Oracle® Cloud

Using Oracle Analytics Synopsis

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Oracle Cloud Using Oracle Analytics Synopsis,

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Preface

This guide contains information about using Oracle Analytics Cloud Synopsis for Android and iOS to create instant analytics from your spreadsheet data on mobile devices. It explains how to load, analyze, and share data on a mobile device, which provides actionable intelligence and helps you make critical and timely business decisions.

Audience

This guide is intended for anyone who needs to get meaningful analytics from spreadsheet data and use that data to make critical and timely business decisions with Oracle Analytics Cloud Synopsis.

Documentation Accessibility

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Related Documentation

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

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.

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1

Basics

- What can I do with Oracle Analytics Synopsis?
- What kind of data can I upload?
- What is a number card?
- What are my charts?
- Are there any performance limits in the app?
- What are the file size considerations?
- How do I configure mobile applications for single sign-on in Oracle Analytics Cloud?
- How do I access Oracle Identity Cloud Service using single sign-on from Oracle Analytics Synopsis?
- How do I create and distribute the MagicURL for Oracle Analytics Synopsis manually?
- How do I use the MagicURL for Oracle Analytics Synopsis?

What can I do with Oracle Analytics Synopsis?

Oracle Analytics Synopsis provides instant analytics on a mobile device. With this app, you can quickly and easily turn data into meaningful data visualizations, without any detailed knowledge of data exploration or data science.

With Oracle Analytics Synopsis, you can:

- Import spreadsheet data and receive instant data visualization.
- Change the initial visualization; for example, from a donut chart to a bar chart. Based on the complexity of the data, the app displays the data in an appropriate chart; however, you can easily change the chart format.
- Select specific data from your spreadsheet for the analysis.
- Change the format of the data; for example, you can change the preferred currency, opt to display the number data as percentage, and specify the decimal character and number separator.
- Transform data from a number value to text value; for example, you can change the month value to display as text rather than as a number.
- Share the analysis using the apps on your mobile device.
- Export the project to destinations of your choice.
- Add frequently used charts to your charts list.
- Import data from Oracle Analytics Cloud data sets and your fitness data from the Google Fit app.
- Scan printed tables with the device camera, view real time chart visualization atop table data, create a project instantly, and spot trends in the printed data.
- Scan the nutrition label of your favorite foods to store and analyze the nutrition data.

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- Expand the data set in a project by merging two projects; for example, add data across time periods or regions.
- View project and chart insights for a predictive analysis.
- Add a new column of calculated numbers in a data file; for example, create a new Profits column in the data file by subtracting Sales values from Cost values.
- Change the initial visualization; for example, from a donut chart to a word cloud chart in which the size of the word represents the size of a measure.
- Add multiple text elements such as month and year to charts; thereby use time specific controls to select date ranges and times when manipulating charts with a time dimension.
- Back up and restore projects.

What kind of data can I upload?

You can import data as numbers (for example, gross price = 1000) and text values (for example, country = Canada).

What is a number card?

A number card displays the important number from the number values in your spreadsheet data; for example, the sum of sales price or manufacturing price.

What are my charts?

My charts contain visualizations of data that you frequently use or want to refer to.

Are there any performance limits in the app?

On both Android and iOS, the app is limited by the processor power, memory, and storage on the device. The app performs well on most modern devices (those manufactured in the year 2015 and later), but older devices or devices with limited storage may perform slower, have issues loading large files, or experience other issues that cannot be addressed.

What are the file size considerations?

The app supports XLSX and CSV file types. Here are the recommended file sizes based on the number of rows:

File Type	Android	iOS
XLSX	250,000	25,000
CSV	250,000	250,000

Large files can take longer to load and are not recommended. Files that have more that 20,000 unique values in a single text column impact chart and project performance. The app (for Android and iOS) can load files while in the background, so files that take longer to load can process while you work on other tasks on the device.

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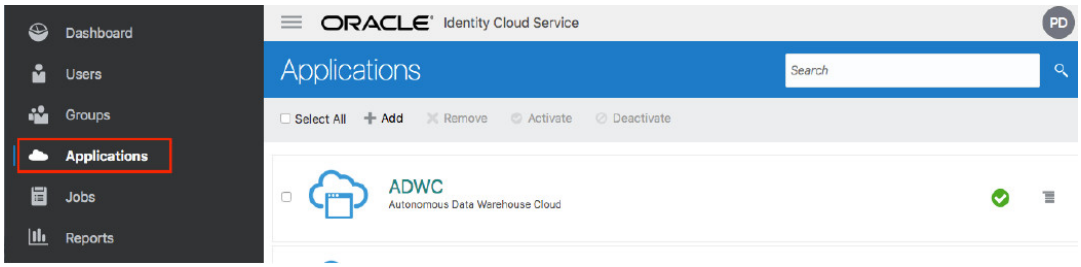
How do I configure mobile applications for single sign-on in Oracle Analytics Cloud?

