Oracle® Cloud

Using Oracle Analytics Cloud Day by Day
Oracle Cloud Using Oracle Analytics Cloud Day by Day,
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Preface

Using Oracle Analytics Cloud Day by Day for Android and iOS, learn how to generate, access, and collaborate on the analytical charts from data in your BI system.

Audience

This guide is intended for anyone who needs to get meaningful analytics from data in their BI system to make better business decisions day by day.

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.

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Related Documentation

See the Oracle Analytics Cloud documentation library for a list of related documents.

Conventions

Conventions used in this document are described in this topic.

Text Conventions

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

Your company can use skins and styles to customize the look of the Oracle Analytics Cloud, dashboards, reports, and other objects. It is possible that the videos and images included in the product documentation look different than the skins and styles your company uses.

Even if your skins and styles are different than those shown in the videos and images, the product behavior and techniques shown and demonstrated are the same.
Basics

Topics

- What can I do with Oracle Analytics Cloud Day by Day?
- Are there any prerequisites for this app?
- What is the recommended feed?
- What is your feed?
- What is a crew?
- What data does the app use?
- Can I add comments to the cards and who can see them?

What can I do with Oracle Analytics Cloud Day by Day?

Oracle Analytics Cloud Day by Day is an innovative app that provides the right analytics at the right time and place. Based on your searches for business data in the app, it learns what you’re interested in, when and where you’re interested in it, and it displays the data in ready-to-use analytical charts. The app displays the analytical charts as cards.

With Oracle Analytics Cloud Day by Day, you can:

- Search for business data in your Oracle Analytics Cloud instance.
- Add the search results to the app’s recommended list as analytic cards, if you’re an administrator; otherwise add the search results to your feed.
- Access the analytical cards when and where you want them without searching for them repeatedly.
- Perform voice queries to generate the analytical cards.
- Invite colleagues from the contacts list on your mobile device to use the app.
- View insights about the cards.
- Share with nearby users across the iOS and Android operating systems.
- Share and collaborate on the analytical cards privately with individual users or groups of users. Users can be either:
  - Suggested users; who are in the contacts list on your mobile device and are also registered users of the app with an email address that exactly matches the email of the user ID that they use for the app.
  - Users; who are available in your Oracle Analytics Cloud instance and are also registered users of the app.
- Add comments that are visible to all on the analytical cards.
Are there any prerequisites for this app?

Yes, you must have access to Oracle Analytics Cloud with BI Author and DV Consumer roles.

What is the recommended feed?

Recommended feed displays the cards that your organization wants everyone to view. It also displays the popular searches and the cards that have been shared with you by others.

What is your feed?

Your feed is a series of analytical cards that are meaningful to you based on what’s going on with your business in a week, month, or since the time you started using the app.

What is a crew?

A crew is a group of users that you most often communicate with regarding your business.

What data does the app use?

The app uses data that is available in your Oracle Analytics Cloud instance based on the subject areas that are indexed. To configure search indexing, see Configuring Search Indexing.

Can I add comments to the cards and who can see them?

Yes, you can add public and private comments. These are visible to:

- Users who share your server and security settings, and search for the same data as you, can see public comments that you add. These users see the same card and any comments that you added to the card. For example, if you and other users search for Revenue and Product, then the app displays the same card and public comments to you and those users.

- Specific users or crews (groups of users) with whom you share a card can see private comments that you add. For example, if you share a card with specific users or your crew, then the app adds that card to the For You feed of those users. They can view your comments and add their own comments.
Topics

• How do I log into the app?
• How do I log out of the app?
• How do I create a crew?
• How do I invite colleagues to use the app?
• How to add a card to your feed?
• How can the Recommended feed display the popular searches?
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• How do I view insights about a card?
• How do I comment on a card?
• How do I share and collaborate on a card?
• How do I remove a card from your feed?

How do I log into the app?

1. Tap the app in your mobile device.
2. Tap **Login**.
3. Tap to enter the server details.
   
   You see the server details that you last used. You can select the previously used server or enter the new server details.
   
   For example, [https://hostname:port](https://myserver.com:443)
4. Optionally, select the **Enable secure connection** check box to sign in securely.
5. Tap **Connect**.
6. Enter the login user name and password.
7. Tap **Login**.

How do I log out of the app?

1. In the app, tap **Settings**.
2. In the Server Information region, tap **Disconnect**.
You’re disconnected from the server and need to re-login to the server to work with the app.

