

# BI Master Data Document Integration with Portal KM



## 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.

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## Author Bio



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## Introduction

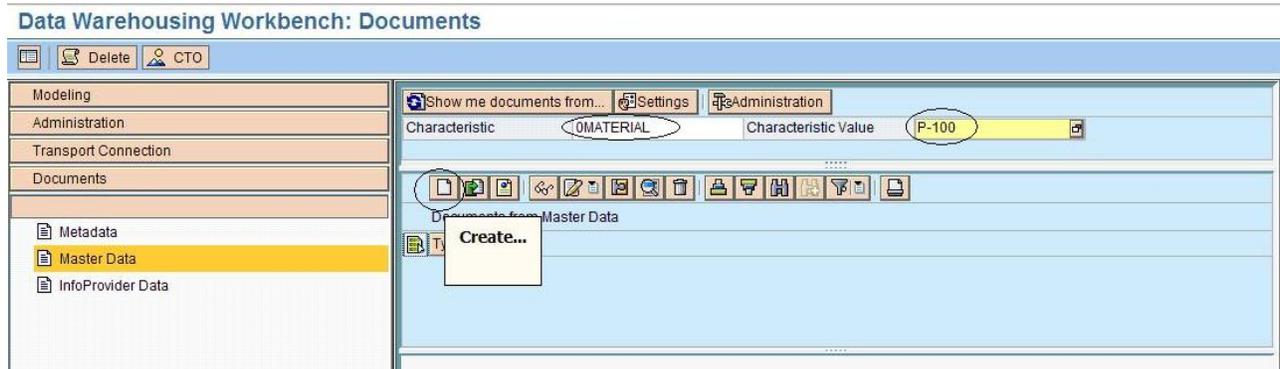
If we have a business scenario where a field in a report has to show additional information like displaying a document or image etc. we can use the concept of document integration. The close integration of BI and the knowledge management can create the connection between the structured business data and unstructured documents.

## Documents Creation for the Specific Fields

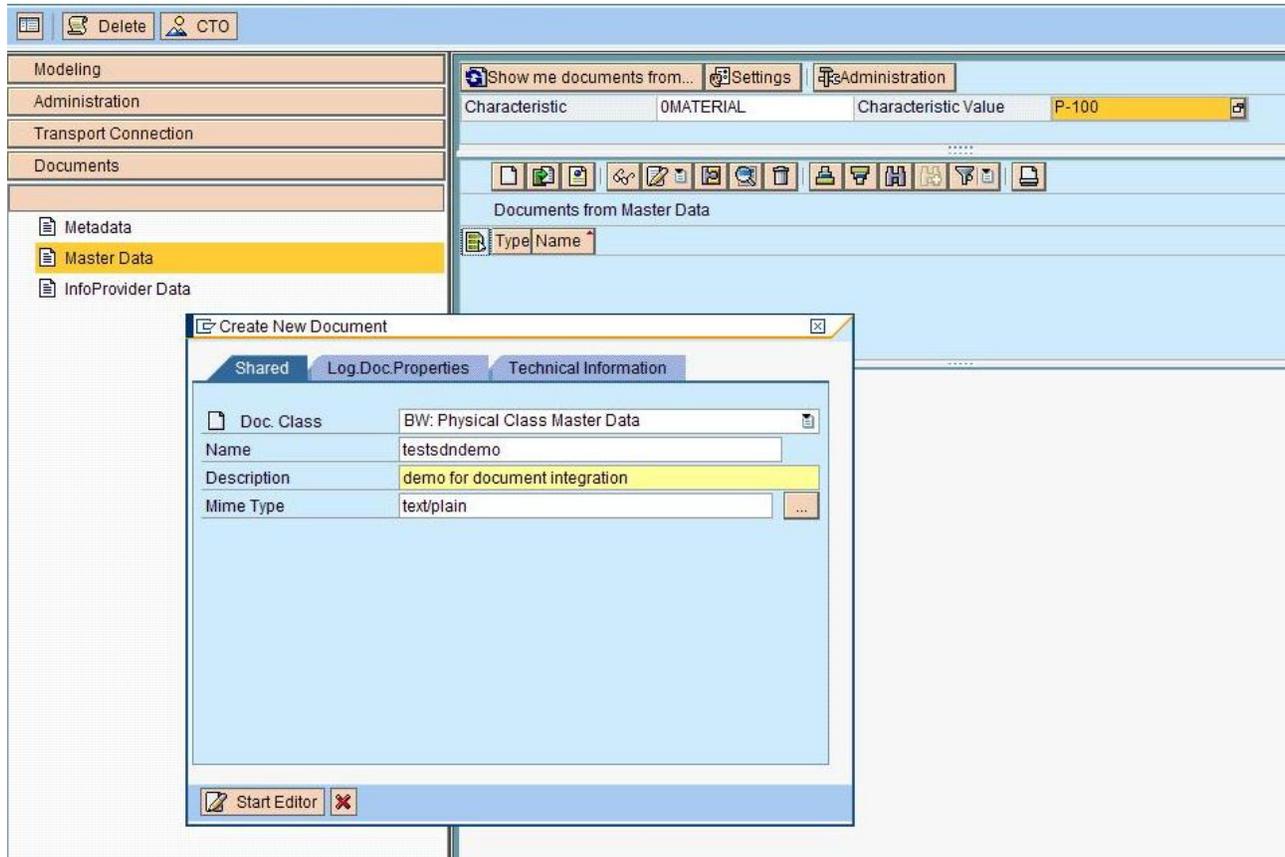
Create a master data document class with info objects. For easy understanding I have taken a demo cube named with billing (Sales and distribution area) which is already in my system.

