

How to Setup a Simple Scenario Using SAP Records Management



Applies to:

SAP Records Management 2.4 & 3.0.

Summary

This document aims at providing a basic understanding of how to work with RM using a simple scenario. For more detailed information on RM & more complicated scenario configuration details, please refer to the training BIT640 (generic RM), IP650(Public Sector RM) or get in touch with SAP consultants.

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Author Bio



Pragya Pande has been with SAP Labs India for 4 years & has been associated with Records Management product for the same time as a developer first & now as a business expert. She has been involved in presenting the Records Management to the developer's community in India at TechEd2006 & TechEd2007.

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Introduction

This document aims at providing a basic understanding of how to work with RM using a simple scenario. For more detailed information on RM & more complicated scenario configuration details, please refer to the training BIT640 or get in touch with SAP consultants. The document assumes understanding of SAP systems in general & familiarity with SPRO. It is aimed at users of SAP systems with some understanding of navigation on SAPGUI screens.

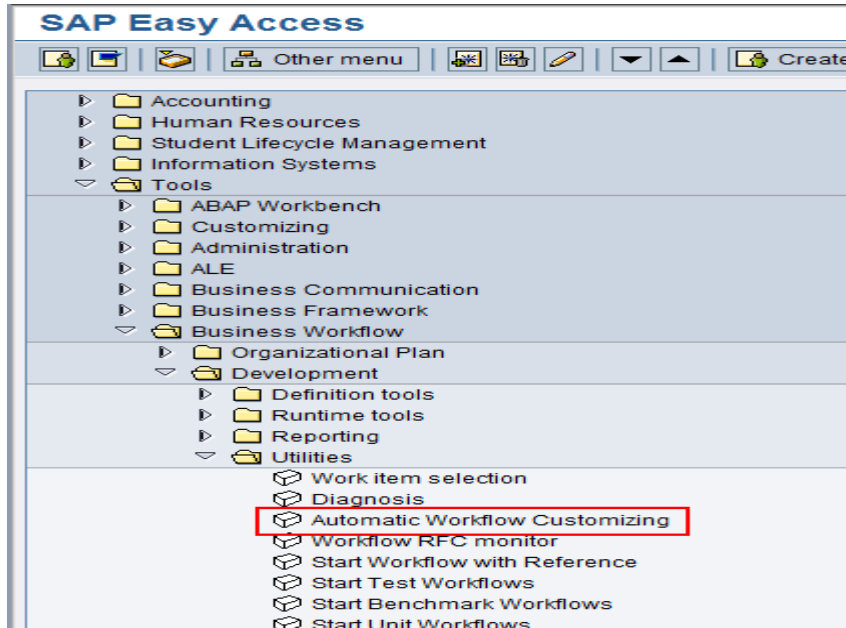
Basic Configuration to Make System Usable

The Records & Case Management application has been setup in a system & you have to prepare the application to get the basic functionalities running like creation of objects, workflow up & running etc.

There are few things which should be done before one can use RM productively even for research & testing:

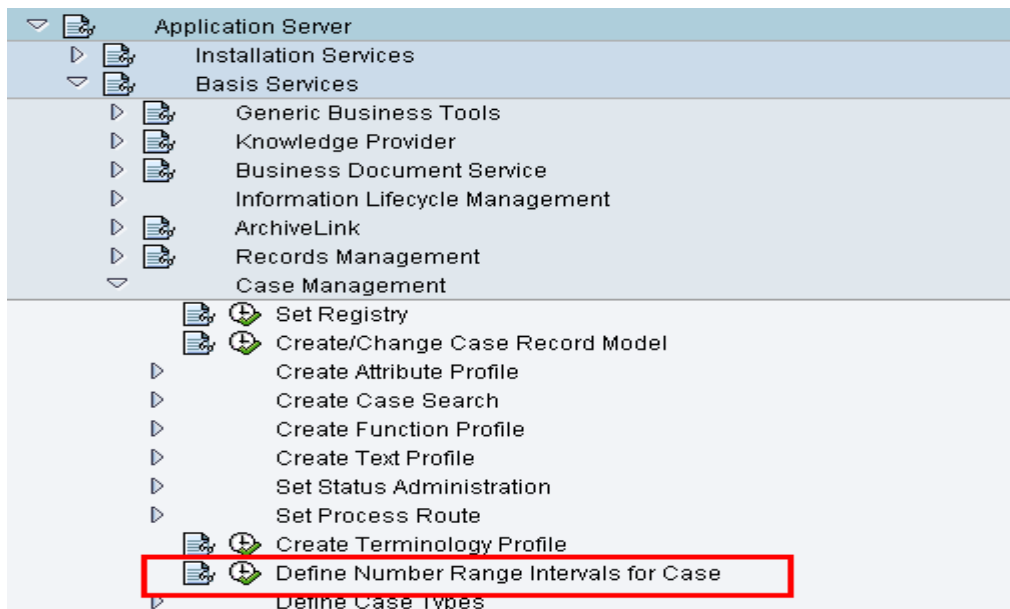
1. Setting up Business Workflow:

The business workflow should be setup first of all. This can be done in transaction SWU3 (*Automatic Workflow Customizing*)



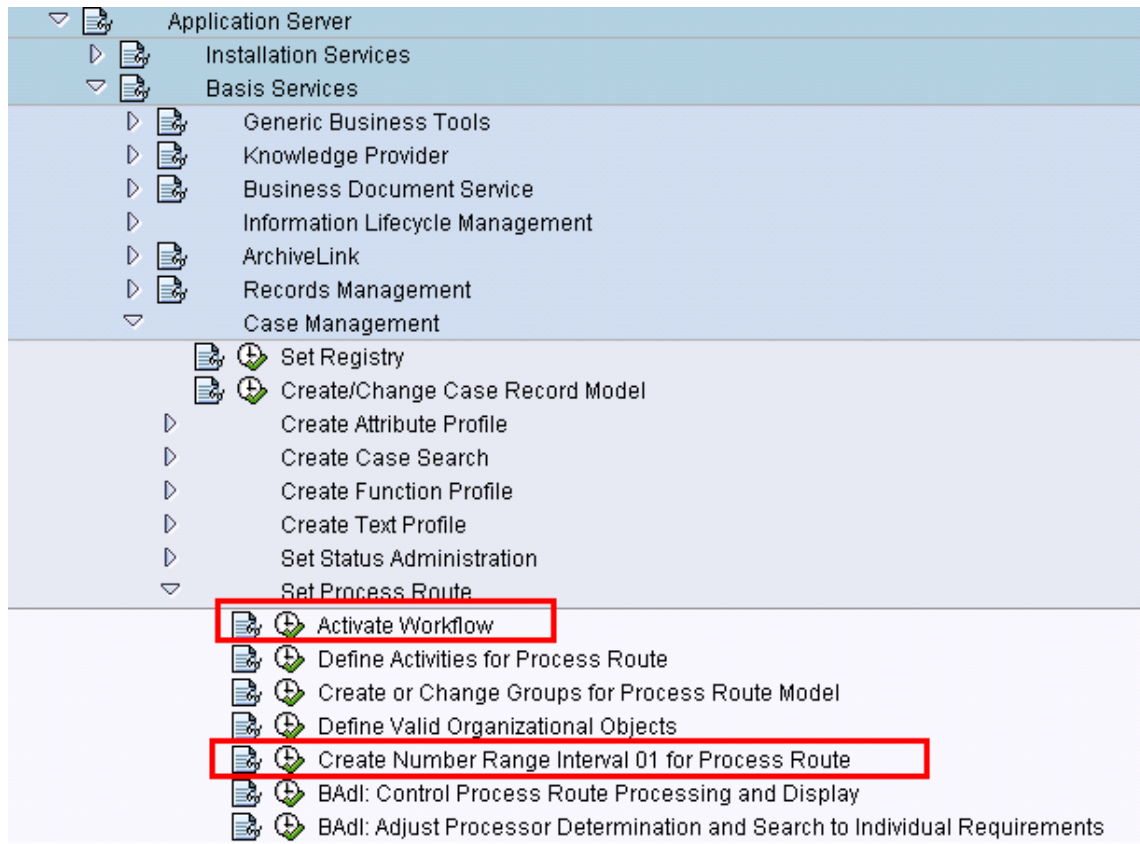
2. Creation of number range for case:

In SPRO, navigate to option *Define Number Range Intervals for Case (Application Server ->Basis Services->Case Management -> Define Number Range Intervals for Case)*



3. Creation of number range for process route (transaction SPRO or SCASE_CUSTOMIZING) & activation of the workflow templates for use¹:

Menu option *Activate Workflow* (*Application Server ->Basis Services->Case Management -> Activate Workflow*) should be used to activate the Workflow template used in process route. Please use menu option *Create Number Range Interval 01 for Process Route* (*Application Server ->Basis Services->Case Management -> Create Number Range Interval 01 for Process Route*) to create the number range used in process route.