You must set up OAuth in Oracle Identity Cloud Service for mobile access.

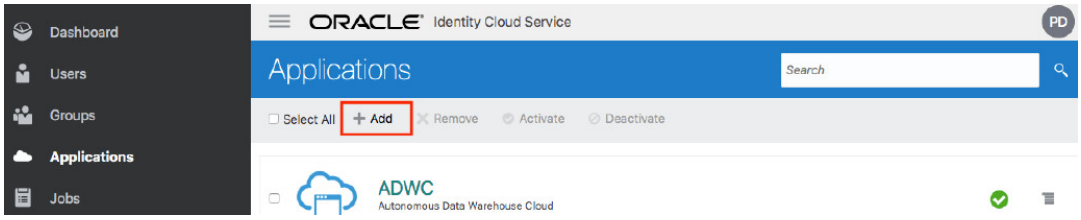
1. Log in to Oracle Identity Cloud Service using your administrator credentials.

> **Note**
>
> If you don't have access to Oracle Identity Cloud Service, then ask your administrator to set up OAuth.

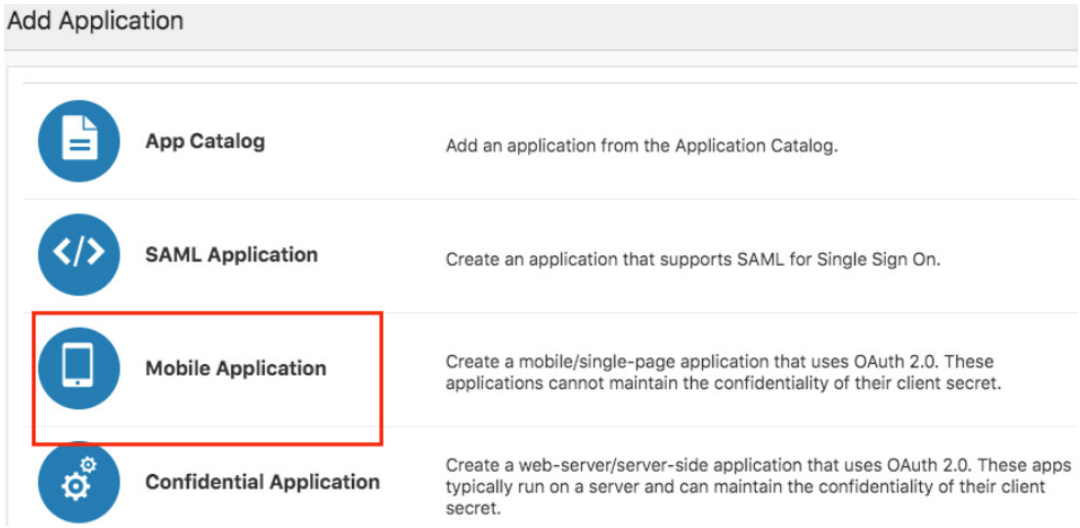
2. In the Oracle Identity Cloud Service console, expand the Navigation menu, and then click **Applications**.