**How do I create a crew?**

1. In the app, tap **Settings**.
2. Tap **My Crew**.  
   You see two types of users:
   - **Suggested users**: Registered users of the app who are in the contacts list on your mobile device with an email address that exactly matches the email address of the user IDs that they use for the app.
   - **Users**: Registered users of the app who are available in your Oracle Analytics Cloud instance.
3. You can:
   - Search for users and select them.
   - Tap ✤ beside the user name in the displayed list to select them.

**How do I invite colleagues to use the app?**

1. In the app, tap **Settings**.
2. Tap **Invite Colleagues**.  
   You see the users available in the contacts list on your mobile device.
3. Select a user or multiple users and then tap ➔.
4. Select the mail app on your mobile device.  
   The app drafts a mail inviting the selected contact to use the app.
5. Tap ➡️ in the draft mail to send it to the contact.

**How to add a card to your feed?**

1. In the app, tap **Search**.
2. Search for data in two ways:
   - Enter the keywords in the Search field. You see a list of matching results. Tap the result that you want.
   - Tap 🎤 and speak the keywords.
   Depending on the number of items that you search for, the app generates a card or series of cards. The app displays card types that are best suited for the returned data. For example, if you search for Revenue and Product, then you see a single card that depicts Revenue by Product. If you search for Revenue, Product, and Brand, then you see a series of cards that display varying combinations of Revenue, Product, and Brand.
3. Tap ➕ for the card that you want.
4. Tap **Add to Your Feed**.

You see a message that the card has been added to your feed.

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**How can the Recommended feed display the popular searches?**

1. In the app, tap **Settings**.
2. Enable **Show Leaderboard**.

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**How do I retrieve data on a date, time, location, and by threshold values?**

You can retrieve data on a specific date and time, location, and by threshold values from your feed. You can set three types of bring backs for a card simultaneously such as calendar (date and time), location, and threshold.

1. Access the card using one of the options:
   - In search mode, tap below the card that the app displays after searching for the data.
   - If you've added the card to your feed, then in your feed, tap below the card.
2. Tap **Bring Backs**.
3. Specify one or more options:
   - Tap a day; for example, tonight, tomorrow, or next week.
   - Tap **Time** to specify the time and the recurrence (such as daily, weekly, or monthly).
   - Tap **Place** to specify the location.
   - Tap **Threshold** to specify the threshold values. For example, on a card displaying regional revenues, if you set the threshold value for total revenue as \( x \), then when the total regional revenue reaches \( x \), the app retrieves that card and displays it in your feed.

Based on your selection, you automatically see the card on the specified date, time, place, or when the card data reaches the specified threshold.

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**How do I filter data in a card?**

1. Tap the card to view it in full-screen mode.
2. Tap **+**.
3. Tap **Filter**.
4. Under **Number**, tap next to the available options.
5. Tap \( \) and select a filter option.
6. Tap **Text** and tap \( \).
7. Select the text filter options and click **Apply**.

**How do I manage settings for bring backs on cards?**

1. In the app, tap **Settings**.
2. Tap **Bring Backs**.
   The app displays the existing bring backs for the card.
3. Tap a bring back.
4. Modify the bring back’s settings.
5. Tap **X** to remove the bring back.

**How do I change the type of a chart in a card?**

You can change the type of a chart in two ways.

1. Tap 👇 below the chart.
2. In **Change Chart**, select a chart type.
   You see the chart in the new format.
3. Tap the chart to view it in full-screen mode.
4. Tap 🔄.
5. Tap **Change Chart**.
6. Select a chart type.
   You see the chart in the new format.

**How do I view specific data in the card?**

1. Tap the card to view it in full-screen mode.
2. Tap a data segment in the card.
   You see the data specific to the segment in its tooltip.

**How do I view insights about a card?**

1. Tap a card to view it in full-screen mode.
2. Tap ✉️ adjacent to the card title.
   You see insights about the data in the card.
3. Tap ✉️ to share the insight.
How do I comment on a card?

1. Tap 📌 below the card.
2. Tap Comments.
3. Enter a comment and tap ▶️.

You see the card refresh and you see the number of comments below the title of the card. Users with whom you've shared the card see it automatically in their Recommended feed. They can view and respond to comments.

How do I share and collaborate on a card?

1. Tap 📌 below the card.
2. Share the card in one of these ways:
   • Tap Share to Crew to share it with your crew.
   • Tap Share to Colleagues to share it with individual users. You see two types of users:
     – Suggested users: Registered users of the app who are in the contacts list on your mobile device with an email address that exactly matches the email address of the user IDs that they use for the app.
     – Users: Registered users of the app who are available in your Oracle Analytics Cloud instance.
   • Tap Share Nearby to share it with a user who is physically near you.

