

# SAP Sourcing / Contract Lifecycle Mgmt Mail Configurations

April 2013

Vikram Shanmugasundaram, SAP Sourcing/CLM Center of Excellence



# SAP Sourcing / CLM 2013 Webcast Series

---



## Goal

- Spread the knowledge about SAP Sourcing
- Build and leverage the SAP Sourcing community



## Audience

- SAP Consulting and Field Services
- Partner Consulting
- SAP Sourcing Customers



## Upcoming Webcasts

- Use of import files in SAP Sourcing
- Mail configurations
- Business process integration to ECC and SRM

# SAP Sourcing/CLM Upcoming Trainings



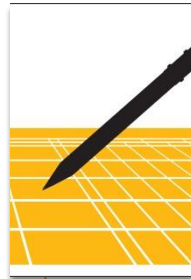
## Which trainings are being offered?

- TSO100: Functional Training
- TSO150: Technical Training



## When and where are these classes ?

- TSO100 in May (NSQ), Aug (SFO), Nov (NSQ)
- TSO150 in June (NSQ), August (SFO) and December (NSQ)



## How to sign up ?

- [www.training.sap.com](http://www.training.sap.com)
- Search for TSO100/150/180
- Contact: [armin.fakouhi@sap.com](mailto:armin.fakouhi@sap.com)

# Agenda

---

- Overview of mail notifications in SAP Sourcing
- Configurations
  - Mail Templates
  - Mail Configuration
  - System Properties
  - Enabling email
- Custom emails
- DB Write Back Considerations
- Tips & Best practices
- Q&A



# Overview of Mail Configurations

# Overview of Mail Configurations

---

- Email notifications are integral part of SAP Sourcing / CLM. It informs both buyers and suppliers of their participation in the sourcing events, important dates, reminders for upcoming tasks and other relevant information regarding their Sourcing and Contract Management process
- Allows organizations to select from the list of pre-defined triggers for which email notifications will be sent
- SAP Sourcing ships with standard mail templates that can be customized to fit your requirements
- The language of the email content is determined based on the language setting of the recipient
- In general, Mail Configurations are a one time setup activity

# Overview of Mail Configurations

## Some examples

---

- **Buyer email notifications**
  - Adding collaborator to a business document
  - Tasks and milestones reminder
  - MA renewal reminder
  - Workflow approval request
  
- **Supplier email notifications**
  - Supplier registration approved
  - RFx is opened for response
  - Contract document is shared with supplier
  
- **User Management email notifications**
  - New user creation
  - Password reset

# Overview of Mail Configurations

## Key components

---

Key components involved in configuring mail messages in SAP Sourcing include:

- Mail Message Templates
- Mail Tokens
- Mail Configurations
- System Properties
- Mail Daemon





# Configuring Mail Messages

# Configuring Mail Messages

## Mail Message Templates

- Mail Message Templates are used to define the content of the email messages sent from SAP Sourcing
- Standard mail templates cannot be edited, however, it can be duplicated to meet specific needs
- Each Mail Message Template should be assigned to a Mail Type

\* Display Name: Collaborator Added For New Docum

Description:

\* External ID: system.collab\_added\_from\_template

Subject: A new %DOCUMENT\_TYPE% has been created in SAP Sourcing called - %DOCUMENT\_TITLE%

---

\* Mail Type: Collaborator Added For New Document ▼

Module: General

Purpose: Message sent to document collaborators when a new document is saved

Sender: Company Admin E-mail

Recipient: Collaborator

Trigger: User Action

# Configuring Mail Messages

## Mail Message Templates

- The trigger for the notification, Sender and Recipient information is pre defined by the system and cannot be changed

**Mail Type Information**

\* Mail Type: Collaborator Added For New Document ▼

Module: General

Purpose: Message sent to document collaborators when a new document is saved

Sender: Company Admin E-mail

Recipient: Collaborator

Triqger: User Action

- Email body

\* Plain Message Text:

Language: Default ▼

RES\_ID(doc\$messaging.message\_header.ss)

You have a notification from SAP Sourcing:

This message is to inform you that %DOCUMENT\_CREATOR% has just created a new %DOCUMENT\_TYPE% titled: %DOCUMENT\_ID%, %DOCUMENT\_TITLE%.

