

Display BI Report in CRM Web UI Overview (TPM)



Applies to:

BI 7.0, CRM 6.0 & Above. For more information, visit the [Business Intelligence homepage](#).

Summary

SAP Net Weaver BI, can be displayed directly in the marketing application area under planning profile so that you can analyze your promotion directly from CRM Web UI Overview Page. For Example before releasing the promotion, you want to look at a pre-evaluation of your promotion. This will also help in performance improvement, If you have lot of calculated key figures in planning layout. In that case plan volume and use planning function to calculate and save and go to Analysis to view your promotion.

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Introduction

The reports are created in SAP Net Weaver BI, can be displayed directly in the marketing application area under planning profile so that you can analyze your promotion directly from CRM Web UI Overview Page. For Example before releasing the promotion, you want to look at a pre-evaluation of your promotion.

This will also help in performance improvement, If you have lot of calculated key figures in planning layout. In that case plan volume and use planning function to calculate and save and go to Analysis to view your promotion.

The Business Intelligence (BI) report reuse component can be used to display any BI report based on the SAP Net Weaver Business Intelligence 3.x and 7.x template technology inside of the CRM Web Client UI framework. As with any reuse component, it can be embedded in a view set or navigated to in the component's window. You can use it in work center pages and overview pages.

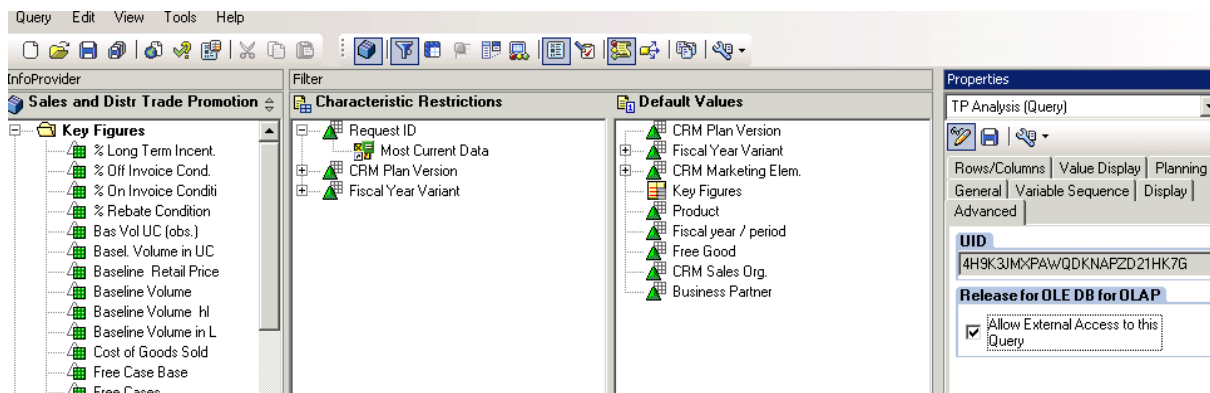
The BI reports must be created with a unique BI Report ID in Customizing. You must specify this ID when the component is called. Additionally, Customizing allows you to specify cross navigation targets from objects in the BI report to other CRM Web Client UI components.

Create BI Query

Create BI query in SAP Net Weaver system.

Prerequisite:-

- It must be checked to “Allow External Access to the Query”.
- If the query is on Planning Cube it must contain Variable „ Most Current Data“ for request ID to get recent posted data.



How to Customize a BI Report for SAP CRM

The customizing is maintained in view cluster CRMVC_GEN_UI_BI

Basic Customizing

You can define Business Intelligence (BI) reports in Customizing for Customer Relationship Management under

Trade Promotion Management -> Key Figure Planning -> Display SAP NetWeaver BI Reports in CRM.

Change View "Define BI Reports": Details

Define BI Reports	
BI Report ID	TP_ANALYSIS
Long description	TP Analysis
BI Object Type	Query 7.x
BI Object Key	/GCC/6_TPM_C1R_Q0003
BI System	DCBCLNT100

You can modify an existing BI Report or create a new entry.

