



Getting Started Guide SAP BusinessObjects Strategy Management Mobile App 1.0 SP3

Target Audience

- Business Users

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Document History



Caution

Before you start, make sure you have the latest version of this document. You can find the latest version on SAP Service Marketplace at <http://service.sap.com/instguidesEPM-STM>.

The following table provides an overview on the most important document changes:

Version	Date	Description
1.0	9/27/2011	First version
2.0	10/24/2011	Updated for version 1.0 SP2. Changed requirement of strategy management 7.5 SP9 Hot Fix 1 or higher to a Hot Fix version of 7.5 SP9.
3.0	1/30/2012	Updated for version 1.0 SP3. New support for SAP BusinessObjects Strategy Management 10.0 SP03 and higher. When logging in, you can now select the strategy management database containing the data to use in the app.
3.1	2/10/2012	Added the URL format for starting the strategy management application during login.

Table of Contents

<i>Chapter 1</i>	Introduction	<u>5</u>
1.1	About the SAP BusinessObjects Strategy Management Mobile App	<u>5</u>
1.2	About this Guide	<u>5</u>
1.3	Who Should Read this Guide	<u>5</u>
1.4	SAP Notes for the Installation	<u>6</u>
1.5	Information Available on SAP Service Marketplace	<u>6</u>
<i>Chapter 2</i>	Getting Started	<u>7</u>
2.1	SAP BusinessObjects Strategy Management Backend Requirements	<u>7</u>
2.2	Device Requirements	<u>7</u>
2.3	Syncing the Strategy App onto Your iPad	<u>8</u>
2.4	Launching the Strategy App	<u>8</u>
<i>Chapter 3</i>	Using the Strategy App	<u>11</u>
3.1	Home	<u>11</u>
3.1.1	Selecting a Context	<u>11</u>
3.1.2	E-Mailing the Screen Contents	<u>11</u>
3.1.3	Reviewing Details	<u>12</u>
3.1.3.1	Links	<u>13</u>
3.1.3.2	Comments	<u>13</u>
3.2	Strategy Map	<u>14</u>
3.3	Scorecard	<u>14</u>
3.4	Data	<u>14</u>
3.5	Security	<u>15</u>

1 Introduction

1.1 About the SAP BusinessObjects Strategy Management Mobile App

The SAP BusinessObjects Strategy Management Mobile app (*Strategy* app) lets you manage your SAP BusinessObjects Strategy Management content from your iPad, with full access to data. Use the *Strategy* app to do the following:

- View initiatives, objectives, and KPIs at the summary level or detail level
- View operational reviews
- Choose contexts
- Take screenshots of content and email them to colleagues
- View associated links
- View comments, add comments, and reply to comments
- View live data.

The *Strategy* app is secure. You can set the app to ensure that all data pulled from the server is removed from the device when you log out of the app.

1.2 About this Guide

This guide shows how to do the following:

- Download and launch the *Strategy* app on the iPad.
- Explore and work with scorecard data.

1.3 Who Should Read this Guide

This guide is intended for content consumers who are SAP BusinessObjects Strategy Management users and want to explore strategy information from their iPad.

To use this app, you must have permissions for comments, contexts, application groups, and model connections set for you by the strategy management administrator. The same permissions you have for the strategy management application should suffice for your usage in the *Strategy* app.

1.4 SAP Notes for the Installation

Before you start the installation, it is important to read the following SAP Notes. The notes contain the most recent information about the installation, as well as corrections to the installation documentation.

Make sure that you have the most current version of each SAP Note, which you can find on SAP Service Marketplace at service.sap.com/notes.

SAP Notes

SAP Note Number	Title
1598386	Central Note for the SAP BusinessObjects Strategy Management Mobile App
1598221	Restrictions Note for the SAP BusinessObjects Strategy Management Mobile App

1.5 Information Available on SAP Service Marketplace

More information on SAP Service Marketplace.