3. On the Applications page, click **Add**.



4. In the Add Application dialog, click **Mobile Application**.



5. In the Details section, enter a name and description to identify the application, and then click **Next**.

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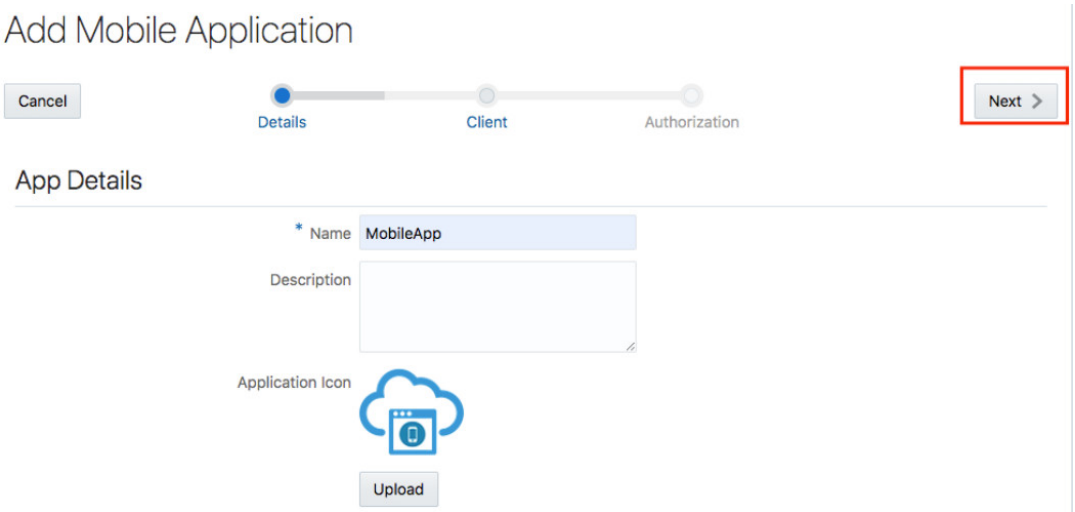
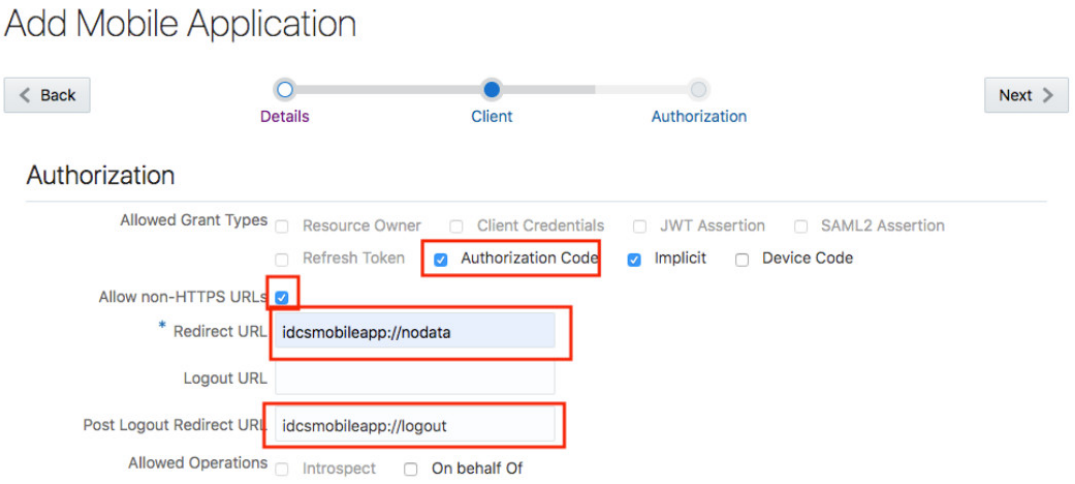
For example:

- **Name**: `MyMobileApp`
- **Description**: `Mobile application for Oracle Analytics`



6. To identify this application as a client:
   a. Display the Authorization section in the Client step.
   b. Select **Authorization Code** and **Allow non-HTTPS URLs**.
   c. Enter these values exactly as specified:
      - **Redirect URL**: `idcsmobileapp://nodata`
        This URL scheme identifies the application to open.
      - **Post Logout Redirect URL**: `idcsmobileapp://logout`



> **Note**
>
> Ensure that you don't populate the **Logout URL** field.

7. In the Client step, scroll down and select **Add Scope** and the Oracle Analytics Cloud instance that you want to access through this application.

