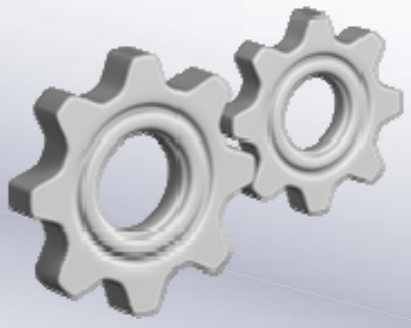

How To...

Email a BPC Data Manager Package Log to a Team

SAP Product Name:	SAP BusinessObjects Planning and Consolidation, version for NetWeaver
Applicable Product Versions:	7.0
Last Updated:	09/2009

Enterprise Performance Management

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1 Scenario

Within this scenario, we will show how to use the “Email Team” process type within the example process chain. This process type is designed to except a team ID, and send an email to all users assigned to that team. Attaching the log as an attachment to the email is also supported.

2 Introduction

In this how-to guide, we will use an example process chain for loading transaction data into BPC. Included with this guide is the transport request which contains the custom process type, the example process chain, as well as the default package instructions for this process chain. A data file called Planning.csv has also been included as an example of transaction data. This how-to guide will provide the steps for creating and running the package.

3 The Step By Step Solution

This How-To guide contains transport request files, K900825.PMR and R900825.PMR. This transport request contains all the NetWeaver objects that are required to complete this How-To Guide, including custom classes, custom process types, custom process chains, and the default package instructions.

Classes

- ZCL_UJD_BPC_EMAIL_TEAM — Process Type Class for Emailing Team
- ZCL_UJD_EMAIL_TEAM — Functional Class for Emailing Team

Process Types

- ZBPCEMLTM — Process Type for Emailing Team

Process Chains

- ZBPC_IMP_AND_EMAIL_TEAM — Import Transaction Data and Email Team

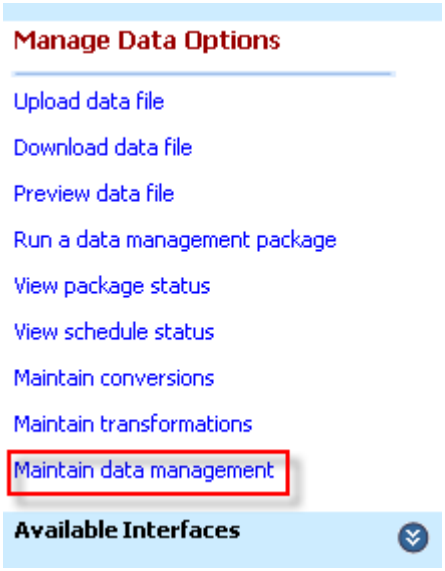
As the process of importing a transport request is not covered here, it is suggested that you seek assistance from your basis administrator in order to have this transport request imported into your system.

Note: These objects must be imported into your system before continuing any further.

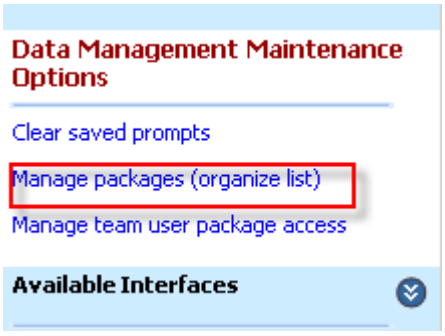
3.1 Create the Package from the BPC Excel Client

1. Launch the BPC Excel Client and log on to the “ApShell” Appset or a copy of the “ApShell” appset. In this example, we will be using an Appset called APSHELL_HTG. Use the PLANNING application. From the action pane, click “Manage Data”.

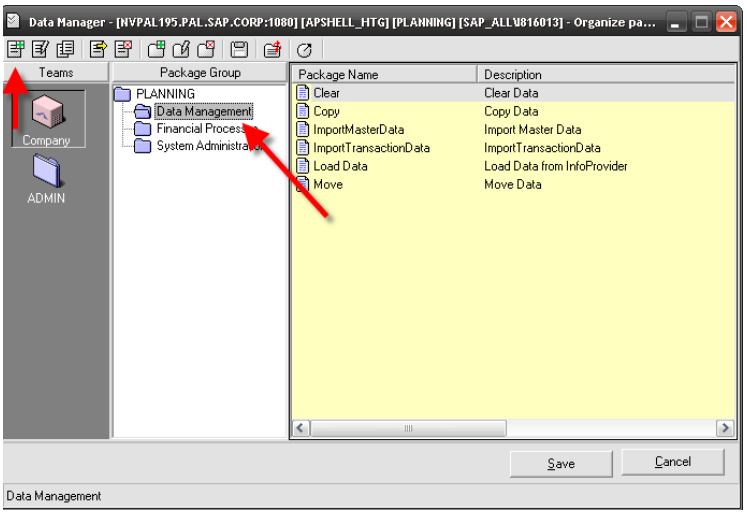
2. Next, click “Maintain data management”



