

Integrating Easy Document Management System in SAP DMS



Applies to:

SAP Easy Document Management System Version 6.0 SP12. For more information, visit the [Product Lifecycle Management homepage](#).

Summary

This Document describes the basic integration scenario of the Easy Document Management System with SAP Document Management System of R/3. Integration of Easy Document Management System is generally followed business practice in industry using different attachment documents by using Microsoft windows Explorer functionality without login to SAP R/3.

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Author Bio

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Easy Document Management System Version 6.0 sp12

Business drivers

Creating folders and document info records without login to SAP R/3

Change and display of document info records

Deleting and renaming of the documents and folders

Searching the document info records

Moving the documents between the folders

Integration of Easy DMS to Document Management System of R/3

SAP Easy Document Management supports the extensive functions of SAP Easy Document Management without having detailed knowledge of SAP Document Management.

We can create public and private folders, which are documents in SAP Easy Document Management in hierarchical structures and save the files in the style of Microsoft Windows Explorer.

Public folders: Quick access information and documents for all persons involved in a project

Private folders: Personal folder of the documents

This paper is confined to the scope of Easy Document Management System (Easy DMS) with SAP DMS Integration Capabilities.

The section below describes how Easy DMS acts as a powerful front end system which has been integrated with back end DMS system. Easy DMS needs to be installed on user desktop.



Logon to Easy DMS by using

 The screenshot shows the 'Connect to SAP' dialog box for SAP Easy Document Management. The title bar reads 'Connect to SAP'. The main title is 'SAP Easy Document Management'. Below the title, it says 'Version: 6.0.0.0: SP12 (Non-Unicode)'. The dialog contains several input fields: 'Available Systems' with a dropdown menu showing 'SAP ECC6.0', 'Client' with '800', 'User Name' with 'ECCGEN', and 'Password' with '*****'. There is also a 'Language' dropdown set to 'EN'. At the bottom left, there are three checkboxes: 'Save Password', 'Change Password', and 'Log On Automatically Next Time', all of which are unchecked. At the bottom right, there are three buttons: 'Work Offline', 'Log On', and 'Cancel'. The copyright notice 'Copyright (c) 2007, SAP AG' is visible at the very bottom.

Create a Document folders (structures) or sub folders (sub structures) from Easy DMS or SAP DMS.

Private folder by maintaining user name or user id

Public folder

Create Document Structure

Document Description	File Name	Status Description	Type	Document Number	Version
Private Root Folder of Rama		Work request	DRW	ECCGEN	00
SAP DMS Documents		In work	FOL	EDIPUBLICROOTFOLDER	00

Document Description	File Name	Status Description	Type	Document Number	Version
IDES Robot RX		Work request	FOL	10000000197	00
Design and Drawing		Work request	DRW	10000000232	00
Quality Documents		Work request	DRW	10000000233	00

By using T.Code: CV11 from SAP DMS Create structures and sub structures or directly from Easy DMS click on "New Folder"