EXISTS(IS\_XPRESS, "You are listed as a CSR or collaborator on this document so that you can review and take action on this document.", "You are listed as a collaborator on this document. As a collaborator you now have access to this document. You may be required to perform some specific tasks, so please check with %OWNER\_FIRST\_LAST\_NAME% to understand the current status.")

To view the document, please follow these steps:

# Configuring Mail Messages

## Mail Tokens

- Mail messages use mail tokens heavily. They are place holders that are filled in when the email message is generated

- Syntax for mail token is name of the token followed by %

- In the example below the tokens will be replaced by actual values when the email is generated

*This message is to inform you that the system administrator from %BUYER\_COMPANY\_NAME%, for Agreement: %DOCUMENT\_ID%, %DOCUMENT\_NAME% has deleted the contract document %CONTRACT\_DOCUMENT\_NAME%. This delete action has removed all version history for the given contract document.*

- Tokens are specific to a mail message template. A list of tokens available for each mail message template can be found in the Reference Guide

### SAP Sourcing Reference Guide

#### Reference Materials

Check the [Class Reference](#) for information about the objects in SAP Sourcing.

Use the [IAPI JavaDoc](#) to learn about the Java interface to SAP Sourcing.

The [Mail Template Reference](#) details the mail tokens for each mail type.

The [Database ERD](#) details the ERD diagrams related to Sourcing objects.

- There are 2 types pre-defined set of mail tokens
  - Global Tokens
  - Mail Template specific tokens

# Configuring Mail Messages

## Mail Tokens

- Global Tokens
  - Can be applied to several mail templates
  - NOTE: Global tokens may not work on all mail templates
    - Example – OWNER\_PHONE, OWNER\_EMAIL global tokens will not work on a Contract document as there is no “owner”. Owner is available on the parent Master Agreement
- Mail Template specific tokens
  - Applicable to a specific template

Type: **Buy-side User Deleted a Document Version** ([type list](#))

### Type-Specific Tokens

| Token Name              | Description  |
|-------------------------|--|
| BUYER_COMPANY_NAME      | The buyer's company name                               |
| CONTRACT_DOCUMENT_NAME  | The contract document name                             |
| DOCUMENT_VERSION_NUMBER | The document version number                            |
| CONTRACTDOC_URL         | The contract document page's url                       |
| LAST_VERSION            | If the document version the last one in the collection |

| Token Name               | Description  |
|--------------------------|--|
| IS_BUYSIDE               | Always present for internal emails.                                    |
| IS_SELLSIDE              | Always present for external emails.                                    |
| RECIPIENT_FIRST_NAME     | The first name of the recipient.                                       |
| RECIPIENT_USER_ID        | The user ID of the recipient.  |
| TECH_SUPPORT_PHONE       | The phone number for tech support.                                     |
| TECH_SUPPORT_EMAIL       | The email address for the technical support contact.                   |
| COMPANY_NAME             | The name of the company generating the message.                        |
| WORKBENCH_URL            | The URL to login to the application and bring a user to the workbench. |
| LOGIN_URL                | The URL to login to the application.                                   |
| DOCUMENT_NAME            | The name of the document.  |
| DOCUMENT_ID              | The document number of a business document.                            |
| DOCUMENT_URL             | The URL for the document.  |
| DOCUMENT_HEADER_URL      | The URL for the document's header page.                                |
| DOCUMENT_DISCUSSIONS_URL | The URL for the document's discussions page.                           |
| DOCUMENT_TYPE            | The name of the assigned document type (RFx, RFQ, etc.).               |
| OWNER_FIRST_LAST_NAME    | The full name of the document's owner.                                 |
| OWNER_EMAIL              | The email address of the document's owner.                             |
| OWNER_PHONE              | The phone number of the document's owner.                              |

# Configuring Mail Messages

## Macros

---

Following macros can be used in mail message templates

- **EXISTS**
  - Include content conditionally in the message
  
- **RES\_ID**
  - Takes a localized resource
  
- **FORMAT**
  - Wraps the string in the given html tag
  - Will work only when HTML Mail option is selected on the user account
  
- **LINK**
  - Allows embedding a link in the message

Look at standard mail message templates for examples of usage of the above tokens

# Configuring Mail Messages

## Mail Configurations

- Mail Configuration allows you have control on when and whom emails are sent to from SAP Sourcing tool
- Contains a list of all Mail Types and the associated Mail Templates
- Allows rules to be setup at
  - Global level – applies to all mail templates
  - Template level - rules can be set to individual template

