

How to Add an Attribute to a Case, Record and a Document in NW Folder Management (ex-Records Management)



Applies to:

SAP Folder Management 2.4 & 3.0. For more information, visit the [Enterprise Performance Management homepage](#).

Summary

This document explains how to add a new attribute to a record, document & case.

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Author Bio



Pragya Pande has been with SAP Labs India for 5 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 details steps to add a new attribute to a record, document & case.

The document assumes rudimentary knowledge about SAP Folder Management (NWFM). The document assumes understanding of SAP systems in general & is aimed at users of SAP systems with some understanding of navigation on SAPGUI screens.

Brief Overview of Case, Record & Document

- Case:

Case is an object created in NWFM for ad hoc process tracking. Some attributes are delivered with the application. Customers can also create new attributes if they want & process them in the case.

- Record & Document:

Record is an object created in NWFM to organize data objects. It gives an hierarchical structure to the context & data objects created can be attached in the phase/folder them are created in.

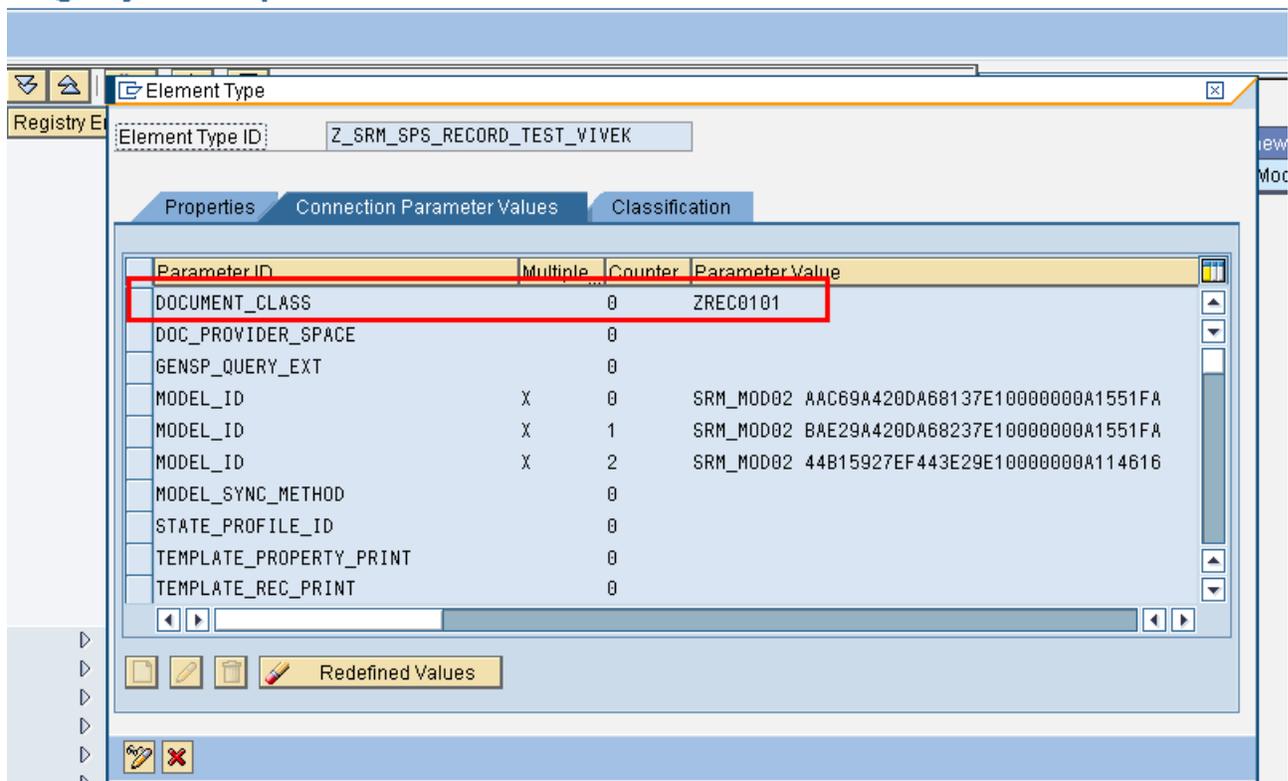
Documents are data objects which are primarily edited & displayed using MS Office, Star office etc.

How to Add a New Attribute to a Record/Document

Record & documents have identical approach of data & attribute storage. Hence, way of adding an attribute to a record or document is the same.