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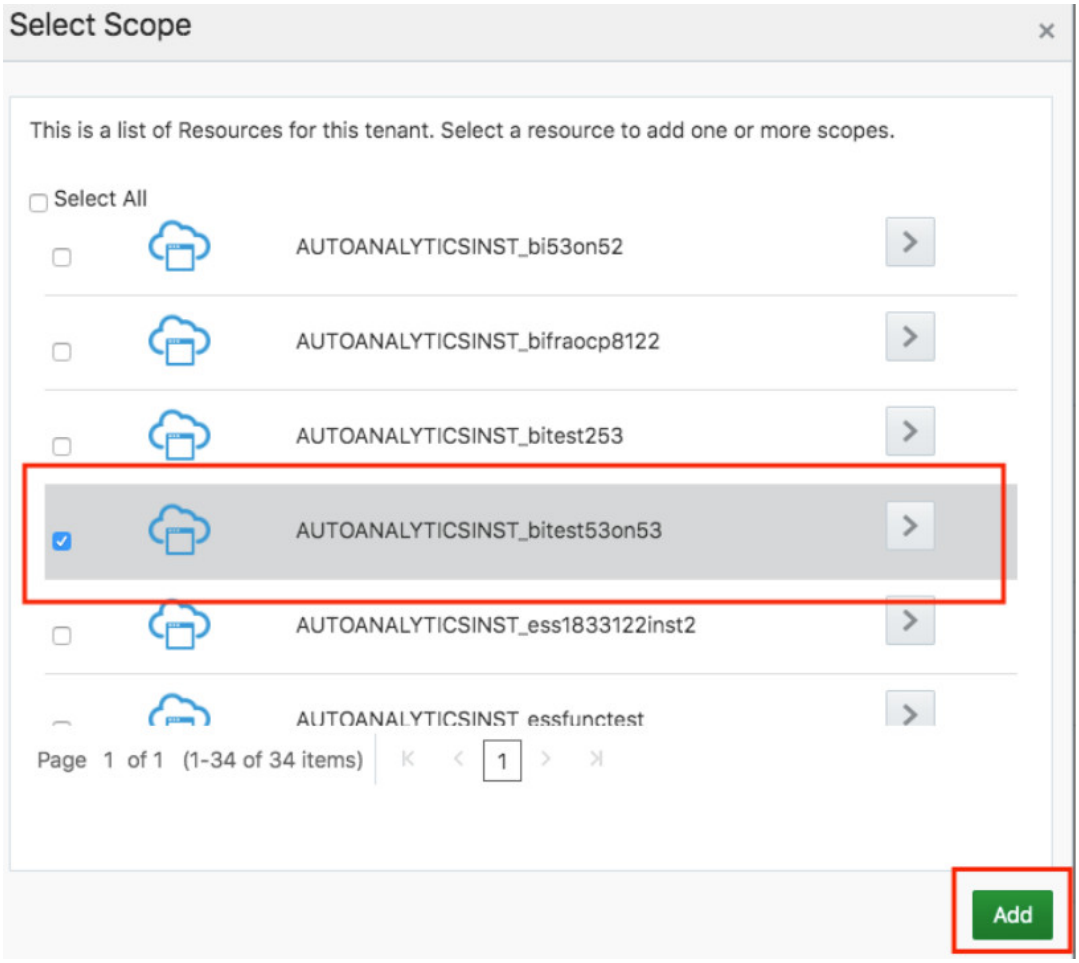
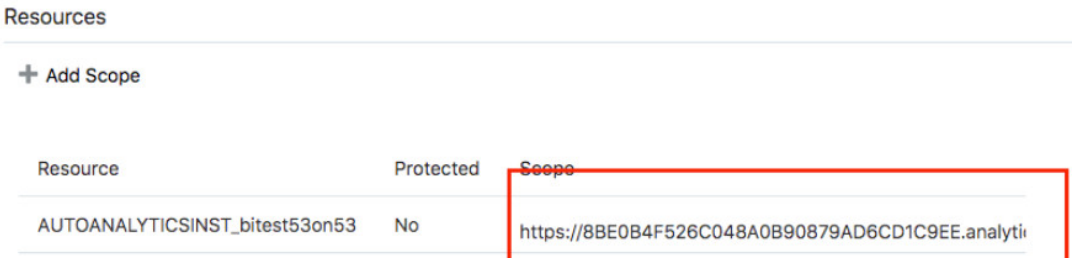
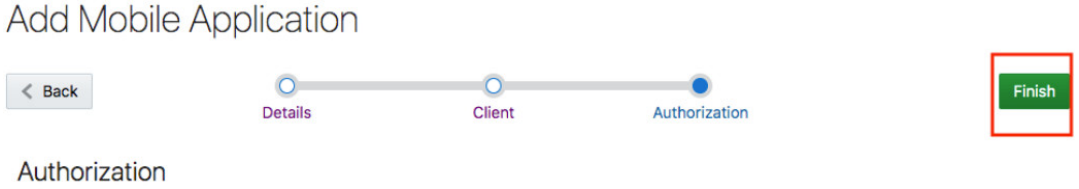


You see an URL in the Resources section.

8. In the Resources section, scroll to the end of the URL and note the entire URL.



9. In the Client step, scroll to the bottom of the page and click **Add** below **Grant the client access to Identity Cloud Service Admin APIs**.
10. In the Add App Role dialog, select the application roles that you want to assign to this application, and then click **Add**.
11. In the Client step, click **Next** until you reach the last step, and then click **Finish**.



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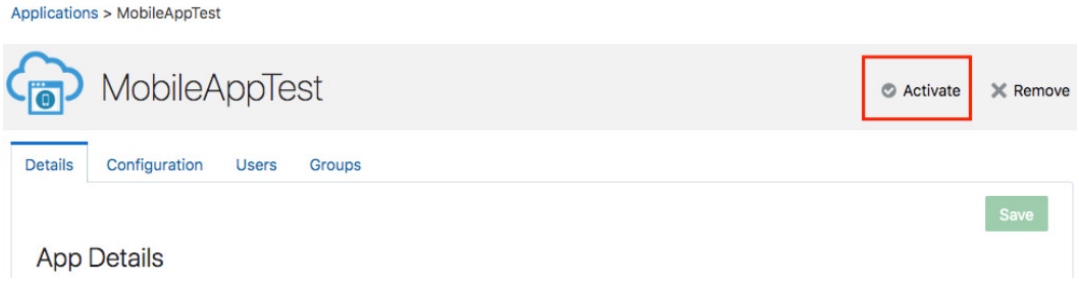
12. From the Application Added dialog, make a note of the **Client ID** value, and then click **Close**.