**Global Rules**

Use Global Rules

Internal Action:  Send  
 Hold  
 Postpone  
 Delete

External Action:  Send  
 Hold  
 Postpone  
 Delete

Custom Rule:   
 Example: @acme.com=send;@abc.com=delete;@all=redirect to admin@acme.com

**Mail Types Map**

| Mail Type                                     | Mail Template   | Internal Action | External |
|---|---|-----------------|----------|
| Account Activation (Password Only) [Default]  | Account Activation (Password): Default <input type="checkbox"/>   | Send            | Send     |
| Account Activation (Password Only) [External] | Account Activation (Password): Sell-Side <input type="checkbox"/> | Send            | Send     |
| Account Activation (User name Only) [Default] | Account Activation (Username): Default <input type="checkbox"/>   | Send            | Send     |

**Global Rules**

Use Global Rules

Internal Action:  Send  
 Hold  
 Postpone  
 Delete

External Action:  Send  
 Hold  
 Postpone  
 Delete

Custom Rule:   
 Example: @acme.com=send;@abc.com=delete;@all=redirect to admin@acme.com

**Mail Types Map**

| Mail Type                                     | Mail Template   | Internal Action           | External Action           |
|---|---|---------------------------|---------------------------|
| Account Activation (Password Only) [Default]  | Account Activation (Password): Default <input type="checkbox"/>   | Send <input type="text"/> | Send <input type="text"/> |
| Account Activation (Password Only) [External] | Account Activation (Password): Sell-Side <input type="checkbox"/> | Send <input type="text"/> | Send <input type="text"/> |
| Account Activation (User name Only) [Default] | Account Activation (Username): Default <input type="checkbox"/>   | Send <input type="text"/> | Send <input type="text"/> |

# Configuring Mail Messages

## Mail Configurations

---

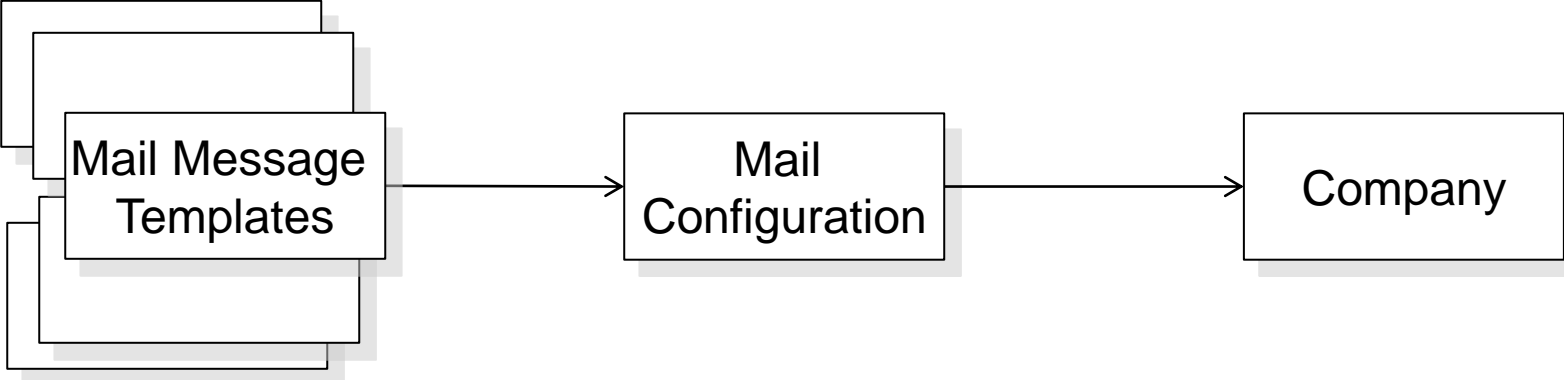
- SAP Sourcing ships with the “default” mail configuration which will be used if there is no custom mail configuration
- When using template level rules, for each template there are 4 options to select from
  - Send – send the message
  - Hold – hold the message in the queue indefinitely
  - Postpone – Postpone sending message until product mode is changed to Production. Not widely used.
  - Delete – delete without sending