With these four settings done, we would be able to create cases & start workflow for them. We can do our research in the S_CMG_DEMO for cases & S_RMS_DEMO for records.

¹ **Remark:** Other workflow related settings may also be required to be done & not mentioned here. Please see SPRO & documentation for each of other menu options for process route.

Scenario Description

We will see the usage of case management in RM using a small scenario. The scenario is of a small project to be setup & executed in a firm. The stakeholders need to have the information of the phase the project is in & the processor involved in the phase to be available to view at all time. They should also be able to see the deliverables created at each phase of the project. The project will have 4 main phases: Specifications, Design, Development, and Test. The details are as given below:

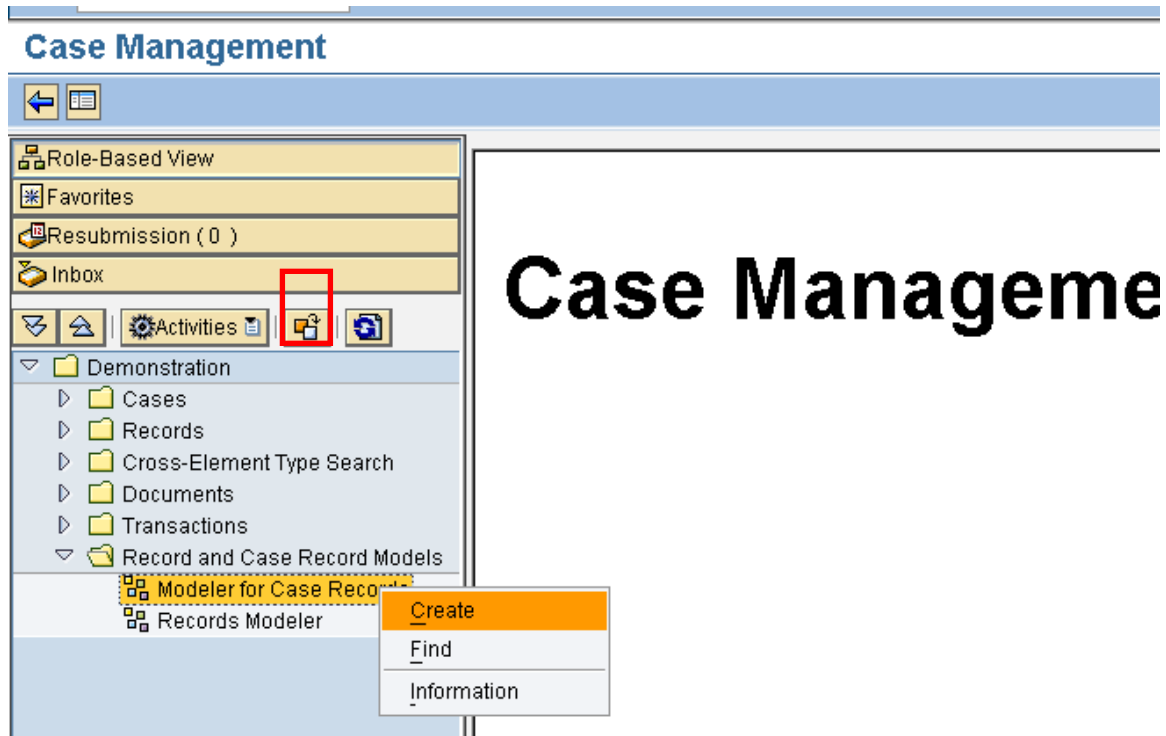
Case	Phase	Status of case	Processors involved	Deliverables (objects created in the phase)	Remarks
Project	-	New	Administrator	Case creates(Project)	Project is setup in system- the project structure is defined & case for tracking the project is created but the work has not started
Project	Specification	Specification phase	Specification Writer	Specification document	Project is in specification phase & specification is to be written
Project	Design	Design phase	Designer	Design document	The design for application is written in this phase
Project	Development	Development phase	Developer	Code module, technical documentation for code written	Application is coded here. The developer may write the technical documentation of the application
Project	Testing & bug-fixing	Test phase	Tester, Developer	Status report of tests executed & bugs fixed	
Project	-	Closure	Administrator	-	Project is closed in the system.

Once, we are clear about the structure, and the deliverables of the project, we can go ahead & create a case for the handling and monitoring of the different project phases. It is not technically necessary to know all processors of the case in advance. The processors can be added at the moment that the project is to be transferred to the concerned phase.

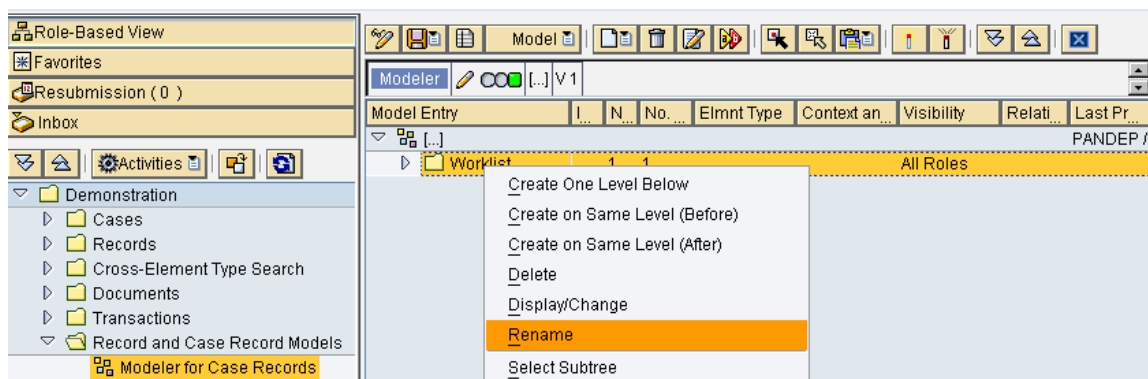
How to Setup the Scenario

The first step to do now is to model the structure of the case content (phase structure to be designed). This is done by creating a Record Model for case.

