BI Master Data Document Integration with Portal KM

SAP

Applies to:

Business Intelligence and SAP Enterprise Portal

Summary

This document explains about the connection between the structured business data and unstructured documents. This gives the detailed description about the business scenario like document with in the report need to provide additional information about the query. Individual characteristic values as well as the combinations of characteristic values are extremely useful.

Author: Balaji Bodagala

Company: IntelliGroup

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Author Bio

Balaji Bodagala is currently working in Intelligroup as application integrator for
http://sdn.sap.com. Balaji has about 6 years of experience in application and sofware
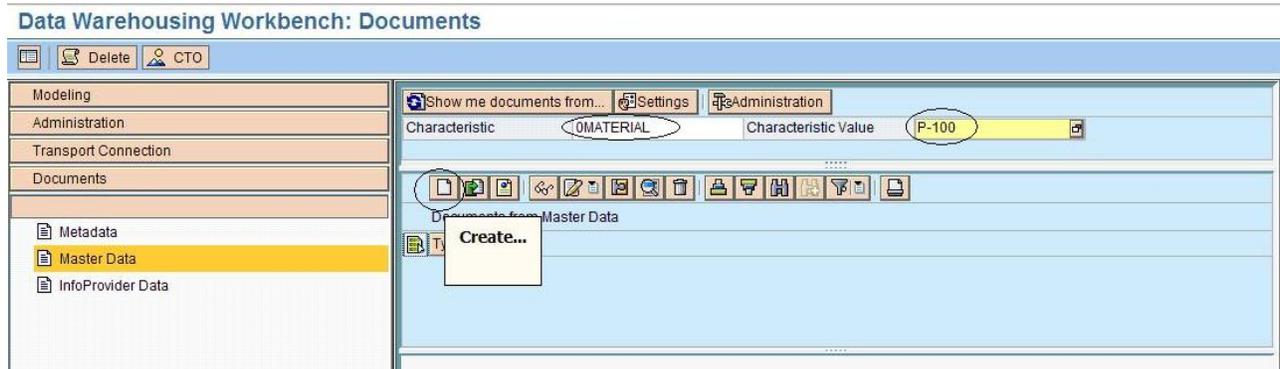development.

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Introduction

If we have a business scenario where a filed with in a report has to show additional information like displaying a document or image etc. we can use the concept of document integration. The close integration of bi and the knowledge management can create the connection between the structured business data and unstructured documents.
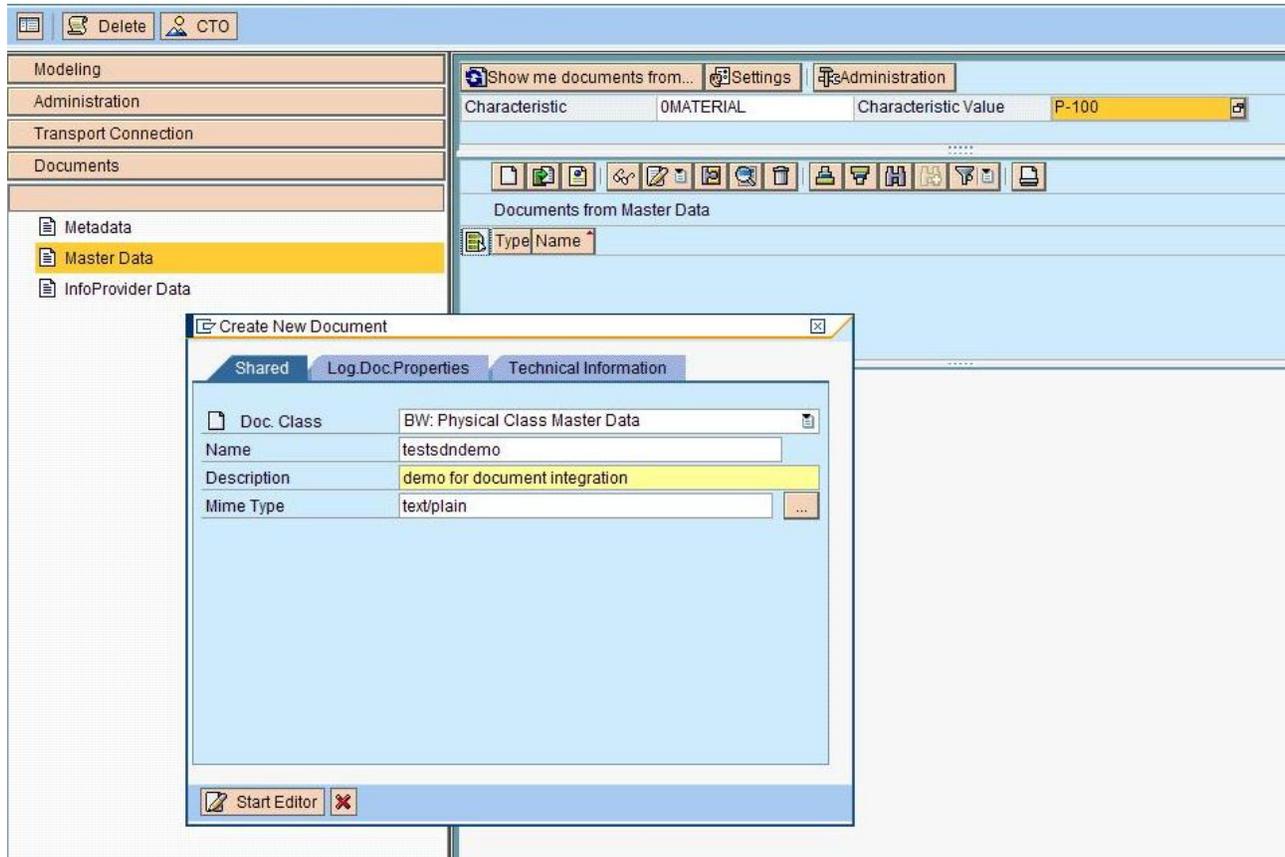
Documents Creation for the Specific Fields