***Note:***

You can share across iOS and Android mobile devices. This sharing passes the card from one device to another. This method doesn't share the card data with other users; those users will see data they have access to on the shared card.

Sharing a card with individual users or with your crew creates a private discussion and places the card in the Recommended feed of each user. Users can comment and collaborate on the shared card.

How to remove a card from your feed?

1. Tap 📌 below the card.
2. Tap Remove.
Day by Day for iOS

Topics

• How do I log into the app?
• How do I log out of the app?
• How do I change the default server details?
• How do I create a crew?
• How do I invite colleagues to use the app?
• How to add a card to your feed?
• How can the Recommended feed display the popular searches?
• How do I retrieve data on a date, time, location, and by threshold values?
• How do I filter data in a card?
• How do I manage settings for bring backs on cards?
• How do I change the type of a chart in a card?
• How do I view specific data in the card?
• How do I view insights about a card?
• How do I comment on a card?
• How do I share and collaborate on a card?
• How do I remove a card from your feed?

How do I log into the app?

1. Tap the app in your mobile device.
2. Enter the server details.
   For example, https://hostname:port (https://myserver.com:443)
   When you specify the server for the first time, you see it as the default for subsequent logins.
3. Optionally, select the Enable secure connection check box to sign in securely.
4. Tap Connect.
5. Enter the login user name and password.
6. Tap Login.

How do I log out of the app?

1. In the app, tap Settings.
2. In Account, tap Disconnect.
You're disconnected from the server and need to re-login to the server to work with the app.

**How do I change the default server details?**

You can change the server details in two ways.

1. Open the app.
   You see the server details that you last used.
2. Optionally, open the app, tap **Connect**, and tap **Change Server**.
3. Delete the details and enter the new server information.

**How do I create a crew?**

1. In the app, tap **Settings**.
2. Tap **Manage My Crew**.
   You see two types of users:
   - Suggested users: Registered users of the app who are in the contacts list on your mobile device with an email address that exactly matches the email address of the user IDs that they use for the app.
   - Users: Registered users of the app who are available in your Oracle Analytics Cloud instance.
3. You can:
   - Search for users and select them.
   - Tap beside the user names in the displayed list to select them.

**How do I invite colleagues to use the app?**

1. In the app, tap **Settings**.
2. Tap **Invite Colleagues**.
   You see the user search page listing the contacts available in your mobile device.
3. Search for colleagues or select from the contacts list.
4. Invite colleagues in two ways:
   - In the **Message** tab, select the contact, and tap **Send**. The app drafts and displays the message inviting the contact to use the app. Tap to send the message.
   - In the **Mail** tab, select the contact, and tap **Send**. The app drafts and displays the mail inviting the contact to use the app. Tap **Send**.

**How to add a card to your feed?**

1. In the app, tap **Search**.
2. Search for data in two ways:
   - Enter the keywords in the Search field, select from the results, and tap
     ![Search button]
   - Tap ![Microphone icon] and speak the keywords.

   Depending on the number of items that you search for, the app generates a chart or series of cards. The app displays card types that are best suited for the returned data. For example, if you search for Revenue and Product, then you see a single card that depicts Revenue by Product. If you search for Revenue, Product, and Brand, then you see a series of cards that display varying combinations of Revenue, Product, and Brand.

3. Tap ![Add to feed icon] below the card and tap **Add to Your Feed**.

   You see a message that the card has been added to your feed.

**How can the Recommended feed display the popular searches?**

1. In the app, tap **Settings**.
2. Enable **Show Leaderboard**.

**How do I retrieve data on a date, time, location, and by threshold values?**

You can retrieve data on a specific date, time, location, and by threshold values from your feed.

1. In search mode, search for data.
2. Select a card generated by the app and tap ![Add to feed icon] below the card.
3. Tap **Bring Backs**.
4. If you've added the card to your feed, then tap ![Add to feed icon] below the card in your feed, and then tap **Bring Backs**.
5. Specify one or more options:
   - Tap a day; for example, tonight, tomorrow, or next week.
   - Tap **Bring Back by Time** to specify the time and the recurrence (such as daily, weekly, or monthly).
   - Tap **Bring Back by Place** to specify the location.
   - Tap **Bring Back by Threshold** to specify the threshold values. For example, on a card displaying regional revenues, if you set the threshold value for total revenue as $x$, then when the total regional revenue reaches $x$, the app retrieves that card and displays it in your feed.