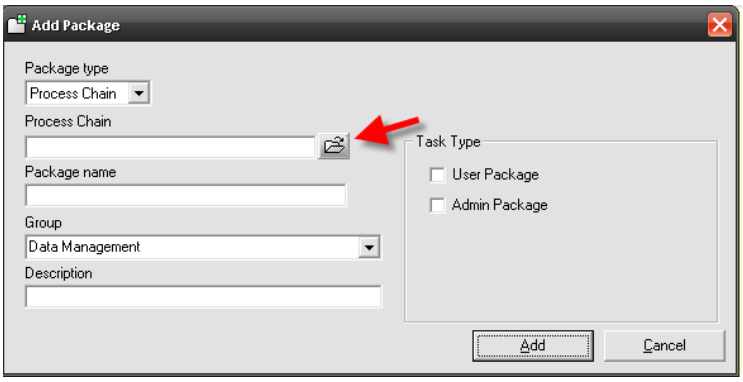
3. Next, click “Manage packages (organize list)”.



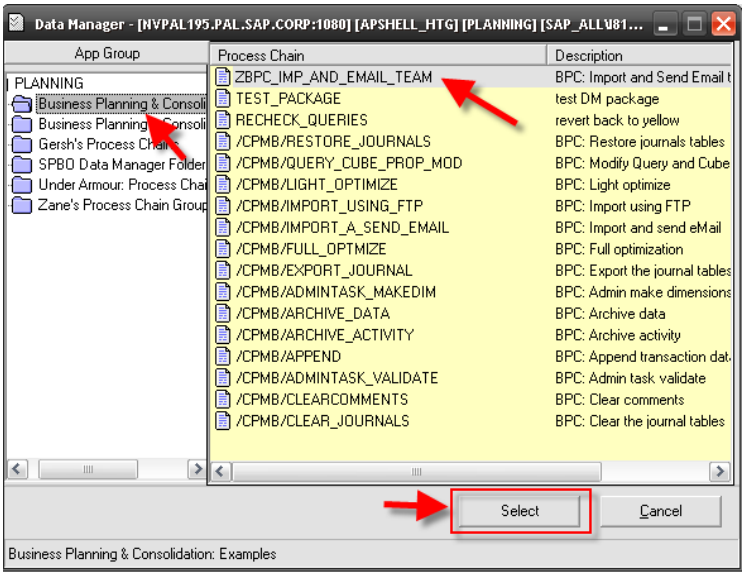
4. In this dialog, we can create the packages. Select the “Data Management” package group, and click the icon, to create a new package.



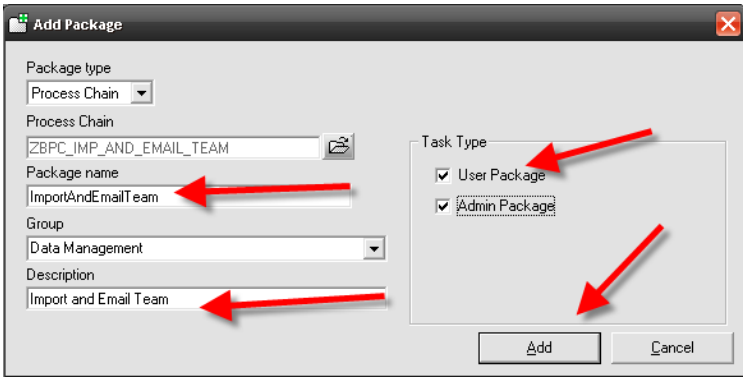
5. Click the icon next to the input field for Process Chain.