Execute transaction SCASE & click in Change RMS button & choose RMS ID S_CMG_DEMO. Then choose *Create* menu option (*select Modeler for Case Records ->right-click ->choose Create*) for element type Modeler for Case Records (*Demonstration -> Record and Case Record Models -> Modeler for Case Records*)



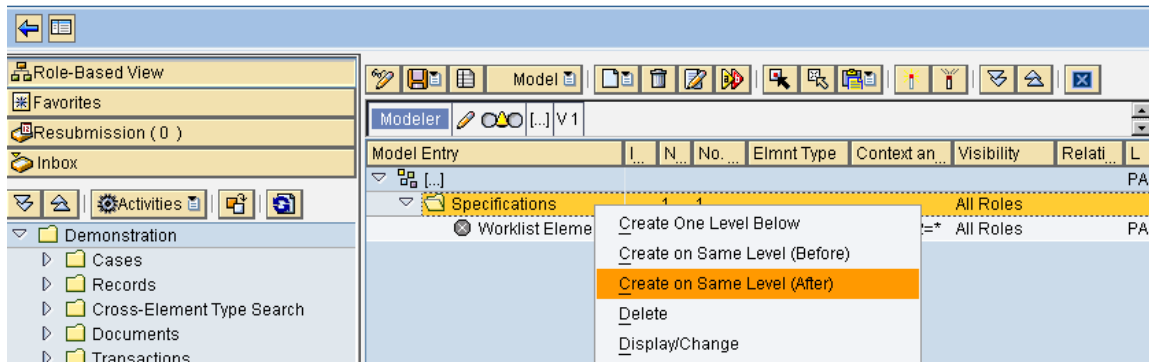
The record model created will have one folder by default named Worklist & a model node² inside it named worklist element. Change the name to Specifications using Rename option (*Select Worklist node->right click->choose Rename*). This folder will hold the documents created in the specifications phase.



Now select the Specifications node & right click & choose *Create on Same Level(After)* option to create another folder under it at the same level.

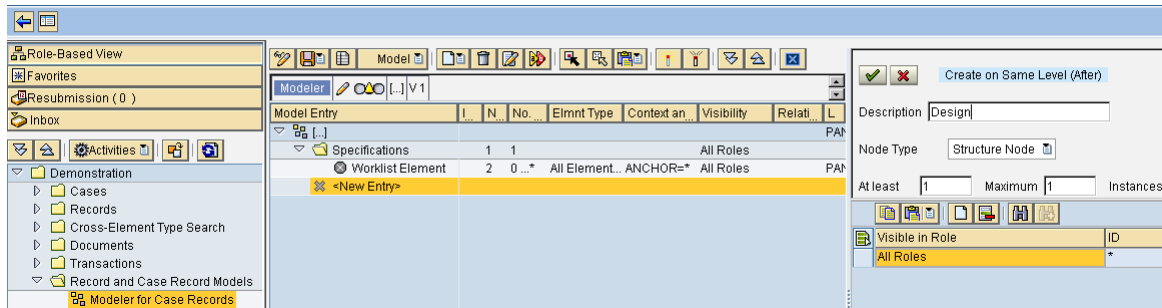
² Don't remove this default model node. Otherwise you can run into unexpected problems.

Records Modeler - Edit Model



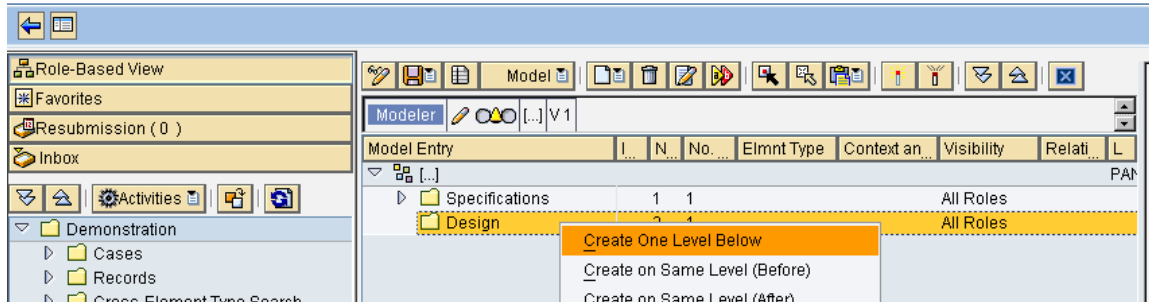
Name it Design & click on ✓ (tick-mark) to save the node.

Records Modeler - Edit Model



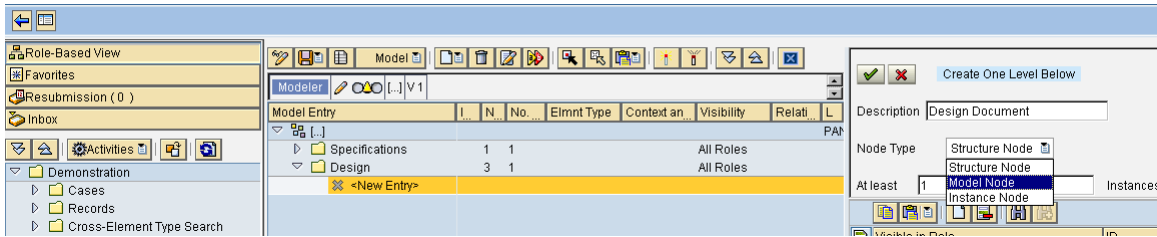
Now create a node inside the Design folder (to hold the design documents created in the project) using context menu option *Create One Level Below*.

Records Modeler - Edit Model



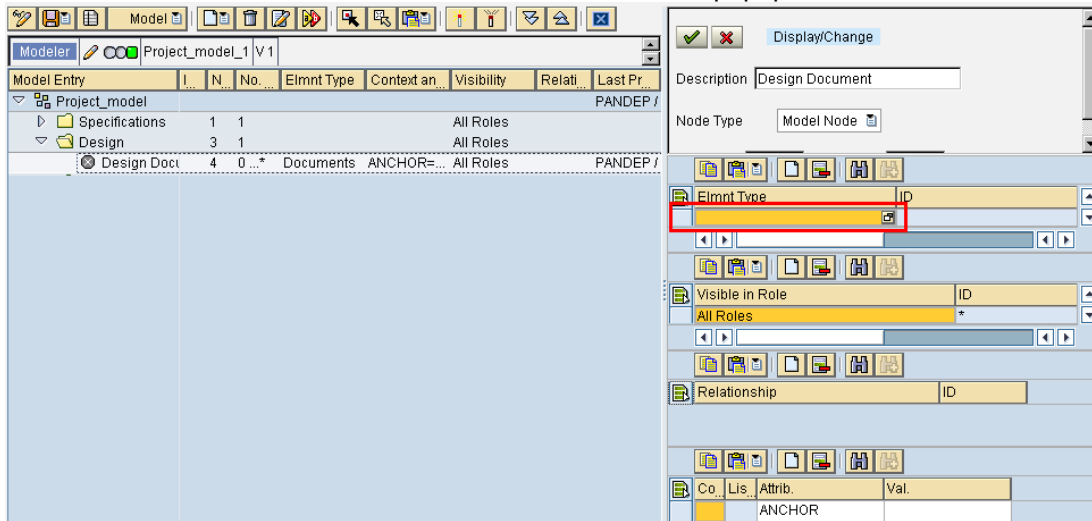
Make it a model node by choosing Model Node in drop down list for Node Type. Then click on ✓(tick-mark) to save the node.

Records Modeler - Edit Model

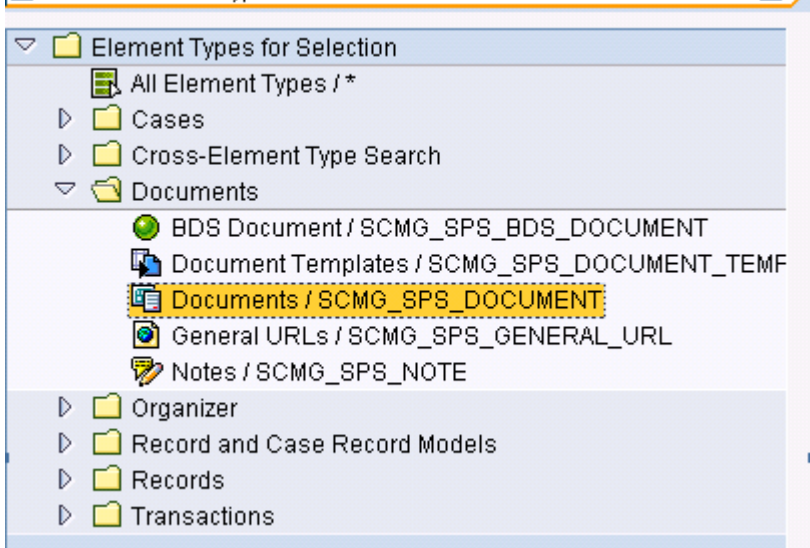


We will need to assign an element type to the model node. At runtime, we would be able to add the objects (instances) only of that element type incorporated in the model node.

