

# Cal Answers

## Oracle Business Intelligence Mobile App User Guide

February 2016

### **This guide shows you how to:**

- Install the app
- Navigate and use the dashboards
- Apply mobile tips & tricks


### **Please note**

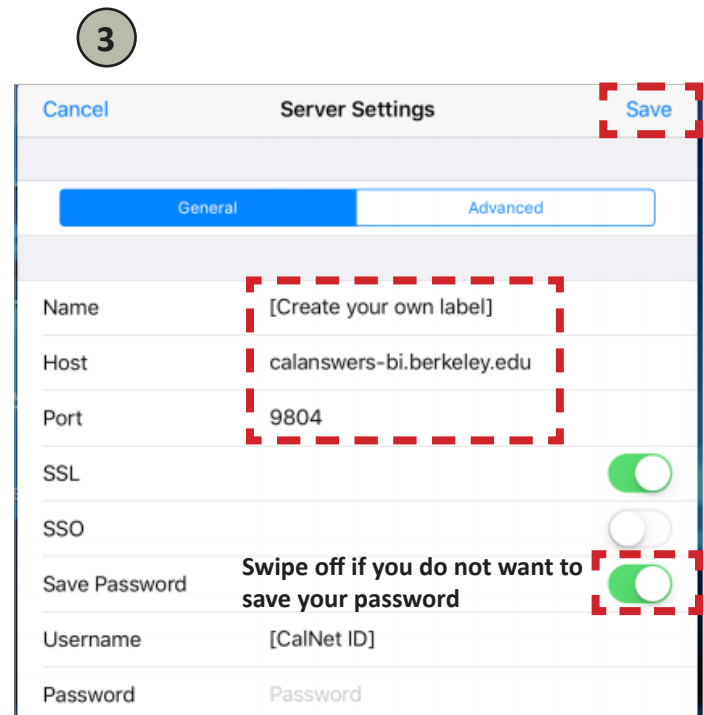
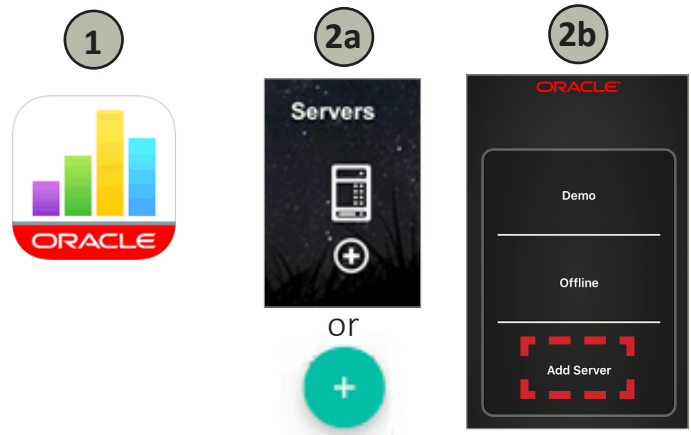
The Oracle BI Mobile application is a self-service option. The Cal Answers and CSS-IT support teams have limited ability to troubleshoot issues with the mobile application. As with any app downloaded from an app store, please contact your regular device support for assistance.

As with any app as well, the speed at which this app runs depends on the speed of the internet network you are on.

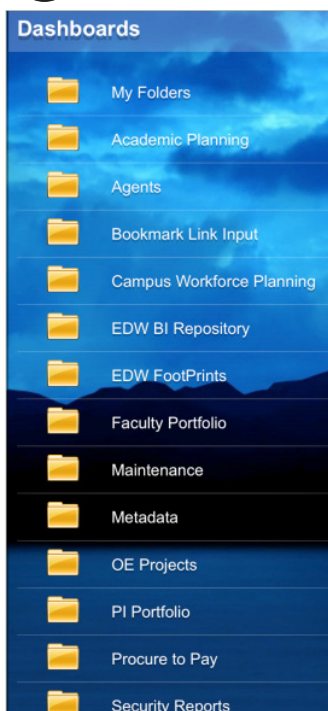
# Install the App

Available on any network:  
AirBears2, public wifi, private wifi

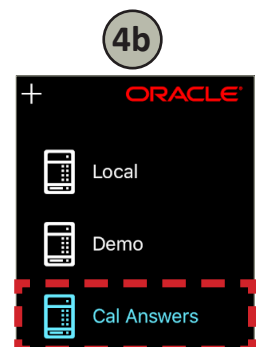
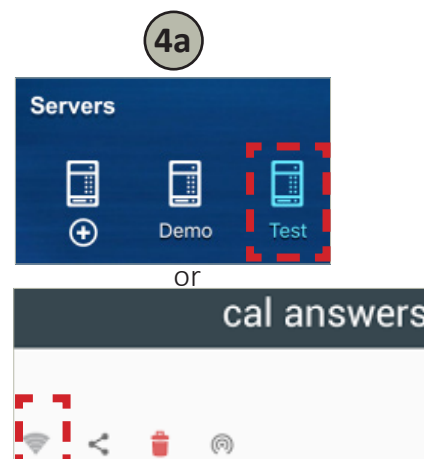
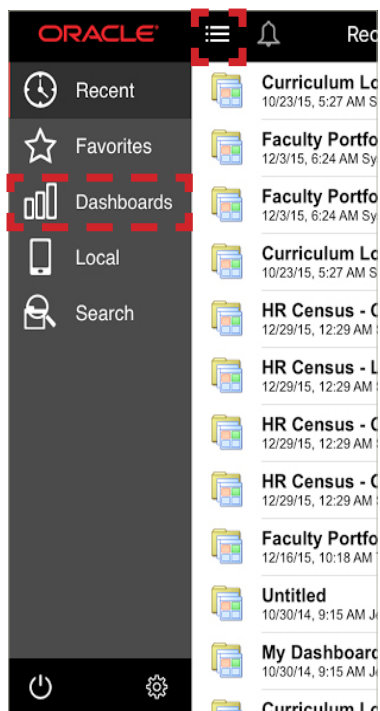
1. In the App store, search for “Oracle Business Intelligence Mobile HD” and look for the icon with the white background, bar chart only, and no Rubik’s Cube
2. After loading the app and accepting the licensing agreement, add the Cal Answers server
  - 2a. Tablet
  - 2b. Phone
3. Fill out the Server Settings form
4. You are back to the view from Step 2. Click on the Server you added. Try again if it does not authenticate the first time.
  - 4a. Tablet
  - 4b. Phone
5. You should see the Dashboards label. If you see the Recents label, click the top left  icon and click Dashboards.