# Configuring Mail Messages

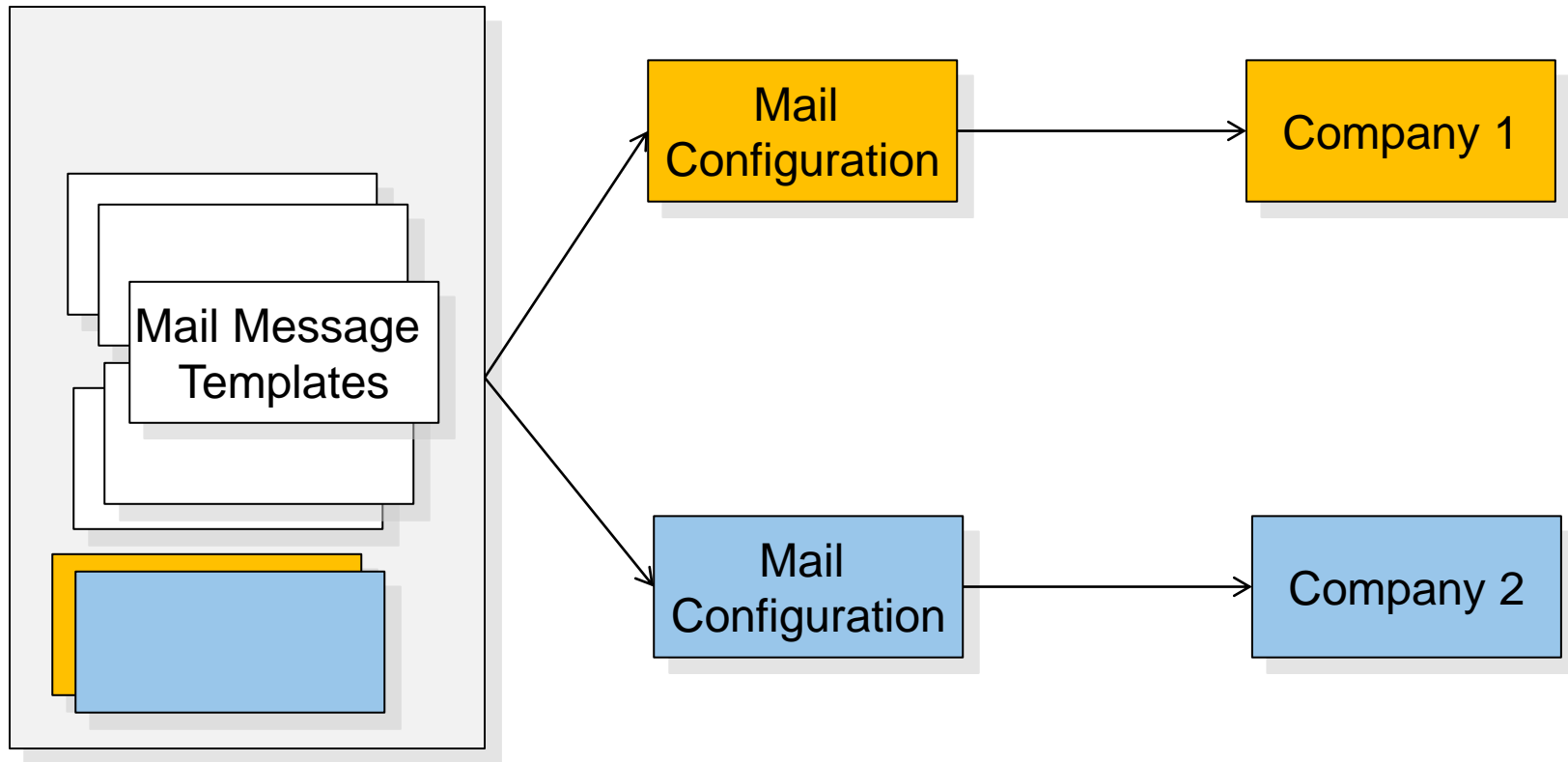
## Typical setup

---



# Configuring Mail Messages

## Typical setup



# Configuring Mail Messages

## System Properties

---

- The following system properties are available for configuring emails

| System Property               | Description   |
|-------------------------------|---|
| messaging.smtp.mailhost       | Hostname of the SMTP server   |
| messaging.smtp.password       | Password for the SMTP server  |
| messaging.smtp.port           | Port for connecting to the SMTP server  |
| messaging.smtp.username       | Username for the SMTP server  |
| messaging.mail_source_policy  | Rule for the FROM field on mail messages. One of DEFER_TO_MAILTYPE, SENDERS_COMPANY (default), or SPECIAL_ADDRESS     |
| messaging.force_from_address  | The address to use as the FROM field on mail messages when messaging.mail_source_policy is set to SPECIAL_ADDRESS     |
| messaging.mail_reply_policy   | Rule for the REPLY-TO field on mail messages. One of DEFER_TO_MAILTYPE, SENDERS_COMPANY (default), or SPECIAL_ADDRESS |
| messaging.force_reply_address | The address to use as the REPLY-TO field on mail messages when messaging.mail_reply_policy is set to SPECIAL_ADDRESS  |