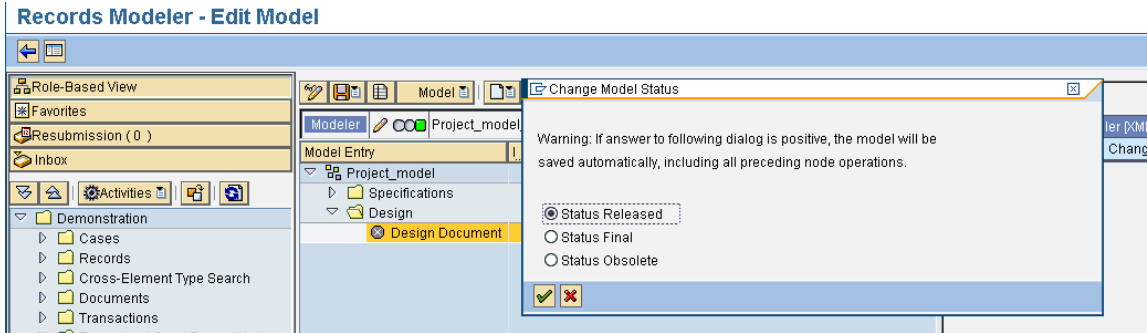
For this click on F4  button & select Documents from the popup list.



Select Element Type

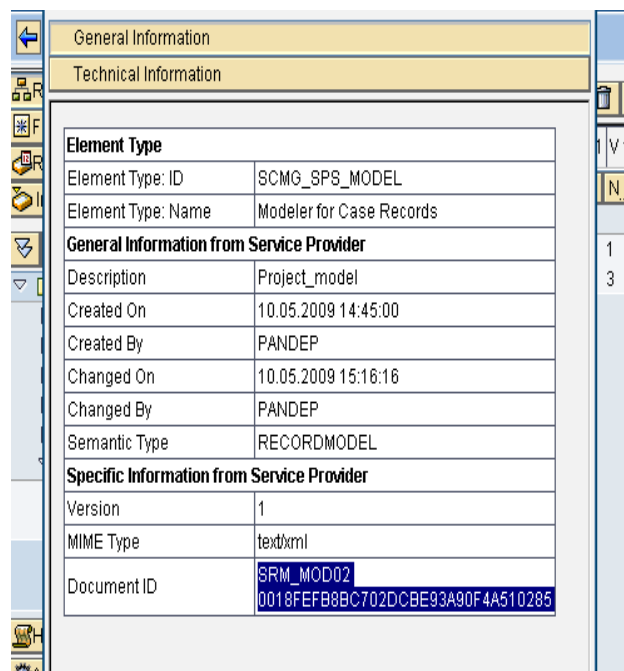
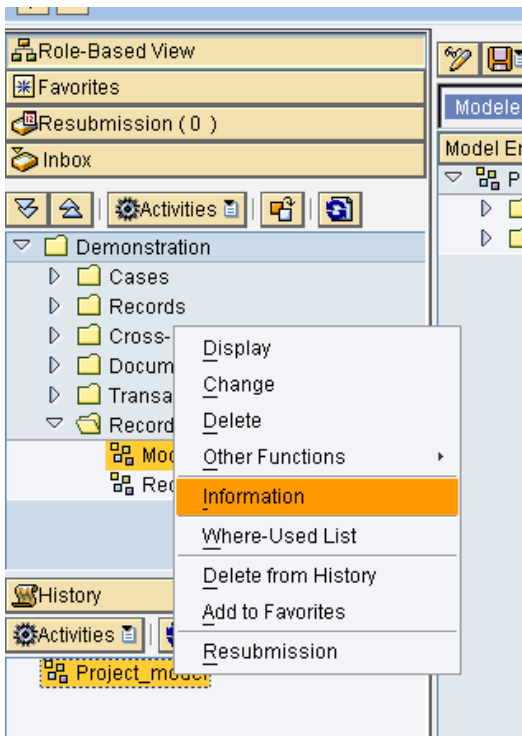


With this, we have selected demo document element type. This means that at runtime we can create within the case content only a document which refers to an element type incorporated in the selected model node.



To make use of this model for structuring the case content, we need to note down its system id (called document ID):

Display the information about the record model created using menu option *Information* (Select *Project_model* in history-right click ->select *Information*)

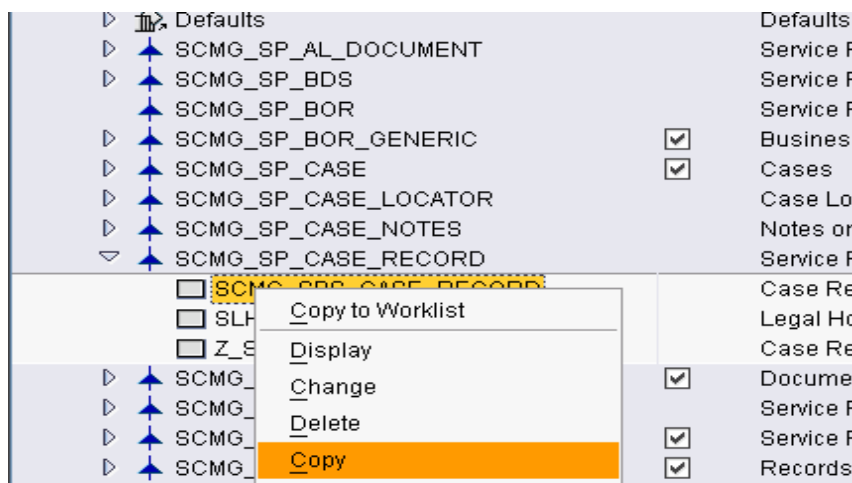


We will register this ID for the case record element type which will be used for creating the case record (case record is one of the subcomponents of the case & will be created along with case when case is created).

To do this, we will first create an element type.

Execute transaction SRMREGEDIT & navigate to S_AREA_CMG->SCMG_SP_CASE_RECORD.

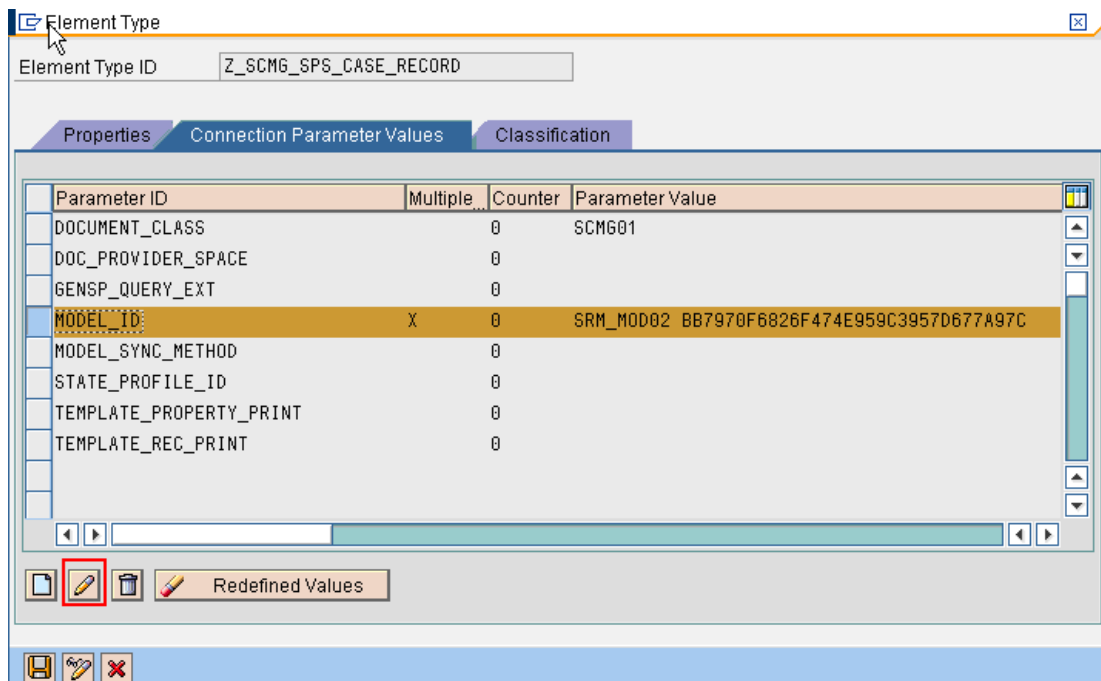
Copy the demo element type SCMG_SPS_CASE_RECORD by choosing Copy menu option (Select SCMG_SPS_CASE_RECORD ->right click -> select copy from the context menu⁵)