1. Make note of the document class of the element type in registry (transaction *SRMREGEDIT*, *IMG->Application Server -> Basis Services ->Records Management->Basic Customizing->Maintain Registry(developer Mode)*).

Registry: Developer Mode



2. Locate the document class in document modeling workbench in SRM -> LOIO classes folder (transaction DMWB, IMG->Application Server -> Basis Services ->Records Management ->Customizing for Record Models, Records and Documents).

SRM	SAP Records Management
Connection spaces	
LOIO classes	
SRM_GENERIC_V	Template Class for Generic SP
RPR_FILEPLAN_V	
RPR_GENSEARCH_V	
SRM_DOCUMENTS_V	Template Class for Documents
SRM_FILEPLAN_V	Template Class for Record Plans
SRM_MODEL_V	Template Class for Record Models
SRM_RECORD_V	Template for Records
RPR_CONTAINER_V	
RPS_RECORD_V	DOMEA Record Templates
SCMG_RECORD_V	Customer Template Class for Rec
SRM_DEMO_RECORD_V	Template for Demo Records (trans
SRM_P_RECORD_V	Template for Personnel Records
SRM_RECORD_DOM_V	Template for Domea Records
ZREC01_RECORD_V	Customer TemplateClass for Rec
ZREC01_REC01_V	Customer TemplateClass for this
ZREC0101	this is for testing .

3. Note the virtual LOIO class of the document class. There will be an identical pair of physical class & physical virtual class in the folder PHIO classes

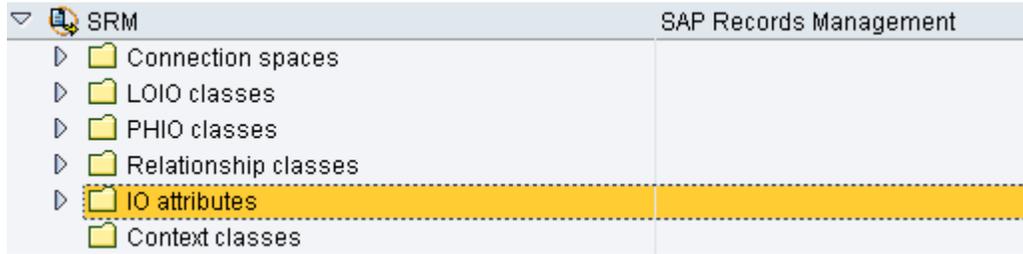
LOIO classes	
PHIO classes	
SRM_GENERIC_PH_V	Template Class for Generic SP
RPR_FILEPLAN_PH_V	
RPR_GENSEARCH_PH_V	
SRM_DOCUMENTS_PH_V	Template Class for Documents
SRM_FILEPLAN_PH_V	Template Class for Record Plans
SRM_MODEL_PH_V	Template Class for Record Model
SRM_RECORD_PH_V	Template Class for Records
RPR_CONTAINER_PH_V	
RPS_RECORD_PH_V	DOMEA Record Templates
SCMG_RECORD_PH_V	Customer Template Class for Rec
SRM_DEMO_RECORD_PH_V	Template Class for Demo Record
SRM_P_RECORD_PH_V	Template Class for Personnel Re
SRM_RECORD_DOM_PH_V	Template Class for Domea Recor
ZREC01_RECORD_PH_V	Customer TemplateClass for Rec
ZREC01_REC01_V	Customer TemplateClass for this
ZREC01P01	this is for testing .

Attributes can be persisted at either of LOIO or PHIO virtual class technically but it is recommended to do so at PHIO level because most of the attributes are generally changed from version to version or need to be modified often. PHIO object of a document/record represents a version-variant combination (for eg there will be a PHIO to persist version 1 variant 1 attributes of a record) which keep changing every time there is a modification of record/document(even a change of document/record & saving as the same version will create new PHIO in the system since variant gets changed & delete the old PHIO). For

attributes like CREATE TIME need to be persisted at LOIO since these will be mostly unchangeable for a record/document throughout its processing life.

