



How-To Guide: BI Report Component

SAP[®] CRM 7.0

Target Audience

- System administrators
- Technology consultants

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Type Style	Description
<i>Example Text</i>	Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Cross-references to other documentation
Example text	Emphasized words or phrases in body text, graphic titles, and table titles
EXAMPLE TEXT	Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.
Example text	Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.
Example text	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example text>	Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.
EXAMPLE TEXT	Keys on the keyboard, for example, F2 or ENTER.

Icons

Icon	Meaning
	Caution
	Example
	Note
	Recommendation
	Syntax

Additional icons are used in SAP Library documentation to help you identify different types of information at a glance. For more information, see *Help on Help → General Information Classes and Information Classes for Business Information Warehouse* on the first page of any version of *SAP Library*.

Contents

1 Introduction	8
2 How to Customize a BI Report for SAP CRM	9
2.1 Basic Customizing	9
2.2 Cross Navigational Links	10
2.2.1 Define a Cross Navigational Link.....	10
2.2.2 Using a Cross Navigational Link.....	11
2.3 Report Replacement	11
3 How to Display a BI Report in the CRM WebClient UI	12
3.1 Define Logical Link	12
3.2 Display a BI Report Inside of a CRM WebClient UI Component.....	12
3.2.1 Create a Component Usage for the BI Report.....	12
3.2.2 Set BI Report ID to Component Usage	13
3.2.3 Optional: Specify Additional Parameters.....	14
3.2.4 Optional: Specify RFC Destination for BI System.....	14
3.3 Show BI Report in Dynamic Pages	15
4 Miscellaneous.....	16
4.1 Test Component.....	16
4.2 Default BI RFC Destination.....	16
5 Frequently Asked Questions	17
6 Related SAP Notes	19

1 Introduction

The Business Intelligence (BI) report reuse component can be used to display any BI report based on the SAP NetWeaver Business Intelligence 3.x and 7.x template technology inside of the CRM WebClient 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 WebClient UI components.

 **Caution**

If you want to customize BI reports in the CRM WebClient UI framework and you are not familiar with BI, make sure to check with a contact person who knows the technical data of the BI reports you want to use.

2 How to Customize a BI Report for SAP CRM

The Customizing is maintained in view cluster CRMVC_GEN_UI_BI.

2.1 Basic Customizing

You can define Business Intelligence (BI) reports in Customizing for *Customer Relationship Management* under *UI Framework* → *UI Framework Definition* → *Display SAP NetWeaver BI Reports in CRM*.

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 WebClient 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.



Do not ship entries with a BI system in the field.

For more information, see *Default BI RFC Destination* [page 16].

2.2 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.



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.

2.2.1 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 *UI Framework* → *UI Framework Definition* → *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* [page].

 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.

2.2.2 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 *UI Framework* → *UI Framework Definition* → *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.

2.3 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 *UI Framework* → *UI Framework Definition* → *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.

3 How to Display a BI Report in the CRM WebClient UI

3.1 Define Logical Link

If you define a logical link for a particular BI report, you can use that logical link in work center link groups or direct link groups.

You can define a logical link in Customizing for *Customer Relationship Management* under *UI Framework* → *Technical Role Definition* → *Define Navigation Bar Profile*.

Choose *Define Logical Links* and select an existing logical link or create a new entry.

Enter the following parameters:

Field	Field Value
<i>Type</i>	BI Report
<i>Target ID</i>	DISPLAY
<i>Parameter</i>	<BI Report ID>
<i>Parameter Class</i>	CL_CRM_GEN_UI_BI_UTIL
<i>Title</i>	<Title> This is the text that is displayed in the Navigation bar.

3.2 Display a BI Report Inside of a CRM WebClient UI Component

To display a BI report inside of a component, you must create a component usage for every BI report that you want to display. This allows you to use it wherever a reuse component can be used.

3.2.1 Create a Component Usage for the BI Report

Using the Component Enhancement Concept, do the following:

1. In the runtime repository editor, select *Component Usages* and choose *Add Component Usage* from the context menu.
2. Enter the following parameters:

Field	Field Value
<i>Id</i>	<unique ID inside of your component>
<i>Used Component</i>	GSBIRP
<i>Interface View</i>	MainWindow

The new component appears in *Component Usages* with the ID that you assigned to it.