Give it a name (here we have given Z_SCMG_SPS_CASE_RECORD).

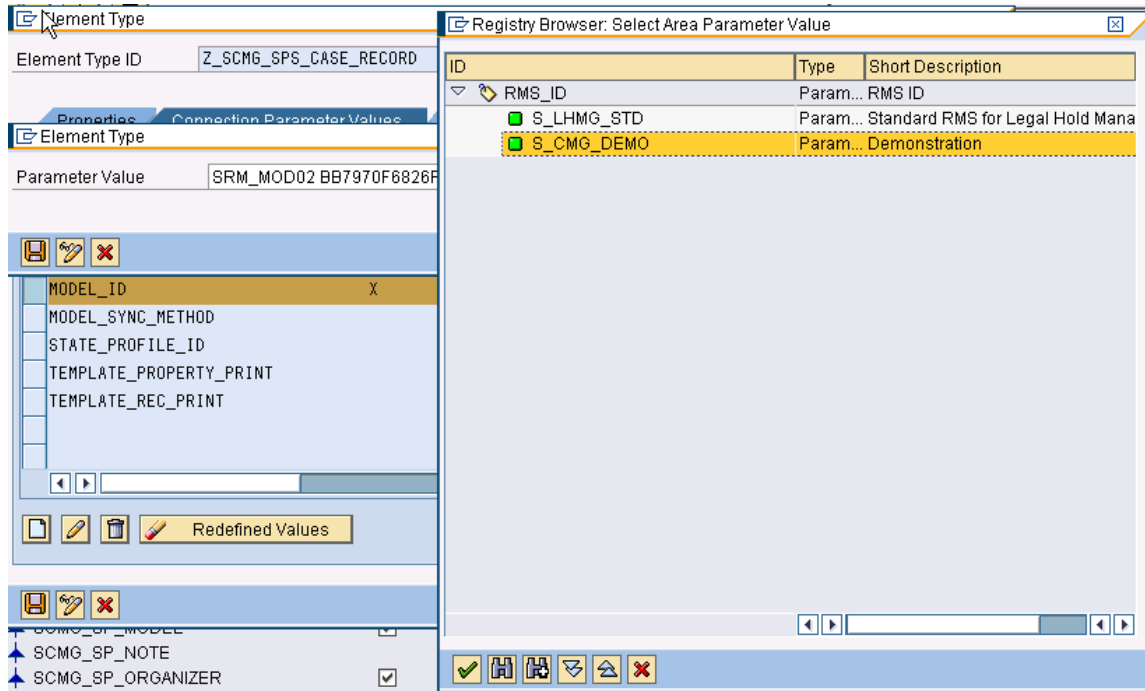
Double-click on Z_SCMG_SPS_CASE_RECORD & open it.

Go to change mode using the 2nd button in the bottom toolbar in the popup. Then select the MODEL_ID row & click the pencil button.

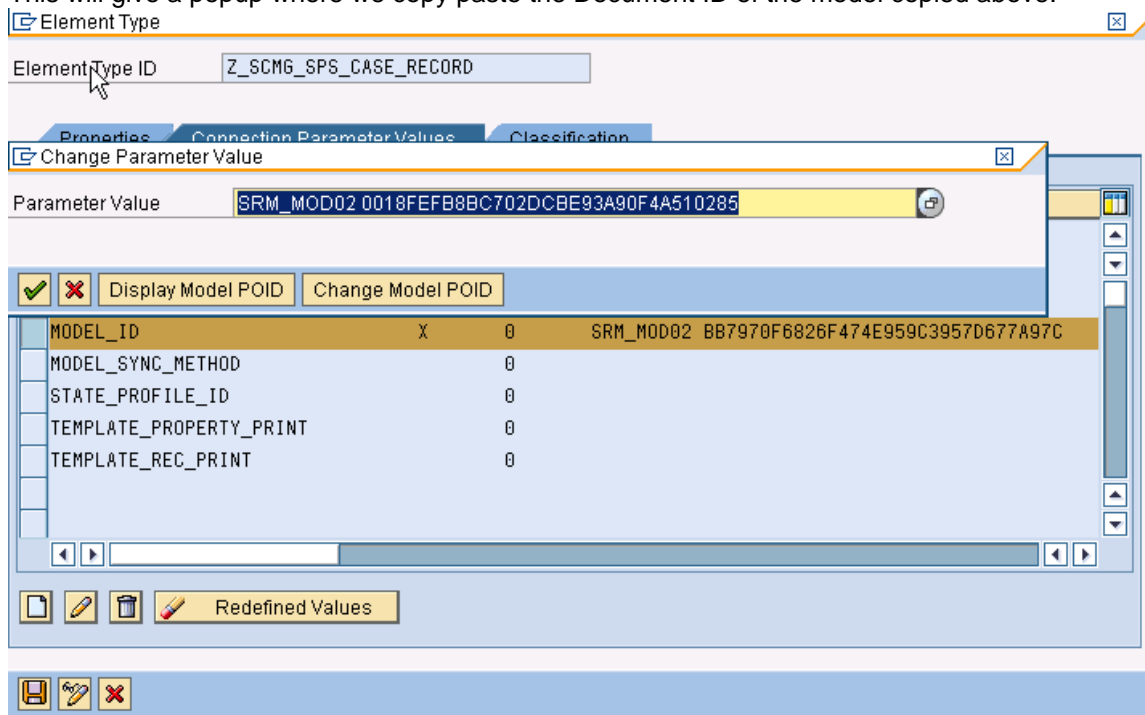


⁵ Demo objects should not be changed for testing. Please create a copy of object & then use the copy.

In the popup we get now, we need to select the RMS_ID for which this record model is valid. Since we are working in S_CMG_DEMO, choose S_CMG_DEMO⁶.



This will give a popup where we copy paste the Document ID of the model copied above.