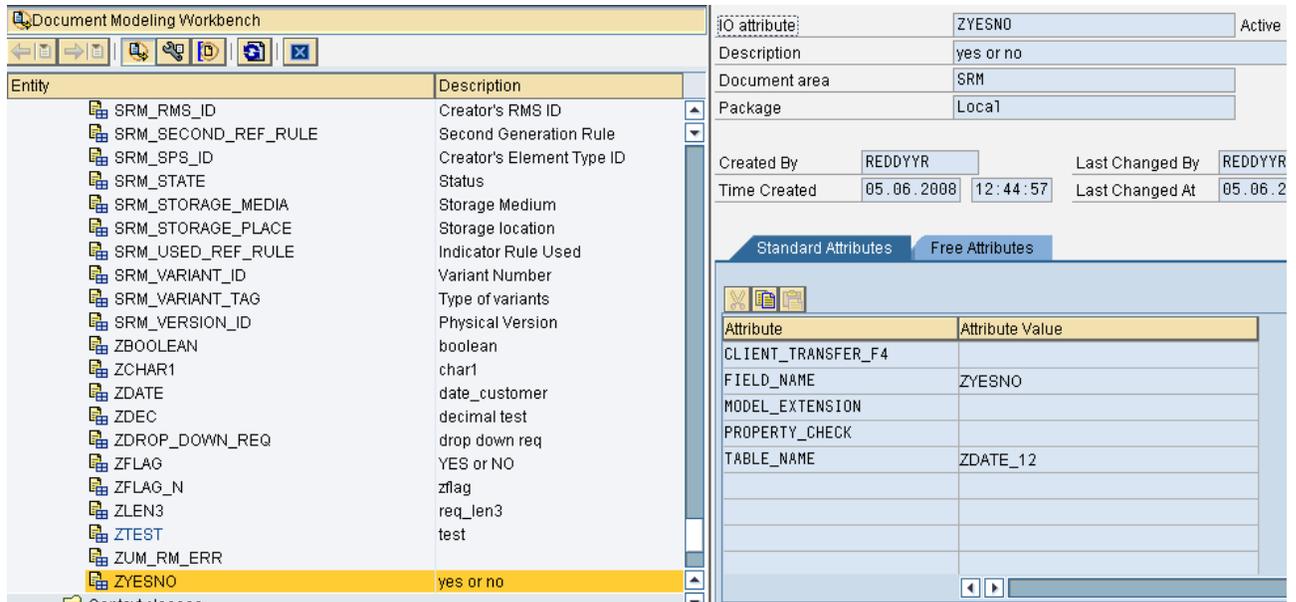
Let us add an attribute at the PHIO level.

4. Create a new attribute ZYESNO under folder “IO Attributes”.

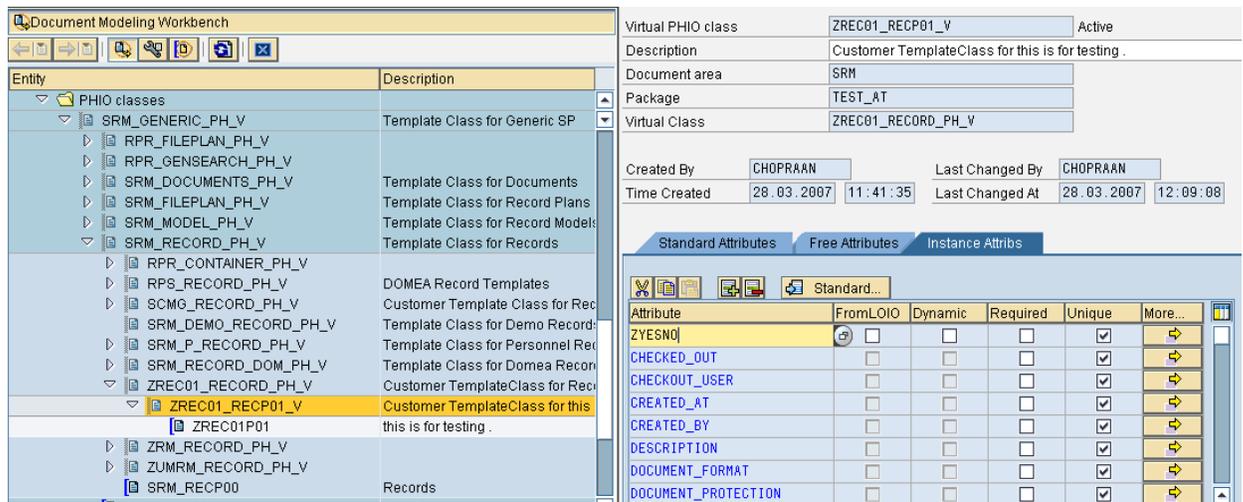


Specify the table & field name in the definition. This will define the behavior of the attribute. For eg, if the attribute has to appear on the screen then whether it will be numerical etc, will be decided by the definition here. If you do not specify anything then it will be taken by default as string. Attributes can be stored in attribute table of PHIO or PHIO header table. The latter is recommended for attributes most commonly used for search so that search is faster(Refer to note 1269789 & 1003089). For that, attributes have to be string & so should not have any definition here.