## 5 Dashboards



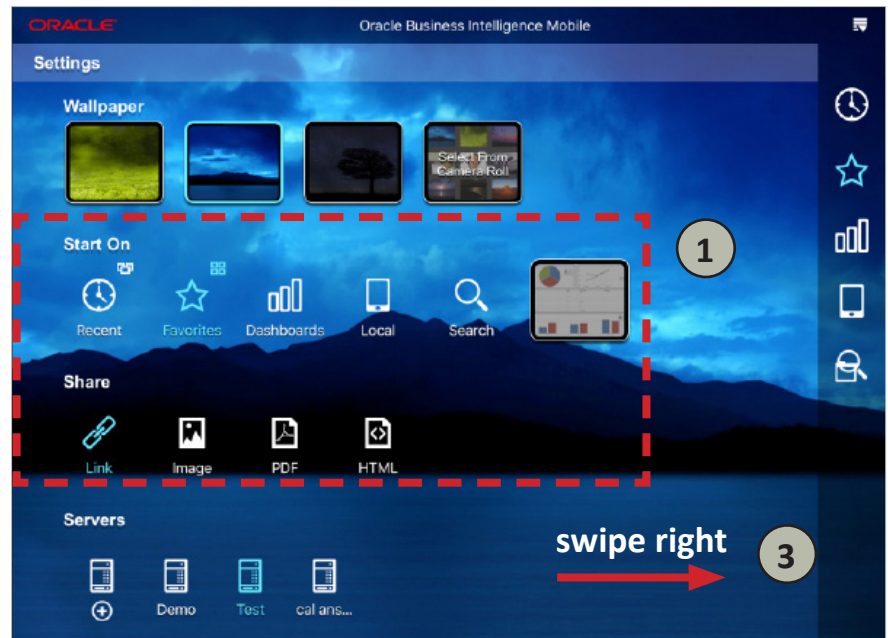
## Recents



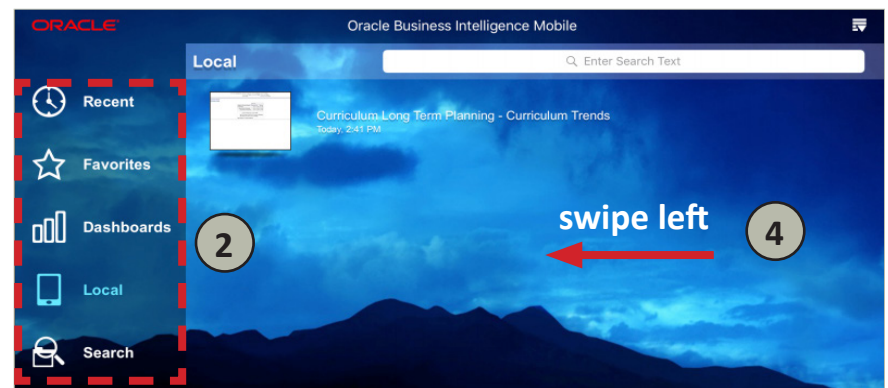
# Toggle Between Home and Settings

## On a tablet

1. "Settings" - Change how you share a report or your initial landing page
2. "Home" - Run different reports and access your favorited, recent, and saved reports
3. Swipe right to go to the Home screen
4. Swipe left to go to the Settings screen

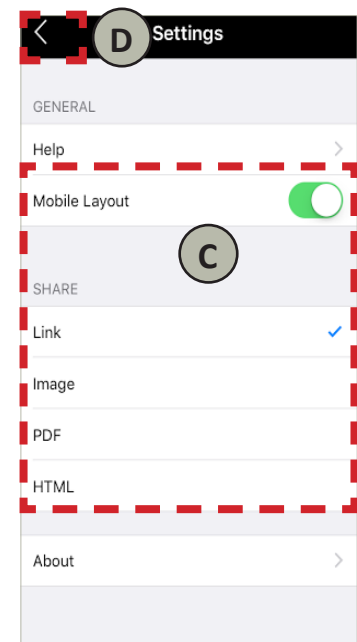
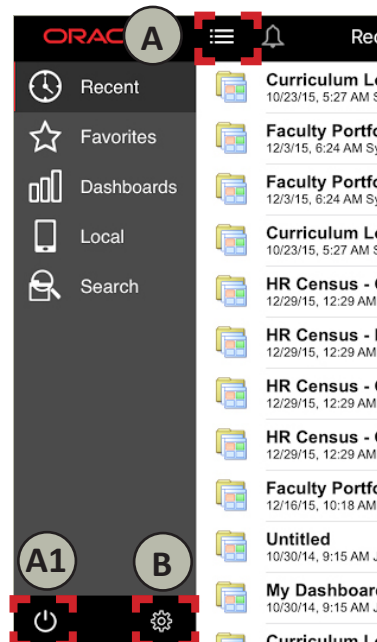


Note: Settings may not be available as a separate feature depending on the version of the operating system. Options may be presented as part of the report instead.



