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.

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

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

<table>
<thead>
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<th>Convention</th>
<th>Meaning</th>
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<tr>
<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>
</tr>
<tr>
<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><code>monospace</code></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 a smart feed?
• What is a crew?
• What are the external devices to which I can cast the smart feed content?
• What data does the app use?
• What is a snapshot?
• Can I add comments to the charts 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 smart feed as analytical charts.
• Access the analytical charts when and where you want them without searching for them repeatedly.
• Perform voice queries to generate the analytical charts.
• Invite friends in the contacts list on your mobile device to use the app.
• View insights about the charts.
• Share with nearby users across the iOS and Android operating systems.
• Share and collaborate on the analytical charts 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 charts.
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 a smart feed?

A smart feed is a series of analytics that are meaningful to you based on what's going on with your business on a given day.

To build a smart feed, see:

• For Android: How do I add a chart to the smart feed?
• For iOS: How do I add a chart to the smart feed?

What is a crew?

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

What are the external devices to which I can cast the smart feed content?

You can cast the smart feed content to any Google Chromecast device. This feature is available for Android devices only.

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.

What is a snapshot?

A snapshot is a copy of a chart that you've recently changed. For example, when you change the type for a chart in full-screen mode, the app saves those edits automatically as a snapshot, while retaining the original chart.

Can I add comments to the charts 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 chart and any comments that you added to the chart. For example, if you and other users search for Revenue and Product, then the app displays the same chart and public comments to you and those users.
• Specific users or crews (groups of users) with whom you share a chart can see private comments that you add. For example, if you share a chart with specific users or your crew, then the app adds that chart to the smart feed of those users. They can view your comments and add their own comments.
2

Day by Day for Android

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 specify the app settings?
• How do I create a crew?
• How do I invite contacts to use the app?
• How do I add a chart to the smart feed?
• How can my smart feed display the popular searches?
• How do I retrieve data on a date, time, location, and contact?
• How do I filter data in a chart?
• How do I manage bringbacks on charts?
• How do I change the type of a chart?
• How do I view specific data in the chart?
• How do I view insights about a chart?
• How do I comment on a chart?
• How do I share and collaborate on a chart?
• How do I cast a chart to an external device?
• How do I remove a chart from the smart feed and search results?

How do I log into the app?

1. Tap the app in your mobile device.
2. Tap Login.
3. 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.
4. Tap Connect.
5. Enter the login user name and password.
6. Tap Login.
How do I log out of the app?

1. Tap your profile image available on the SmartFeed or Search pages.
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 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 specify the app settings?

1. Tap your profile image available on the smart feed or search pages.
2. Tap to upload a profile image and specify a profile name.
3. Specify the settings to:
   • Allow nearby.
   • Show leaderboard.

How do I create a crew?

1. In the app, tap your profile image available on the smart feed or search pages.
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 contacts to use the app?

1. In the app, tap your profile image available on the SmartFeed and Search pages.
2. Tap **Invite Users**.
   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 do I add a chart to the smart feed?**

1. Tap
2. Search for data in two ways:
   - Enter the keywords in the Search field and tap
   - Tap and speak the keywords.
   Depending on the number of items that you search for, the app generates a chart or series of charts. The app displays chart types that are best suited for the returned data. For example, if you search for Revenue and Product, then you see a single chart that depicts Revenue by Product. If you search for Revenue, Product, and Brand, then you see a series of charts that display varying combinations of Revenue, Product, and Brand.
3. Tap
4. Tap
   You see a message that the chart has been added to the smart feed.

**How can my smart feed display the popular searches?**

1. Tap your profile image available on the smart feed or search pages.
2. Enable **Show Leaderboard**.

**How do I retrieve data on a date, time, location, and contact?**

You can retrieve data on a specific date and time, location, and contact from the smart feed or in the search mode. You can set three types of bringbacks for a chart simultaneously such as calendar (date and time), location, and contact.
1. In search mode, tap below the chart that the app displays after searching for the data.

2. If you've added the chart to the smart feed, then in the smart feed, tap below the chart.

3. Tap

4. Specify one or more options:
   • Tap a day; for example, tonight, tomorrow, or next week.
   • Tap **By Time** to specify the time and the recurrence (such as daily, weekly, or monthly).
   • Tap **By Place** to specify the location.
   • Tap **Contact** to specify a contact from your contacts list.

Based on your selection, you automatically see the chart on the specified date, time, and place. For a contact-based bringback, when the contact whom you have specified calls you or sends a message, the app displays the chart.

How do I filter data in a chart?

1. Tap the chart to view it in full-screen mode.

2. Tap .

3. Tap **Filter**.

4. Tap 📈 under **Number**.

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 bringbacks on charts?

1. Tap your profile image available on the smart feed or search pages.

2. Tap **Bringbacks**.
   The app displays the existing bringbacks for the chart.

3. Tap a bringback.

4. Modify the bringback settings.

5. Tap ⏿ to remove the bringback.
How do I change the type of a chart?

1. Tap below the chart.
2. 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 chart?

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

How do I view insights about a chart?

1. Tap a chart to view it in full-screen mode.
2. Tap adjacent to the chart title.
   You see insights about the data in the chart such as maximum, minimum, average, and percentile values.
3. Tap to share the insight.

How do I comment on a chart?

1. Tap available below the chart.
2. Enter a comment and tap .
   You see the chart refresh and you see the number of comments on the chart. Anyone can see the comment that you've entered. If you've shared the chart with individual users or your crew, then you see a new chart and the number of users who
can view the comment. Users with whom you've shared the chart see it automatically in their smart feed. They can view and respond to comments.

How do I share and collaborate on a chart?