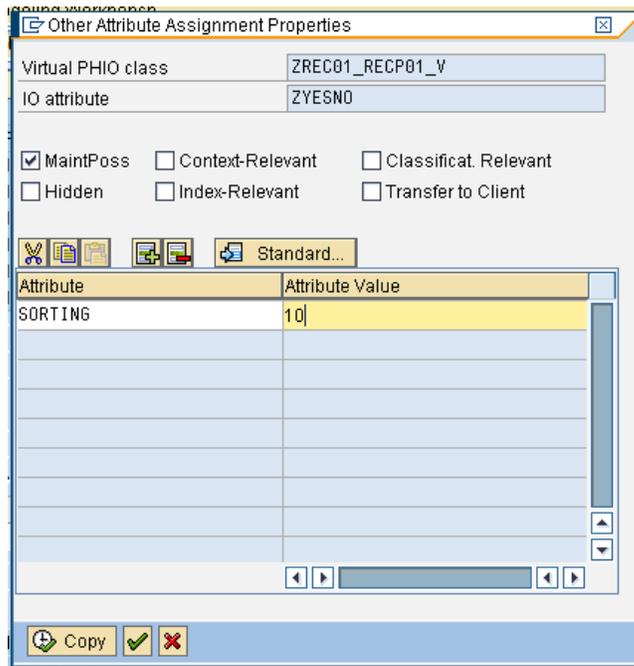
Give a description of the attribute in the *IO attribute* field. This will be displayed if the attribute is displayed in the screen for any object. Please remember to add description for every language you need to support(login the system in that logon language & maintain the description here). This is not translated by itself.



5. Add the attribute to the PHIO virtual class.



6. If you click on *More...* button then you can specify meta-data for the attribute. For eg whether it should be available for modification (*MaintPoss*), should be *hidden* or *index relevant*. There are some meta-data defined in NWFM which can be specified in the table like *SORTING*(specifies the position of this attribute on the attribute maintenance section when you open a record/document) .You will find more about NWFM defined meta-data in the documentation of *IMG->Application Server -> Basis Services ->Records Management->Customizing for Record Models, Records and Documents*.



Please note that all attributes that are to be displayed in the attribute section of record/document should have different values of *SORTING*. No two attributes should have the same value else system will give error s. Attributes can be marked *MaintPoss* at both LOIO & PHIO levels (can be added in both LOIO & PHIO virtual classes of document class). If by chance an attribute has been marked in both LOIO & PHIO then it is taken to be persisting at PHIO.

7. Activate the virtual class after adding the attribute with a *SORTING* value. After this, when you open the record/document then you can see the attribute on the attribute section.

How to Add a New Attribute to a Case

To have a new attribute in a case, the attribute needs to be added to the attribute profile.

1. First create a table with attributes you need as fields of the table in transaction *SE11*. You should have the case GUID as the primary key. This is the unique identifier for a case.

Field	Key	Initi	Data element	Data Ty...	Length	Decim...	Short Description
MANDT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	MANDT	CLNT	3	0	Client
CASE GUID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SCMG_CASE_GUID	CHAR	32	0	Technical Case Key (Case GUID)
AMOUNT1_V	<input type="checkbox"/>	<input type="checkbox"/>	ZATTR_V1	CURR	16	2	Test Data Element
AMOUNT2_V	<input type="checkbox"/>	<input type="checkbox"/>	ZATTR_V1	CURR	16	2	Test Data Element
CUKY1_V	<input type="checkbox"/>	<input type="checkbox"/>	ZATTR_V2	CUKY	5	0	Test CUKY
CUKY2_V	<input type="checkbox"/>	<input type="checkbox"/>	ZATTR_TEST	STRING	0	0	test attr
STATUS	<input type="checkbox"/>	<input type="checkbox"/>	ZRM_USERST	CHAR	30	0	Status
ATTR_TEST	<input type="checkbox"/>	<input type="checkbox"/>	ZATTR_TEST	STRING	0	0	test attr
CASE_YESNO	<input type="checkbox"/>	<input type="checkbox"/>	ZCASE_YN	CHAR	1	0	Case Yes/no values

2. Create a new attribute profile entry in *IMG->Application Server -> Basis Services ->Case Management->Create Attribute Profile* & assign the table to it. This will ensure that attributes created as fields of that table are available to be used in case.