## On a phone

- A. Get to Home screen  
A1. Tip: Tap the power icon once if you want to log out
- B. Get to Settings screen
- C. Choose settings  
Tip: Swipe off Mobile Layout to expand graphs to full scale, choose PDF for formatted shared reports
- D. Click back arrow to leave Settings



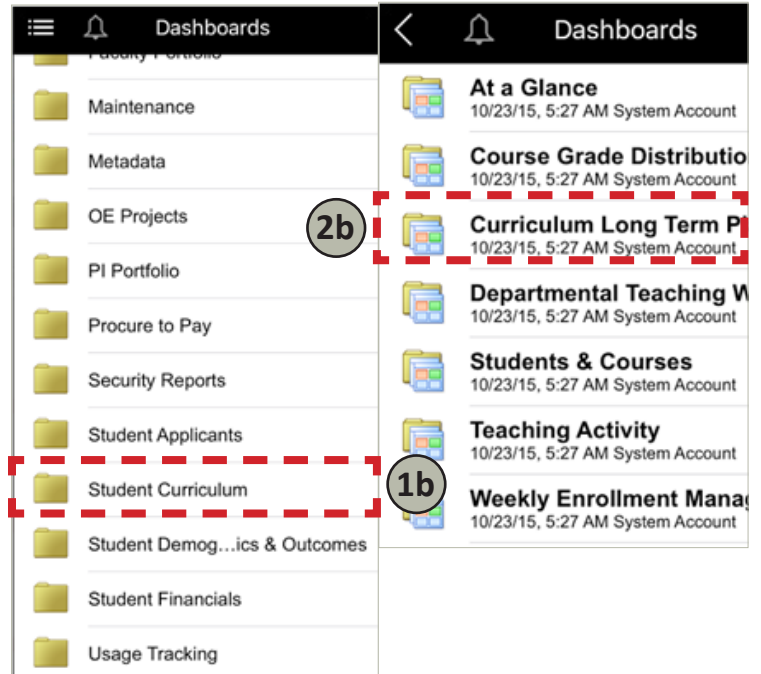
# Find a Dashboard

1. Click a subject folder to open a list of the dashboards for that subject area
  - 1a. Tablet
  - 1b. Phone
2. Choose a dashboard from list of graph icons
  - 2a. Tablet
  - 2b. Phone

**Tablet**



**Phone**



## Did you know?

If you logged out previously or it has been a while since you accessed the app, you will need to refresh the server. If you are using it on a phone, it will prompt you automatically. If you are using it on a tablet, click on the server you created in Settings. You know to refresh because the navigation menu is a muted gray rather than a bright white.


**Server inactive**




**Server active**



# Run the Dashboard

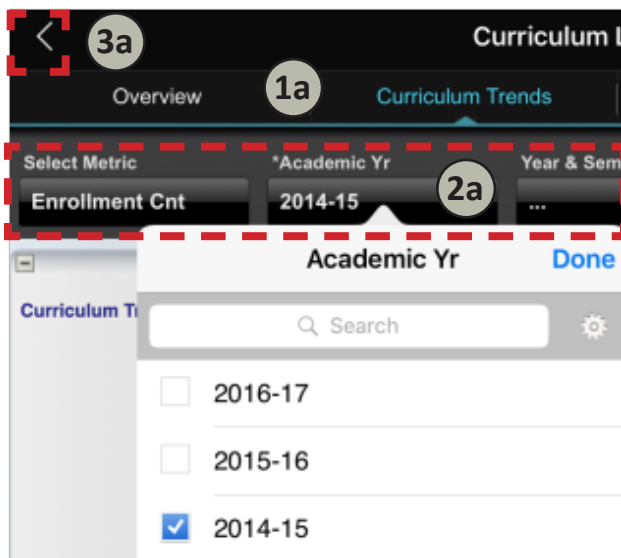
1. Choose a tab:  
Overview, Curriculum Trends, Course View  
1a. Tablet      1b.1 + 1b.2. Phone
2. Apply filters as needed:  
Enrollment Cnt and 2014-15 have been selected  
2a. Tablet      2b. Phone
3. Click  arrow to navigate back  
3a. Tablet      3b. Phone

Note: If you do not see tabs or filters:

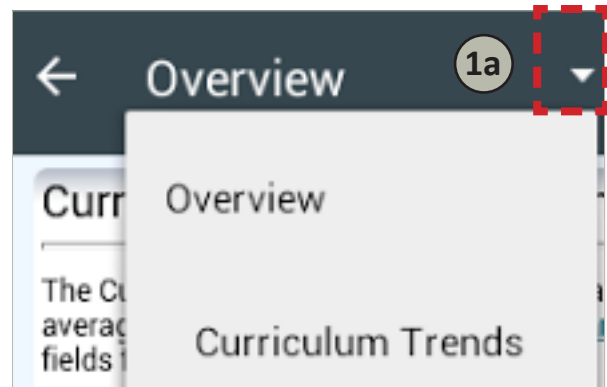
- If you see this  icon in the top center of the screen, click the icon to pull down these options.