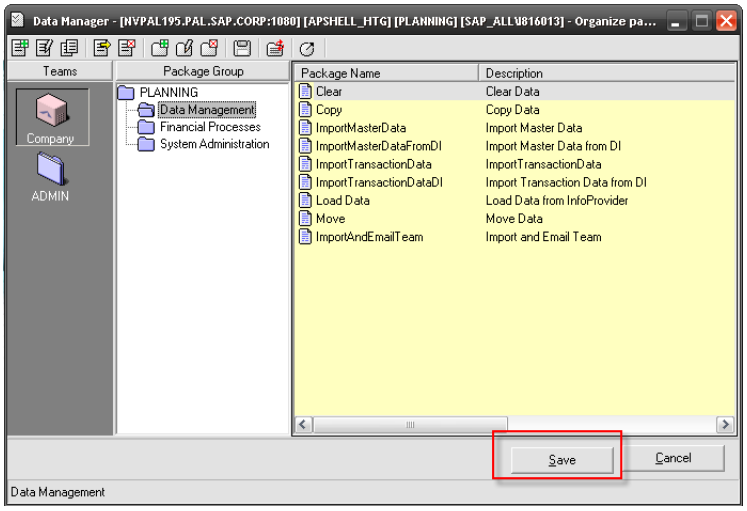
6. Select the “BPC: Planning and Consolidation: Examples” group on the left, and then select the ZBPC_IMP_AND_EMAIL_TEAM process chain on the right. Finally click the “Select” button.



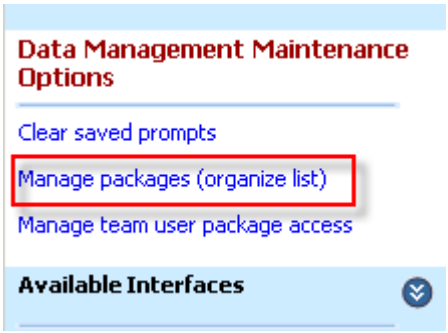
7. Continue creating the package, and enter the package name as “ImportAndEmailTeam”, and the description as “Import and Email Team”. Also check both checkboxes under Task Type. Finally click the “Add” button.



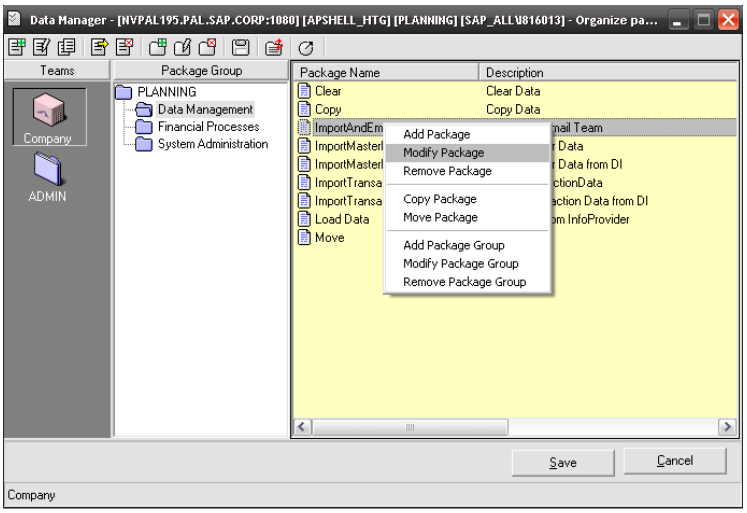
8. Now click the “Save” button. A message will appear stating that the package has been saved successfully, and the dialog will close.



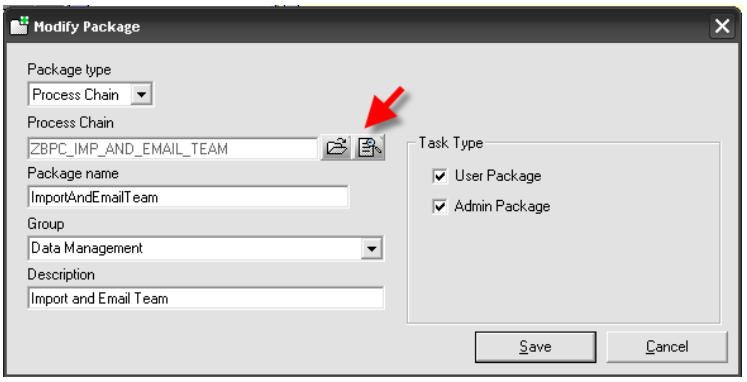
9. From the action pane, once again click the “Manage packages (organize list)” link to go back into the package maintenance screen.



