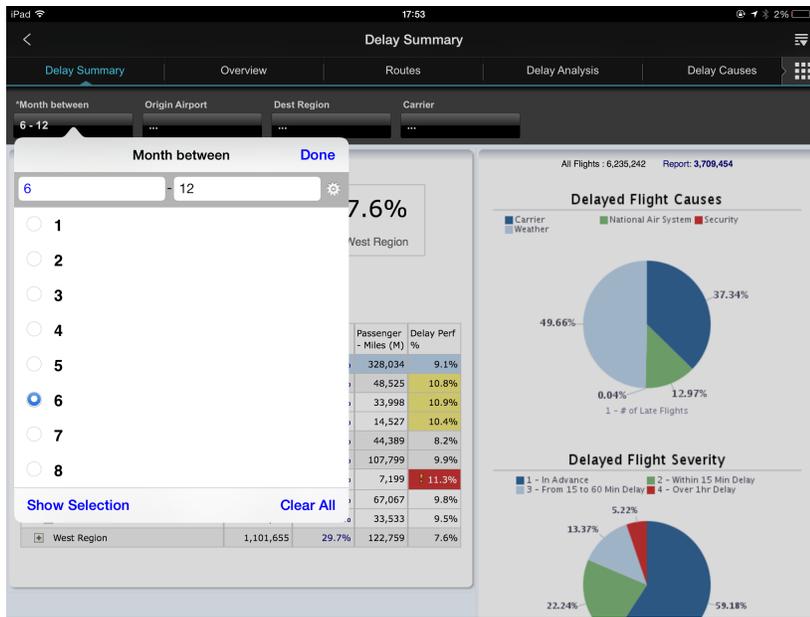
You can hide the **Prompts** bar by tapping the **Options** icon, then tapping **Hide Prompts**. To make the **Prompts** bar visible again, tap **Show Prompts**.

What are Simple Prompts and Advanced Prompts?

Oracle BI Mobile uses two variants of prompts.

These prompts are:

- **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.

The following image displays a simple list prompt that accepts a single entry from the user:
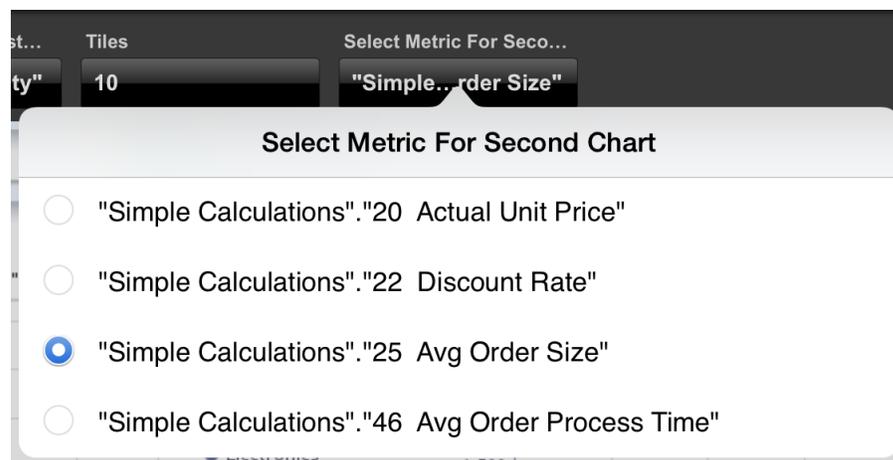
The following image displays an advanced list prompt that includes a **Search** field:
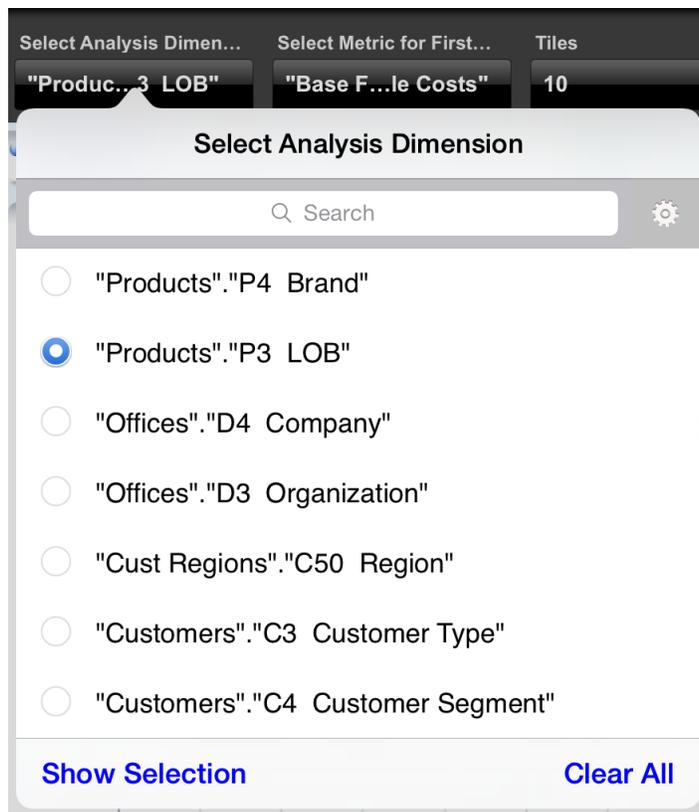
The **Show Selections** button is a toggle that switches to **Show All** . When you tap **Show Selections**, only the list items you have selected are displayed rather than the entire list provided by **Show All**. The **Clear All** button enables you to clear all your selections at once.

