

Business Objects Mobility Navigation on the iPad Quick Reference

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

How do I annotate a report?

Getting Started

How do I download the SAP BI Application?


1. Tap **App Store**.
2. Tap  to search for the **SAP BI** application.
3. Tap  and then  to download the **SAP Business Objects Mobile** application.
4. After the application is installed, tap  to launch the application.

How do I log on the SAP BI Application?

1. Tap .
2. Type your application password in the **Enter your application password** field and tap . The *Log on to NewProd* dialog box displays.
3. Type your network password in the **Password** field and tap . The *All Reports* screen displays.
4. Tap a report title to launch the report, such as the *QTD Sales & Orders – iPad* report.

How do I configure connection settings for the SAP BI Application?




When you obtain access to SAP Business Objects Sales and Orders – Mobile reports, you will receive an e-mail from IT support with a link to add the connection settings for the SAP BI application.

1. Tap the [Tap to add a connection in the SAP BI application](#) link within the e-mail message. The *Mail wants to open SAP BI* dialog box displays.
2. Tap . The *Create New Connection* screen within the SAP BI application displays.





Note: The *Connection Type* and *Connection Detail* settings auto-populate.

3. Tap to select the **Default** option. This ensures that the production environment is the default connection.
4. Scroll down to enter *Authentication Details*.
5. Type your network username in the **Username** field and your network password in the **Password** field.

Note: It is recommended that you **do not** select the *Save Password* option, since your network password must be changed every 90 days.

6. Tap . The *Do you want to connect to NewProd?* dialog box displays.
7. Tap . The *Log on to NewProd* dialog box displays.
8. Type your network password in the **Password** field and tap . The *Application Password* screen displays.
9. Type an application password in the **Enter An Application Password** field.

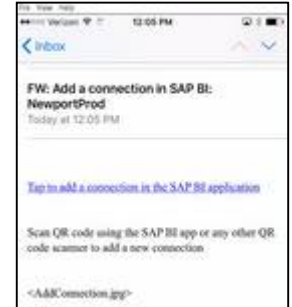
Notes: This is a password other than your network password. It must be at least 8 characters and can contain alphanumeric characters. Every time you log on to the SAP BI application you are required to enter your application password and your network password. Unlike the network password, the application password does not have to be changed every 90 days.

10. Tap . The *Application Password* screen displays requiring you to re-enter the application password to verify your entry.
11. Tap . The *All Reports* screen displays.
12. Tap  (**Notifications**) in the upper-right corner of the screen. The *Notification* screen displays.
13. If auto-update is off, tap  to access the *Additional Settings* screen.

Note: When auto-update is enabled, the system automatically refreshes existing reports if changes are made and displays new reports as they are developed and published.

14. Tap .

For example:



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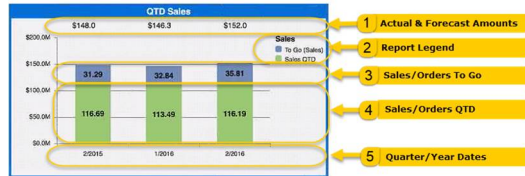
Mobility Sales/Order Reports on iPad

How do I view Global Reports?

The SAP Business Objects Mobile Quarter to Date (QTD) Sales and Orders application on the iPad launches with the following Global reports displayed:

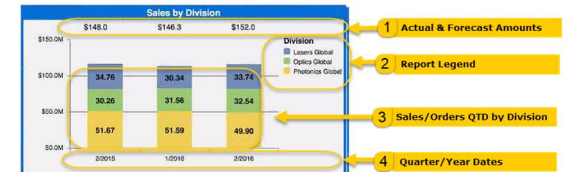
QTD Sales/Orders Report

The *QTD Sales/Orders* report displays the actual and forecasted amount of sales and orders for the previous quarter, current quarter, and previous year. Review the following elements:

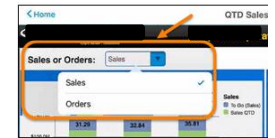


QTD Sales/Orders By Division Report

The *QTD Sales/Orders by Division* report displays the actual and forecasted amount of sales and orders by division for the previous quarter, current quarter, and previous year. Review the following elements:



Note: The application allows you to view sales and orders quarter-to-date data. The application defaults displaying sales data.



Tap the drop-down in the **Sales or Orders** field at the top of the screen and select the **Orders** option. The report data displays for orders.