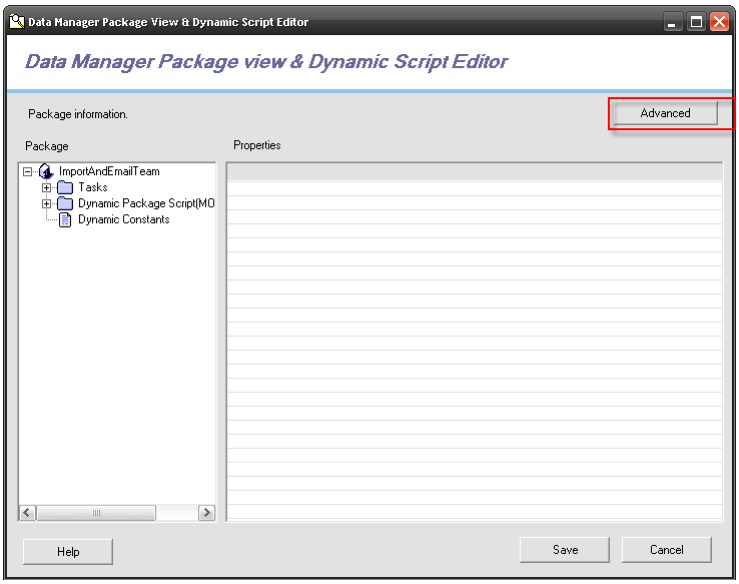
10. Select the “ImportAndEmailTeam” package and right-click on it. Choose “Modify Package”.



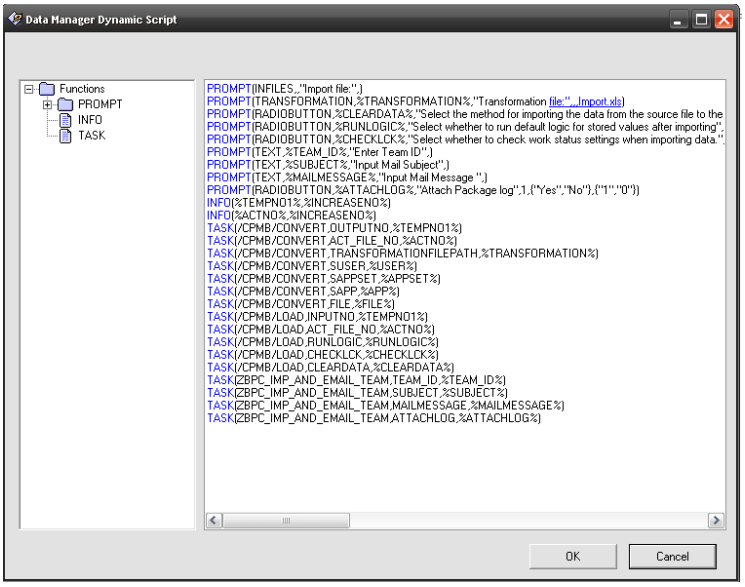
11. In the following dialog, click the icon to view the package.



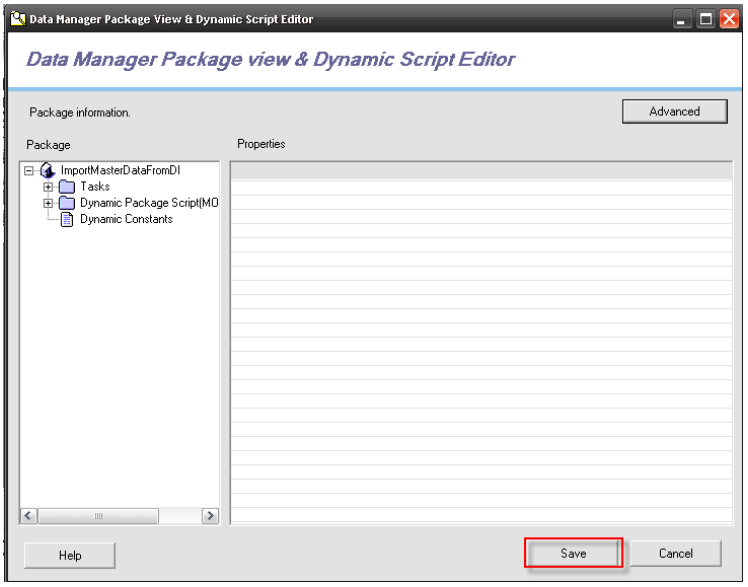
12. The “Data Manager Package and Dynamic Script Editor” will then be launched. Here you can configure how the dialog screen for this package will look and behave. Click the “Advanced” button at the top to launch the editor.



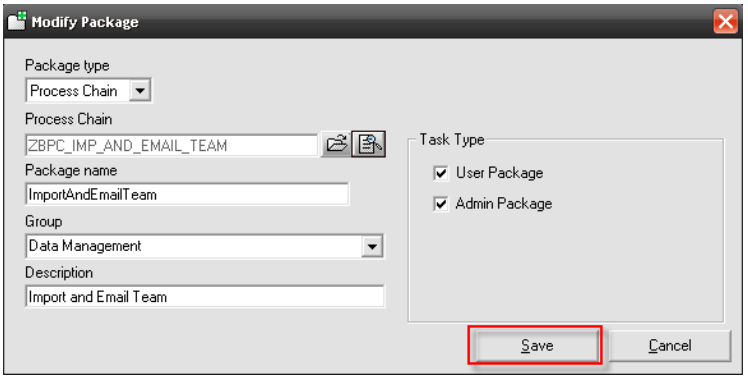
13. The default instructions were installed with the transport request. You may modify to prompt for additional parameters if required. Click “Ok” if the script has been modified, otherwise click “Cancel”.