3. Navigate to *Interface View* under your new component, select *Inbound Plugs*, and choose *Add Inbound Plug* from the context menu.

4. Add the inbound plug DISPLAY, as you need it to navigate inside of your component to the embedded BI report.

3.2.2 Set BI Report ID to Component Usage

If the BI report is displayed without navigation (as part of a view set, overview page, or dynamic page) you must specify the parameter `REPID` inside of the method `WD_USAGE_INITIALIZE`.

The method can be found in the *Component Controller* in the component workbench (transaction `BSP_WD_CMPWB`).

The following is an example of the code:

Syntax

```
METHOD wd_usage_initialize.  
  
    DATA: bicontext TYPE REF TO cl_bsp_wd_context_node.  
    CASE iv_usage->usage_name.  
        WHEN 'ZBIREPORT_1'.  
            TRY.  
                bicontext = iv_usage->get_context_node(  
                    'ZBIREPORT_1' ).  
                bicontext->set_s_struct(  
                    attribute_path = '' component = 'REPID' value  
                    = 'ZSAMPLE6' ) .  
            CATCH cx_root.  
            ENDTRY.  
        ENDCASE.  
    ENDMETHOD.
```

`ZSAMPLE6` must be replaced with the BI report ID.

If you want to navigate to the BI report, you can also pass a collection with the navigation (for example, a view that is called using an inbound plug). The collection can be created with the static method `CL_CRM_GEN_UI_BI_UTIL ->CREATE_COLLECTION`.

The following is an example of code that can be used in an event handler or outbound plug:

Syntax

```
DATA: lv_bo_coll TYPE REF TO if_bol_bo_col.  
  
    lv_bo_coll =  
    cl_crm_gen_ui_bi_util=>create_collection( 'ZSAMPLE7' ).  
    view_manager->navigate( source_rep_view = rep_view  
                            outbound_plug   = 'NAVLINK'  
                            data_collection = lv_bo_coll  
    ).
```

`ZSAMPLE7` must be replaced with the BI report ID that you have defined in Customizing.

`NAVLINK` must be replaced with the name of the navigational link in your component that navigates to the BI report component.

3.2.3 Optional: Specify Additional Parameters

The SAP NetWeaver Business Intelligence (BI) Templates URL allows you to set variable values (similar to select options) and filter values. It also offers some additional settings that would allow you to, for example, skip the first screen in a navigation.

For 3.x, these URL parameters are specified in the *Web API Reference* available on SAP Service Marketplace at <http://service.sap.com> under *BI Documentation* (also available in a German version).

For 7.x, see *BEx Web Application or Query as iView in the Portal* on SAP Help Portal at <http://help.sap.com> → *SAP NetWeaver 7.0 Library* → *SAP NetWeaver by Key Capability* → *Information Integration: Key Areas* → *Business Intelligence* → *BI Suite: Business Explorer* → *Integrating Content from BI into the Portal* → *Integration from the Viewpoint of Administrators and Authors* → *Display of Content from BI in the Portal*.

To use these URL parameters, you must build a string with additional parameters according to the BI documentation. The following is an example of how to filter to a specific country (given the report has characteristic 0COUNTRY):



Syntax

DATA:

```
lv_parameter TYPE string,
lv_bo_coll TYPE REF TO if_bo1_bo_col.
```

```
lv_parameter = 'FILTER_I OBJNM=0COUNTRY&FILTER_VALUE=DE'.
lv_bo_coll = cl_crm_gen_ui_bi_util=>create_collection(
    iv_id = 'ZSAMPLE7'
    iv_addparameter = lv_parameter
).
view_manager->navigate( source_rep_view = rep_view
                        outbound_plug   = 'NAVLINK'
                        data_collection = lv_bo_coll
                      ).
```

ZSAMPLE7 must be replaced with the BI report ID that you have defined in Customizing.

NAVLINK must be replaced with the name of the navigational link that navigates to the BI report component.