1. Tap for the selected chart.
2. Share the chart in one of these ways:
   • Tap to share it with your crew.
   • Tap 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 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 chart from one device to another. This method doesn't share the chart data with other users; those users must search for the data in the shared chart on their own devices to be able to work with that specific chart.

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

How do I cast a chart to an external device?

You can view a chart on an external screen or device using Google Chromecast. Ensure that you have specified the Cast settings in your mobile device.

1. Tap a chart to view it in full-screen mode.
2. Tap
   You see the available nearby devices that you can cast to.
3. Tap the device that you want to cast to such as a TV screen.
How do I remove a chart from the smart feed and search results?

1. Tap below the chart that you want to remove from the smart feed and search results.

2. Tap
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 specify the app settings?
- How do I create a crew?
- How do I invite friends to use the app?
- How do I add a chart to the smart feed?
- How can my smart feed display the popular searches?
- How do I retrieve data on a specific date, time, and location?
- How do I filter data in a chart?
- How do I manage bringbacks on charts?
- How do I change the type of a chart?
- How do I view specific data in the chart?
- How do I view insights about a chart?
- How do I comment on a chart?
- How do I share and collaborate on a chart?
- How do I remove a chart from the smart feed and search results?

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](https://myserver.com:443))
   
   When you specify the server for the first time, you see it as the default for subsequent logins.
3. Tap Connect.
4. Enter the login user name and password.
5. Tap Login.

How do I log out of the app?

1. Tap  

![Settings Icon]

3-1
2. Tap **Account**.

3. 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 specify the app settings?

1. In the app, tap 🛒.

2. Tap ✍️ to upload a profile image and specify a profile name.

3. Specify the settings to:
   - Allow nearby.
   - Show leaderboard.

### How do I create a crew?

1. In the app, tap 🛒.

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 names in the displayed list to select them.

### How do I invite friends to use the app?

1. In the app, tap 🛒.
2. Tap **Invite Friends**.
   You see the user search page.

3. Search for friends available in the contacts list on your mobile device.

4. Invite friends in two ways:
   - Select the contact, select Message 📩. The app drafts and displays the message inviting the contact to use the app. Tap ➡️ to send the message.
   - Select the contact, select Mail 📧, and tap **Send**. The app drafts and sends a mail inviting the contact to use the app.

**How do I add a chart to the smart feed?**

1. Tap 🔍.

2. Search for data in two ways:
   - Enter the keywords in the Search field and tap **Search**.
   - Tap 🎤 and speak the keywords.
   Depending on the number of items that you search for, the app generates a chart or series of charts. The app displays chart types that are best suited for the returned data. For example, if you search for Revenue and Product, then you see a single chart that depicts Revenue by Product. If you search for Revenue, Product, and Brand, then you see a series of charts that display varying combinations of Revenue, Product, and Brand.

3. You can add the chart to the smart feed in two ways:
   - Swipe the chart from right to left and tap **Add to Feed**.
   - Optionally, tap ☑️ beside the chart title and tap **Add to Feed**.
   You see a message that the chart has been added to the smart feed.

**How can my smart feed display the popular searches?**

1. In the app, tap 🗝.

2. Enable **Show Leaderboard**.

**How do I retrieve data on a specific date, time, and location?**

You can retrieve data on a specific date, time, and location from the smart feed or in search mode.
1. In search mode, search for data.
2. Select a chart generated by the app and swipe it from right to left.
3. Tap . Optionally, tap beside the chart title and tap .
4. If you've added the chart to the smart feed, then in the smart feed, swipe it from right to left and follow step 3.
5. You can retrieve by time, date, or place. Tap suitable options. Based on your selection, you automatically see the chart on the specified date, time, and place.

How do I filter data in a chart?

1. Tap the chart to view it in full-screen mode.
2. Tap .
   You see the Filters page with dimensions and measures.
3. Tap a dimension.
4. Select the text filter options.
5. Tap to go back to the Filters page.
6. Tap a measure.
7. Select a filter option.
8. Tap to exit the Filters page.

How do I manage bringbacks on charts?

1. In the app, tap .
2. Tap Bringbacks.
   The app displays the existing bringbacks for the chart.
3. Tap a bringback.
4. Modify the bringback settings.

   Note:
   If a chart has a reminder set by contact, then you can delete the reminder but can't modify the reminder settings.

5. Tap Edit.
6. Tap to remove the bringback.
7. Tap Done.
How do I change the type of a chart?

1. Tap beside the chart title and tap  
2. Select a chart type.  
   The app refreshes and you see the chart in the new format.
3. If you want to retain the original chart, then tap the chart to view it in full-screen mode, and follow steps 1 and 2.  
   The app creates a snapshot and saves it as a new chart in the smart feed, while retaining the original chart.

How do I view specific data in the chart?

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

How do I view insights about a chart?

1. Tap a chart to view it in full-screen mode.
2. Tap adjacent to the chart title.  
   You see insights about the data in the chart such as the maximum, minimum, average, and percentile values.
3. Tap to share the insight.

How do I comment on a chart?

1. Tap available below the chart.
2. Enter a comment and tap .  
   You see the chart refresh and you see the number of comments on the chart.  
   Anyone can see the comment that you’ve entered. If you’ve shared the chart with individual users or your crew, then you see a new chart and the number of users who can view the comment. Users with whom you’ve shared the chart see it automatically in their smart feed. They can view and respond to comments.

How do I share and collaborate on a chart?

1. Tap available below a chart.
2. Share the chart 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 chart 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 chart from one device to another. This method doesn’t share the chart data with other users; those users have to search for the data in the shared chart on their own devices to be able to work with that specific chart.

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

**How do I remove a chart from the smart feed and search results?**

1. Select a chart and swipe it from right to left.
2. Tap **Remove from Feed**.
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 https://hostname:port; for example, https://oacserver.com:443.

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

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.
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”.

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.
• 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.