

How-To Guide: Document Management System Setup and Configuration for RFM

Applies to:

Utopia Solutions for MDG RFM

Summary

This guide is used to setup and configure Document Management System (DMS), Document Info Record (DIR) number range and replication of DIR for RFM.

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Introduction

This document describes how to setup and configure Document Management System (DMS), Document Info Record (DIR) number range and replication of DIR for RFM.

Prerequisites

Document Management System (DMS) is installed.

Setup Document Management System

Refer the attached SAP document for Configuration and Setup of Easy Document Management System.



223_BB_ConfigGuid
e_EN_IN.doc

Note: Contact BASIS team for performing activities in the above attached document.

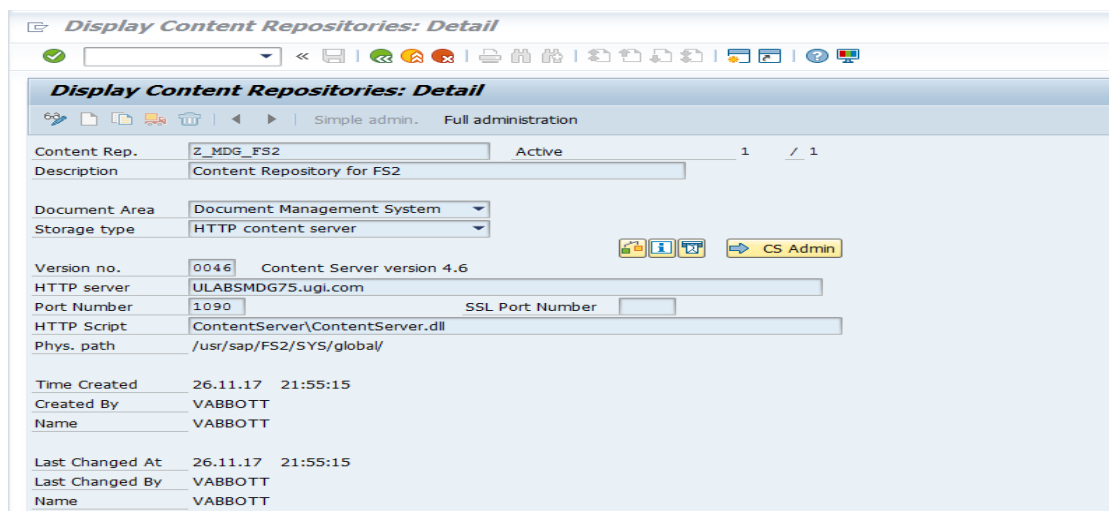
DMS Configuration for RFM

Use the following steps to configure DMS for RFM.

- [Create Content Repository](#)
- [Maintain Category](#)
- [Assign Content Repository to Category](#)
- [Define Document Types](#)
- [Define Object Links](#)
- [Define Profile](#)

Create Content Repository

Create content repository using transaction code (t-code) OAC0.



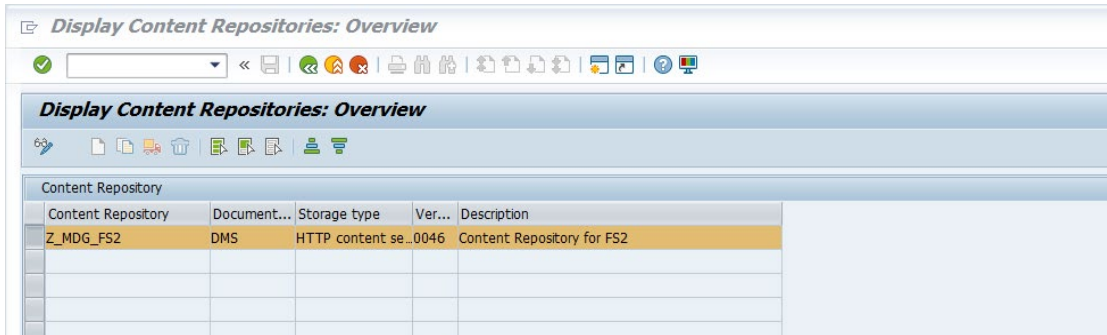
Display Content Repositories: Detail	
Content Rep.	Z_MDG_FS2 Active 1 / 1
Description	Content Repository for FS2
Document Area	Document Management System
Storage type	HTTP content server
Version no.	0046 Content Server version 4.6
HTTP server	ULABSMG75.ugl.com
Port Number	1090
SSL Port Number	
HTTP Script	ContentServer\ContentServer.dll
Phys. path	/usr/sap/FS2/SYS/global/
Time Created	26.11.17 21:55:15
Created By	VABBOTT
Name	VABBOTT
Last Changed At	26.11.17 21:55:15
Last Changed By	VABBOTT
Name	VABBOTT

Maintain Category

Maintain Category using t-code OACT.

Assign Content Repository to Category

Assign content repository to new category as shown in the following screen.

