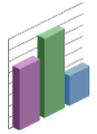




This guide describes the most common tasks when using Oracle BI Mobile to access, analyze, and share data from the iPad for viewing actionable intelligence and for making critical and timely business decisions. It also describes, for administrators, how to manage mobile privileges and enforce security.



For more detailed information about these and other tasks, see the [Oracle BI EE documentation](#) on Oracle Technology Network.

Before Beginning

Before you start using Oracle BI Mobile:

- Make sure your iPad is connected to the Internet. If your Oracle BI Presentation Services host server is accessed through a VPN, make sure your iPad's VPN setting is ON. On your iPad, tap the **Home** button, then tap **Settings**.
- Secure your iPad with a Passcode Lock. Tap the **Home** button, then tap **Settings**. The Passcode Lock is for the protection of your locally-saved BI content.
- Make sure you have the following information regarding your Oracle BI Presentation Services host server, available from your system administrator: server name (host); port; your standard Oracle BI EE login credentials. In addition, you need to know whether your server connections will enforce security using SSL and SSO.



Installing and Starting Oracle BI Mobile

Getting the Oracle BI Mobile Client



You install the Oracle BI Mobile application from Apple's App Store.

1. On your iPad, search the App Store for "Oracle".
2. Select the "Oracle BI HD" application, and tap the **Install** button.

OR:

Using a QR code scanner on your iPad, scan this QR code to access the Oracle BI application.



Launching Oracle BI Mobile for the First Time

1. On your iPad's Home screen, tap the **Oracle BI Mobile application** icon.
2. In the end-user licensing agreement, scroll to read, and if you agree to the terms, tap **Accept**.
3. In the Login screen, tap the Add Server row to enter your initial server configuration settings.
4. In the Server Setting screen, specify the following:
 - Name (enter any name for this server connection)
 - Host
 - Port
 - Your standard username/password for Oracle BI EE
5. Tap **Save**.
6. Tap **Login**.



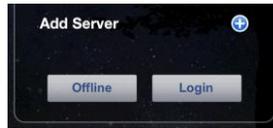
Managing Server Connections

Access the Server Settings screen by tapping the **Options** icon. This is where you can add, modify, switch, and remove server connections.



Adding a Server Connection

1. In the branding bar, tap the **Options** icon, then tap **Settings**.
2. Tap the Add Server row (with the blue **Add** icon).
3. In the Server Setting screen, complete the fields.
4. Tap **Save**.



Name	Settings Name
Host	Server Name
Port	Port
SSL	<input checked="" type="checkbox"/>
SSO	<input type="checkbox"/>
Username	Principal
Password	Credential
Save Password	<input checked="" type="checkbox"/>
Device Locale	<input checked="" type="checkbox"/>
Analytics Path	/analytics/saw.dll
Publisher Path	/xmlpserver

Switching Servers

You can change the server you connect to by default, which will re-launch the application. To change your default server:

1. In the branding bar, tap the **Options** icon, then tap **Settings**.
2. Tap the row for the server connection to which you want to switch.
3. In the confirmation dialog, tap **OK**.

Removing a Server Connection

Note: The default server connection cannot be deleted. The default server is the one that has the green checkmark next to it. If you want to delete a server connection that is set as the default, first log out, then switch to a new default server.

1. In the branding bar, tap the **Options** icon, then tap **Settings**.
2. Tap the row for the server connection you want to delete.
3. Scroll down to the red **Delete Server** button, and tap it.
4. Tap **Done**.

Save Password

Device Locale

Analytics Path /analytics/saw.dll

Publisher Path /xmlpserver

Delete Server

Viewing Oracle BI Content on the iPad

Navigating the Catalog and Finding Dashboards



You can navigate the catalog in any of the following ways:

- Slide or scroll through your recently viewed objects in the carousel view.
- Slide or scroll through your favorite objects in the carousel view after tapping the **Favorites** icon.
- Access your dashboards directly in a special dashboards hierarchy view by tapping the **Dashboards** icon.
- Perform searches to access BI content that you have not already viewed or marked as favorite.

Performing Searches

To choose the catalog objects you want your searches to be performed on:

1. To the right of the Search field, tap the **Search Settings** icon (the gear).
2. In the Search Settings dialog, tap the **ON/OFF** toggle for each type of catalog object you want to include or exclude in searches.
3. Tap **Done**.

All	<input checked="" type="checkbox"/>
Dashboard	<input checked="" type="checkbox"/>
Analysis	<input checked="" type="checkbox"/>
Briefing Book	<input checked="" type="checkbox"/>
Report	<input checked="" type="checkbox"/>
Scorecard	<input checked="" type="checkbox"/>

To search for BI content:

1. In the tab bar, tap the **Search** icon.
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".



3. Tap the **Search** key 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.

4. (Optional) 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.