Create a master data document class with info objects. For easy understanding i have taken a demo cube named with billing (Sales and distribution area) which is already in my system.

From the sap easy access menu → transaction RSA1->Click on the "Documents", please refer the below screen shot

In the billing cube we have '0 Material' characteristic info object and the characteristic value 'P-100', enter the details and click on the create icon.

After clicking on the create icon system will alert the document properties like the below screen shot
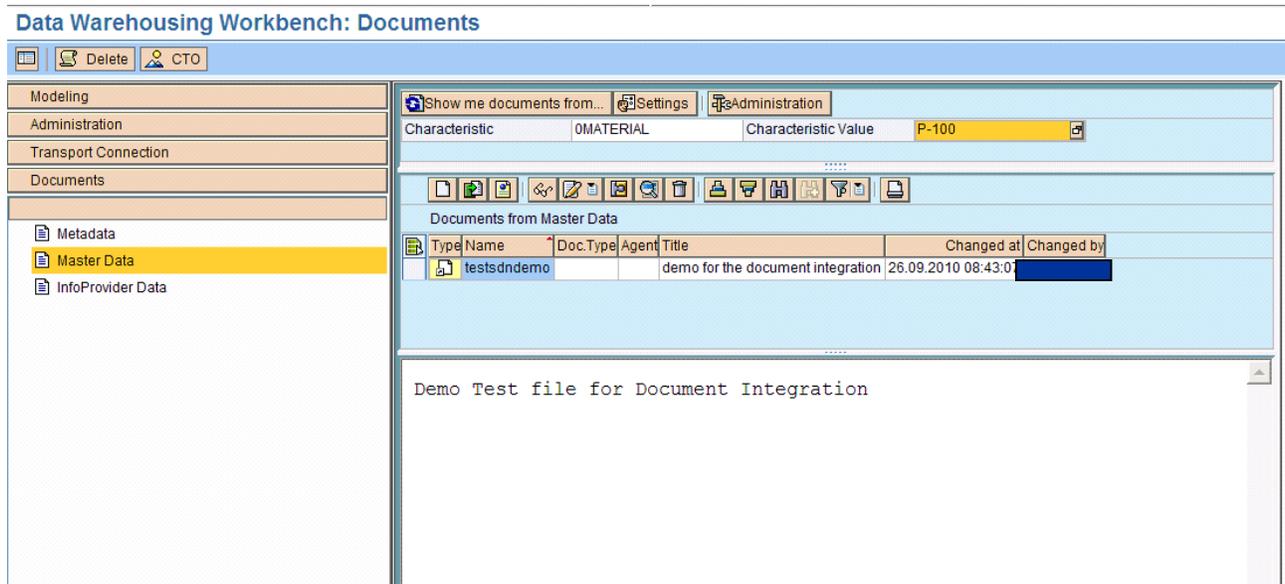
Doc Class: Indicates which document class (that means Metadata, Masterdata, Info provider Data) is referred to create the object of the document, in our scenario we are creating the 'Masterdata' class.