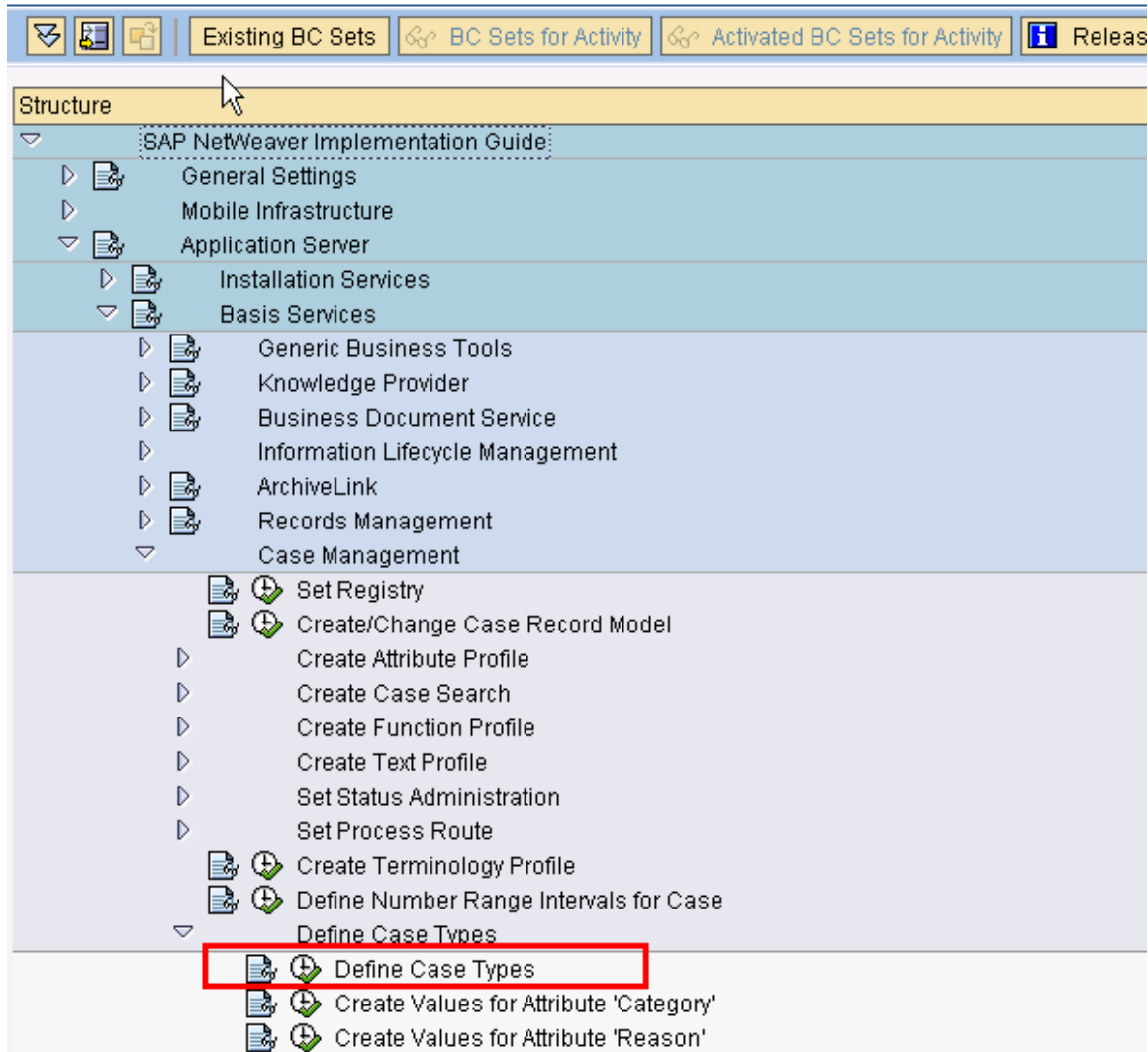


Save the element type & note the element type name (here is it Z_SCMG_SPS_CASE_RECORD).

⁶ If there is only one RMS defined for cases then we would not get this popup to select the RMS.

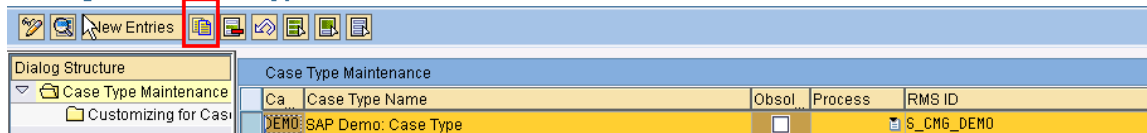
This ID of the model has to be registered for the case type we would use to create a case.
For this, execute SPRO & select option *Define Case Types (Application Server ->Basis Services->Case Management -> Define Case Types)*

Display IMG



Now copy⁷ the demo case type by pressing button "Copy as" after selecting the row of DEMO case type.

Change View "Case Type Maintenance": Overview









⁷ Demo objects should not be changed; we will make a copy of the case type & change the copy.

Now the details of the copied case type come up (see next figure). Here we have to maintain the attributes of the case type:

1. We enter case type = ZPRJ
2. We enter name for the case type = Project Management
3. Enter the ID of the record model = <Document ID of record model created above>
4. Enter the case record element type (indicated by "Element Type ID(Rec)") = Z_SCMG_SPS_CASE_RECORD⁸
5. Ensure that the process route used flag is ticked (so that we have option to add processors in the process route tab).

Case Type

Case Type Maintenance	
Name	Project Management
RMS ID	S_CMG_DEMO
Case Rec. Model	SRM_MOD02 0018FEFB8BC702DCBE93A90F4A510285
Element Type ID(Rec)	Z_SCMG_SPS_CASE_RECORD
Element Type ID (Case)	SCMG_SPS_CASE
Element Type ID (Notes)	SCMG_SPS_CASE_NOTES
Attrib.Profile	SAP Demo 
Funct. Profile	SAP Demo 
Status Profile	SAP Demo 
Text Profile	SAP Demo 
Terminology	SAP Demo 
Process	
Int.No.Range	<input type="text" value="01"/> <input type="checkbox"/> Early No. Assmt
<input checked="" type="checkbox"/> Route being used <input type="checkbox"/> Case type obsolete	

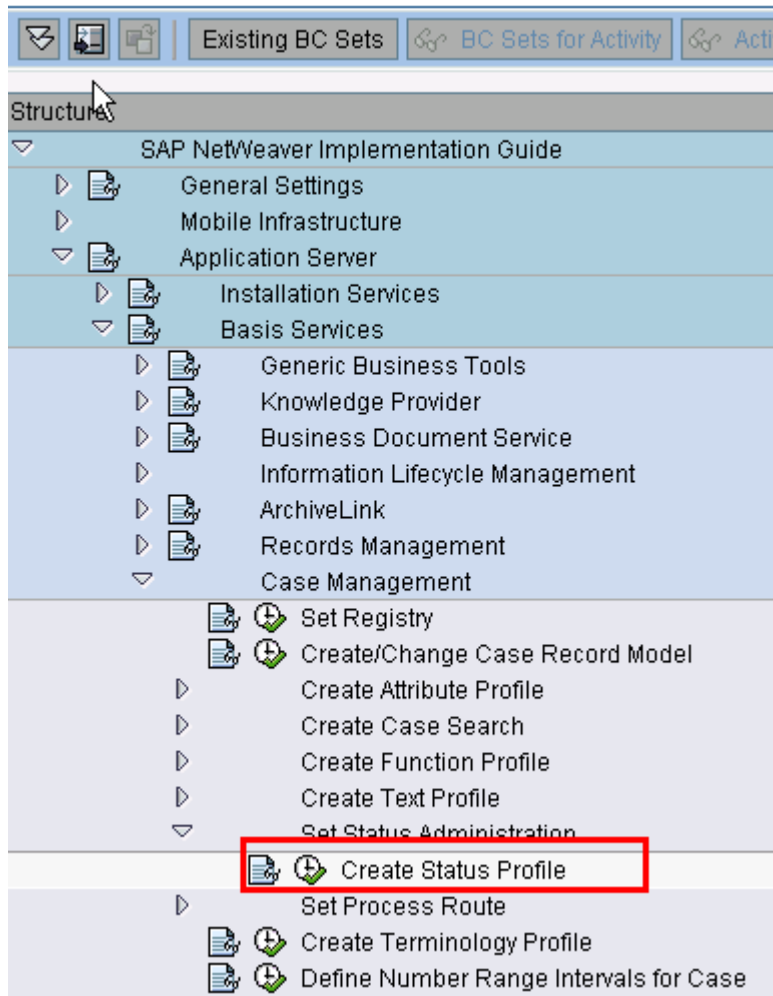
If you recall, the lifecycle of the project has different phases & these phases will form different statuses for the case.