# Configuring Mail Messages

## System Properties

- The following system properties are available for configuring emails...contd

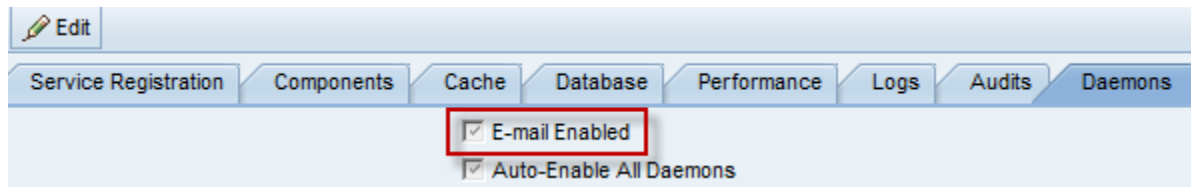
| System Property                                   | Description   |
|---|---|
| messaging.backoffintervalmins                     | Extend the time to retry mail transmission by this amount each time a message fails.  |
| messaging.maxretrytimehours                       | Maximum time for attempting to deliver mail   |
| messaging.queue_alert_size                        | The number of queued messages required to trigger an alert  |
| messaging.maxunzippedattachmentsize               | The maximum size for an unzipped attachment, in KB. Setting the value to 0 will disable .zip compression  |
| messaging.savesentmsgsdays                        | Save sent mail messages for this period of time (in days)   |
| system.doc.collaborators.disable_new_collab_email | Disable system-wide email notification for new collaborators who are added to documents.  |
| system.mail.separate_buyer_supplier_activation    | If TRUE, then a separate mail template is used for internal and external account activation emails. The default template is used for internal users and the supplier template is used for external users. |
| system.security.separate_pswd_and_name            | If TRUE, then upon setting up or modifying an account for a user, the user will receive two separate emails: one with a user name, the other with a password.   |
| system.security.pswd_msg.delay                    | Delay for sending password message (in seconds)   |

# Configuring Mail Messages

## Enabling email sending

---

- By default emails are turned off in SAP Sourcing
- To enable emails, go to Setup → System Administration tab → System Information → Daemons tab → Check E-mail Enabled



# Configuring Mail Messages

## Queued Messages and Processed Messages

- To view queued messages go to Setup → System Administration tab → Administrative Reports → Queued Messages

**Queued Messages** Modify Search Full Screen

Query: All Queued Messages

Find:  In: Message From

| Message From | Message To | Subject  | Message State |   |
|--------------|------------|--|---------------|---|
| ...          | ...        | You have been added as a collaborator to SAP Sourcing SRM %DOCUMENT_TYPE% - %DOCUMENT_TITLE% | Pending       |  |

- To view processed messages go to Setup → System Administration tab → Administrative Reports → Processed Messages

**Processed Messages** Modify Search Full Screen

Query: All Processed Messages

Find:  In: Message From

| Message From | Message To | Subject  | Result | Date Processed            |
|--------------|------------|--|--------|---------------------------|
| ...          | ...        | RFx: supplier att test was viewed by Boston Medical Research | Sent   | 04/22/2013 03:50 PM (EDT) |



# Custom email templates

# Configuring Mail Messages

## Custom Mail Message Templates

- Custom templates can be used to send email notifications when a specific action is performed by the end user
  - Example - Contract document moved to legal review and email notification is sent to the legal team
- There are 10 custom mail message templates that are provided by default
- Each custom mail message template comes with 5 custom tokens