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

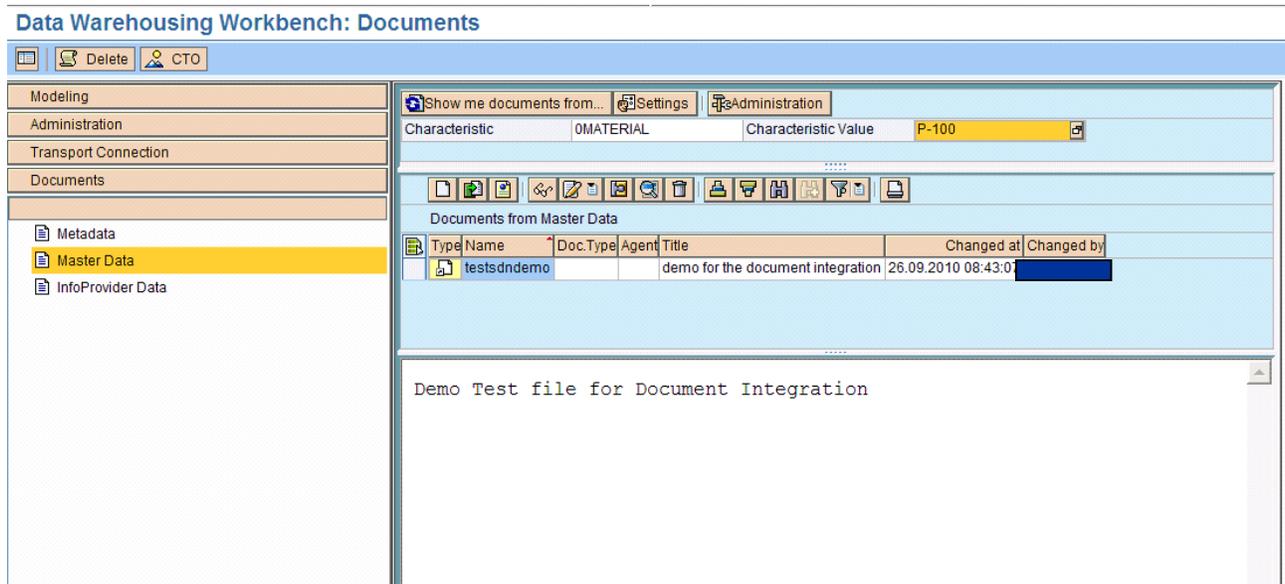


**Doc Class:** Indicates which document class (that means Metadata, Masterdata, Info provider Data) is referred to create the object of the document, in our scenario we are creating the 'Masterdata' class.