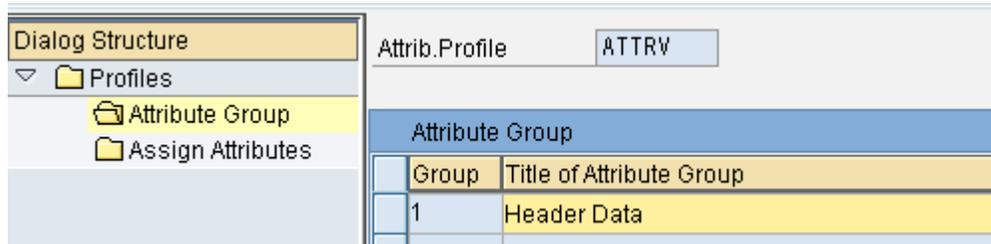
Change View "Profiles": Overview

Attribute Profile	Description	Table Name
AAAA	aasd	SCMGFUNCTION
ARCHTEST	adada	ZCASE_OS
ATTRV	Attribute Profile - Veena	ZCMG_CASE_ATTR_V
DEMO	SAP Demo	
RH	rh	ZRH_SCMG_T_CASE
TECHED	Attributes For Teched	ZCMG_ATTR_TECHED

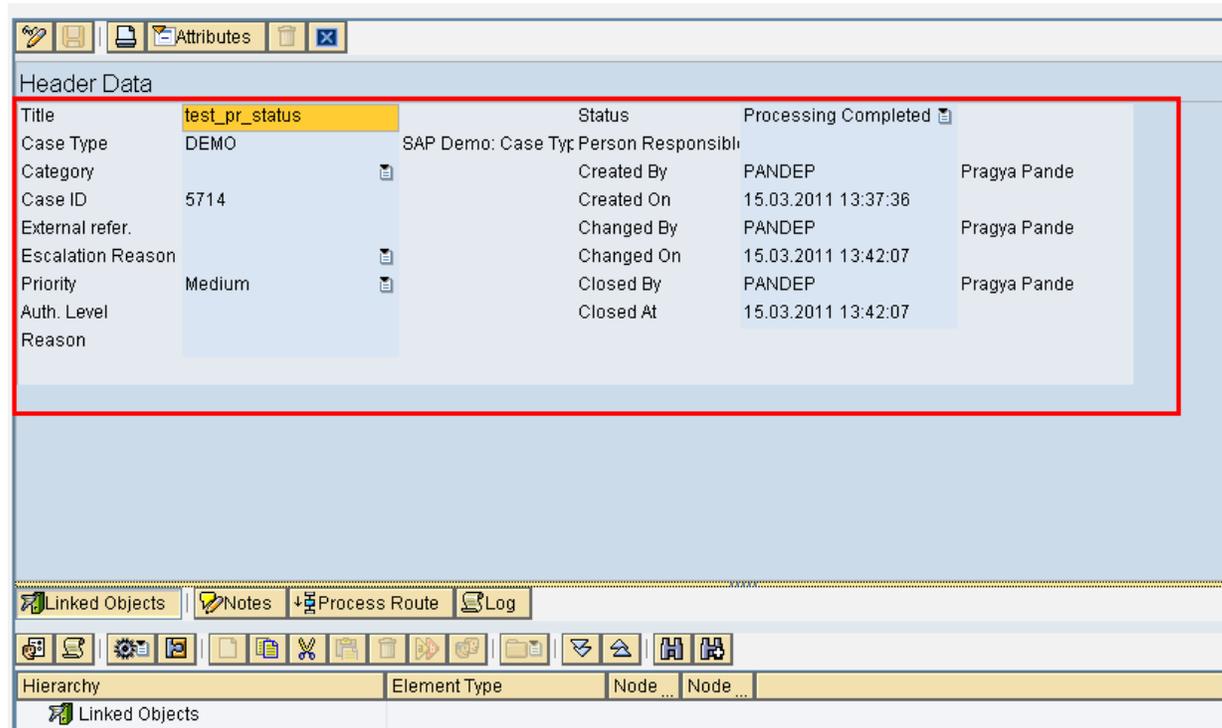
3. Select the entry & click the *Attribute Group*. In this option you can define the logical grouping of attributes. For eg if you have just one group then all attributes.