| Mail Types Map   |  |                 |                 |
|--|--|-----------------|-----------------|
| Mail Type  | Mail Template  | Internal Action | External Action |
| Auction Invite   | <a href="#">Auction Invite</a>                         | Send            | Send            |
| Auction No Bid   | <a href="#">Auction No Bid</a>                         | Send            | Send            |
| Auction Outbid   | <a href="#">Auction Outbid</a>                         | Send            | Send            |
| Auction Winning Bidder Notice  | <a href="#">Auction Winning Bidder Notice</a>          | Send            | Send            |
| Auction Winning Bids   | <a href="#">Auction Winning Bids</a>                   | Send            | Send            |
| Begin Collaborative Scoring For this RFx Event                                 | <a href="#">Notify Collaborators Open For Scoring</a>  | Send            | Send            |
| Buyside User Deleted a Document Version  | <a href="#">Document Version Deleted</a>               | Send            | Send            |
| Collaborative Scores For this RFx Event Are Now Published                      | <a href="#">Notify Collaborators Scoring Published</a> | Send            | Send            |
| Collaborative Scoring for this RFx Event once marked as complete is open again | <a href="#">RFx Reopen For Collaborative Scoring</a>   | Send            | Send            |
| Collaborator Added By User   | <a href="#">Collaborator Added By User</a>             | Send            | Send            |
| Collaborator Added For New Document  | <a href="#">Collaborator Added For New Document</a>    | Send            | Send            |
| Contract Document Share With Supplier  | <a href="#">Version Shared With Supplier</a>           | Send            | Send            |
| Contract Imports Batch Completed   | <a href="#">Contract Imports Batch Completed</a>       | Send            | Send            |
| Custom Development Error   | <a href="#">Custom Development Error</a>               | Send            | Send            |
| Custom Template1   | <a href="#">Custom Template 1 Demo</a>                 | Send            | Send            |
| Custom Template10  | <a href="#">Custom Template10</a>                      | Send            | Send            |
| Custom Template2   | <a href="#">Custom Template2</a>                       | Send            | Send            |
| Custom Template3   | <a href="#">Custom Template3</a>                       | Send            | Send            |
| Custom Template4   | <a href="#">Custom Template4</a>                       | Send            | Send            |
| Custom Template5   | <a href="#">Custom Template5</a>                       | Send            | Send            |

2 of 8 Go



# Configuring Mail Messages

## Custom Mail Message Templates

---

- Step 1 – Create a new mail message template by duplicating one of the custom templates. Add content to the message and save.
- Step 2 – Edit Mail Configuration to use the custom template created in step 1
- Step 3 – Write the script to call the custom Mail Message Template
  - NotificationUtil class – sendNotification method

### Related blog on SCN

<http://scn.sap.com/community/sourcing/blog/2012/12/21/sap-sourcing-custom-mail-message-templates>



# DB Write Back Considerations

# DB Write Back Consideration

---

- Scenario: DB write back from Prod to QA
- It is extremely important to take necessary steps to ensure that emails are not accidentally sent out to suppliers and also limit who receives emails on the buyer side

There are 2 options to consider

- Option 1
  - Execute SQL command directly against the DB to update all the email address
  - Ensures emails are not accidentally sent out to suppliers
  - Allows testing the business process and the content of the email messages
  - Open a OSS message and SAP will provide the SQL



CAUTION MUST BE APPLIED WHEN EXECUTING SQL COMMANDS DIRECTLY AGAINST THE DB. MUST FULLY UNDERSTAND THE IMPLICATIONS. INCORRECT EXECUTION OF SQL COULD RESULT IN A CORRUPTED DB AND AN UNUSABLE SYSTEM

# DB Write Back Consideration

- Option 2
  - Use Custom Rules on the Mail Configuration
  - Custom Rule
    - @all=redirect to admin@acme.com
    - @all=delete

Global Rules

Use Global Rules

Internal Action:  Send  
 Hold  
 Postpone  
 Delete

External Action:  Send  
 Hold  
 Postpone  
 Delete

Custom Rule:

Example: @acme.com=send;@abc.com=delete;@all=redirect to admin@acme.com

- It is important to leave the email daemon ON to avoid queuing up of messages



# Tips and Best Practices

# Tips & Best Practices

---

- When creating custom Mail Message Template, it is recommended to use the following naming convention
  - Standard: `system.collab_added_from_template`
  - Custom: `custom.collab_added_from_template`
- Always duplicate from standard template
- Always duplicate from the default Mail Configuration
- Global tokens are for internal use only. Using them in mail templates could have unexpected results
  - Example: Using `OWNER_FIRST_LAST_NAME` global token on a Contract Document mail template
- Other than using the system provided tokens it is not possible to add dynamic content to email messages. Custom tokens are not supported

# Tips & Best Practices

---

- By default when the system is first setup email daemon is turned off
- Several Mail Messages Templates are shared across modules, so when customizing a template keep that in mind
- Workflow related mail message templates are shared across modules. See SAP NOTE 1263839
- Once Mail Message Templates and Mail Configurations are configured in the Dev system it can be migrated using standard transport process (via oma)



**Thank You!**



# © 201' SAP AG. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP AG. The information contained herein may be changed without prior notice.