- If you do not see the icon, drag down from the top of the screen to pull down these options.

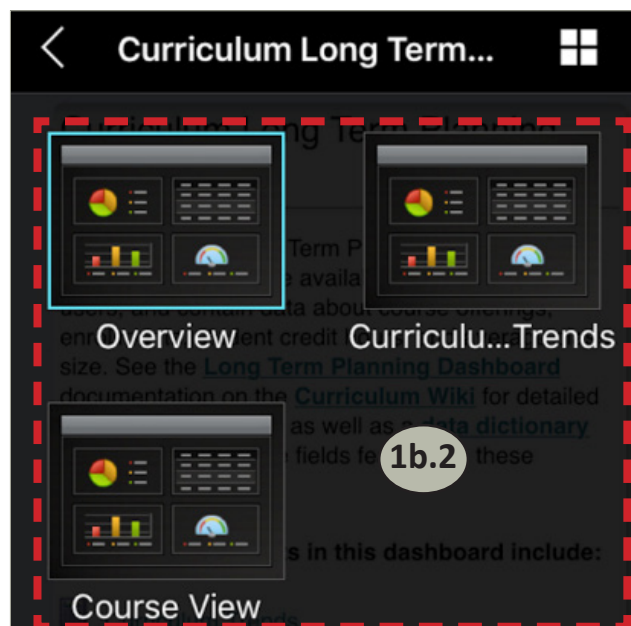
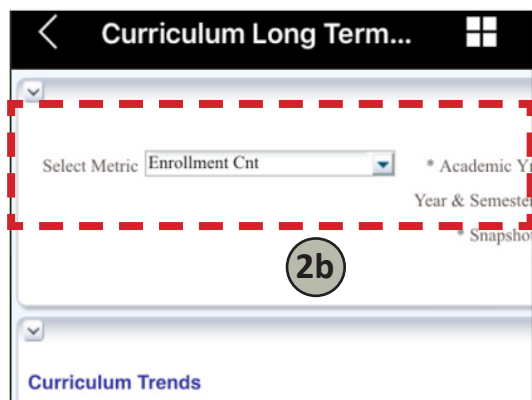
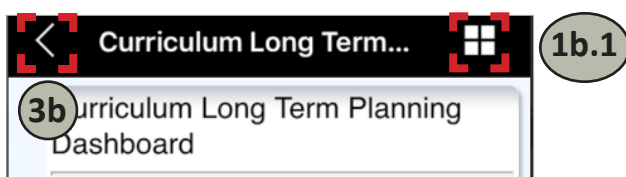
## Tablet



or



## Phone

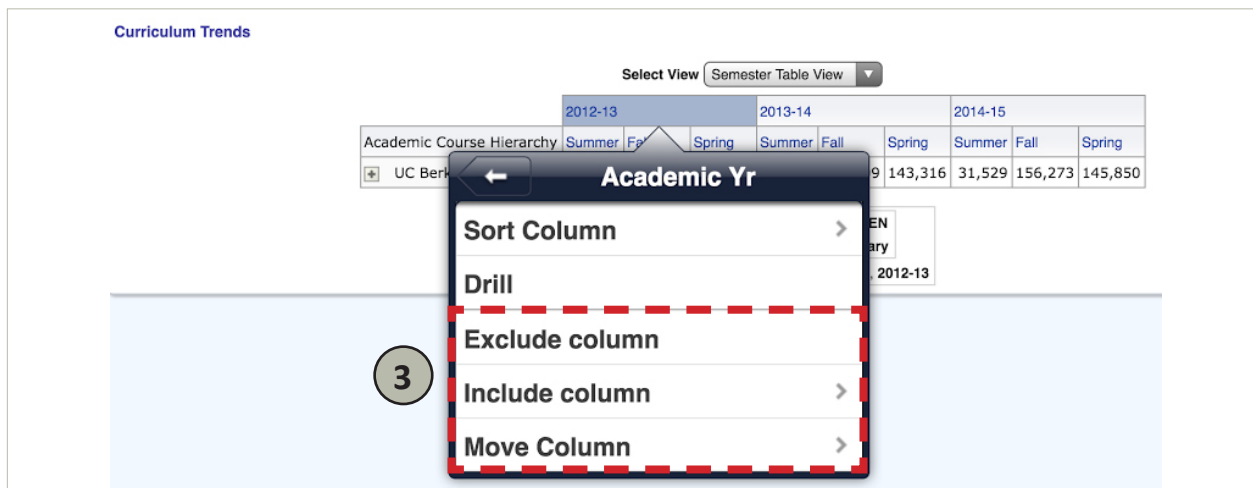
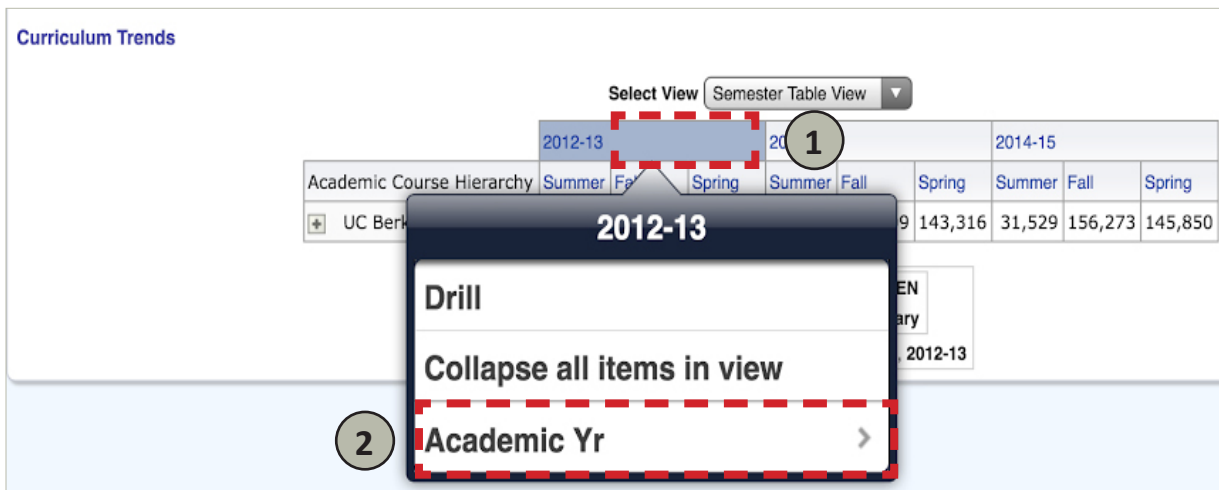