Document structure Edit Goto Extras Environment Settings System Help

Change document structure: Initial Screen

Document: EDIPUBLICROOTFOLDER

Document Type: FOL

Document Part: 000

Doc. Version: 00

Validity

Valid From: 12/29/2009

Create folders and subfolders from CV11

Document structure Edit Goto Extras Environment Settings System Help

Change document structure: General Item Overview

New entries Header Validity

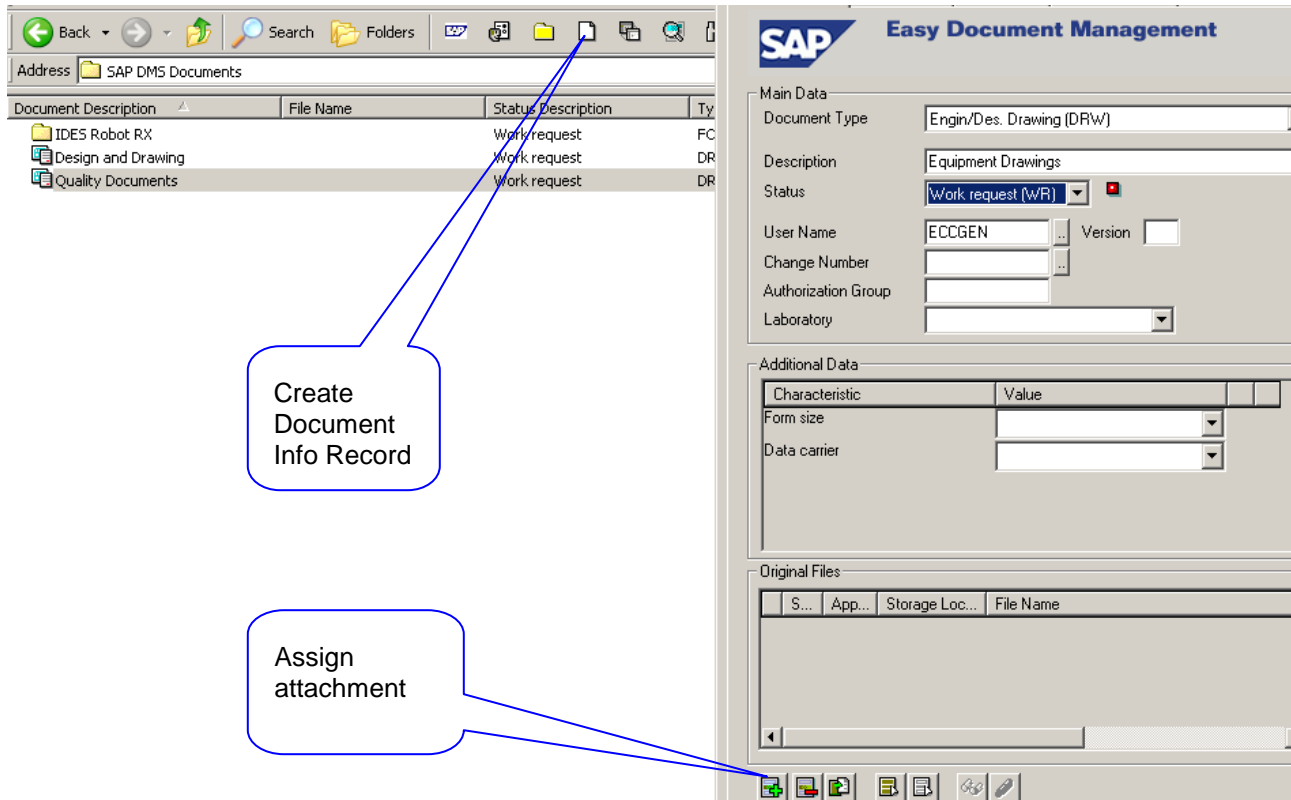
Document: EDIPUBLICROOTFOLDER FOL 000 00

SAP DMS Documents

Document General

Item	ICt	Document	Ty	DPT	Vr	Component description	Valid From	Valid to	Change No.	Quantity	Un	As
0010	D	10000000197	FOL	000	00	IDES Robot RX	08/22/2003	12/31/9999		1	PC	<input checked="" type="checkbox"/>
0020	D	10000000232	DRW	000	00	Design and Drawing	12/29/2009	12/31/9999		1	PC	<input type="checkbox"/>
0030	D	10000000233	DRW	000	00	Quality Documents	12/29/2009	12/31/9999		1	PC	<input type="checkbox"/>
0040	D											<input type="checkbox"/>

Creating Document Info Record from Easy DMS to SAP DMS



Document 1000000234 created automatically in SAP DMS by selecting “Document Type” and “Description” and assigning attachment

Document Description	File Name	Status Description	Type	Document Number	Version
IDES Robot RX		Work request	FOL	10000000197	00
Design and Drawing		Work request	DRW	10000000232	00
Equipment Drawings		Work request	DRW	10000000234	00
Quality Documents		Work request	DRW	10000000233	00

Check the document info record, which was created from Easy DMS into SAP DMS

Document Edit Goto Extras Environment Originals System Help

Display Document: Basic Data Engine/Des. Drawing (DRW)

Status Log Classification

Document

Document: 10000000234 Part: 000 Version: 00

Deletion Flag Document Structure CAD Indicator Hierarchy

Document Data Addnl Data Descriptions Originals Document Browser Authorizations

Document Data

Description: Equipment Drawings

Document Status: WR Work request Not Released

CM Relevnce:

User: ECCGEN ECC ECCgen

Lab/Office:

Change Number: Valid From:

Authorization Group:

Superior Document

Document: Type: Part: Version:

Originals

Appl.	Application	Storage Cat.	File Name

Change or Edit of a Document Info Record by selecting suitable record from the list