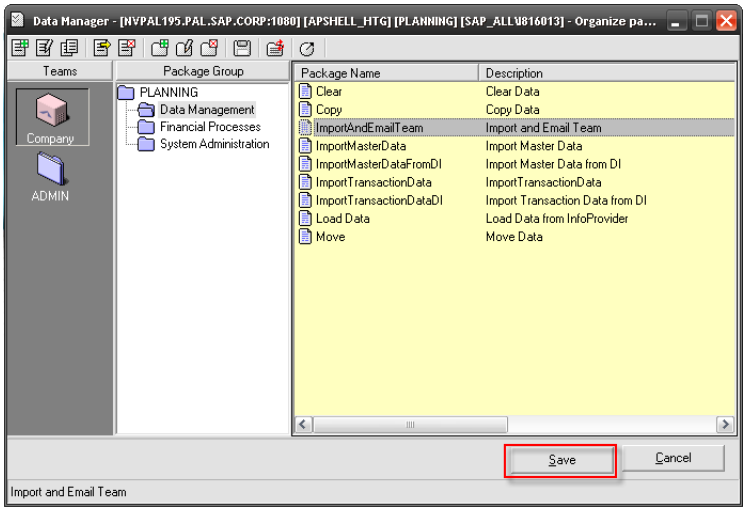
14. Control is then passed back to the previous dialog, click the “Save” button.



15. Control is then passed back to the previous dialog, click the “Save” button.

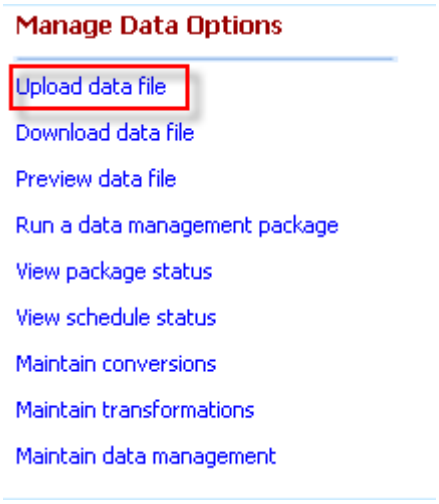


16. Finally, at the last dialog, click “Save” one last time. You will receive a message saying that the package has been saved successfully

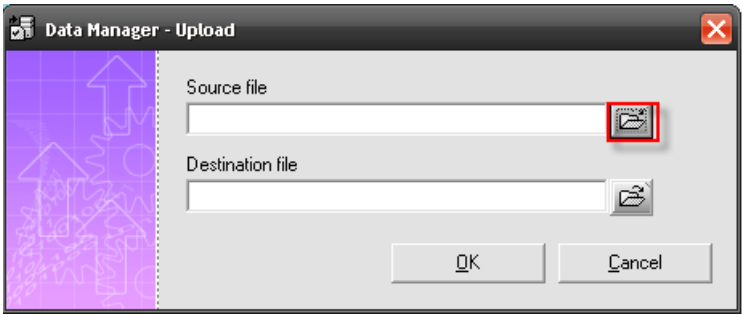


3.2 Run the Package

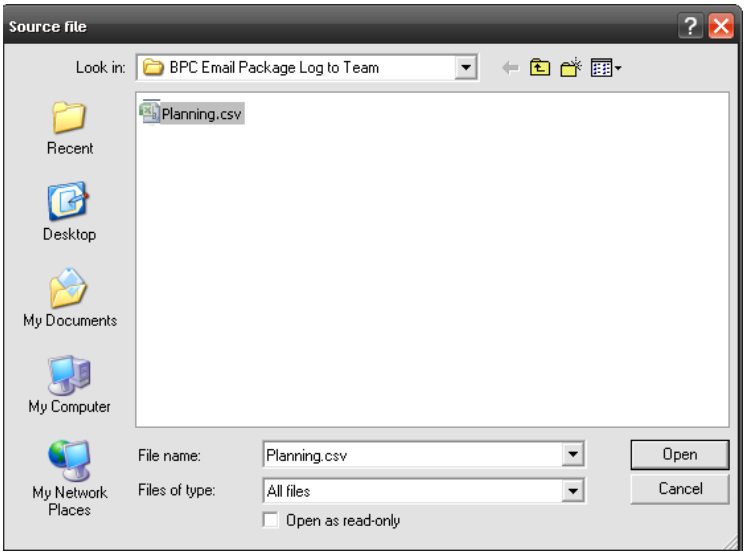
1. From the action pane, click on the “Upload Data File” link.