Name & Description: Specifies the name and description of the document.

Mime Type: Normally we can specify the content types under this property, in our case it is normal text file.

The moment we click on the start editor it will open notepad and we can add the text whatever the related text, save and close the notepad. It will automatically display a list like in the below screen shot.

Query Settings in Query Designer

Open demo cube in the query designer and click on the properties window

InfoProvider	Rows/Columns		Properties

InfoProvider

Billing

- **Key Figures**
  - Sales Volume EUR
  - Sales Volume
  - Invoiced quantity
  - Sales Volume (MC)
  - No. Document Items
- **Dimensions**
  - Organization
  - Customer
  - Material
  - Sales Area
  - Document Classification
  - Data Package
  - Time
  - Unit

Rows/Columns

Free Characteristics

Area for Dimensions

Columns

- Key Figures
  - Sales Volume
- Original Curr./Unit

Area for Dimensions

Rows

- Division
- Material

Preview

	Sales Vol
	a-Original	b-Origir
a-Division	a-Materia	
	b-Materia	
b-Division	a-Materia	
	b-Materia	

Properties

1 (Query)

General | Variable Sequence | **Display** | Rows/Columns | V:

Display Options
- ☑ Adjust Formatting after Refreshing
- ☑ Hide Repeated Key Values
- ☐ Display Scaling Factors for Key Figures

Document Links
- ☐ For InfoProvider Data
- ☑ For Master Data
- ☐ For Metadata

Click on the display tab and check the option "For Master Data". Then select characteristics and key figures in the desired columns and rows. In current scenario 'Division' and 'Material' are dragged into rows, sales and 'Org Unit' is dragged into columns. After finishing everything save the changes of the query and execute the query. It will display the result on the browser

New Analysis	Open	Save As...	Display As	Table	Information	Send	Print Version	Export to Excel	Comments	Filter Settings

			Sales Volume			
▼ Columns		Original Curr./Unit	EUR	USD	Overall Result ⇕	
• Key Figures			Euro	US Dollar		
• Original Curr./Unit	Division ⇕	Material ⇕	EUR	$		
▼ Rows	01 Pumps	P-100	2.957.923,50		2.957.923,50 EUR	
• Division		P-101	6.314.752,52		6.314.752,52 EUR	
• Material		P-102	11.195.969,00		11.195.969,00 EUR	
• Free characteristics		P-103	9.410.119,20	7.602,00	9.417.721,20 MIX	
		P-104	14.322.104,73		14.322.104,73 EUR	
		P-109	4.883.418,52		4.883.418,52 EUR	
		P-402	8.689.250,52		8.689.250,52 EUR	
		Result	57.773.537,99	7.602,00	57.781.139,99 MIX	
	Overall Result		57.773.537,99	7.602,00	57.781.139,99 MIX	

Accessing Documents from the Fields

At the starting of the document we have created the document for the 'P-100' material, right click on the 'P-100' Material → Documents → Display Documents

We have already created document for this material, so it will show the list of documents for the material 'P-100'

Documents Creation in Portal for the Specific Fields

The same way we can create documents vice versa i.e. we can create documents in portal and view in the bi server as well for the corresponding field. For easy understanding we are creating the document for the material 'P-101' here.

Select the material P-101 →Documents→ Create New Document, it will ask the document properties for the material field.

Give the name and description, document type in our example text/html.click on "OK" Button so that it will be saved in the document repository.

Search Documents in BI Server Created in Portal KM folders

Go back to sap easy access menu → transaction RSA1->Click on the '**Documents'** in the Left Panel

Data Warehousing Workbench: Documents

| | Delete | CTO |

Modeling	Show me documents from...	Settings	Administration
Administration			
Transport Connection	Characteristic	0MATERIAL	Characteristic Value	P-101
Documents			

Documents from Material 'Pump PRECISION 101' (2)

Type	Name	Doc.Type	Agent	Title	Changed at	Changed by
	test sdn demo p101.txt	text/html		test documet for the SDN for the materail p101	27.09.2010 13:44:05	
	testsdndemop101.txt	text/html		test the document for the material p101	26.09.2010 09:06:07	

Left panel items:
- Metadata
- Master Data
- InfoProvider Data

Enter the characteristic as shown in the above screen shot. In our example the characteristic field is '0MATERIAL' and Characteristic Value is 'P-101'. Click the button "Show me Documents from". A List is displayed at the bottom half i.e. in the list view showing the details of the corresponding documents (which were created in the portal earlier) of the field.

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