   Based on your selection, you automatically see the card on the specified date, time, place, or when the card data reaches the specified threshold.
How do I filter data in a card?

1. Tap the card to view it in full-screen mode.
2. Tap ✉️
   You see the filters available for the card.
3. Tap the Text filter and select the text filter options.
4. Tap ← to go back to the Filters page.
5. Tap the Number filter and select a filter option.
6. Tap ▼ to exit the Filters page.

How do I manage settings for bring backs on cards?

1. In the app, tap Settings.
2. Tap Bring Backs.
   The app displays the existing bring backs for the card.
3. Tap a bring back.
4. Tap × to modify the existing setting, and then tap Done.
5. Tap + to add another type of bring back for the card, and then tap Done.
6. Tap Edit.
7. Tap ☐ to remove the bring back.
8. Tap Done.

How do I change the type of a chart in a card?

1. Tap ••• below the card.
2. In Change Chart, select a chart type.
   The app refreshes and you see the chart in the new format.

How do I view specific data in the card?

1. Tap the card to view it in full-screen mode.
2. Tap a data segment in the card.
   You see the data specific to the segment in its tooltip.

How do I view insights about a card?

1. Tap a chart to view it in full-screen mode.
2. Tap 📈 adjacent to the card title.
You see insights about the data in the card.

3. Tap at the top of the card and then tap Share to share the insight.

How do I comment on a card?

1. Tap below the card.
2. Tap Comments.
3. In Add comment, enter a comment and tap Post.

You see the card refresh and then you see the number of comments on the card. Anyone can see the comment that you’ve entered. Users with whom you’ve shared the card see it automatically in their Recommended feed. They can view and respond to comments.

How do I share and collaborate on a card?

1. Tap below the card.
2. Share the card in one of these ways:
   - Tap Share with Colleagues. You see two types of users:
     - Suggested users: Registered users of the app who are in the contacts list on your mobile device with an email address that exactly matches the email address of the user IDs that they use for the app.
     - Users: Registered users of the app who are available in your Oracle Analytics Cloud instance.
   - Tap Share with Crew to share it with your crew.
   - Tap Share Image to send the image of a card to anyone else, using the apps available in your mobile device.
   - Tap Share Nearby to share it with a user who is physically near you if you’ve enabled the Share Nearby option in Settings.

   **Note:**
   You can share across iOS and Android mobile devices. This sharing passes the card from one device to another. This method doesn’t share the card data with other users; those users will see data they have access to on the shared card.

   - Tap Share Data to share to other apps installed on the device that accept data.

Sharing a card with individual users or with your crew creates a private discussion and places the card in the Recommended feed of each user. Users can comment and collaborate on the shared card.
How to remove a card from your feed?

1. Tap ⬤ beside the card title.
2. Tap Remove.
Troubleshoot

Topics

• What do I do if the app can’t connect to the server?
• What do I do if search doesn’t auto complete search keywords or display any results?
• How do I fine-tune my searches?
• Why am I not receiving bring-back notifications?
• What do I do if the app doesn’t display the suggested contacts?
• Why am I unable to share with near by users from my Android device?
• Why can’t I upload a profile image?
• Where can I learn more?

What do I do if the app can’t connect to the server?

Note:
To complete this task, you must have the Administrator role assigned to you.

If the app can’t connect to the server, then:

• Verify the URL format of the server in the app. The URL format must be

  Note:
  Always use 443 for the port and https for the protocol.

• Run the Users Service End Point test.
  – Using a desktop browser, navigate to https://oacserver.com:443/bimajel. A page with a link for the Users Service End Point test must be displayed.
    * If the page displays properly, then click the Users Service End Point link. Enter your user name and password to display text similar to the following:

```json
["id":"2F9B7762-CF87-481F-861C-574E411504E8","version":0,"modifiedTime":1489682920014,"pictureUrl":null,"userId":"cloud.user","preferredName":"cloud user"]
```
Chapter 4

What do I do if search doesn’t auto complete search keywords or display any results?

Note:

Only users who have connected through Oracle Analytics Cloud Day by Day are shown on this page. If you see an empty set of brackets (for example, [ ]), then no users have connected through the app.

* If the page doesn't open in the browser, then use Oracle WebLogic Scripting Tool (WLST) to verify whether the BI Majel application is running. If the application isn't running, then start it. If the application doesn't start, then run the diagnostic dump to collect logs to analyze the situation.