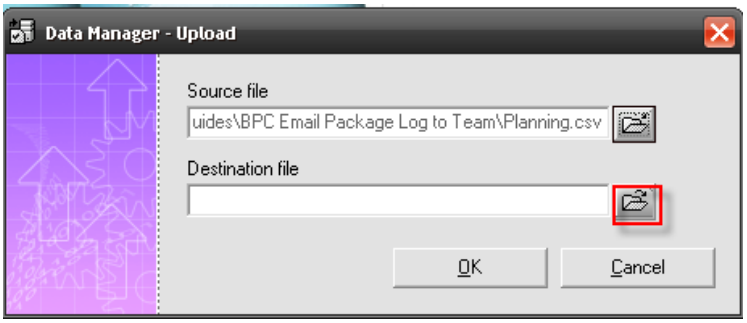
2. Choose the source file by clicking on the icon next to the input field.



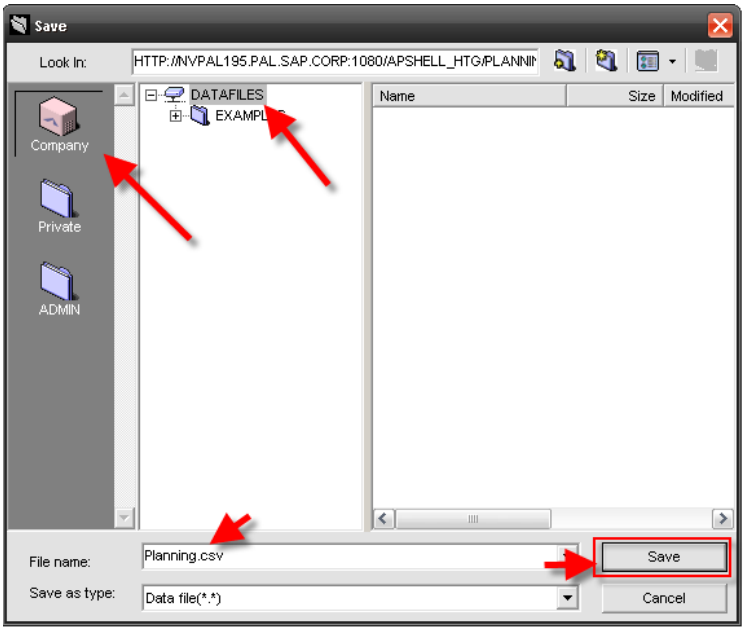
3. Select the Planning.csv file which has been included with this guide.



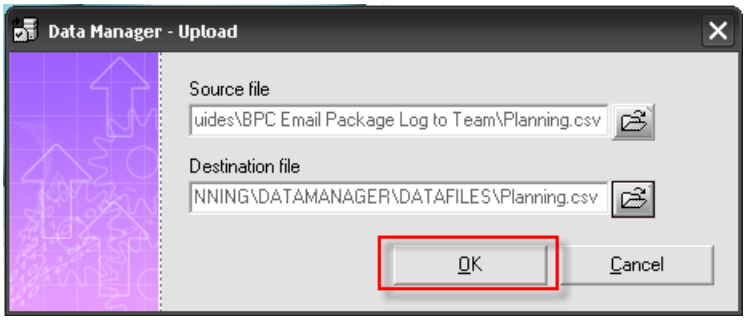
4. Next, click the icon next to the destination file input field.



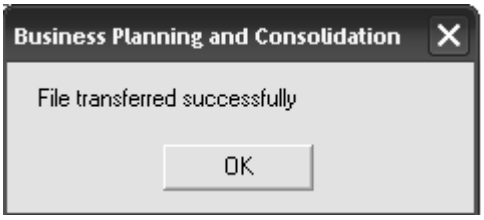
5. Click on the DATAFILES directory, and click the “Save” button.



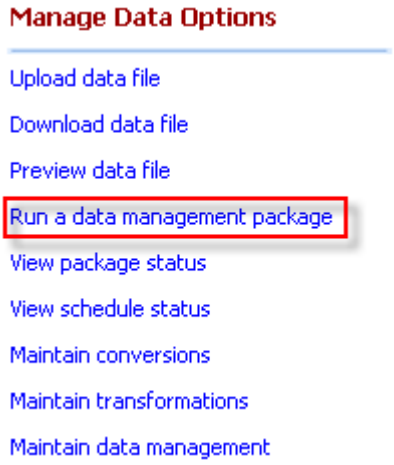
6. In this dialog box, click “Ok”.