> **Note**
>
> The mobile application needs the Client ID value to integrate with Oracle Identity Cloud Service.

13. From Applications, click the test page of the mobile application you just created; for example, MyMobileAppTest or MobileAppTest, and then click **Activate**.



14. In the Activate Application dialog, click **Activate Application**.

How do I access Oracle Identity Cloud Service using single sign-on from Oracle Analytics Synopsis?

You can access Oracle Identity Cloud Service using single sign-on from Oracle Analytics Synopsis with a MagicURL.

A MagicURL contains all the required information to access using single sign-on and can be shared across your organization. It contains these five elements:

- Mobile app code name: `synopsisoracle`
- Client ID: Value of the mobile application that you configured for single sign-on in Oracle Analytics Cloud. For example, `123ab456cd`.
- Oracle Analytics Cloud Scope URL: Available in the Resources section of the mobile application that you configured for single sign-on in Oracle Analytics Cloud. For example, `https://ABCDFG1234.analytics.oac.com:123urn:opc:resource:consumer:all`.
- Oracle Analytics Cloud URL. For example, `https://analytics.myserver.com`.
- Oracle Identity Cloud Service URL. For example, `https://analytics.myserver.com`.

The MagicURL with these values would look like: `synopsisoracle://oauth?clientID=123ab456cd&friendlyURL=https://analytics.myserver.com&scope=openid%20https://ABCDFG1234.analytics.oac.com:123urn:opc:resource:consumer:all&idcsURL=https://123abc456fgh.identity.oraclecloud.com`

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> **Note**
>
> To retrieve the Client ID and the Scope URL, navigate to your Oracle Identity Cloud Service Admin Console, click **Applications**, click **Mobile App**, and then click **Configuration**. You see **Client ID** in the General Information section and **Scope URL** in the Client Configuration section by scrolling down until you see **Token Insurance Policy**.

How do I create and distribute the MagicURL for Oracle Analytics Synopsis manually?

After you complete the federated single sign-on configuration, create the MagicURL based on bits of information taken from the configuration. To create the MagicURL, you must have administrator privileges in Oracle Identity Cloud Service.

1. Collect the information required for the MagicURL.

   See How do I access Oracle Identity Cloud Service using single sign-on from Oracle Analytics Synopsis?

2. Use the following URL format and replace the brackets and their content, for each one of its corresponding elements:

   ```
   [Mobile App code name]://oauth?clientID=[Client ID]&friendlyURL=[OAC friendly URL]&scope=openid%20[Scope URL]&idcsURL=[IDCS URL]
   ```

3. Distribute the MagicURL to your user community using email, a corporate messenger, or other appropriate channel.

How do I use the MagicURL for Oracle Analytics Synopsis?

As a user who has installed Oracle Analytics Synopsis and received the MagicURL sent by your organization, tap the MagicURL from your mobile device. The app opens and automatically provisions itself.

> **Note**
>
> You mustn’t use Gmail as your mail client to access the MagicURL; a known issue exists with Gmail where such hyperlinks are treated as plain text.

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Synopsis for iOS

Manage Data

- How do I load data from a spreadsheet?
- How do I load data from a data set from Oracle Analytics Cloud?
- How do I load data from the HealthKit app?
- How do I load data from an image of a table?
- How do I change the format of the loaded data?
- How do I change the data type for a project in the app?
- How do I select specific data for analysis?
- How do I add a calculated numeric column in a data file?
- How do I add a chart to my charts list?
- How can I view insights about a chart?
- How can I view insights about a project?
- How do I rename a project?
- How do I delete a project?
- How do I back up the project data?
- How do I restore the project data?

Manage Visualizations

- How do I change the initial visualization provided by the app?

Share

- How do I share the analysis?

How do I load data from a spreadsheet?

1. Ensure that the data file (such as xls, xlsx, or csv) is available on your mobile device.
2. Open the app.

   You see a list of projects.
3. Tap + available at the top of the Projects screen.
4. Tap **File Explorer**.
5. Select the location of your data file; for example, Dropbox.
6. Select the data file.

   You see a preview of the data.

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7. Optionally, you can tap Text or Number or Date attribute for a data column to modify it. For example, if Customer ID is displayed as Number, then tap Number to change it to Text.
8. Tap **Load**.

   The app opens, loads the file as a project, and presents the initial analysis as a visualization that contains numbers and text values.

How do I load data from a data set from Oracle Analytics Cloud?