Click on Edit icon to change Info Record

Document Description	File Name	Status Description	Type	Document Number	Version
IDES Robot RX		Work request	FOL	1000000197	00
Design and Drawing		Work request	DRW	1000000232	00
Equipment Drawings		Work request	DRW	1000000234	00
Quality Documents		Work request	DRW	1000000233	00

Display Document

Document Data | Authorizations | Object Links | Technical Details

SAP Easy Document Management

Main Data

Document Type: Engin/Des. Drawing (DRW)

Description: Equipment Drawings

Status: Work request (WR)

User Name: ECCGEN Version: 00

Change Number:

Authorization Group:

Laboratory:

Additional Data

Characteristic	Value
Form size	
Data carrier	

Click on "Technical Details" tab to make changes in Info Record

Click on change document button

Document Description	File Name	Status Description	Type	Document Number	Version
IDES Robot RX		Work request	FOL	1000000197	00
Design and Drawing		Work request	DRW	1000000232	00
Equipment Drawings		Work request	DRW	1000000234	00
Quality Documents		Work request	DRW	1000000233	00

Display Document

Document Data | Authorizations | Object Links | Technical Details

SAP Easy Document Management

Document Keys

Document Number: 1000000234

Document Type: Engin/Des. Drawing (DRW)

Document Part: 000

Document Version: 00

SAP Transactions

Display Document

Change Document

By clicking on "Change Document", system automatically takes into SAP DMS of Document Info Record to make changes, if required.

Document Edit Goto Extras Environment Originals System Help

Change Document: Basic Data Engin/Des. Drawing (DRW)

Status Log Classification

Document

Document 10000000234 Part 000 Version 00

Deletion Flag Document Structure CAD Indicator Hierarchy

Document Data Addnl Data Descriptions Object Links Originals Document Browse

Document Data

Description Equipment Drawings for special purpose

Document Status IW Work request Not Released

CM Relevnce

User ECCGEN ECC ECCgen

Lab/Office

Change Number Valid From

Authorization Group

Superior Document

Document Type Part Version

View or Display of Document Info Record

Address: SAP DMS Documents

Document Description	File Name	Status Description	Type	Document Number	Version
IDES Robot RX		Work request	FOL	10000000197	00
Design and Drawing		Work request	DRW	10000000232	00
Equipment Drawings for special purpose		In work	DRW	10000000234	00
Quality Documents		Work request	DRW	10000000233	00

Click on "Display" on Info Record icon

Display Document

Document Data | Authorizations | Object Links | Technical Details

SAP Easy Document Management

Main Data

Document Type: Engin/Des. Drawing (DRW)

Description: Equipment Drawings for special purpose

Status: In work (IW)

User Name: ECCGEN | Version: 00

Change Number: |

Authorization Group: |

Laboratory: |

Additional Data

Characteristic	Value
Form size	
Data carrier	

Click on "Display Document" to view the Document Info Record in SAP DMS by click on "Technical Details" tab

Address: SAP DMS Documents

Document Description	File Name	Status Description	Type	Document Number	Version
IDES Robot RX		Work request	FOL	10000000197	00
Design and Drawing		Work request	DRW	10000000232	00
Equipment Drawings for special purpose		In work	DRW	10000000234	00
Quality Documents		Work request	DRW	10000000233	00

Click on "Display Document" button

Display Document

Document Data | Authorizations | Object Links | Technical Details

SAP Easy Document Management

Document Keys

Document Number: 10000000234

Document Type: Engin/Des. Drawing (DRW)

Document Part: 000

Document Version: 00

SAP Transactions

Display Document

Change Document

Display of Info Record in DMS of SAP

Document Edit Goto Extras Environment Originals System Help

Display Document: Basic Data Engin/Des. Drawing (DRW)

Status Log Classification

Document

Document: 10000000234 Part 000 Version 00

Deletion Flag Document Structure CAD Indicator Hierarchy

Document Data Addnl Data Descriptions Originals Document Browser Authorization

Document Data

Description	Equipment Drawings for special purpose		
Document Status	IW In work	<input checked="" type="checkbox"/> Not Released	
CM Relevnce	<input type="checkbox"/>		
User	ECCGEN	ECC ECCgen	
Lab/Office	<input type="checkbox"/>		
Change Number	<input type="checkbox"/>	Valid From	<input type="checkbox"/>
Authorization Group	<input type="checkbox"/>		