Attribute Profile	Description	Table Name
AAAA	aasd	SCMGFUNCTION
ARCHTEST	adada	ZCASE_OS
ATTRV	Attribute Profile - Veena	ZCMG_CASE_ATTR_V
DEMO	SAP Demo	
RH	rh	ZRH_SCMG_T_CASE
TECHED	Attributes For Teched	ZCMG_ATTR_TECHED

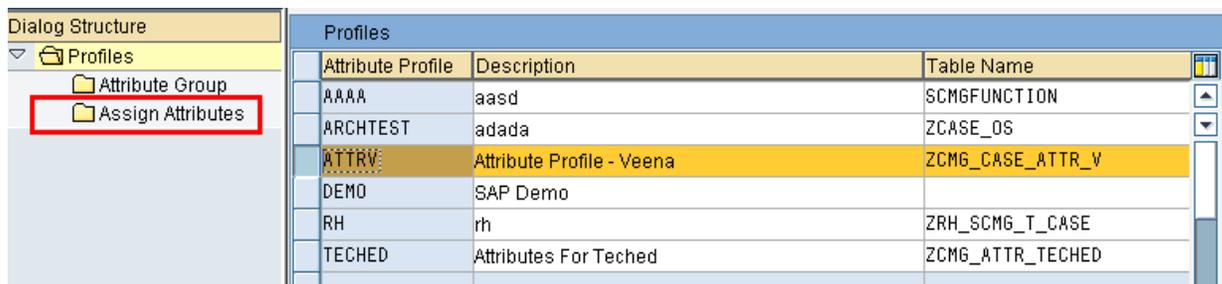
For example, here there is just one group defined.



So attributes are shown in one group with title *Header Data*.