⁸ If you enter the name of the element type ID(Rec) you can use F4 help to search for the ID of *Case Rec. Model*. First search for case record element type ID and then for the record model ID as system will pick up the model IDs registered for a case record element type.

Now we create a status profile⁹, create different statuses & link them & attach the profile to the case type. Below the necessary steps are explained in detail:

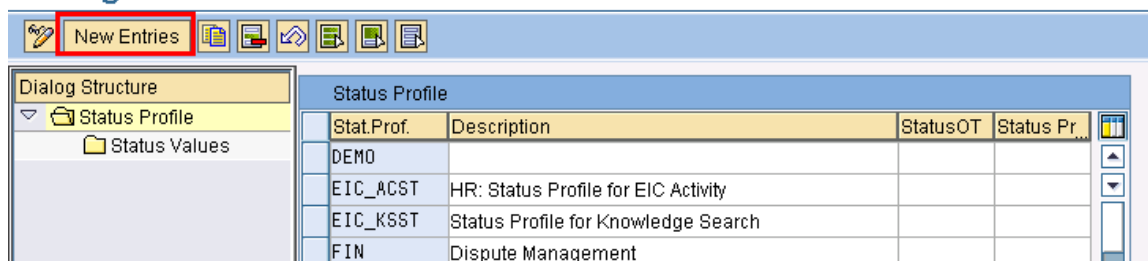
Execute SPRO & select *Create Status Profile* option (*Application Server -> Basis Services->Case Management -> Set Status Administration -> Create Status Profile*)

Display IMG



Click on *New Entries* to create new Status Profile.

Change View "Status Profile": Overview

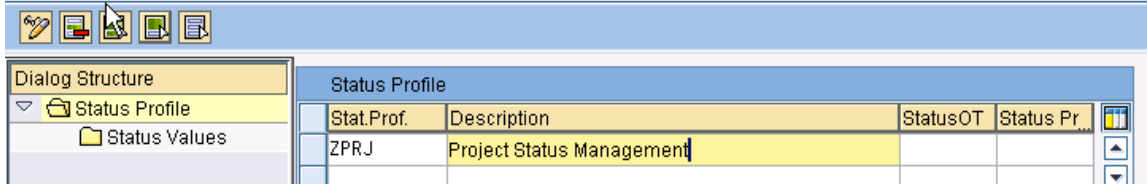


⁹ Transaction SCASE_CUSTOMIZING; IMG path: *Case Management* → *Set Status Administration* → *Create Status Profile*.

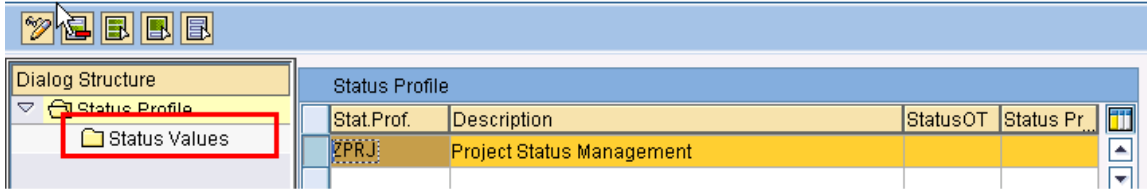
Here we are creating the status profile with following information:

1. Status Profile = ZPRJ
2. Description = Project Status Management

New Entries: Overview of Added Entries



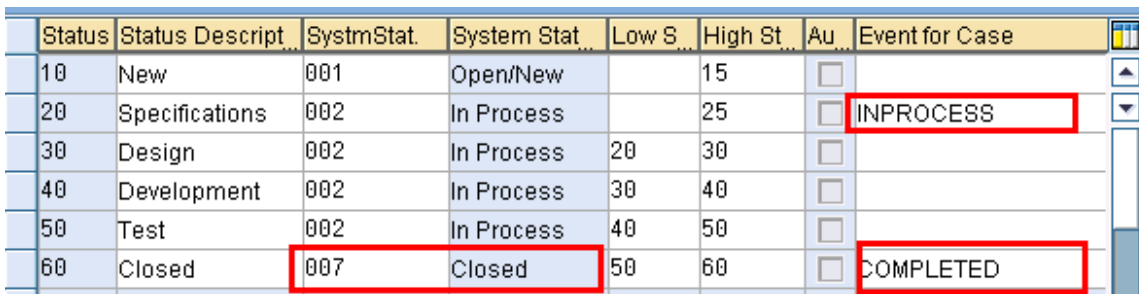
Next to create different statuses select *Status Values* option.



Create the different statuses with following information. Other details will be filled up automatically¹⁰:

Status	Status Description	System Status	Low Status	High Status	Event for case
10	New	001		15	
20	Specifications	002		25	INPROCESS
30	Design	002	20	30	
40	Development	002	30	40	
50	Test	002	40	50	
60	Closed	007	50	60	COMPLETED

It is important to assign 007 as the last System Status as application understands this to indicate that case is closed against further changes. The events are important to add as these are recognized by the workflow templates. INPROCESS event triggers the workflow for the case & COMPLETED ends the workflow.



Save the statuses & the status profile.

¹⁰ It is important to use correct system status for the statuses we create. For e.g. Closed status should have 007 as system status. The application status needs to be resolved by a system status in any case. The last column gives the event to be raised. Since the project will start with Specifications phase, the change of the status from New to Specifications will trigger the event INPROCESS & will deliver the case as a workitem in the first processor's inbox. The COMPLETED event will close the case. The case once completed cannot be changed anymore.





Now we add the status profile to the case type.

We go back to option *Define Case Types (Application Server ->Basis Services->Case Management -> Define Case Types)* & assign

Status Profile = Project Status Management

Case Type

Case Type Maintenance

Name	SAP Demo: Case Type	
RMS ID	S_CMG_DEMO	
Case Rec. Model	SRM_MOD02 0018FEFB8BC702DCBE93A90F4A510285	
Element Type ID(Rec)	SCMG_SPS_CASE_RECORD	
Element Type ID (Case)	SCMG_SPS_CASE	
Element Type ID (Notes)	SCMG_SPS_CASE_NOTES	
Attrib.Profile	SAP Demo	
Funct. Profile	SAP Demo	
Status Profile	SAP Demo	
Text Profile	Project Status Management	
Terminology	SAP Demo	
Process		

Int.No.Range Early No. Assmt

Route being used

Case type obsolete

Now the case type is complete and can be used to create cases.
 This case type will be available for the standard case element type SCMG_SPS_CASE as
 Element Type ID (Case) = SCMG_SPS_CASE.
 If we want we can change the element type & put in a new one especially for project use.

Case Type

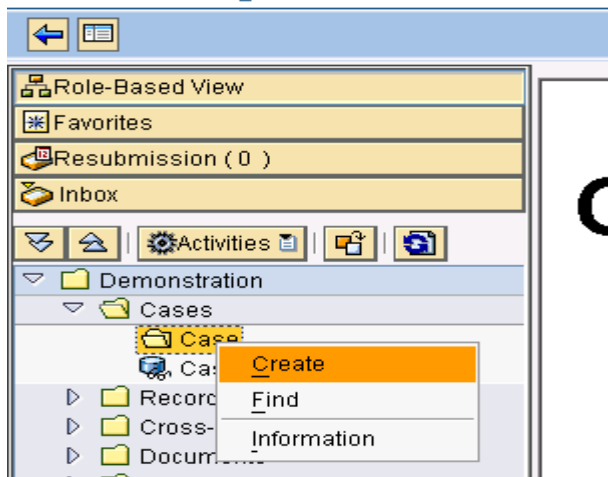
Case Type Maintenance	
Name	SAP Demo: Case Type
RMS ID	S_CMG_DEMO
Case Rec. Model	SRM_MOD02 0018FEFB8BC702DCBE93A90F4A510285
Element Type ID(Rec)	SCMG_SPS_CASE_RECORD
Element Type ID (Case)	SCMG_SPS_CASE
Element Type ID (Notes)	SCMG_SPS_CASE_NOTES
Attrib.Profile	SAP Demo
Funct. Profile	SAP Demo
Status Profile	Project Status Management
Text Profile	SAP Demo
Terminology	SAP Demo
Process	