# Add/Remove/Move Columns

## On a tablet and phone

1. Tap once and hold in the white space of the column you want to adjust to get to the menu. Tap twice and hold if it does not work initially. If you are in a drillable report and the menu does not show initially, click once on the drillable section such that the underline shows up, then tap once and hold in the white space again. In this example, the drillable section is “2012-13”.
2. The add/remove/move function resides in a sub-menu. To get to it, first choose the data field you want to adjust. In this example, the data field being adjusted is “Academic Yr”.
3. Then choose
  - Exclude column
  - Include column
  - Move column



# Customize and View Custom Queries


You cannot create nor save new customizations or custom queries in the app, but you can apply those that were previously created in a desktop browser

## Why this is useful:

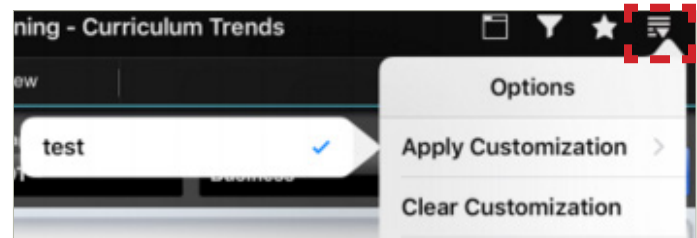
Retrieves a customized dashboard with no need to apply filters nor format changes

## Customize the report

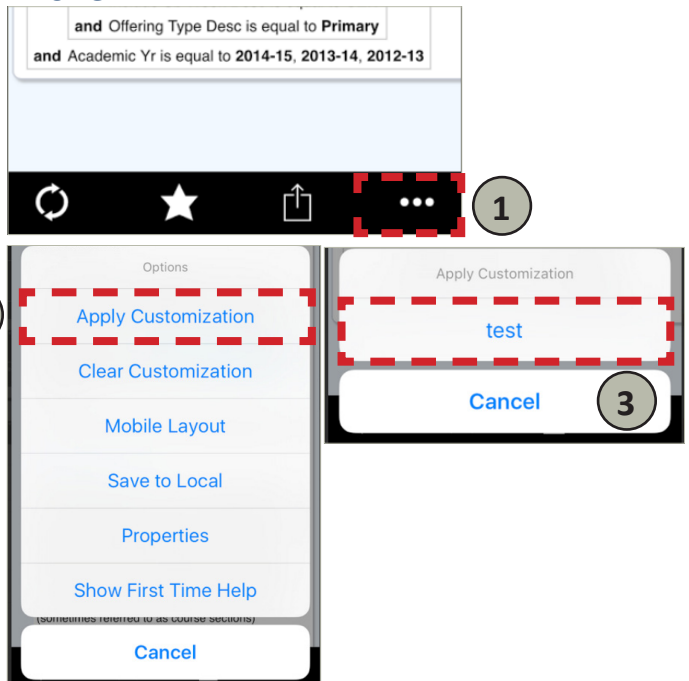
### On a tablet

Click the top-right  icon and apply a customization you had previously saved in the desktop browser

### Tablet



### Phone



### On a phone

1. Choose the “...” icon
2. Choose Apply Customization
3. Choose one of your customizations. In this example, the customization is labeled “test”.

Note: The customization feature may not be available depending on the version of the operating system.

## View custom queries

- A. Go to Search  
This is labeled as “Catalog” instead in some devices.
- B. Choose a folder on the left
- C. Choose a subfolder on the right
- D. Choose a file

### Custom queries



# Share a Report

## Why this is useful:

This is great for sharing reports with others. Your report will reflect the specific customizations and filters applied. This provides the same functionality as the bookmark link feature in the desktop browser.