Working with Text Boxes in List Prompts

A list prompt includes the Between operator (a hyphen) and two text boxes.

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.
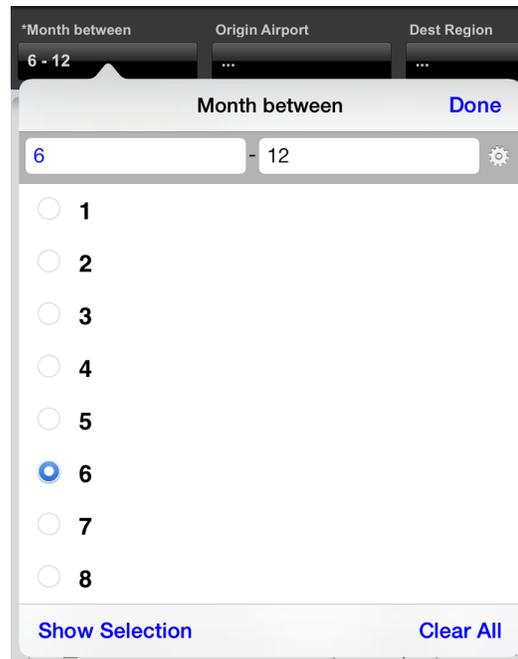
2. Tap the second **Text Box** to move the focus there, then select an item from the list to add it.

What Do Slider Prompts Look Like?

A double-thumb slider prompt using a Between operator (a hyphen) shows a range of revenue totals.
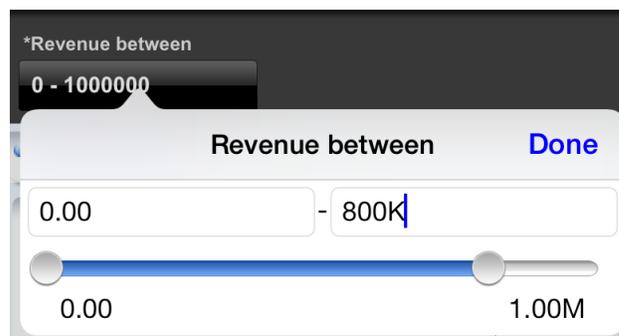
Working with Changeable Prompt Operators

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. From the dropdown, the desktop user selects the desired operator (for example, `contains`).
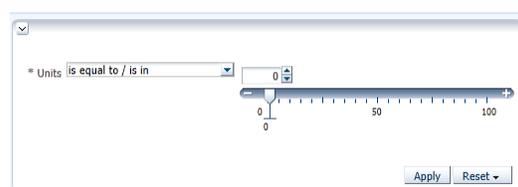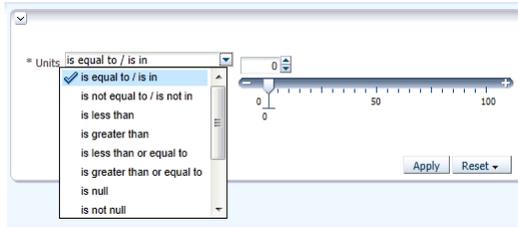
In Oracle BI Mobile, changeable prompt operator display differently. There is a single button (circled in red in the figure) displayed in the top left of the prompt box. With each tap you do, you toggle to the next operator in the list.
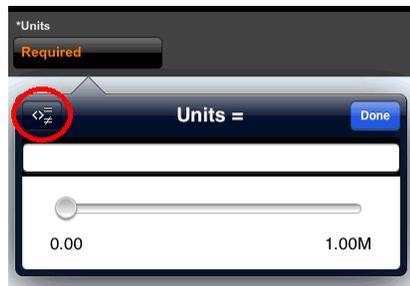
To vary the prompt operator in a changeable prompt:

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.