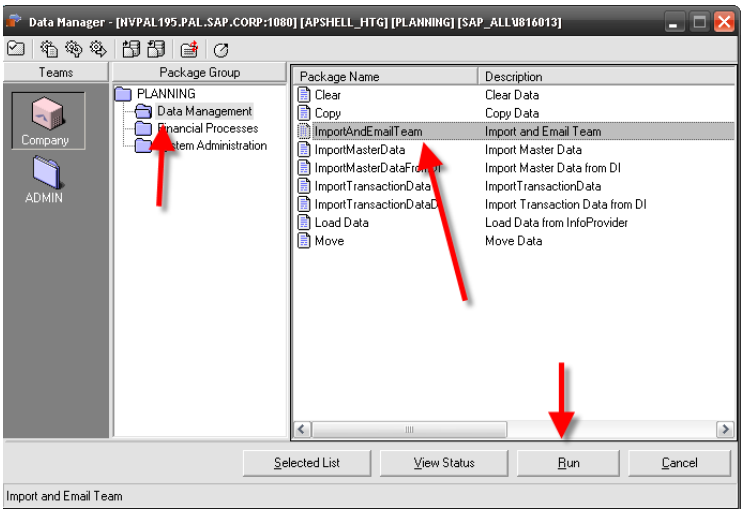
7. Click “Ok”.



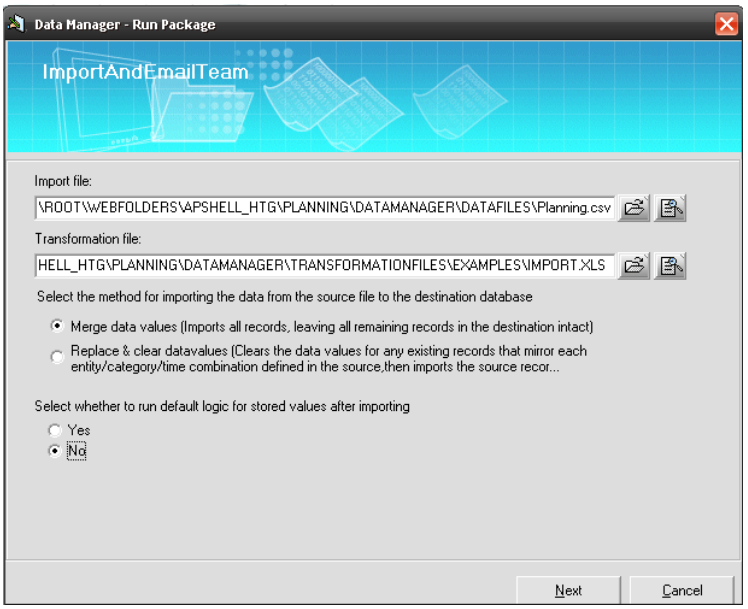
8. From the action pane, click on “Run a data management package”.



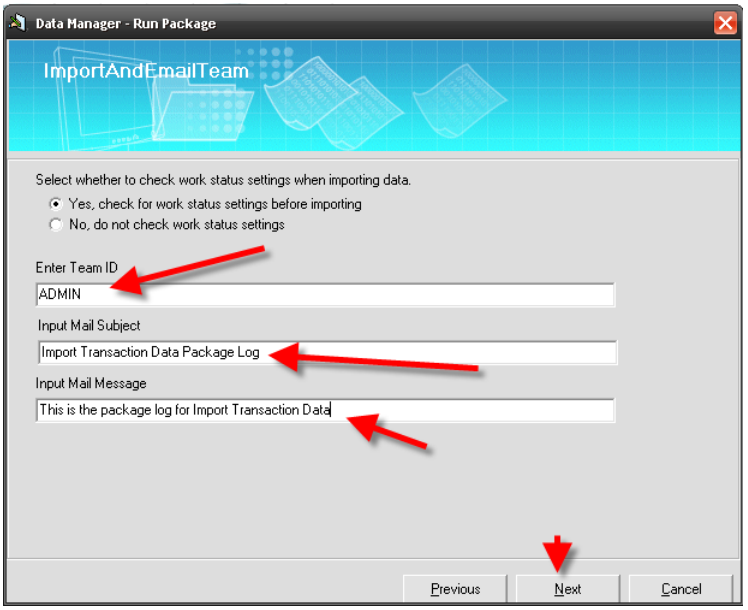
9. Choose the ImportAndEmailTeam package, and click the “Run” button.