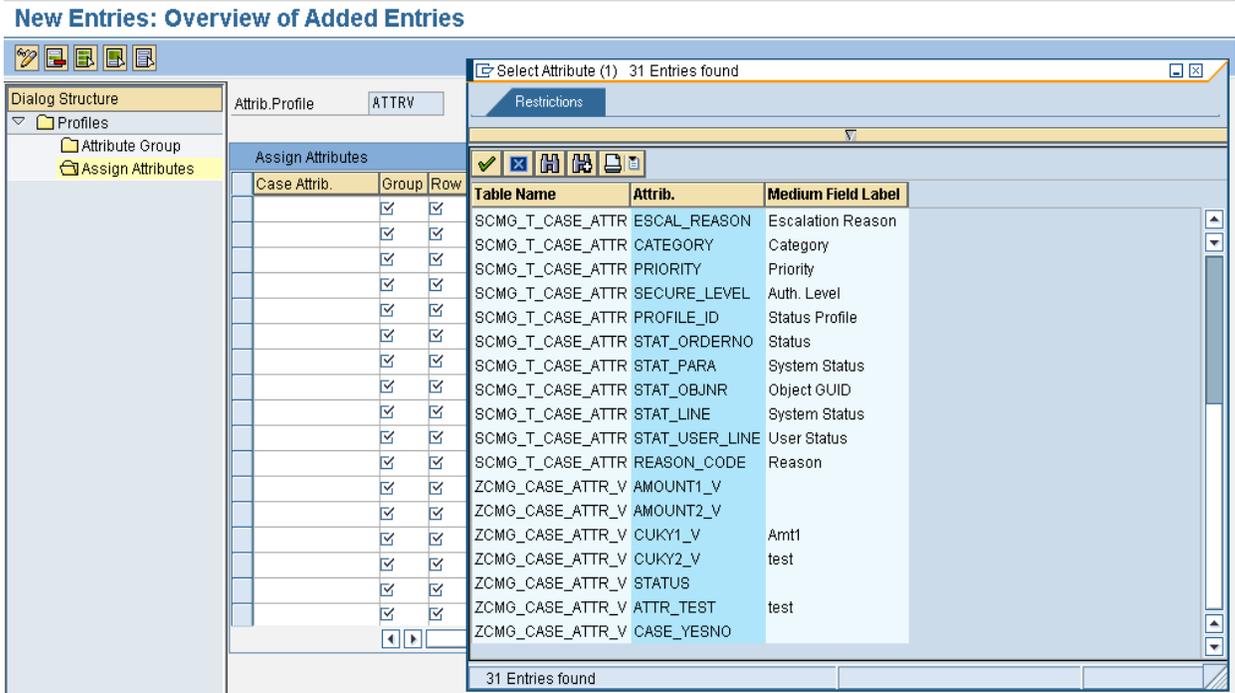


4. Assign attributes to the group in the option *Assign Attributes*.

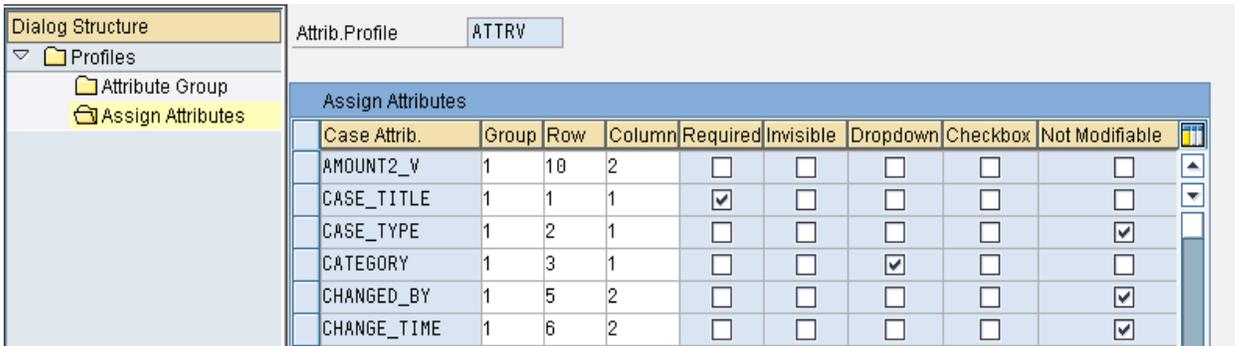


Here you can add entries of attributed defined in the table you have created. Standard attributes are also available which you can add to your attribute profile.

- Click on F4 help for field *Case Attrib* & it will give you attributes you can use.



- For added attribute, you can define metadata like *Required*, *Invisible* etc. Please read the documentation of *IMG->Application Server -> Basis Services ->Case Management->Create Attribute Profile* for details on metadata. There are metadata for ensuring logging of changes to an attribute (*log*), allowing attribute to be changed only when case is created (*Modif New*). Please note, if metadata *checkbox* is selected for an attribute then attribute on screen gets a drop down with blank & X as values. It will not be displayed as checkbox.



7. Create a new case type in IMG->Application Server -> Basis Services ->Case Management->Define Case Types -> Define Case Types and assign the attribute profile to it.

Case Type

Case Type Maintenance

Name	Veena: Case Type
RMS ID	S_CMG_DEMO
Case Rec. Model	SRM_MOD02 44741B2ADB621377E10000000A11461
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	Attribute Profile - Veena
Funct. Profile	Function Profile Veena
Status Profile	SAP Demo
Text Profile	SAP Demo
Terminology	TEST_GT
Process	

Int.No.Range Early No. Assmt

Route being used
 Case type obsolete

Now when you create a new case with this case type then you will see all attributes that you have assigned to the attribute profile & which have not been defined to be *hidden*, on the screen.

Appendix A – Hint for Most Common Searched for Attribute of Record/Document

Attributes for LOIO or PHIO are stored in two places – There is an attribute table each for LOIO & PHIO where the attributes are stored as table entries. This optimizes storage but search suffers because index cannot be specified on the attribute. It is also possible to store attributes as fields in PHIO or LOIO header table. There are some empty fields defined in the header table just for this purpose. These are names as prop01, prop02... & can be seen by clicking on *Tabulation* button.

Document Modeling Workbench

Real PHIO class: ZREC01P01 Active

Description: this is for testing .

Document area: SRM

Package: TEST_AT

Virtual Class: ZREC01_REC01_V

Created By: CHOPRAAN Last Changed By: CHOPRAAN

Time Created: 28.03.2007 11:41:36 Last Changed At: 28.03.2007 11:44:25

Tabulation

Attribute	Attribute Value	Exposed	Required	Hidden	Maint. P.
AUTHORITY_CHECK_FUNCTION		Exposed			
AUTO_INDEX	X	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BUFFER_EXPIRATION		<input type="checkbox"/>			
DELETE_FUNCTION		<input type="checkbox"/>			
DOCUMENT_PROTECTION		<input type="checkbox"/>			
DYN_DELETE_FUNCTION		<input type="checkbox"/>			
DYN_GET_FUNCTION		<input type="checkbox"/>			
DYN_INIT_FUNCTION		<input type="checkbox"/>			
DYN_PURGE_FUNCTION		<input type="checkbox"/>			

You can specify whether attribute is to be stored in field prop01, prop02 etc by selecting radio button for 01, 02 respectively. You can see the name of the header table in *Header table* field. 10 such attributes can be stored. Care of attribute length should be taken as fields have fixed lengths as you can see in the header table snapshot. Once attribute is stored in header table, it is possible to define secondary index on that field for faster search.