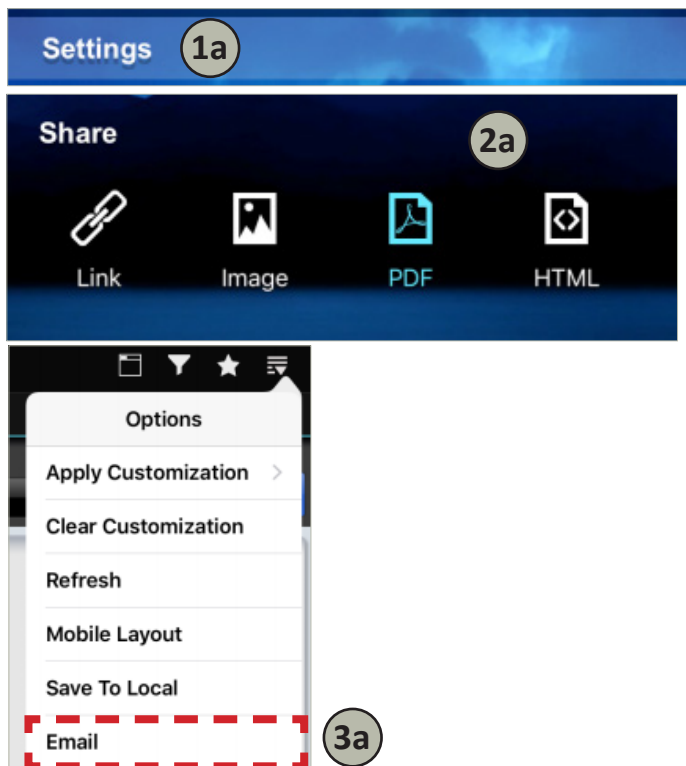
1. Go to Settings
  - 1a. Tablet
  - 1b. Phone
2. Choose the format of the email attachments to share. PDF is recommended since it is formatted for viewing and shows the report criteria.
  - 2a. Tablet
  - 2b. Phone

Note: When viewing a report shared as a link on iPhone, use the Apple mail app and not the Gmail app

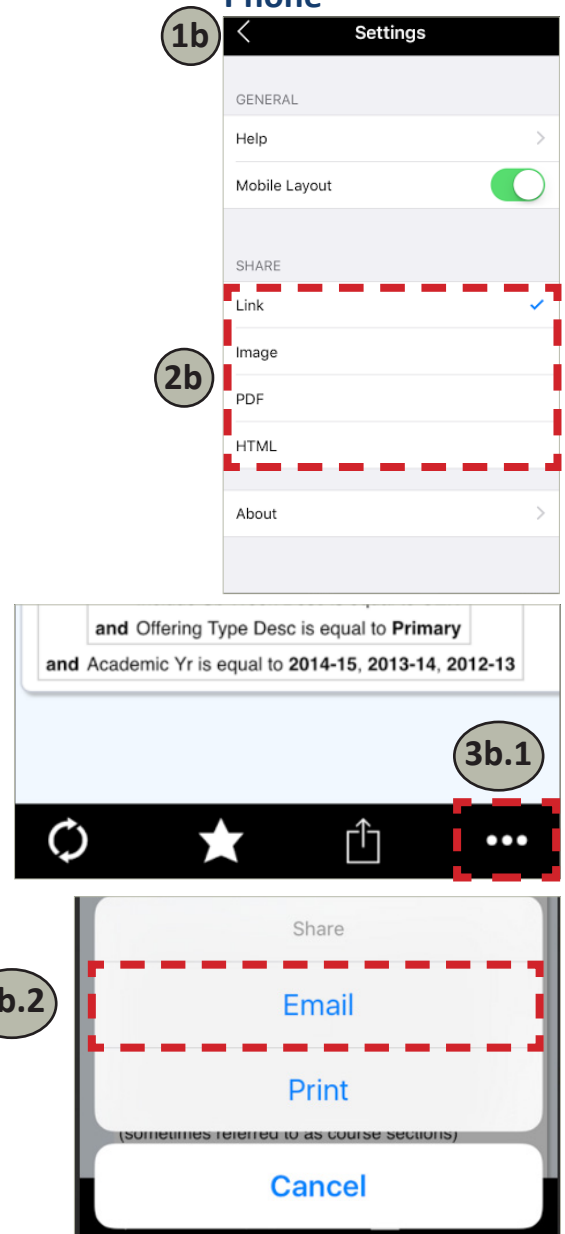
3. Choose Email
  - 3a. Tablet
  - 3b.1 + 3b.2. Phone

2c + 3c. In devices without Settings, choose “Share as” in the report and choose the format from the available options. An email draft will pop up.