• Test the URL for the server in a browser on a computer. After confirming that the URL works properly in that browser, enter the same URL in a browser on the mobile device.

• Ensure your SSL certificate is valid. SSL connections require valid signed certificates. Ensure that there are no warnings for bad certificates in the address bar and when loading a page on the desktop or on the mobile device. Take appropriate actions to address the warnings for bad certificates.

What do I do if search doesn’t auto complete search keywords or display any results?

Note:

To complete this task, you must have the Administrator role assigned to you.

If search doesn’t auto complete the partial search keywords that you enter in the app, then using a desktop browser, log into your instance of Oracle Analytics Cloud (for example; https://<hostname>:<port>/va) and:

• Type in the ASK bar on the Oracle Analytics Cloud Home page to verify that it returns suggestions.

• From the Oracle Analytics Cloud Home page, navigate to the Console and click Search Index to verify that the index has been run for at least one subject area. Generate the index to ensure that it’s not corrupt.

• Verify that the user has been assigned the BI Content Author and DV Consumer roles.

• Ensure that you’re searching for a term that exists in the business data in your Oracle Analytics Cloud instance.

• Create a new project and view the subject area to view the available terms.

If search doesn’t display any results, then you can:

• Type the same keywords in the ASK bar on the Oracle Analytics Cloud Home page to verify that it returns results.

• Verify that the user has been assigned the BI Content Author and DV Consumer roles.
Note:

On the Home page for Oracle Analytics Cloud, the ASK bar supports only matched terms and not unmatched terms. The Oracle Analytics Cloud Day by Day app supports both matched and unmatched terms. Unmatched terms might not return the results that you expect.

How do I fine-tune my searches?

You can fine-tune your searches in various ways:

- Avoid special characters in your indexes, especially in terms from your subject areas. For example, avoid indexing “Number of Promotions” as “# of Promotions.” If you perform a voice search for “number of promotions”, then you won’t see results if it’s indexed as “# of promotions”. Instead, create a duplicate of “# of Promotions” as “Number of Promotions” and specify that the search indexing process must index only the expanded term, “Number of Promotions”.

- Don’t index any field names whose value includes a large amount of text or confidential information, to assist in making the search results meaningful and free of clutter. For example, avoid indexing the following:
  - Call center conversation field
  - Customer addresses
  - Long description fields
  - Social security numbers, customer numbers, or identification (ID) fields (instead, use customer names)
  - High-cardinality dimensions, such as those as large as 1MB (such large dimensions aren’t searched for performance reasons)

- Try to flatten hierarchies or avoid indexing hierarchies.

- Minimize the number of duplicate dimensions. For example, avoid stating the same thing in different ways as each overlapping dimension gets matches, forcing you to explicitly choose one. Having to make choices makes searching more challenging, especially for voice queries.

- Avoid indexing level-based measures, such as yearly product revenue.

- Create synonyms to handle search queries, as you may search for the same thing by different names. For example, you may search for revenue amount as “revenue” or “sales”.

- Expand acronyms because they aren’t easily understood when searching. For example, avoid acronyms such as these:
  - Avg = Average
  - Pct = Percent
  - Nbr = Number
  - YoY = Year over Year

In a voice query, say “percent” or “percentage” rather than “p-c-t”.

Chapter 4

4-3
• Ensure that your security settings improve and personalize what users see. BI Ask enforces level security at the presentation layer, not at the member level. For example, if a user doesn’t have access to the revenue metric, then that user can’t see revenue in the autocomplete result.

Why am I not receiving bring-back notifications?

You won’t receive bring-back notifications in the app, if:
• Notifications for the app are disabled.
• **Do Not Disturb** is enabled on the mobile device.
• Location services are disabled on the mobile device.
• The mobile device is running in low-power mode.
• Wi-Fi is disabled on the mobile device.

What do I do if the app doesn’t display the suggested contacts?

Ensure that the contact:
• Is available in your Oracle Analytics Cloud instance.
• Is a registered user of the app.
• Has an email address that exactly matches the email of the user ID that they use for the app.

Why am I unable to share with near by users from my Android device?

If your mobile device is connected to a corporate VPN, then verify the VPN settings that may be blocking the channels, such as Wifi Direct, that Android uses to connect with the near by devices.

Why can’t I upload a profile image?

If you’re having difficulty uploading a profile image, then ensure that:
• The app can access the camera and the photos on your mobile device.
• The image isn’t larger than 1 MB.

Where can I learn more?

Go to the Day by Day community page to learn more.