The following are mandatory fields under Define BI Reports:

- BI Report ID
You must define this unique ID when you create a BI report. You use this ID when calling the BI report component.
- BI Object Type
This defines the type of BI report. Currently the CRM Web Client UI framework Supports the following types:
 - ABAP based BI reports:
 - Template 3.x
You must specify the technical name of the BI template in BI Object Key.
 - Query Views 3.x
This is the generic template for query views. You must specify the query view name in BI Object Key.
 - The following BI report types require a BI 7.0 system
 - Template 7.x
You must specify the technical name of the BI template in BI Object Key.
 - Query Views 7.x
This is the generic template for query views. You must specify the query view name in BI Object Key.
 - Query 7.x
This is the generic template for queries. You must specify the query name in BI Object Key.
 - Info Provider 7.x
This is the generic template for info providers. You must specify the info Provider name in BI Object Key.
 - Enterprise Report 7.x
You must specify the technical name of the enterprise report in BI Object Key.
 - BI Object Key
This identifies the object based on the BI Object Type.

The BI System entry is optional. It determines the Remote Function Call (RFC) destination of a BI system. A BI system entry is only needed if the report is not started in the default BI system.

Cross Navigational Links

You can define cross navigational links from any characteristic in a Business Intelligence (BI) report to other SAP Customer Relationship Management (SAP CRM) components by making the appropriate settings in Customizing.

Example

You have a list of business partners in the BI report, and you want to view details about a specific business partner. You can define the Customizing for characteristic Business Partner to be able to choose one of the business partners and select Display Business Partner, which navigates to the Business Partner Details component.

Define a Cross Navigational Link

A cross navigational link is based on a characteristic's name (the technical name of an InfoObject) in SAP NetWeaver Business Intelligence (SAP NetWeaver BI). It is possible to define several cross navigational links for one InfoObject.

You can make these settings in Customizing for Customer Relationship Management under *Trade Promotion Management -> Key Figure Planning -> Display SAP NetWeaver BI Reports in CRM*.

You can modify an existing cross navigational link or create a new entry.

The following are mandatory fields under Define Cross Navigational Links for InfoObjects:

- InfoObject
This is the technical name of the characteristic that you want to navigate from.
- Nav. Link ID
This is the ID of the individual cross navigational link for a characteristic. Since you can define more than one entry for a characteristic, you need IDs to differentiate between these entries.
- Sequence
This is a number that is used to sort the menu entries within the BI report's context menu.
- Object Type
This is used to determine the target of the navigation. For more information, see How-To Guide: Dynamic Cross-Component Navigation.
- Object Action
This is used to determine the target of the navigation. For more information, see How-To Guide: Dynamic Cross-Component Navigation.
- Object Key Name
This is the name of the field that corresponds to the value that was selected in the BI report. In the above example, you click a business partner in the BI report. This is typically the ID of a business partner (not the GUID), so you need to tell the framework that the value that is passed is an ID.
- Menu Text
This is the text that appears in the BI report's context menu.

The parameters Object Type, Object Action, and Object Key Name let the framework create the entity based on the value it receives from BI for the receiving component. For more information, see Object Mapping.

Example

The business partner ID 01234567890 is selected in the BI report. The framework passes the value to the object mapper class to create a Business Object Layer (BOL) entity of the correct type based on that ID. The created entity is passed to the receiver.

Using a Cross Navigational Link

To use a cross navigational link within a BI report, it must first be assigned to the report. You can do this in Customizing for Customer Relationship Management under

Trade Promotion Management -> Key Figure Planning -> Display SAP NetWeaver BI Reports in CRM.

Select a BI report ID and choose Assign Cross Navigation Links. You can modify an existing link assignment or create a new entry.

Report Replacement

You can use this feature if you want to replace any delivered customizing. You can define BI report replacements in Customizing for Customer Relationship Management under

Trade Promotion Management -> Key Figure Planning -> Display SAP NetWeaver BI Reports in CRM.

Example

SAP delivers the BI report ID TOP10_OPPORTUNITIES, which calls BI template 0TPLI_TOP10_Q0001_V01 (Note: this is not a real template name).