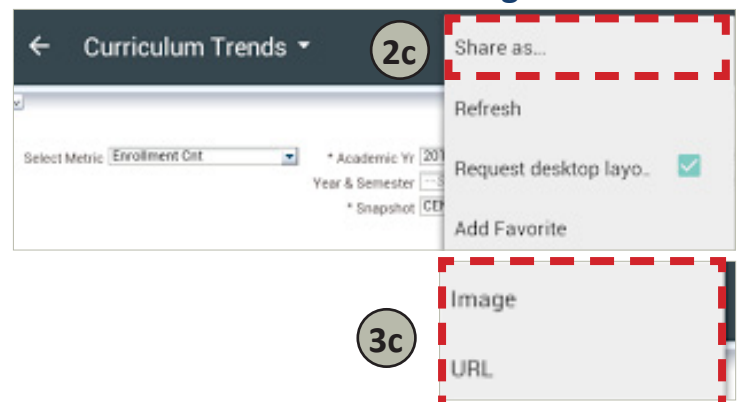
## Tablet



## Phone



## Devices without Settings





# Manage Favorites

## To favorite a report

Choose the star icon

A. Tablet B. Phone

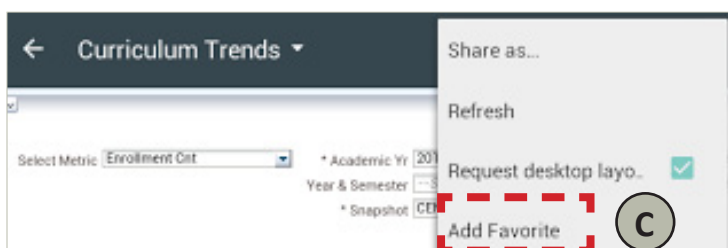
Not favorited or unfavorited



Favorited



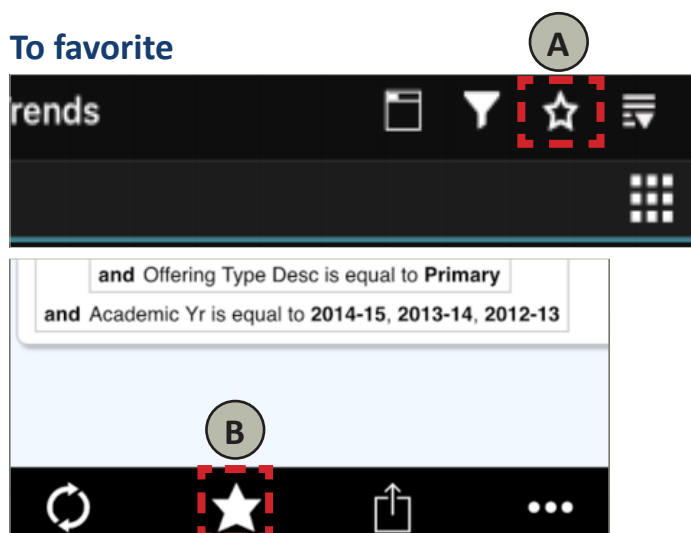
C. Depending on your device, you may favorite by choosing “Add Favorite” instead, and unfavorite by going to Favorites and choosing the star icon.



## Did you know?

The favorites on the desktop and app versions are in sync. Changes made in one version are saved to the other.

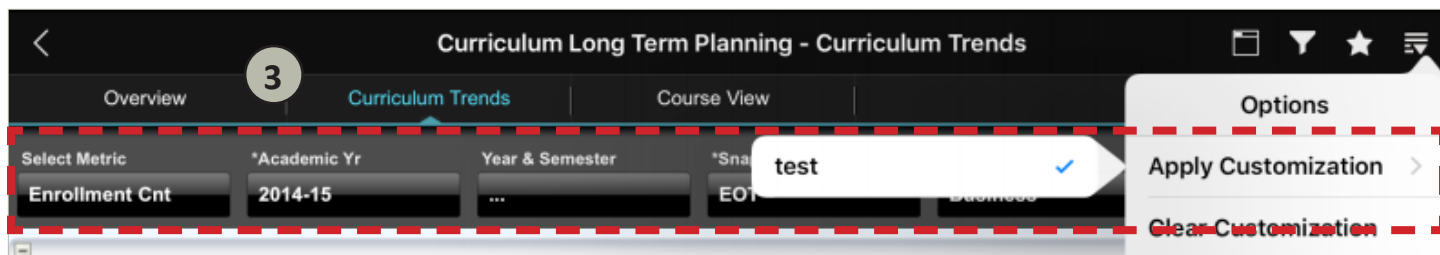
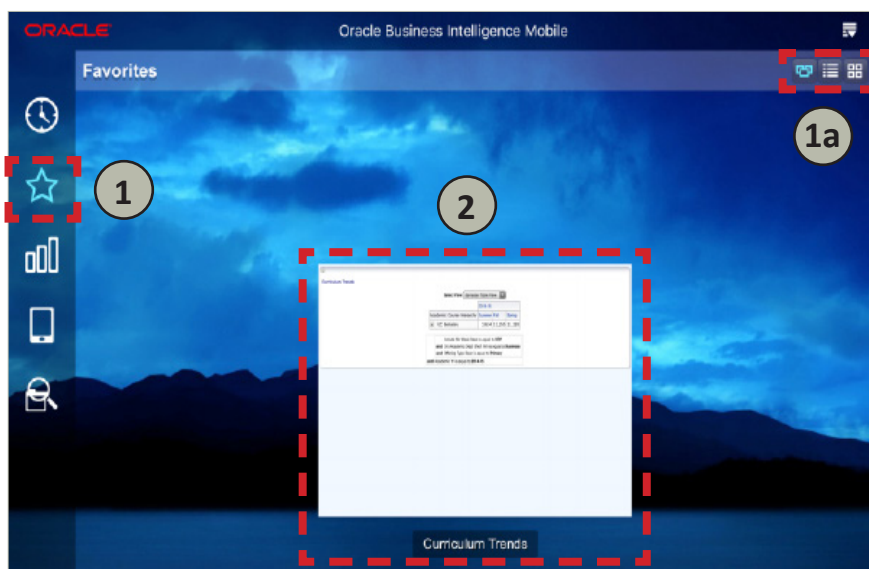
## To favorite



## To retrieve a favorited report

- Go to Favorites in the Home screen
  - Tip: Customize your view by choosing to display your favorites in carousel, list, or grid format
- Choose the report
- Re-run the report by choosing the filters or applying a saved customization

## To retrieve a favorite



# Save/Retrieve/Delete Locally on Device

## Why this is useful:

You may want to save reports for viewing at a later time where you do not have internet or cannot VPN into the Cal Answers server