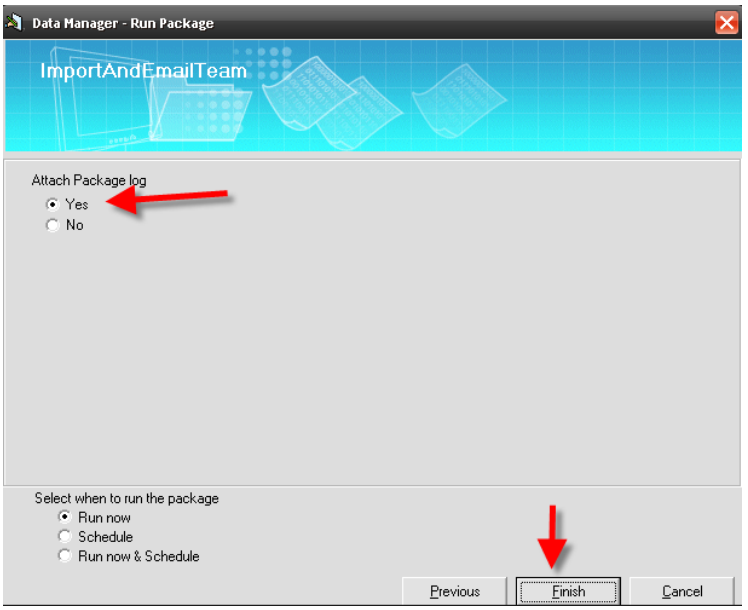
10. In this dialog box, enter the import file as well as the transformation file. Click “Next”.



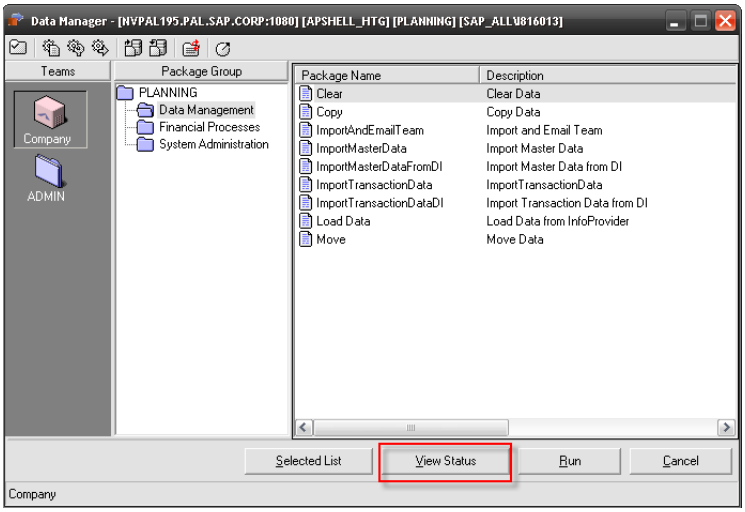
11. In the next dialog box, enter the Team ID for the team which is to be emailed, the email subject, as well as the email message body. Click “Next”.



12. In the next dialog box, select “Yes” to attach the package log. Click “Finish”.

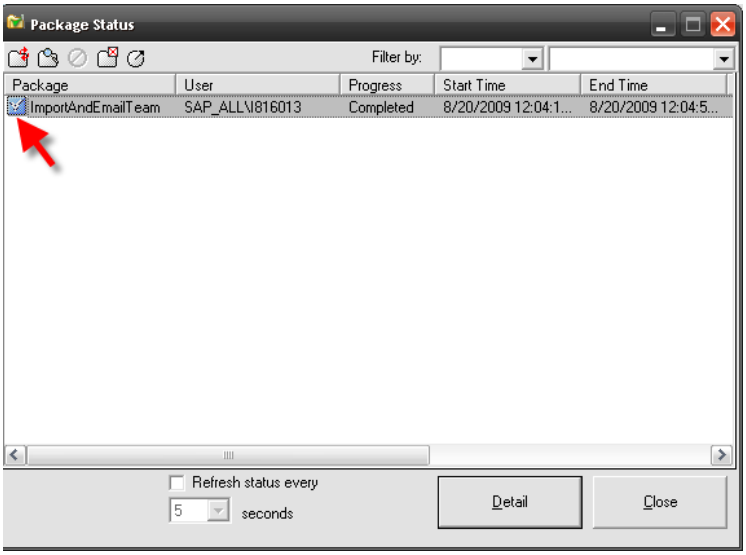


13. Click the “View Status” button.



14. You should see a successful completion. The members of the team should receive emails momentarily.

Note: Configuration in transaction SCOT is required. This should be done by the system administrator.



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