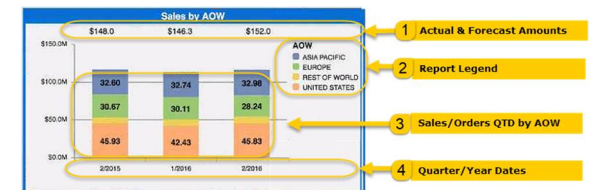
QTD Sales/Orders By Market Report

The *QTD Sales/Orders by Market* report displays the actual and forecasted amount of sales and orders by market for the previous quarter, current quarter, and previous year. Review the following elements:



QTD Sales/Orders By Area of the World (AOW) Report

The *QTD Sales/Orders by AOW* report displays the actual and forecasted amount of sales and orders by area of the world for the previous quarter, current quarter, and previous year. Review the following elements:



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Mobility Sales/Order Reports on iPad (continued)

How do I view Top 10 Reports?

The Top 10 section of the SAP Business Objects Mobile Quarter to Date (QTD) Sales and Orders application on the iPad consists of the following reports. To access the *Top 10 Reports*, swipe the screen to the left or tap the **Top 10** icon at the bottom of the screen.

Top 10 Customer Sales

The *Top 10 Customer Sales/Orders* report displays the quarter-to-date sales/order percentage and amount for the top 10 customers based on your security authorization.

- To display the actual sales/order amount, tap the customer name on the pie chart.

Note: When a specific customer is selected, the other four charts on the screen will re-paint and display values based on the customer selected.

- To return to the quarter-to-date sales/order percentage and amount for all top 10 customers, tap in the white space outside of the pie chart.

Note: The application allows you to view sales and orders quarter-to-date data. The application defaults displaying sales data.



Tap the drop-down in the **Sales or Orders** field at the top of the screen and select the **Orders** option. The report data displays for orders.

Top 10 Customer Sales/Orders by AOW

The *Top 10 Customer Sales/Orders by AOW* report displays quarter-to-date sales/order percentage and amount for the top 10 customers by area of the world.

Note: You can also tap on a pie chart area to get additional details, such as the sales/order amount.

Top 10 Customer Sales/Orders by Division

The *Top 10 Customer Sales/Orders by Division* report displays quarter-to-date sales/order percentage and amount for the top 10 customers by division.

Note: You can also tap on a bar chart area to get additional details, such as the sales/order amount.

Top 10 Customer Sales/Orders by Business Unit

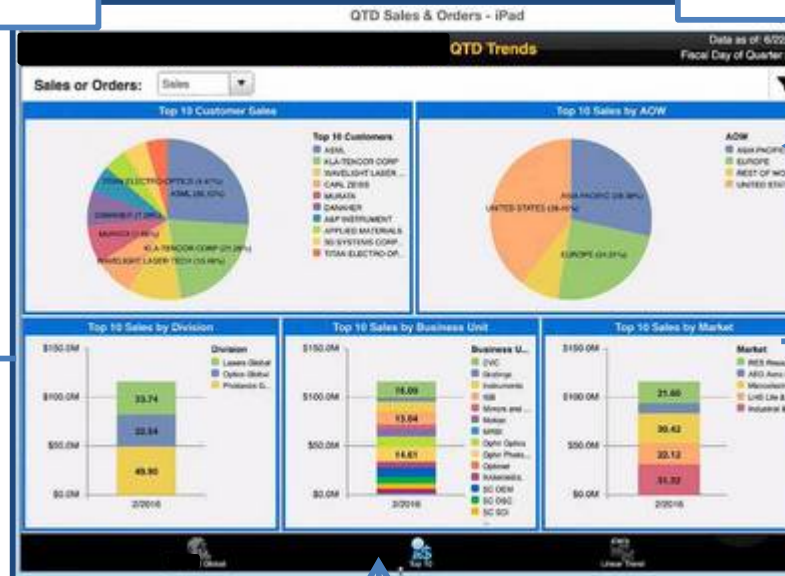
The *Top 10 Customer Sales/Orders by Business Unit* report displays quarter-to-date sales/order percentage and amount for the top 10 customers by business unit.

Note: You can also tap on a bar chart area to get additional details, such as the sales/order amount.

Top 10 Customer Sales/Orders by Market

The *Top 10 Customer Sales/Orders by Market* report displays quarter-to-date sales/order percentage and amount for the top 10 customers by market.

Note: You can also tap on a bar chart area to get additional details, such as the sales/order amount.



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Mobility Sales/Order Reports on iPad (continued)

How do I view Linear Trend Reports?

The *Linear Trend* section of the SAP Business Objects Mobile Quarter to Date (QTD) Sales and Orders application on the iPad, contains a line chart that displays the quarter-to-date actuals for the current quarter and prior four quarters. These trend lines can be used to graphically display trends in the data and help analyze problems of prediction.

1. To access the *Linear Trend* report, swipe the screen to the left or tap the **Linear Trend** icon at the bottom of the screen.



Note: The values displayed are cumulative. In the example on the left it is fiscal day 81 of the quarter; therefore, the current quarter line is straight from day 82 to the end of the quarter.