Some software products marketed by SAP AG and its distributors contain proprietary software components of other software vendors.

Microsoft, Windows, Excel, Outlook, PowerPoint, Silverlight, and Visual Studio are registered trademarks of Microsoft Corporation.

IBM, DB2, DB2 Universal Database, System i, System i5, System p, System p5, System x, System z, System z10, z10, z/VM, z/OS, OS/390, zEnterprise, PowerVM, Power Architecture, Power Systems, POWER7, POWER6+, POWER6, POWER, PowerHA, pureScale, PowerPC, BladeCenter, System Storage, Storwize, XIV, GPFS, HACMP, RETAIN, DB2 Connect, RACF, Redbooks, OS/2, AIX, Intelligent Miner, WebSphere, Tivoli, Informix, and Smarter Planet are trademarks or registered trademarks of IBM Corporation.

Linux is the registered trademark of Linus Torvalds in the United States and other countries.

Adobe, the Adobe logo, Acrobat, PostScript, and Reader are trademarks or registered trademarks of Adobe Systems Incorporated in the United States and other countries.

Oracle and Java are registered trademarks of Oracle and its affiliates.

UNIX, X/Open, OSF/1, and Motif are registered trademarks of the Open Group.

Citrix, ICA, Program Neighborhood, MetaFrame, WinFrame, VideoFrame, and MultiWin are trademarks or registered trademarks of Citrix Systems Inc.

HTML, XML, XHTML, and W3C are trademarks or registered trademarks of W3C®, World Wide Web Consortium, Massachusetts Institute of Technology.

Apple, App Store, iBooks, iPad, iPhone, iPhoto, iPod, iTunes, Multi-Touch, Objective-C, Retina, Safari, Siri, and Xcode are trademarks or registered trademarks of Apple Inc.

IOS is a registered trademark of Cisco Systems Inc.

RIM, BlackBerry, BBM, BlackBerry Curve, BlackBerry Bold, BlackBerry Pearl, BlackBerry Torch, BlackBerry Storm, BlackBerry Storm2, BlackBerry PlayBook, and BlackBerry App World are trademarks or registered trademarks of Research in Motion Limited.

Google App Engine, Google Apps, Google Checkout, Google Data API, Google Maps, Google Mobile Ads, Google Mobile Updater, Google Mobile, Google Store, Google Sync, Google Updater, Google Voice, Google Mail, Gmail, YouTube, Dalvik and Android are trademarks or registered trademarks of Google Inc.

INTERMEC is a registered trademark of Intermec Technologies Corporation.

Wi-Fi is a registered trademark of Wi-Fi Alliance.

Bluetooth is a registered trademark of Bluetooth SIG Inc.

Motorola is a registered trademark of Motorola Trademark Holdings LLC.

Computop is a registered trademark of Computop Wirtschaftsinformatik GmbH.

SAP, R/3, SAP NetWeaver, Duet, PartnerEdge, ByDesign, SAP BusinessObjects Explorer, StreamWork, SAP HANA, and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP AG in Germany and other countries.

Business Objects and the Business Objects logo, BusinessObjects, Crystal Reports, Crystal Decisions, Web Intelligence, Xcelsius, and other Business Objects products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of Business Objects Software Ltd. Business Objects is an SAP company.

Sybase and Adaptive Server, iAnywhere, Sybase 365, SQL Anywhere, and other Sybase products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of Sybase Inc. Sybase is an SAP company.

Crossgate, m@gic EDDY, B2B 360°, and B2B 360° Services are registered trademarks of Crossgate AG in Germany and other countries. Crossgate is an SAP company.

All other product and service names mentioned are the trademarks of their respective companies. Data contained in this document serves informational purposes only. National product specifications may vary.

The information in this document is proprietary to SAP. No part of this document may be reproduced, copied, or transmitted in any form or for any purpose without the express prior written permission of SAP AG.