The following image shows the Search Options dialog where you can specify details including the search operator, and whether your search is to be case-sensitive.
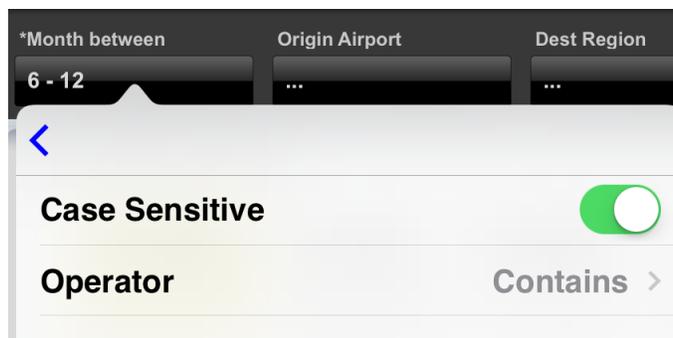
To specify search options for a prompt:

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

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

This section complements Working with Map Views on Dashboard Pages in *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 *User's Guide for Oracle Business Intelligence Enterprise Edition* before learning the gestures described in this section.

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.

The following image displays a map view:
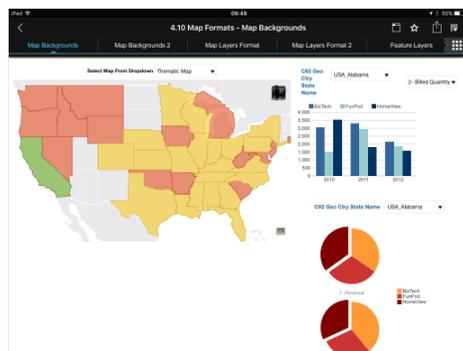
The following image displays the same map view expanded to fill the entire screen:
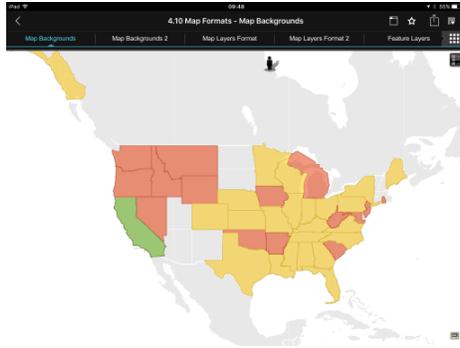
You can move back and forth between the expanded and unexpanded map views.

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.

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.

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

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:

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

2. Tap the **Previous** icon.

   Tip:

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

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

You can save Oracle BI Publisher reports as local content, and when connected to the Oracle BI 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.

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.

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 section 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 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.

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 and print briefing books.

A

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 Business Intelligence Mobile (Oracle BI Mobile).

Use the touch gestures listed in the following table to work with Oracle BI Mobile.

Gesture	How to Perform	What It Does
Tap	Tap the screen with a single finger.	This gesture is generally equivalent to a left-click in the desktop version of the application. 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. Tap on a control or item to select it or press it.
Tap and Hold	Tap an area and hold your finger in place.	In a table, pivot table, or trellis, tap and hold to access a list of available options or a tooltip. In a scorecard, tap and hold on a scorecard diagram node or watchlist table cell to access the context menu. 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.
Double-Tap	Tap twice quickly.	In a view, double-tap to expand the view to fill the entire screen. In a scorecard, double-tap on a node within a scorecard strategy contribution wheel to re-focus the diagram on that node.
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.

Gesture	How to Perform	What It Does
Drag (Two-Finger)	Drag two fingers.	In a scorecard, to scroll a watchlist, drag two fingers. To scroll a dropdown list, if a one-finger drag does not work, drag two fingers.
Flick	Flick a finger quickly across the screen.	Flick to scroll or pan quickly.
Pinch	Pinch two fingers together or apart.	In a map, pinch to zoom out or in. In most scorecard diagrams, pinch to zoom out or in. In a scorecard strategy 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.

B

Accessibility Features for Oracle BI Mobile

This appendix describes accessibility features you can use with Oracle Business Intelligence Mobile (Oracle BI Mobile).

The 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 Enterprise Edition (Oracle BI EE) (the desktop version), BI content is accessible.

You can access BI content 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). See Accessibility Features in *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. 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. Log out if you are currently logged in to the Oracle BI Mobile application.

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.