You have created your own version of the BI template with name ZTPLI_TOP10_Q0001_V01. To display your version in the CRM WebClient UI, you need to define a report replacement.

First, you need to create a copy of the basic customizing for the BI report ID TOP10_OPPORTUNITIES, for example, ZTOP10_OPPORTUNITIES. You change the BI Object Key to ZTPLI_TOP10_Q0001_V01 and save it.

Now you create a new entry in Define BI Report Replacement of TOP10_OPPORTUNITIES to ZTOP10_OPPORTUNITIES

Define Parameters for SAP Net Weaver BI Analysis

In this IMG activity, you define the SAP NetWeaver Business Intelligence (SAP NetWeaver BI) analyses you wish to display in marketing.

Trade Promotion Management -> Key Figure Planning -> Display SAP NetWeaver BI Reports in CRM.

Maintenance of Web Report Parameter for Marketing Planning		
Analysis	Internal BI Report ID	Variable
Y1_Q0001	Y1_TP_ANALYSIS	0S_CTELM
Y2_Q001	Y2_TP_ANALYSIS	0S_CTELM

Enter the following information in the IMG activity:

1. A number, which is freely definable
2. A BI report ID

This ID is defined in Customizing for Customer Relationship Management under

Trade Promotion Management -> Key Figure Planning -> Display SAP NetWeaver BI Reports in CRM.

3. The variable for the web report; this information is taken from the query and is the external ID for the marketing project

Define Planning Profile Groups

Planning profile groups contain one or more planning profiles. By assigning them to a marketing project, you are then able to use the corresponding planning profile from Business Planning and Simulation (BPS), in addition to your user-specific settings.

For trade promotions, you can also do analysis of your Promotion. Once you have done this, you can evaluate the performance of you promotion .

Trade Promotion Management -> Key Figure Planning -> Define planning Profile Group.

1. Enter an ID and a description in the columns PlanProfGrp and Description respectively.
2. You can assign the planning profile group to a specific object category such as a trade promotion, campaign, marketing plan or deal. If none is specified, the planning profile group will be available for all object categories.

Change View "Definition of Planning Profile Groups": Overview

PlanProfGrp	Description	Category
4C01	Group Cost Planning for Coupons	CP
4C02	Cost Planning for Coupons	CP
4CP1	Business Partner Planning for Campaigns	CP
4DLM	Standard Deal/Product Group	DL
4MKT	Campaign Planning	CP
SAP2	Marketing Planning	MP
ZSCB	Scale - A/O Level Product ST	TP
ZSCC	Scale - A/O Level Product I T	TP

3. Select the entry and choose Assign BW Analyses

New Entries: Overview of Added Entries

Planning Profile Grp: ZSCF

Analysis
Y1_Q001
Y2_Q001

Display BI report on CRM Web UI Overview Page.

Go to CRM WEB UI -> Trade Promotion Overview -> Analysis



The screenshot shows the SAP CRM interface for Trade Promotion: T-000000020398, Test 2. The left sidebar contains navigation options: Master Data, Trade Promotions, Reports, and Picture of Success. The main content area is titled 'Trade Promotion: T-000000020398, Test 2' and includes a toolbar with Save, Cancel, New, and other actions. The 'Analysis' tab is selected, showing a 'Variable Entry' section with a table of variables.

Trade Promotion: T-000000020398, Test 2

Save | Cancel | New | Create Trade Promotion Template | Show Hierarchy | More ▾

- Trade Promotion Details
- Dates
- Product Segments
- Planning
- Causal Product Segments
- Analysis

Back

Variable Entry

Available Variants: Scale | Save | Save As... | Delete [Show Variable Personalization](#)

General Variables		
Variable	Current Selection	Description
Campaign Element	T-000000020398	<input type="checkbox"/> T-000000020398

OK | Check

Prerequisite :-

You must have BI & CRM access to view the report.

Web UI must contain Analysis Tab

Related Contents

For more information, visit the [Business Intelligence homepage](#).

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