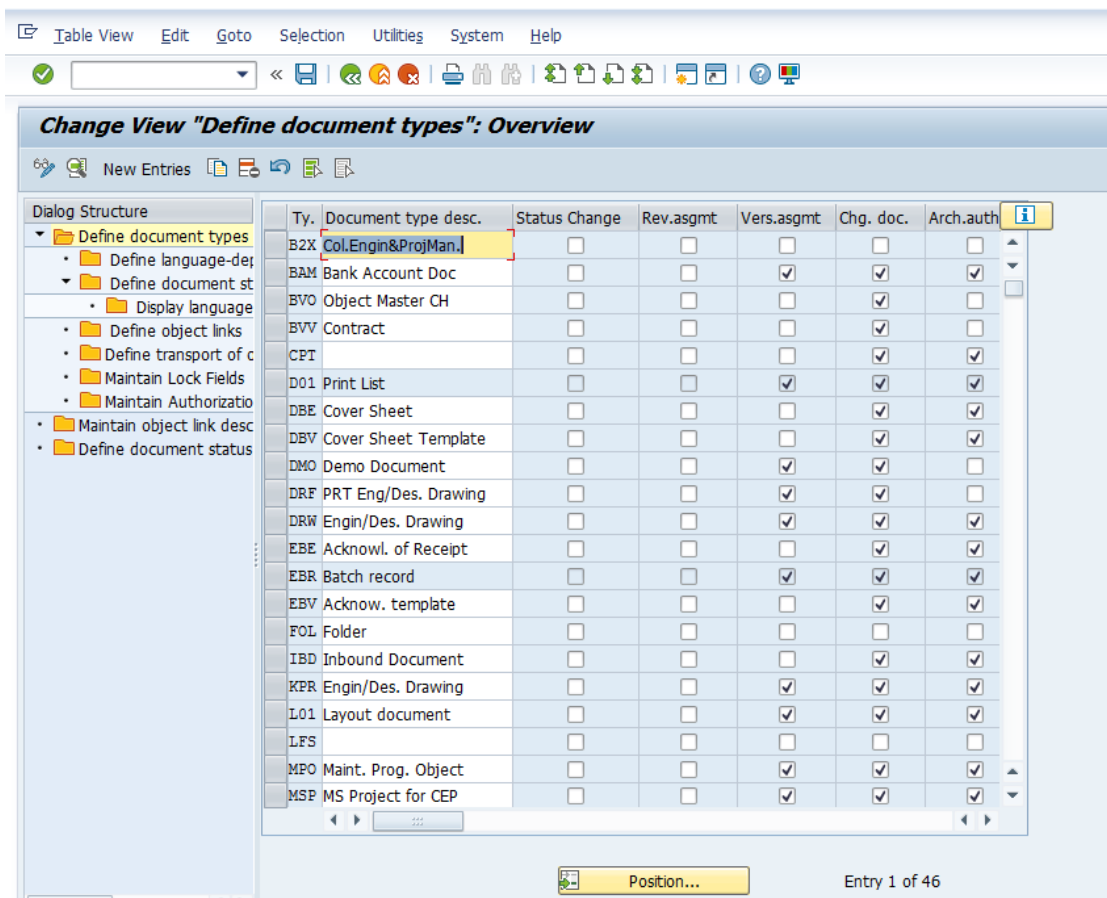


Display Content Repositories: Overview

Content Repository	Document...	Storage type	Ver...	Description
Z_MDG_FS2	DMS	HTTP content se...	0046	Content Repository for FS2

Define Document Types

Use the navigation to define Document types: Cross-Application Components> Document Management> Control Data> Define Document Types.



Change View "Define document types": Overview

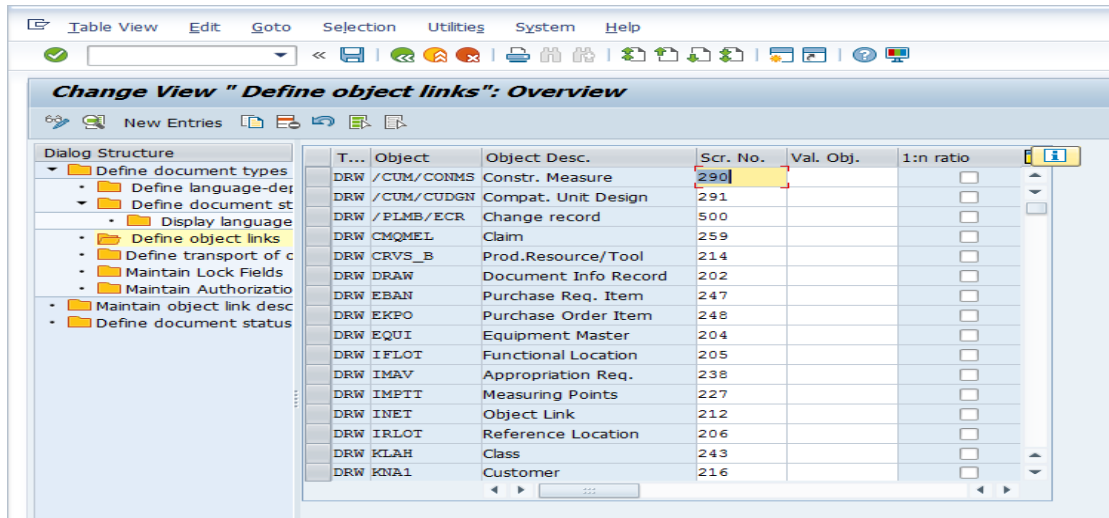
Ty.	Document type desc.	Status Change	Rev.asgmt	Vers.asgmt	Chg. doc.	Arch.auth
B2X	Col.Engin&ProjMan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BAM	Bank Account Doc	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BVO	Object Master CH	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BVV	Contract	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CPT		<input type="checkbox"/>	<input type="checkbox"/>	<input 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 type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DMO	Demo Document	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DRF	PRT Eng/Des. Drawing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DRW	Engin/Des. Drawing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EBE	Acknowl. of Receipt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EBR	Batch record	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EBV	Acknow. template	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FOL	Folder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IBD	Inbound Document	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
KPR	Engin/Des. Drawing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
L01	Layout document	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
LFS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MPO	Maint. Prog. Object	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MSP	MS Project for CEP	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Position... Entry 1 of 46