Documentation

Description	Internet Address
Guides for installing, configuring, and administering SAP BusinessObjects Strategy Management	http://service.sap.com/instguidesEPM-STM
Application Help for using SAP BusinessObjects Strategy Management	▶ help.sap.com/epm → Strategy Management → SAP BusinessObjects Strategy Management ◀ Choose Application Help.

General Quick Links

Description	Internet Address
SAP Help Portal	help.sap.com/epm
SAP Notes	service.sap.com/notes
<i>iPad User Guide</i>	www.apple.com/support/manuals/ipad

2 Getting Started

2.1 SAP BusinessObjects Strategy Management Backend Requirements

Before you can use the *Strategy* app, the following requirements must be met:

- You are an SAP BusinessObjects Strategy Management user.
- A Hot Fix version of 7.5 SP09 or the 10.0 SP3 version of SAP BusinessObjects Strategy Management is running on a SAP NetWeaver server.
- The strategy management administrator has built a scorecard in SAP BusinessObjects Strategy Management version 10.0 SP3 or a hot fix version of 7.5 SP09. The strategy management application contains objectives, KPIs, and initiatives, and may also contain operational reviews.
For more information, see the SAP Library for SAP BusinessObjects Strategy Management at <http://help.sap.com/epm> → *Strategy Management* → *SAP BusinessObjects Strategy Management* ↩.
Then choose *Application Help*.
- (Requirement for SAP BusinessObjects Strategy Management 7.5 series users) Before you sync the *Strategy* app to your device, the strategy management administrator has run the *Create Named Queries* tool at the `http://<nw_server>:<port>/strategy/tools`.
- If you are upgrading from a previous version of the SAP BusinessObjects Strategy Management Mobile app, you must remove the previous app from your iPad before syncing the new version.

2.2 Device Requirements

The *Strategy* app has the following requirements for the device:

- You have an Apple iPad running iOS 4.3 or higher.
- To view live strategy management data in the *Strategy* app, the strategy management administrator has taken the necessary steps to enable your iPad to connect to the SAP NetWeaver server where the strategy management is deployed.



Note

To use the *Strategy* App, you must be a user of SAP BusinessObjects Strategy Management.

2.3 Syncing the Strategy App onto Your iPad

You sync the *Strategy* app onto your device from Apple's App Store using iTunes. To find the *Strategy* app from the App Store in iTunes, search for *SAP BusinessObjects Strategy Management Mobile App*.

Prerequisites

You have fulfilled the backend requirements and device requirements.

Features

- You can find the version information about the app using the iPad *Settings*. In **Settings** → *Apps* → *Strategy* ↵, see the *Version* number.
- If you are using an iPad 2, you can project the iPad screen onto another display device.

2.4 Launching the Strategy App

Prerequisites

- You have synced the *Strategy* app on your iPad.
- You are an SAP BusinessObjects Strategy Management application user.
- Your strategy management user name is a member of an application group, and the application group has access to a context.
- Before you start your first session with the *Strategy* app, your strategy management administrator has run a *Calculate Scorecard Objects* job in the strategy management administration application to populate data.



Note

The strategy management administrator must run this job every time a change occurs in the strategy management application to make sure you are viewing the most current information. For more information, see *Data*.

- The strategy management administrator has taken the necessary steps to enable your iPad to connected to the SAP NetWeaver server where the strategy management application is deployed.
- You know the URL to the SAP NetWeaver server.

Launching the Strategy App for the First Time

1. Tap the *Strategy* icon.
2. Enter the following URL, including the SAP NetWeaver server and port where SAP BusinessObjects Strategy Management is deployed, and then tap *Done*:
`http://<server>:<port>/strategy`

**Note**

The first time you run the *Strategy* app, the server field is empty and you must enter the location. Once you enter a URL, the information appears the next time you start the *Strategy* app.

The *Strategy* app starts at *Home* with sample data so that you can explore the app. You are not prompted to log into the strategy management application when you run the app with sample data. The application always displays in Portrait orientation.