3.2.4 Optional: Specify RFC Destination for BI System

In some cases it may be necessary to determine the BI system at runtime, for example, if the customer has multiple systems. If this is required, you can specify the parameter `BISYSTEM` as the name of a Remote Function Call (RFC) destination (maintained in transaction SM59 under *ABAP Connections*) for the BI system. If set at runtime, the BI default destination or destination defined in *Basic Customizing* [page] is overwritten.

You can set the parameter in the following ways:

- In method WD_USAGE_INITIALIZE using the first code sample in *Set BI Report ID to Component Usage* [page]:

 Syntax

```
bicontext->set_s_struct( attribute_path = '' component =  
'BISYSTEM' value = 'Q73CLNT003' ).
```

- In navigation by changing the CREATE_COLLECTION method to the following:

 Syntax

```
lv_bo_coll = cl_crm_gen_ui_bi_util=>create_collection(  
    iv_id = 'ZSAMPLE7'  
    iv_bisystem = 'Q73CLNT003'  
    ).
```

Q73CLNT003 must be replaced with the name of the RFC destination or a variable that has the same name.

3.3 Show BI Report in Dynamic Pages

Once you have created a component usage for the BI report, you can use it in dynamic pages. The following dynamic pages can include component usages:

- Overview Page
- Work Center Page
- Home Page
- Report and Dashboard Page

4 Miscellaneous

4.1 Test Component

The name of the test component is GSBIRPTEST. It displays all BI reports that are customized in *Display SAP NetWeaver BI Reports in CRM*. You can also start the BI reports from here.

Usages are defined in the runtime repository. BI report IDs are first set in the component controller method `WD_USAGE_INITIALIZE`.

View BIOverviewPage shows configuration in an overview page. *View BIWorkCenterPage* shows configuration in a work center page.

Samples for navigation to a BI report can be found in the BINavigator event handler view (EH_ONNAVIGATE) in case `GOTO_FULLSCREEN` and `GOTO_FULLSCREEN_2`, and in the BIReportNavigator event handler view (EH_ONSELECT) where the navigation is triggered by row selection of a table.

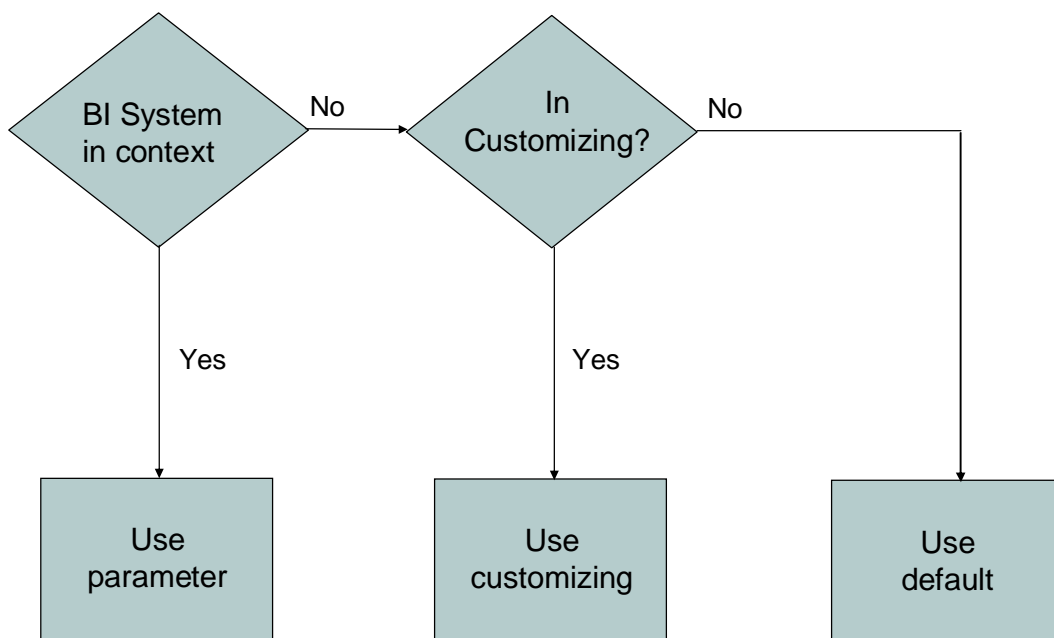
4.2 Default BI RFC Destination

If you have not specified a BI system in *Basic Customizing* [page] or in *Optional: Specify RFC Destination for BI System* [page], the framework always calls the default BI system.