**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

The screenshot shows the SAP Query Designer interface. On the left is the 'InfoProvider' window with a tree view for 'Billing' containing 'Key Figures' (Sales Volume EUR, Sales Volume, Invoiced quantity, Sales Volume (MC), No. Document Items) and 'Dimensions' (Organization, Customer, Material, Sales Area, Document Classification, Data Package, Time, Unit). The main area is split into 'Rows/Columns' and 'Columns'. 'Rows/Columns' contains 'Free Characteristics' and 'Rows' (Division, Material). 'Columns' contains 'Key Figures' (Sales Volume, Original Curr./Unit). On the right is the 'Properties' window with tabs for 'General', 'Variable Sequence', 'Display', 'Rows/Columns', and 'V'. The 'Display' tab is active, showing 'Display Options' (Adjust Formatting after Refreshing, Hide Repeated Key Values, Display Scaling Factors for Key Figures) and 'Document Links' (For InfoProvider Data, For Master Data, For Metadata). The 'For Master Data' checkbox is checked and circled in red.

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

The screenshot shows the SAP Query Results window. The top bar includes buttons for 'New Analysis', 'Open', 'Save As...', 'Display As' (set to 'Table'), 'Information', 'Send', 'Print Version', 'Export to Excel', 'Comments', and 'Filter Settings'. The main area displays a table with the following data:

		Sales Volume			
		Original Curr./Unit	EUR	USD	Overall Result ⇅
			Euro	US Dollar	
Division ⇅	Material ⇅		EUR	\$	
01	Pumps	P-100	2.957.923,50		2.957.923,50 EUR
		P-101	6.314.752,52		6.314.752,52 EUR
		P-102	11.195.969,00		11.195.969,00 EUR
		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

Division	Material	Sales Volume		Overall Result
		Original Curr./Unit	EUR	
		Euro	US Dollar	
01	Pumps	P-100	2.957.923,50	2.957.923,50 EUR
		P-101		6.314.752,52 EUR
		P-102		11.195.969,00 EUR
		P-103	602,00	9.417.721,20 MIX
		P-104		14.322.104,73 EUR
		P-109		4.883.418,52 EUR
		P-402		8.689.250,52 EUR
		Result	602,00	57.781.139,99 MIX
Overall Result				

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

Division	Material	Sales Volume		Overall Result
		Original Curr./Unit	EUR	
		Euro	US Dollar	
01	Pumps	P-100		
		P-101		
		P-102		
		P-103		
		P-104		
		P-109		
		P-402		
		Result		
Overall Result				

## 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.

		Sales Volume			
		Original Curr./Unit	EUR	USD	Overall Result ⇅
			Euro	US Dollar	
Division ⇅	Material ⇅		EUR	\$	
01	Pumps	P-100	2.957.923,50		2.957.923,50 EUR
		P-1			6.314.752,52 EUR
		P-1			11.195.969,00 EUR
		P-1		602,00	9.417.721,20 MIX
		P-1			14.322.104,73 EUR
		P-1			4.883.418,52 EUR
		P-4			8.689.250,52 EUR
		Res	602,00		57.781.139,99 MIX
		Overall Result	602,00		57.781.139,99 MIX

- Filter
- Change Drilldown
- Broadcast and Export
- Save View
- Personalize Web Application
- Properties
- Calculations and Translations
- Documents
- Sort Material

- Display Documents
- Create New Comment
- Create New Formatted Text
- Upload

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

The screenshot shows a 'New Document' dialog box with the following details:

- Path:** bw\_document > MasterData > 0MATERIAL > P-101 - New Text File
- General Tab:**
  - Name:** testsdndemop101
  - Description:** test the document for the material p101
  - DOCUMENT\_TYPE:** text/html
  - Content:** this is the SDN Demo file for the material p-101
- Buttons:** Save, OK

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**

Characteristic:  Characteristic Value:

Documents from Material 'Pump PRECISION 101' (2)

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

Enter the characteristic as shown in the above screen shot. In our example the characteristic field is 'OMATERIAL' 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.

## Related Content

[Integration Using KM Content](#)

[Integration Using KM Content \(SAP Library - BI Suite Business Explorer\)](#)

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