Superior Document

Document	<input type="checkbox"/>	Type	<input type="checkbox"/>	Part	<input type="checkbox"/>	Version	<input type="checkbox"/>
----------	--------------------------	------	--------------------------	------	--------------------------	---------	--------------------------

By using "Search" or "Find" functionality, can find the documents by giving Document Type and Description

Click on "Search" button to find Document

Click on "Search" button to find Document

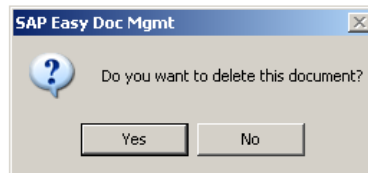
Search Result

Document Description	File Name	Status Description	Type	Document Number	Version
Design and Drawing		Work request	DRW	10000000232	00

To "Delete" a particular document info record, select and delete

Document Description	File Name	Status Description	Type	Document Number	Version
IDES Robot RX		Work request	FOL	10000000197	00
Design and Drawing		Work request	DRW	10000000232	00
Equipment Drawings for special purpose		In work	DRW	10000000234	00
Quality Documents		Work request	DRW	10000000233	00

Deleting Info Record



Document Description	File Name	Status Description	Type	Document Number	Version
IDES Robot RX		Work request	FOL	10000000197	00
Design and Drawing		Work request	DRW	10000000232	00
Equipment Drawings for special purpose		In work	DRW	10000000234	00

Configuration steps in Document Management System (SPRO)

Define Document Types

Display IMG

Existing BC Sets | BC Sets for Activity | Activated BC Sets for Activity | Release Note

Structure

- SAP Customizing Implementation Guide
 - Activate SAP ECC Extensions
 - SAP NetWeaver
 - Enterprise Structure
 - Cross-Application Components
 - Enterprise Services
 - Notification
 - European Monetary Union: Euro
 - Document Management
 - Control Data
 - Define Number Ranges for Document Numbers
 - Define Document Types
 - Maintain Screen for Object Link

Table View Edit Goto Selection Utilities(M) System Help

Change View "Define document types": Overview

New Entries

Dialog Structure

- Define document types
 - Define language-dep
 - Define document sta
 - Display languag
 - Define object links
 - Define transport of or
 - Maintain object link desc
 - Define document status

Ty.	Document type desc.	Status Change	Rev.asgmt	Vers.asgmt	Chg. doc.	Arch.auth.
C2D	CATIA V5 2D Object	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
C3D	CATIA V5 3D Object	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
D01	Print list	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DBE	Cover sheet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DBV	Cover Sheet Template	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DCU	Tech. documentation	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DES	Design / Engineering	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DGA	Microstation Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DGN	Microstation Drawing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DMD	Demo Document	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DOC	Tech. documentation	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DRF	PRT Eng/Des. Drawing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DRM	Engin/Des. Drawing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DRW	Engin/Des. Drawing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DWG	Design / Engineering	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DWK	Design / Engineering	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Assign Class Type and Class for a particular Document Type to maintain Classification in Easy DMS and SAP DMS.

Change View "Define document types": Details

New Entries

Dialog Structure
 Define document types
 Define language-dep
 Define document sta
 Display languag
 Define object links
 Define transport of o
 Maintain object link desc
 Define document status

Document Type: **DRW**

Attributes
 Doc. Type Desc.: **Engin/Des. Drawing**
 Use KPro
 Status Change
 Rev. Lev. Assgmt
 Version Assgmt
 Archiving Authorization
 Change Docs

 CM Relevnce:
 Number Assgmt:
 Internal Number Range: **02**
 External Number Range: **01**
 Number Exit: **MCDOKZNR** **Default**
 Vers. No. Incr.: **1**
 Version Sequence:
 AlternativeScreen:
 AScEx.:
 File Size: **12000000**

 Class Type: **017**
 Class: **CL0001**

Field Selection
 Class Data:
 Hierarchy Indicator:
 Document Status:
 Document Desc.:
 User:
 Authorization Group:
 Lab/Office:
 Change Number:
 CAD Indicator:
 Superior Document:
 WS Application 1:
 WS Application 2:
 CM Relevance:

Number Ranges

Business benefits

- No need to login to SAP R/3
- More number of users can be used
- Required less knowledge
- User can be stored private documents

Related Content

http://help.sap.com/saphelp_erp2004/helpdata/en/db/003353fca05c47bfc8f391cf296fc8/frameset.htm

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