2. To display additional details, tap an area on the line chart.



Note: Keep in mind that the values displayed are cumulative. In the example on the left, the total sales from the beginning of the quarter to day 81 of the quarter are \$113,492,856.54.

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









Filtering Report Data

How do I apply a filter?




- To apply a filter tap  (Filter) at the top of any report. The list of report fields available for filtering displays



- Perform one of the following tasks:

if...	Then...
You want to select filter values from a list of members	<ol style="list-style-type: none"> Tap the arrow  on the right side of the field name. Member values for the selected field display based on your security authorization. Tap the checkbox for the members you want to display within the report. After all member values have been selected tap . The reports on every screen within the application display totals based on the selected members. <p>Note: When a filter has been applied, the filter icon appears with a blue background  indicating the data has been filtered.</p>
You want to enter filter values	<ol style="list-style-type: none"> Tap the field name. Type the member values separated by a semi-colon. Tap . After all member values have been selected tap . The reports on every screen within the application display totals based on the selected members <p>Note: When a filter has been applied, the filter icon appears with a blue background  indicating the data has been filtered.</p>
You want to add a range of values	<ol style="list-style-type: none"> Tap the arrow  on the right side of the field name. Member values for the selected field display based on your security authorization. Tap the checkbox to select the starting member value. Tap . Tap the checkbox to select the ending member value. <p>Note: If you do not see the member value in the list, you can type the value in the Search field to quickly locate it.</p> <ol style="list-style-type: none"> Tap  to add the range value. After all member values have been selected tap . The reports on every screen within the application display totals based on the selected members.

How do I clear a filter?

- To clear filters, tap  (Filter) at the top of any screen.
- Tap the arrow  on the right side of the field name. Member values for the selected field display based on your security authorization.
- Tap the checkbox to de-select the member value that have been selected.
- Tap .

Note: The current quarter forecast amount is applied by **Division**. Therefore, if you apply a filter to any other fields (i.e. **Plant, Business Unit, Market, Product Line** and **Ship-To AOW**) the forecast amount does not appear.

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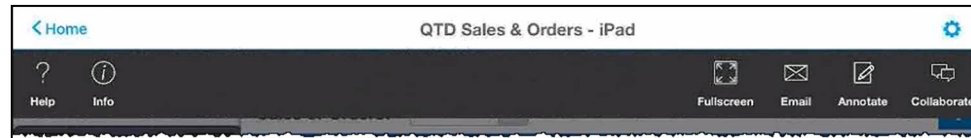
How do I annotate a report?

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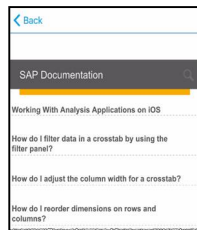
The *Advanced Settings* toolbar provides additional functionality, such as: e-mail, full screen and help.

- To access the *Advanced Settings* toolbar, tap  (**Advanced Settings**) in the upper right corner of the screen to access the *Advanced Settings* toolbar.




How do I view SAP BI application help topics?

- Tap  **Help** to view SAP BI application help related topics.
For example:

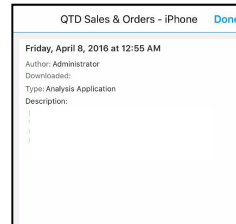


Note: Keep in mind that these are general SAP BI help topics; therefore, they are not company specific. Refer to this work instruction for company specific functionality.



How do I display report query info?

- Tap  **Info** to display report information. Such as **Author** and **Description**.


For example:



How do I display the report in full screen mode?

- Tap  **Fullscreen** to view the report in full screen mode.
- Tap  (**Full Screen**) in the upper right corner of the screen to exit full screen mode.


How do I e-mail a report to a colleague?

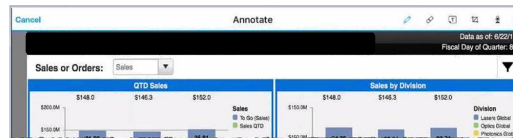
- Tap  **Email** to send a report to a colleague.

Note: The recipient must have security authorization in order to view the report.






- Type the recipient(s) email address in the **To** field and tap **Send**.
- The recipient(s) receives an email with links to access the report via the browser or the SAP BI mobile application.

How do I annotate a report?

- Tap  **Annotate** to add annotation to a report. A message appears indicating the screen orientation is locked and cannot be changed while annotating. The report opens in *Annotate* view with a snapshot of the report and the Annotate toolbar at the top of the screen.



- Review the following Annotate Toolbar functionality:

Icon	Description
	Tap this icon to draw on the report.
	Tap this icon to erase objects drawn with the Draw icon
	Tap this icon to add a text box. Press and hold the text box to type text.
	Tap this icon to blur or crop the report.
	Tap this icon to add a voice note regarding the report.

- When annotation is complete, tap **Done**. An option appears allowing you to email the annotated report to a colleague.