1. Ensure that you've subscribed to Oracle Analytics Cloud.
2. Open the app.

   You see a list of projects.
3. Tap + available at the top of the Projects screen.
4. Tap **Oracle Analytics**.
   - If you use Oracle Analytics Day by Day, then the app asks if you want to connect to Oracle Analytics Cloud using your Day by Day account. Tap **CONNECT**.
   - If you aren’t using Oracle Analytics Day by Day or want to connect to a different server, then enter the server information and tap **CONNECT**.
   - Optionally, select the **Enable secure connection** check box to log in securely.
5. Select a data set that you created on the cloud service.

The app loads the selected data set as a project and presents the initial analysis as a visualization that contains numbers and text values.

How do I load data from an image of a table?

1. Open the app.

   You see a list of projects.
2. Tap + available at the top of the Projects screen.
3. Tap **Lens**.
4. Point the device camera at a table of data and click **Capture**.
5. Optionally, wait for the augmented reality chart to appear over the data in the table and then on the device, click the button that increases volume to import the data from the table.

The app loads the selected data as a project and presents the initial analysis as a visualization that contains numbers and text values.

How do I load data from the HealthKit app?

1. Open the app.

   You see a list of projects.
2. Tap + available at the top of the Projects screen.
3. Tap **HealthKit**.
4. Enable the health data categories that you want and tap **Allow**.

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The app loads the HealthKit data as a project and presents the initial analysis as a visualization that contains numbers and text values.

How do I change the format of the loaded data?

1. Tap the initial visualization to view the analysis data as a list of number cards.
2. You can format at a high level on the number card itself. Tap on the required number card.
3. Select the format options. You can format the value on the number card as sum, average, count, number, currency, and percent.

   You can format the number with a currency symbol, the number of decimal places, and a number separator. Optionally, you can format the data as an aggregate of sum, average, and count. The **Abbreviate** check box enables you to display the number in an abbreviated form. For example, abbreviate 1,234,567.00 as 1.2M

   > **Note**
   >
   > If you select percent, then you can evaluate the value as a percentage of the total numbers.

   You see the modified format.
4. Tap on the number card to close the format options.

How do I change the data type for a project in the app?

1. Tap the project.

   You see the list of number cards.
2. Tap .
3. Tap **Data Staging**.
4. Tap for an item to change the value to a number, text, or date.
5. Tap for an item to show or hide it.
6. Tap **Done** to apply the changes.

How do I select specific data for analysis?

1. Tap a number card.

   You see the charts for the selected number and its available text values. For example, in a chart, you might see product names as text values that each have a corresponding manufacturing price in the form of a number.
2. Tap the chart for the selected number and required text value to view in full-screen mode.
3. Tap .
4. In **Numbers**, **Text**, and **Charts**, select the values that you want.

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5. Optionally, tap > to selet and apply filters to limit the numbers and text values to use in the analysis.

   Based on the data selected, you see the analysis in a chart that is appropriate for that data.

How do I add a calculated numeric column in a data file?

1. Tap the project.

   You see the list of number cards and my charts.

2. Tap .
3. Tap **Add New Column**.

   You see the numeric columns available in the data file and the options to perform basic mathematical calculations; for example, addition, subtraction.

4. Select the columns and the mathematical operation that you want to perform; for example, select Sales and Cost numeric columns; then select .
5. Tap **Done** and then name the new column, for example, `Profit`.

The app adds the new Profit column with the calculated profit values to the list of number cards.

How do I add a chart to my charts list?

1. Tap a project.

   You see the list of number cards and your charts.

2. You can add a chart to your charts list in two ways:

   - In My Charts, tap <plus icon> to add a chart that the app generated based on the number cards in the project.
   - Tap a number card to see the various charts.
   - Tap a chart to view it in full-screen mode.
   - Tap and then tap **Add to My Charts**.

How can I view insights about a chart?

1. Tap a project.

   You see the list of number cards and your charts.

2. Tap a number card.

   You see the charts for the selected number and its available text values.

3. Tap a chart.
4. Tap available at the top of the chart.
5. Tap **Show insights**.

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6. Tap to share the insight using an app on your device.

   You see insights about the data in the chart based on logic and common sense. Use this machine learning for a predictive analysis of the data in the chart.

How can I view insights about a project?

1. Tap a project.

   You see the list of number cards and your charts.

2. Tap .
3. Tap **Project Insights**.

   You see insights about the data in the project based on logic and common sense. Use this machine learning for a predictive analysis of the data in the project.

4. Tap to hear the insight.

How do I rename a project?

1. Tap a project.

   You see the list of number cards and your charts.

2. Tap .
3. Tap **Rename**.
4. Enter the new name and tap **Done**.

   You see the updated name for the project.

How do I delete a project?

1. Swipe right to left on the project.
2. Use **Undo** to reverse the delete action.

How do I back up the project data?

1. Open the app.

   You see a list of projects.

2. Tap .
3. Select **Backups**.

   You see the available apps on your device such as Dropbox.