## To save a report locally

1. Choose options  
1a. Tablet      1b. Phone
2. Choose Save to Local  
2a. Tablet      2b. Phone

## To retrieve a locally saved report

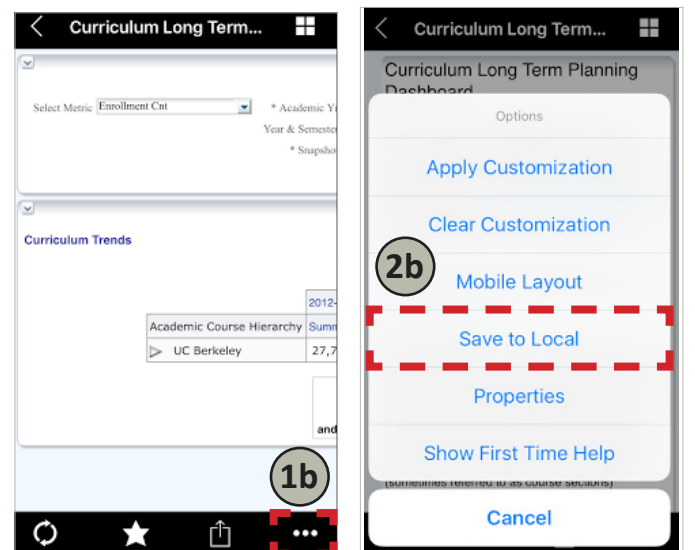
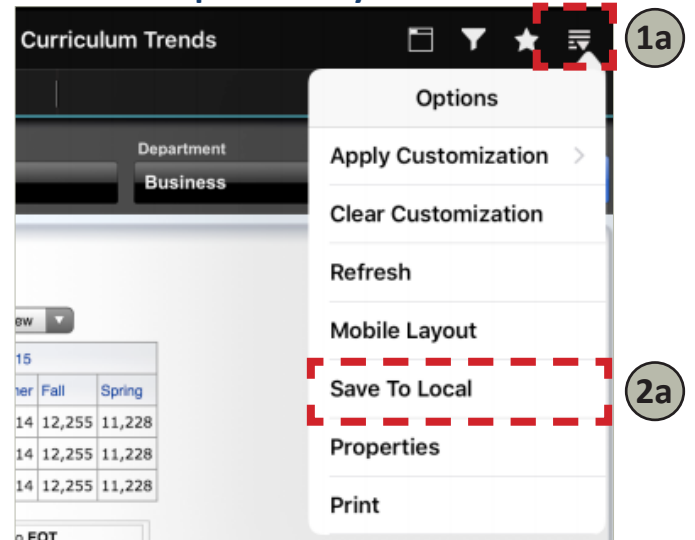
- A. Go to Local in the Home screen
- B. Choose the report

## To delete a locally saved report

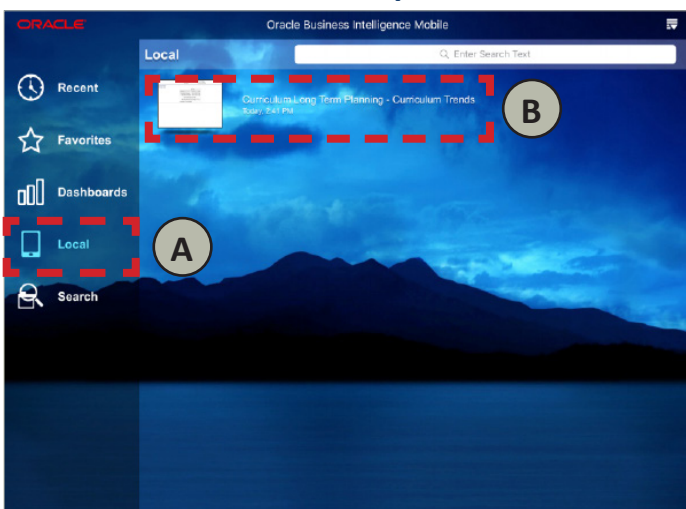
- I. Go to Local in the Home screen
- II. Swipe left on the report you want to delete
- III. Choose Delete

Note: This feature may not be available depending on the version of the operating system.

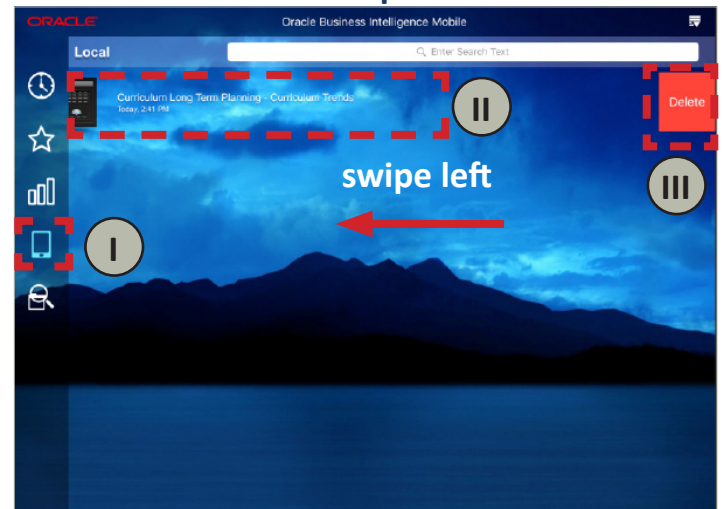
## To save a report locally



## To retrieve on tablet and phone



## To delete on tablet and phone



# Set a Report as Landing Page

## Why this is useful:

Allows you to navigate directly to a specific report when you open the app. Helpful if you often check one particular report.

## Available on tablet only depending on the version of the operating system

1. Go to Settings and choose the dashboard icon
2. Type in a keyword
3. Choose a report from the scroll down menu
4. Choose Done
5. Log out of the server to restart with the new setting
6. Launch the server and report loads as landing page