The default BI system (RFC Connection) must be assigned to the logical system CRMBWDEST (BAPI destination) in transaction BD97.

If there is no logical system CRMBWDEST, you must create it in transaction BD54.

Default BI RFC Destination



5 Frequently Asked Questions

Why is my BI report not displaying in the CRM WebClient UI?

There are a number of possible causes. Try the following:

- Check to see if the default BI system is set to the expected BI system in the SAP CRM system or client that you are using
- Check to make sure that the definition of the BI report is correct
- Do not use logon to the BI system for testing using a display user, as this type of user may not have the necessary authorizations

Where do I define a BI report in SAP CRM?

You can define BI reports in Customizing for *Customer Relationship Management* under *UI Framework* → *UI Framework Definition* → *Display SAP NetWeaver BI Reports in CRM*.

What types of BI reports can I define?

The following types of BI reports are supported:

- Template 3.x
ABAP-based BI template that has been created with either the Web Application Designer (WAD) or with the Template Wizard
- Query Views 3.x
ABAP-based query view that has been created with the Business Explorer Analyzer (SAP NetWeaver BI 3.x)
- Template 7.x
Java-based BI template that has been created with either the Web Application Designer (WAD) or with the Template Wizard
- Query Views 7.x
Java-based query view that has been created with the Business Explorer Analyzer
- Query 7.x
Java-based query that has been created with the Business Explorer Analyzer
- Info Provider 7.x
Java-based generic template to browse an info provider
- Enterprise Report 7.x
Java-based template for formatted reporting

How can I check to see if the BI template name is correct?

1. Log on to the BI system via SAP GUI.
2. Call transaction SE38, select *Source Code* as subobject and run report RS_TEMPLATE_MAINTAIN by choosing *Execute*.
3. Enter the technical name of the template, select version A, and execute the report.

If the BI template name is correct, the HTML code is displayed.

If you do not see the HTML code, the template is inactive. In this case, select version D and execute the report. If version D exists, the BI template name is correct but the report is not active. If version D does not exist, the BI template name is incorrect.

How can I check to see if the query view name is correct?

1. Open the Business Explorer Analyzer under *Start* → *All Programs* → *Business Explorer* → *Analyzer*.

 **Note**

A popup might appear and ask if you want to allow macros. In that case, allow macro activation.

2. Log on to the BI system via SAP GUI.
 3. Call transaction RSTR1.
 4. Enter the technical name of the query view in the *View* field and choose *Execute*.
- If the query view exists, an XLS version of it appears. If not, you receive an error message.

How do I integrate BI reports in the navigation bar?

For each BI report, you must define a logical link in the navigation bar.

You use this logical link as specified in your requirements (for example, in work center groups or direct link groups).

How can I define a logical link that calls a BI report?

1. Go to Customizing for *Customer Relationship Management* under *UI Framework* → *Technical Role Definition* → *Define Navigation Bar Profile*.
2. Select *Define Logical Links*.
3. Create a new entry, specifying the logical link ID.
4. Select type *BI Report*.
5. Choose target ID *DISPLAY* with component *GSBIRP*.
6. Enter the BI report ID (which was defined in the *Display SAP NetWeaver BI Reports in CRM* Customizing activity) in the *Parameter* field.
7. Enter *CL_CRM_GEN_UI_BI_UTIL* in the *Parameter Class* field.
8. Enter a title and description.

What is the default BI system?

The default BI system is maintained with transaction BD97, under logical system CRMBWDEST → *Standard RFC destination for BAPI calls*.

Why is logical system CRMBWDEST missing?

If the logical system is not available in BD97, you must create it in transaction BD54.

6 Related SAP Notes

For more information on BI reports, see the following SAP Notes:

SAP Note Number	Title
1242033	BI report integration in complex system landscapes
1138613	BI Reports in CRM UI are not high enough
1268401	Cross Component Navigation from Java Based BI 7.0 Reports