4. From the list of apps, select an app, for example Dropbox, wait for the backup file to be visible in Dropbox file list, and then tap **Save** to upload to Dropbox.

   The app backs up the projects and configuration data to the app that you selected, for example Dropbox.

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How do I restore the project data?

1. Open the app.

   You see a list of projects.

2. Tap .
3. Tap **Restore**.

   You see the available apps on your device, such as Dropbox.

4. In the app where the backup is saved, for example Dropbox, select the backup zip file.
5. In the message that the app displays, tap **Replace**.

How do I change the initial visualization provided by the app?

1. Tap a number card.

   You see the charts for the selected number and its available text values. For example, in a chart, you might see product names as text values that each have a corresponding manufacturing price in the form of a number.

2. Tap the chart whose type you want to change.
3. Tap to modify the chart type.
4. In **Charts**, select a chart type.

   You see the chart in the selected type.

How do I share the analysis?

1. Tap a number card.

   You see the charts for the selected number (for example, units sold) and the available text values (for example, country, region, segment).

2. Tap beside the chart that you want to share. For example, you might want to share the chart called Units Sold by Country.

   You see the available apps on your device.

3. Select the app you want to share with.

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Synopsis for Android

Manage Data

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Share and Export

- How do I share the analysis?
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How do I load data from a spreadsheet?

1. Ensure that the data file (such as xls, xlsx, or csv) is available on your mobile device.
2. Open the app.

   You see a list of projects.
3. Tap available at the bottom of the Projects screen.
4. Tap **File Explorer**.
5. Select the location of your data file; for example, Dropbox.

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6. Select the data file.

   You see a preview of the data.

7. Optionally, you can tap **Text** or **Number** attribute for a data column to modify it. For example, if Customer ID is displayed as **Number**, then tap **Number** to change it to **Text**.

8. Tap **Load**.

The app opens, loads the file as a project, and presents the initial analysis as a visualization that contains numbers and text values.

How do I load data from a data set from Oracle Analytics Cloud?

1. Ensure that you've subscribed to Oracle Analytics Cloud.
2. Open the app.

   You see a list of projects.

3. Tap available at the bottom of the Projects screen.
4. Tap **Oracle Analytics**.
   - If you use Oracle Analytics Day by Day, then the app asks if you want to connect to Oracle Analytics Cloud using your Day by Day account. Tap **CONNECT**.
   - If you aren't using Oracle Analytics Day by Day or want to connect to a different server, then enter the server information and tap **CONNECT**.
   - Optionally, select the **Enable secure connection** check box to log in securely.
5. Select a data set that you created on the cloud service.

The app loads the selected data set as a project and presents the initial analysis as a visualization that contains numbers and text values.

How do I load data from the Google Fit app?

1. Open the app.

   You see a list of projects.

2. Tap available at the bottom of the Projects screen.
3. Tap Google Fit .

If the Google Fit app isn't installed on the device, you're prompted to install it (a one-time installation). If the Google Fit app is installed on the Android device, then the app asks you to allow access to your fitness data. If you allow, then it loads the Google Fit data as a project and presents the initial analysis as a visualization that contains numbers and text values.

How do I load data from an image of a table?

1. Open the app.

   You see a list of projects.

2. Tap available at the bottom of the Projects screen.

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3. Tap **Lens** .
4. Point the device camera at a table of data and click .
5. Optionally, wait for the augmented reality chart to appear over the data in the table and then on the device, click the button that increases volume to import the data from the table.

The app loads the selected data as a project and presents the initial analysis as a visualization that contains numbers and text values.

How do I change the format of the loaded data?

1. Tap the initial visualization to view the analysis data as a list of number cards.
2. Tap on the number card to open the format options.
3. Select the format options.

   You can format the number with a currency symbol, the number of decimal places, and a number separator. Optionally, you can format the data as an aggregate of sum, average, and count. The **Abbreviate** check box enables you to display the number in an abbreviated form. For example, abbreviate 1,234,567.00 as 1.2M

   > **Note**
   >
   > If you select percent, then you can evaluate the value as a percentage of the total numbers.

   You see the modified format.
4. Tap on the number card to close the format options.
5. In tablets that are 7 inches or larger, tap available for the selected number card to change the format of the numbers.

How do I change the data type for a project in the app?

1. Tap the project.

   You see the list of number cards and your charts.
2. Tap .
3. Tap for an item to change the value to a number or text.
4. Tap for an item to show or hide it.
5. Tap to apply the changes.

How do I select specific data for analysis?

1. Tap a number card.

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You see the charts for the selected number and its available text values. For example, in a chart, you might see product names as text values that each have a corresponding manufacturing price in the form of a number.