Setting Up to Run with Non-Sample Data

1. In **Settings** → **Apps** → **Strategy**, turn off the *Use Demonstration Data* option.
2. Launch the *Strategy* app.

Launching the Strategy App in a Regular Session

1. Tap the *Strategy* icon.
2. If you have made a successful connection to the SAP NetWeaver server, the logon prompt appears. Enter the user id and password you use to log onto the strategy management application.
3. At the *Select Database* prompt, select the database containing the strategy management data to use in the app. If you have only one database, the app immediately appears with the information from the database and this prompt does not appear.

**Note**

The application always displays in Portrait orientation.

Launching the Strategy App with Cached Data

If you want to start the *Strategy* app and use cached data rather than live data, do not enter a URL, or disconnect your iPad from the SAP NetWeaver server.

Exiting from the Strategy App

To exit from the *Strategy* app, tap *Logout*.

Depending on your cache setting, this may clear your cached information or may retain it.

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3 Using the Strategy App

The *Strategy* app consists of a *Home* page, *Strategy Map*, and *Scorecard*. Each one shows you different views of scorecard information.

This section describes the key features available in the *Strategy* app and explains how to use them.

3.1 Home

The *Home* page provides a summary view of initiatives, objectives, and KPIs in the selected context. If you have operational reviews, you can access them on the *Home* page.

You can do the following on the *Home* page:

- Select the context to use.
- Send an e-mail that includes a screenshot attached as a .jpg file.
- Display details about an initiative, objective, or KPI.
- Display operational reviews.
- Refresh the information using the *Refresh* icon.

This re-synchronizes the client database with the data on the server without having to log out or restart to get the latest data. This is useful if you leave the application running all the time.

A star next to an objective, KPI, or initiative in the *Strategy* app represents items in the *My Initiatives*, *My Objectives*, and *My KPIs* section of the *Performance Summary* on the *Home* tab in the strategy management application.

3.1.1 Selecting a Context

You can work in the default context, or you can switch to another context. To select a different context, tap the button showing the context name and then select a new context.

You can tap *Done* to cancel a selection.


3.1.2 E-Mailing the Screen Contents

You can send e-mail from any view on the *Home* page. The e-mail automatically includes a screenshot of your current view, saved as a .jpg file attachment.

Prerequisites

Your iPad is set up with an e-mail account and you are connected to the Internet.

Procedure

1. On the *Home* page or a detail page, tap  (*Mail*).
2. In the empty email message, specify who to send it to and enter your message.
3. Tap *Send*.


3.1.3 Reviewing Details

When you tap an item on the *Home* page, a pop-up window appears with detailed information about the item.

Detailed information is available for the following items:

- Objectives, including the status indicator, the objective name, description, and owner. You can scroll through all the initiatives and KPIs associated with the objective to review their high-level details. You can tap any initiative or KPI to display details about that item.
- KPIs, including the KPI name, target and actual values, status indicator, and trend arrow. You can also review a trend chart of the KPI's actual and target values over time.

You can do the following with a trend chart:

- Tap anywhere on the trend chart to change the start and end date.
- Tap  (*Drill*) to display a table showing the focus dimension, and the actual, target, score, and gap performance values for the dimension. You can also see the status indicator and trend for the KPI.

To change the focus, select a dimension from the *Focus* list.


To control the display of parents when you drill on a dimension member, select or clear the *Show Parents* check box.

- Initiatives, including the initiative name, owner, start and end date, budget and actual data, and description. It also shows all the milestones for the initiative, the milestone owners, importance, and start and end date of the milestones.

On any details page, you can do the following:

- Tap an item on a detail page to go to a different detail page.
- Display links
- Review and add comments and responses.

3.1.3.1 Links

To view and select links for an item, tap  (*Links*) on a *Details* page.


3.1.3.2 Comments

When viewing details about an item, you can read comments, enter comments and respond to comments about the item.



Prerequisites

You are a member of an application group that has permission to create and edit comments.