Real PHIO class:	ZREC01P01	Active
Description	this is for testing .	
Document area	SRM	
Package	TEST_AT	
Header table	ZREC01RECP01	Copy table set

Attrib.	#	Distr	01	02	03	04	05	06	07	08	09	10
RMPS_DOM_COUNTRY	3	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SRM_DOCUMENT_ID	0	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SRM_DOCUMENT_STATE	0	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SRM_LAST_CHANGED_AT	14	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
SRM_LAST_CHANGED_BY	12	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>					
SRM_LOG_VERSION	10	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SRM_REF_RULE	32	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SRM_STATE	3	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SRM_VARIANT_ID	8	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SRM_VARIANT_TAG	2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SRM_VERSION_ID	8	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Transp. Table	ZREC01RECP01	Active
Short Text	Cust.: Instances of Physical Information Objects	

Attributes	Delivery and Maintenance	Fields	Entry help/check	Currency/Quantity Fields
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Field	Key	Initi.	Data element	Data Ty	Length	Decim.	Short Text
STOR_CAT	<input type="checkbox"/>	<input type="checkbox"/>	SDOK_STCAT	CHAR	10	0	Category for physical documents
DOC_FORMAT	<input type="checkbox"/>	<input type="checkbox"/>	SDOK_FORM	CHAR	4	0	Document format (TEXT, TIFF, RTF, PDF, ...)
DOC_PROT	<input type="checkbox"/>	<input type="checkbox"/>	SDOK_DPROT	CHAR	4	0	Document protection
_INCLUDE	<input type="checkbox"/>	<input type="checkbox"/>	SDOKPH_PRV	STRU	0	0	SDOK: Attribute fields in header record of phys.info obj.
PROP01	<input type="checkbox"/>	<input type="checkbox"/>	SDOK_PRV_S	CHAR	15	0	Attribute feature (short version)
PROP02	<input type="checkbox"/>	<input type="checkbox"/>	SDOK_PRV_S	CHAR	15	0	Attribute feature (short version)
PROP03	<input type="checkbox"/>	<input type="checkbox"/>	SDOK_PRV_S	CHAR	15	0	Attribute feature (short version)
PROP04	<input type="checkbox"/>	<input type="checkbox"/>	SDOK_PRV_S	CHAR	15	0	Attribute feature (short version)
PROP05	<input type="checkbox"/>	<input type="checkbox"/>	SDOK_PRV_M	CHAR	20	0	Attribute feature (mid-length version)
PROP06	<input type="checkbox"/>	<input type="checkbox"/>	SDOK_PRV_M	CHAR	20	0	Attribute feature (mid-length version)
PROP07	<input type="checkbox"/>	<input type="checkbox"/>	SDOK_PRV_M	CHAR	20	0	Attribute feature (mid-length version)
PROP08	<input type="checkbox"/>	<input type="checkbox"/>	SDOK_PRV_L	CHAR	40	0	Attribute feature (long version)
PROP09	<input type="checkbox"/>	<input type="checkbox"/>	SDOK_PRV_L	CHAR	40	0	Attribute feature (long version)
PROP10	<input type="checkbox"/>	<input type="checkbox"/>	SDOK_PRV_L	CHAR	40	0	Attribute feature (long version)

Related Content

Trainings which Users Can Attend:

- BIT 640 training – Generic Folder Management (erstwhile Records Management)
- IPS650 training – Public Sector Management
- Folder Management(erstwhile Records Management) on SAP Help –

http://help.sap.com/saphelp_nw04/helpdata/en/87/55bf4fde523c4399a7064c8be899e6/frameset.htm

http://help.sap.com/saphelp_nw04/helpdata/en/2b/f18ad44a77eb4faf67d1ae5aeaff2a/frameset.htm

For more information, visit the [Enterprise Performance Management homepage](#).

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