2. Tap the chart for the selected number and required text value.
3. Tap to modify the chart.
4. In **Numbers**, **Text**, and **Charts**, select the values that you want.
5. Optionally, tap to filter the numbers and text values to use in the analysis.
6. Optionally, tap to add more than one text element to a bar chart.

Based on the data selected, you see the analysis in a chart that is appropriate for that data.

How do I add a calculated numeric column in a data file?

1. Tap the project.

   You see the list of number cards.
2. Tap . You see the numeric columns available in the data file and the options to perform basic mathematical calculations; for example, , . You can swipe to open the numeric keypad to perform complex mathematical calculations.
3. Select the columns and the mathematical operation that you want to perform; for example, select Sales and Cost numeric columns; then select .
4. Tap and name the new column, for example, Profit.

The app adds the new Profit column with the calculated profit values to the list of number cards.

How do I add a chart to my charts list?

1. Tap a project.

   You see the list of number cards and your charts.
2. You can add a chart to your charts list in two ways:
   - In My Charts, tap <plus icon> to add a chart that the app generated based on the number cards in the project.
   - Tap a number card to see the various charts.
   - Tap a chart to view it in full-screen mode.
   - Tap and then tap **Add to My Charts**.

How can I view insights about a chart?

1. Tap a project.

   You see the list of number cards and your charts.

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2. Tap a number card.

   You see the charts for the selected number and its available text values.

3. Tap a chart.

4. Tap .

   You see insights about the data in the chart based on logic and common sense. Use this machine learning for a predictive analysis of the data in the chart.

5. Tap to share the insight using an app on your device.

How can I view insights about a project?

1. Tap a project.

   You see the list of number cards and your charts.

2. Tap .

   You see insights about the data in the project based on logic and common sense. Use this machine learning for a predictive analysis of the data in the project.

3. Tap to hear the insight.

How do I merge charts in a project?

1. Tap a project.

   You see the list of number cards.

2. Tap a number card; for example, Units Sold.

   You see the various Units Sold charts such as Units Sold by Segments and Units Sold by Country.

3. Tap, hold, drag, and drop one chart on top of another to merge the two charts.

   > **Note**
   >
   > Prior to merge, you can predict if the merge will be successful. If a merge is going to be successful, then you see a green background color for the drop target; else, you see a red background color for the drop target.

   You see a new combination chart to work with like other charts.

How do I merge multiple projects?

You can only merge two projects that share the exact same structure; for example, projects that are based on the same spreadsheet. Prior to merge, you can predict if the merge will be successful. If a merge is going to be successful, then you see a green background color for the drop target; else, you see a red background color for the drop target.

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Tap, hold, drag, and drop one project on top of another to merge data of the two projects; for example, projects such as Order Activity of 2017 and Order Activity of 2016. You see a new project that you can work on like other projects.

How do I rename a project?

1. Tap the project to open it.

> **Note**
>
> You can't rename projects when using a tablet.

2. Tap beside the project name and tap **Rename**.
3. Change the name and subtitle as required.
4. Tap **Save**.

How do I delete a project?

1. Swipe left to right on the project.
2. Use **Undo** to reverse the delete action.

How do I back up the project data?

1. Open the app.

   You see a list of projects.

2. Tap next to **Projects**.
3. Select**Settings**.
4. Select **Backups**.

   The app connects to your Google drive.

5. Select

.

   The app backs up the projects and configuration data to your Google drive.

How do I restore the project data?

1. Open the app.

   You see a list of projects.

2. Tap next to **Projects**.
3. Select**Settings**.
4. Select **Backups**.

   The app connects to your Google drive.

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5. Select RESTORE adjacent to the desired time-stamped backed-up data.

How do I change the initial visualization provided by the app?

1. Tap a number card.

   You see the charts for the selected number and its available text values. For example, in a chart, you might see product names as text values that each have a corresponding manufacturing price in the form of a number.
2. Tap the chart whose type you want to change.
3. Tap .
4. Tap **Charts** and select a chart type.

   You see the chart in the selected type.

How do I share the analysis?

1. Tap a number card.

   You see the charts for the selected number (for example, units sold) and the available text values (for example, country, region, segment).
2. Tap beside the chart that you want to share. For example, you might want to share the chart called Units Sold by Country.
3. Select the app you want to share with.

How do I export a project?

1. Tap .
2. Tap **Export Project**.
3. Select the destination folder on your device.
4. If required, tap to create a new folder.
5. Tap **OK**.

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Troubleshoot

- What do I do if data is not loading?
- Where can I learn more?

What do I do if data is not loading?

The app doesn’t load data if it can’t derive anything from your spreadsheet. In such cases, you see a message and an example of correct data formatting. Correct the format of the data according to the example and reload your spreadsheet.

Where can I learn more?

You can learn more on the Oracle Analytics Cloud Synopsis Community page.

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