Reading Comments


1. Tap  (*Comments*).
2. Tap a comment to read it. When you are finished, tap the appropriate button to return to the *Comments* list.
3. Tap *Done*.

Entering to Comments

1. Tap  (*Comments*).
2. Tap  (*Writing*).
3. Type a subject in the *Subject* field.
4. Type your comment or reply in the *Description* field.
5. Select the application groups who you want to view the comment, and tap *Done*.

Users in the application group can view the comment in the *Strategy* app, and in the strategy management application.

Responding to Comments

1. Tap  (*Comments*).
2. Tap the comment to which you want to reply.
3. Tap the Reply arrow.
4. Type a subject in the *Subject* field.
5. Type your comment or reply in the *Description* field.
6. Tap *Done*.

Users in the application group specified for the original comment can read the reply in the *Strategy* app, and in the strategy management application.

3.2 Strategy Map

The organizational strategy map visually depicts core organizational objectives and the relationships between them.

The diagram shown as *Goal Diagram 1* in the strategy management application is used as the strategy map in the *Strategy* app.

3.3 Scorecard

The *Scorecard* provides a hierarchical table view of the context including perspectives, objectives, and KPIs shown in the current context.

You can do the following in a scorecard:

- Sort on any column that appears as a link.
- Collapse and expand the hierarchy of perspectives, objectives, and KPIs.
- Filter the view by the responsible user, status, trend, or by the objectives.
- Reset the filters by selecting each filter and choosing an empty value.

3.4 Data

You can view your company data live when you are connected to the SAP NetWeaver server where the strategy management application is deployed.

Features

- You see live data in the *Strategy* app when you are connected to the SAP NetWeaver server where the strategy management application is deployed.
If any changes occur in the strategy management application (for example, a KPI or objective changes, a responsible owner is changed or a link is added to an objective), the strategy management administrator must run a *Calculate Scorecard Objects* job to update the data in the strategy management application. The latest data appears the next time you run the *Strategy* app. If the administrator does not run a *Calculate Scorecard Objects* job in the strategy management application, and you launch the *Strategy* app, KPIs and objectives appear without status indicators.
- If you are not connected to the SAP NetWeaver server where the strategy management application is deployed, you see different things in the *Strategy* app based on your settings:

If the *Flush Data on Exit or Suspend iPad* setting is set to *OFF*, you can view cached company data from the last time you connected to the server. You can access only the *Home* page, which displays cached information about the objectives, initiatives, and KPIs.

If the *Flush Data on Exit or Suspend iPad* setting is set to *ON*, you can access only the *Home* page, and the cache is cleared when you end a session, so you do not see any data when the app suspends or ends. This is the default setting.

3.5 Security

Data Storage

Data is cached on-device for the duration of the user's session. Data is retrieved when the app is started and when the user browses data. The cache is flushed when the app exits or is suspended. This is controlled by the *Flush Data on Exit or Suspend* setting. The default setting is *ON* so that data is flushed from the cache every time you exit the app.

User Management

Everytime you start the app, you must log on with your strategy management username and password. If you do not have a username and password, you cannot log onto the app. You must be a strategy management user who is a member of an application group for the context. Additions, modifications, or deletions of users in the user management system are synchronized by the strategy management administrator using the *Synchronize User Tables* feature in the administration application.

Third Party Apps

The *Strategy* app makes use of the Core-Plot library.

Cookies

Cookies contain a unique identifier that allows the backend server to maintain a session with the *Strategy* app, but no data is stored in the cookie. Because the backend server is a SAP NetWeaver Java server, the same specifications about cookies on the SAP NetWeaver Java server applies to the *Strategy* app.

When you enter a username and password to log into the strategy management application, the username and password is not cached; a session cookie is established and retained until you log out.

Communication Channels

The *Strategy* app uses HTTP/HTTPS and connections to mail servers.

The port used is the same port that the strategy management application uses.

Secure Network Setup

The *Strategy* app supports SSL and basic authentication on the backend.

Active Code

No active code is used in the app.



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