Int.No.Range Early No. Assmt

Route being used
 Case type obsolete

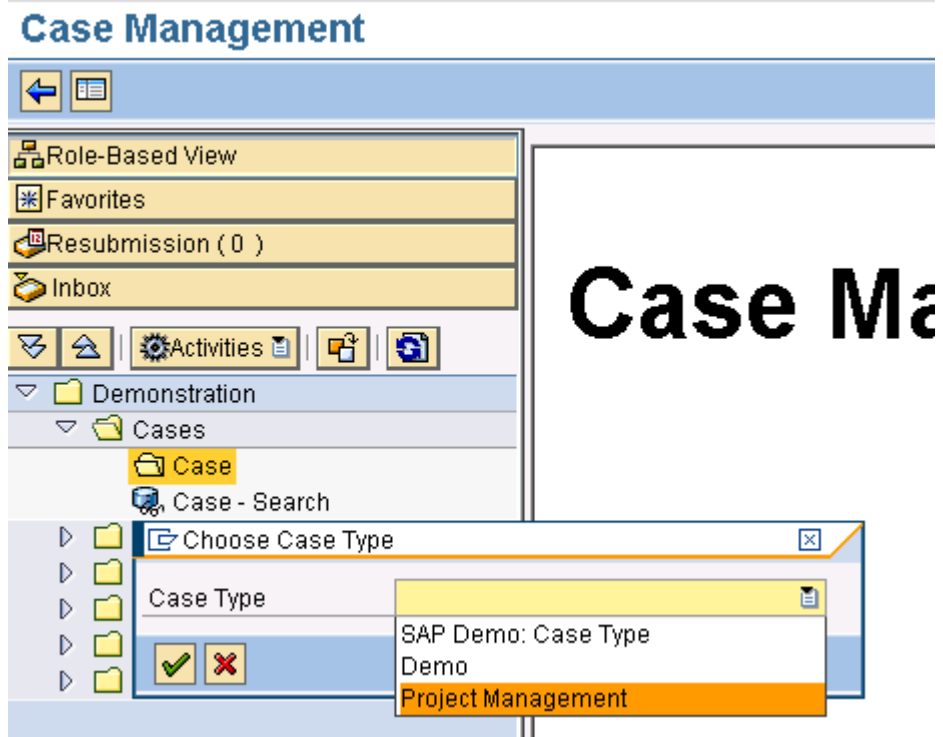
Now we will create a case for the standard element type.
 Execute the transaction SCASE again after finalizing the configuration in SPRO¹¹. Then select Create option for Case element type (technical name-SCMG_SPS_CASE) (*Demonstration->Cases-> Case*).

Case Management



¹¹ In case SCASE screen is already open in another session the case type changes will not be refreshed for the application. SCASE will have to be re-executed.

Choose the element type Project Management.



Now add the title for the case(it is required attribute) & any other attributes if needed.
Title = Project

Header Data

Title	Project	Status	New
Case Type	ZPRJ	Project Management	Person Responsibl
Category		Created By	
Case ID		Created On	
External refer.		Changed By	
Escalation Reason		Changed On	
Priority		Closed by	
Auth. Level		Closed At	

Linked Objects | Notes | Process Route | Log

Description | Copy | Change Last Text

Now we can add the first processor to whom the case should go to & who is the responsible person for writing the Specifications. So click on the *Process Route* tab, select the *Start node* & click on *Insert Sequentially*.

Header Data

Title	Project	Status	New
Case Type	ZPRJ	Project Management	Person Responsibl
Category		Created By	PANDEP Pragya Pande
Case ID	511	Created On	11.05.2009 07:23:15
External refer.		Changed By	PANDEP Pragya Pande
Escalation Reason		Changed On	11.05.2009 07:23:15
Priority		Closed by	
Auth. Level		Closed At	

Linked Objects | Notes | Process Route | Log

Insert Sequentially | Insert in Parallel | Load Process Route Model | Insert Process

Processors	Type	Activity	Latest End (Dat...	Latest End (Dat...	Status
Start					

Now add the processors' details:

- Agent type = SAP User
- Processor ID = <processor's sap system ID>
- Activity = Being Processed

And click on tick-mark to persist the data¹².

The screenshot shows the 'Add Process Route Item' dialog box and the 'Header Data' table. The dialog box is divided into several sections:

- Create for Process Route/Item:** Item (0), Agent Type (dropdown), Processor ID, Activity (dropdown), and Sequential Assignment.
- Properties of New Item:** Agent Type (SAP User), Processor ID (pandep), Activity (Being Processed).
- Latest End:** Latest End (input), Time (00:00:00), Processing Time (input), Days.
- Additional Data:** Authorization Pos. (dropdown), Step priority (5 Medium).

The 'Header Data' table below shows the following information:

Header Data		Status	New
Title	Project	Project Management	Person Responsible
Case Type	ZPRJ	Created By	PANDEP Pragya Pande
Category		Created On	11.05.2009 07:23:15
Case ID	511	Changed By	PANDEP Pragya Pande
External refer.		Changed On	11.05.2009 07:23:15
Escalation Reason		Closed by	
Priority		Closed At	
Auth. Level			

Below the table, there are buttons for 'Linked Objects', 'Notes', 'Process Route', and 'Log'. A toolbar contains 'Insert Sequentially', 'Insert in Parallel', 'Load Process Route Model', and 'Insert Process'. The 'Processors' table at the bottom shows:

Processors	Type	Activity	Latest End (Dat..	Latest End (Dat..	Status
Start					
Pragya Pande	SAP User	Being Processed			

If we have information of all processors then we can add all right now itself else they can be added as & when the case needs to be sent to that processor. If a processor in the route becomes invalid (probably pulled out of the project & somebody else takes his place) then that processor for that step can be changed (provided the case has not been already sent to him or has been executed by him).

¹² Deadline monitoring, priority setting & authorization for the step can be set as well

We can click on the *Linked objects* tab & see the structure. Then we can set the status to *Specifications & Save* the case. The case will be sent to the next processor involved in the specification phase.

The screenshot displays the SAP Case Management interface. The top section shows the 'Header Data' for a case. Below this, the 'Linked Objects' tab is selected, showing a hierarchical tree structure of objects.

Header Data:

Title	Project	Status	Specifications
Case Type	ZPRJ	Project Management Person Responsibility	New
Category		Created By	Specifications Pragya Pande
Case ID	513	Created On	11.05.2009 07:36:32
External refer.		Changed By	PANDEP Pragya Pande
Escalation Reason		Changed On	11.05.2009 07:36:32
Priority		Closed by	
Auth. Level		Closed At	

Linked Objects Tab:

Hierarchy	Element Type	Visibility	Last Processed	Node ...
Linked Objects			PANDEP / 11.05.2009 / 0...	
Specifications		All Roles		1
Design		All Roles		3
Design Document	Documents	All Roles		4
Development		All Roles		5
Testing		All Roles		6

If we needed only a way to manage the content created during the project execution & were not interested in the project tracking then we could have used a record & need not have used a case. So we would have created a record model as given above, registered it to a record element type in the registry (transaction SRMREGEDIT) & then used the record element type to create the record & attach the documents to it.

Related Content

Please include at least three references to SDN documents or web pages.

- BIT 640 training – Generic Records Management
- IPS650 training – Public Sector Management
- RM on SAP Help – http://help.sap.com/saphelp_nw04/helpdata/en/87/55bf4fde523c4399a7064c8be899e6/frameset.htm

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