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.

Accessing the Online Help for Oracle BI Mobile

Access the online help for Oracle BI Mobile in one of the following ways:

- In the branding bar, tap the **Options** icon, then tap **Help**.
- Visit Oracle Technology Network.
- Using a QR code scanner on your iPad, aim the camera lens at this QR code:



Quick Reference of Gestures

Gesture	What It Does
Tap	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	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	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)	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. In a list or menu, drag up or down to scroll. In a data table, drag up or down to scroll. In a dashboard, drag to scroll.
Drag (Two-Finger)	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 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	In a list, swipe on an item to delete it.
Four-Finger Swipe	Reveals the multitasking bar so that you can move between iPad applications.

Quick Reference of Icons



Alerts icon



All/Highlighted toggle



Options icon



Search Settings icon



Home icon



Add icon



Next icon



List-style Display icon



Carousel-style Display icon



Previous icon



Back arrow



Dashboard page icon



Legend icon



Changeable prompt operator button



Funnel icon

For the Administrator

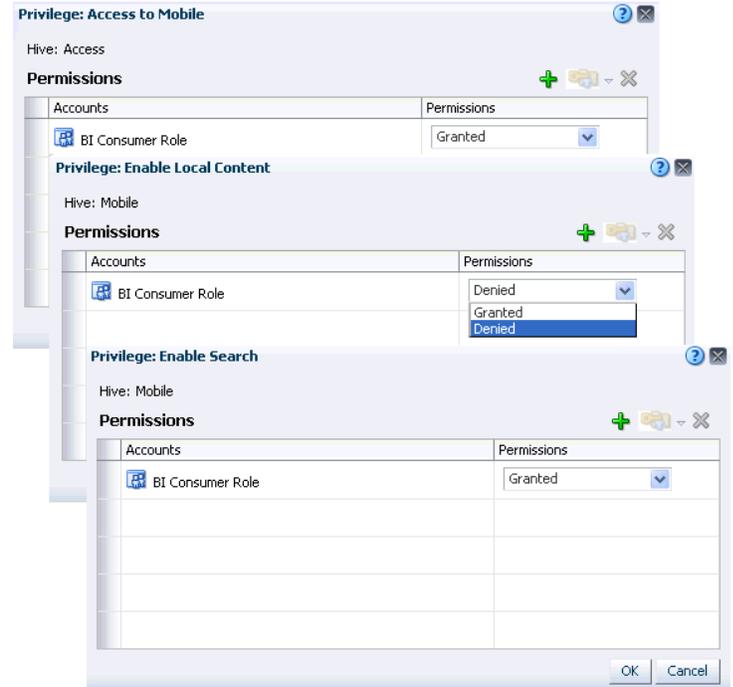
Managing Mobile Privileges

In Oracle BI Presentation Services Administration, check that user privileges are set appropriately.

1. From the Home page in Presentation Services, click **Administration**.
2. In the Security area, click **Manage Privileges**.
3. In the Access component part of the list, click **BI Consumer Role** next to the Access to Mobile privilege.
4. Add application roles as necessary, and make sure the permission is granted for the Mobile Access privilege to the appropriate users.
5. Click **OK**.
6. In the Mobile component part of the list, click **BI Consumer Role** next to the Enable Local Content privilege.
7. Add application roles as necessary, and make sure the permission is granted for the Enable Local Content privilege to the appropriate users.

Note: To add greater security to your BI content, select the Denied option for the Enable Local Content privilege. This prevents users from saving BI content onto their iPads.

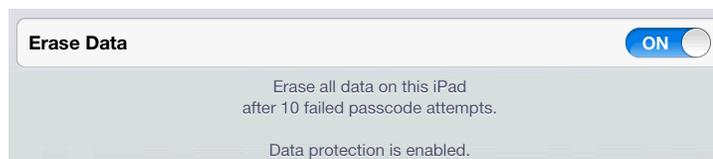
8. In the Mobile component part of the list, click **BI Consumer Role** next to the Search privilege.
9. Add application roles as necessary, and make sure the permission is granted for the Search privilege to the appropriate users.



Enforcing Security



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 enforce device security policies with regard to password protection. You can also remotely wipe the device clean in case of theft or loss.



Using the Security Toolkit for Oracle BI Mobile

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.

To find the FAQ and the toolkit, search on "security toolkit" in the Downloads section of Oracle Technology Network. Scan this QR code to go to Oracle Technology Network.



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.

