

IDEA App Analytics P2P Installation Guide





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For easier readability, we use the masculine gender in our texts. However, this does not imply any discrimination against the female/third gender, but is to be understood as gender-neutral for the purposes of linguistic simplification.

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IDEA App Analytics P2P

Version 2.3

The download package will be provided to you as a ZIP file. Unpack the contents of the ZIP file, e.g. to a temporary folder. The download package comprises the IDEA app Analytics P2P as a DPACK file and the corresponding documentation.

You need an IDEA license to run the IDEA app Analytics P2P and a license for the SmartExporter Desktop Edition to extract data. You will find the installation guides for these software solutions in the corresponding **Readme.txt** file in the download package of the software.

Installation Instructions

You will find all necessary information on the system requirements for the app in the **System_Requirements_IDEA_App_Analytics_P2P_V2.3.pdf** file included in the app download package.

Note:

- You must have installed **IDEA version 12.2 ASCII (English)** or **IDEA version 12.2 Unicode (English) or higher** before importing the app.
- For information on installing IDEA version 12.2 or higher, please refer to the **IDEA Installation Guide.pdf** file in the IDEA download package or on the installation DVD.
- If you are using an **IDEA Network License** and Network License Manager is installed on a different machine than the IDEA version, please import the app on the machine that runs IDEA.
- If you are using an **IDEA Concurrent Edition** and Network License Manager is installed on a different machine than the IDEA version, please import the app on the machine that runs IDEA.
- Different language versions of the IDEA app Analytics P2P should not be installed and run simultaneously.

Importing the IDEA App Analytics P2P

You do not need administrator rights in order to import the app in IDEA.

To import an app you can choose between different options:

1. Open the “Download-Paket_IDEA_App_Analytics_P2P_V2.3_EN” folder from the download package and double-click the **Analytics_P2P_V2.3_EN.dpack** file.

Note:

To import the app by double-clicking the DPACK file, use the same computer on which you have installed **IDEA 12.2 or higher**. Please make sure to close IDEA before importing the app.

2. The **SmartAnalyzer App Import** dialog opens and the status of the import process is shown. You will be informed if the import process has finished successfully. When the import process is finished, the dialog will close automatically or you can exit the dialog by clicking the **Close** button. You can now start IDEA and work with the app.

Or:

1. Open **IDEA** and select the **SmartAnalyzer** tab.
2. On the SmartAnalyzer Ribbon, in the **Apps** group, click **Management**. The **App Management** wizard opens.
3. Go to **Apps** and click **Import apps**. The **Import Apps** page opens.
4. Click the **Browse** button, select the **Analytics_P2P_V2.3_EN.dpack** file and click **Start Import Process**.
5. A message is shown, indicating that the import process has finished successfully. Close the **App Management** wizard. You can now work with the app.

Silent App Import

To enable the import or update of an app for multiple users of a company or organization and make sure that they all use the same app version, SmartAnalyzer offers the possibility to run an app import without user interaction.

This is done via a central deployment folder, where the apps are imported, e.g. by an administrator or an expert user. For more information on how to proceed, please refer to the **Silent App Import** topic in the SmartAnalyzer online help.

Getting Started

App Functions

The app description provides an overview of the scope of functions of the app:

1. Open **IDEA** and select the **SmartAnalyzer** tab.
2. On the SmartAnalyzer Ribbon, in the **Apps** group, click **Start**. The **App Workflow** dialog opens. You will get a list of all imported apps that have a workflow.
3. Click **Analytics P2P**. The Analytics P2P workflow opens.
4. Click the **Description** entry in the menu bar of the app workflow to get an overview of the content items and functions included in the app.

Running the App

The app workflow guides you through all the necessary steps from selecting audit projects, creating a Data Request and importing the data to running audit tests and creating reports, offering a fast and simple approach to process-oriented data analysis.

1. Open **IDEA** and select the **SmartAnalyzer** tab.
2. On the SmartAnalyzer Ribbon, in the **Apps** group, click **Start**. The **App Workflow** dialog opens. You will get a list of all imported apps that have a workflow.
3. Click **Analytics P2P** to open the Analytics P2P workflow.
4. For example, to create a Data Request, open the **Create Data Request** workflow step. The **Data Request** dialog lets you create Data Requests for different data categories (master data or transaction data), which you can use in the software SmartExporter to obtain exactly the SAP® data required for your audit.
5. When you have completed a workflow step or you exit the corresponding dialog or module, you will automatically return to the app workflow. You can then continue with the next step.
6. The workflow guides you through all the steps required to analyze your purchasing data using the audit tests of the IDEA app Analytics P2P.

You will find detailed information on the individual steps in the online help for the IDEA app Analytics P2P by clicking the **Help** entry in the menu bar in the **app workflow** of the Analytics P2P app.

For further information on the IDEA app Analytics P2P, e.g. regarding training courses and webinars, please refer to the Caseware Germany website <https://www.caseware.com/de/ressourcen/reports/idea-app-analytics-p2p> (in German).

App Updates

Updating the App

New app versions or updates will be provided to you for download via the App License Management. You will be informed automatically by email when updates or upgrades are available. New versions can simply be updated as described in the [Importing the IDEA App Analytics P2P](#) section. The existing app does not have to be deleted or removed first. The content items of the app, such as the Standard Import Routine or audit tests, will be updated automatically when the new app version is imported.

Enhancements and Updates

The IDEA app Analytics P2P contains a Standard Import Routine and the corresponding Data Requests for SAP® systems, which can be run using SmartExporter. These elements are subject to continuous development and will be provided to you for download in the shape of apps or updates via the App License Management for use in the IDEA app Analytics P2P. You will be informed by email when updates are available.

Further Information and Documentation

For information on how to use the apps and how to proceed in SmartAnalyzer, please refer to the SmartAnalyzer tutorial in the IDEA installation folder **IDEA – Documentation – SmartAnalyzer Tutorial**. This tutorial provides instructions on case studies that are based on the sample apps shipped with SmartAnalyzer.

The pre-installed **Sample Payments** and **Sample General Ledger** apps, which you can access by clicking the **Start** task on the **SmartAnalyzer** tab, will help you to quickly get acquainted with SmartAnalyzer.

In addition, SmartAnalyzer offers a comprehensive **help system**, which you can open in IDEA by clicking the **File** tab and selecting **Help**. The **Using SmartAnalyzer** help topic provides detailed information on the features and functions. You can also open the help system from within the SmartAnalyzer modules, e.g. **Select and Run Audit Tests** or **Results and Reporting**.

If you have questions about the programs or the installation, the [Customer Portal](#) offers competent assistance. Here you can also submit a case or send your questions directly to our support team via the email address support.de@caseware.com.