Note: The configurations are available for all the objects.

Define Object Links

Define Object Links as shown in the following screen:



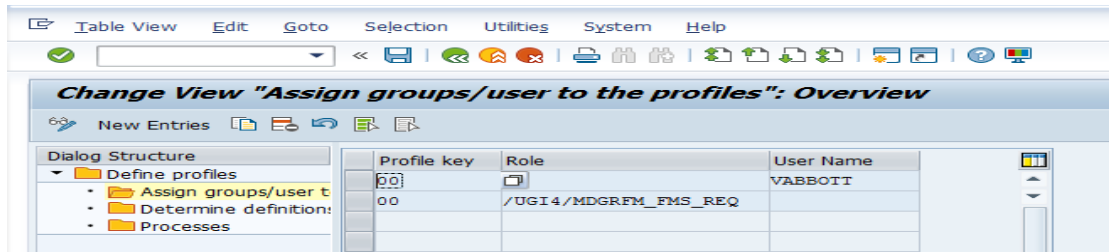
Note: The above configuration is displayed by default and works for all Objects.

The relevant objects have the DMS create and attach functionality based on the following settings as detailed in the next steps.

Define Profile

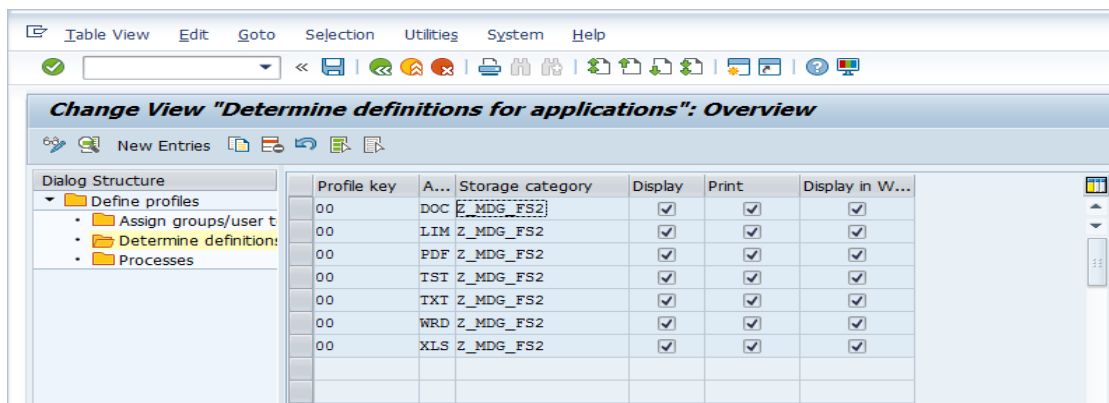
The profile helps user to determine application and default storage category automatically to make sure that the document is stored in the secured predetermined storage space.

Define Profile as shown in the following screen:



Note: The system displays the storage category based on the available role access.

Select Profile Key and Set Determination of Definitions of System.



DMS Replication for RFM

If you want to replicate document links into other target systems, you will need to distribute the documents and document links manually. There is no integration of ALE message types DOCMAS and DOLMAS into the Data Replication Framework (DRF).

Number Ranges for Documents

To replicate the documents and document links from MDG HUB to operational ECC systems, number ranges in operational ECC should be defined as external number range.

Use the following steps for validating and updating the number ranges and assigning the number ranges to the document type.

- [Defining Number Ranges for Documents](#)
- [Assigning Number Ranges to Document Types](#)
- [Clear the Number Range Buffers](#)

Defining Number Ranges for Documents

IMG Path:

Cross-Application Components > Document Management > Control Data > Define Number Ranges for Document Numbers

Or,

This can be accessed directly using t-code SNRO with Number Range Object DOKUMENT

Number ranges should be checked in MDG HUB and operational ECC systems.

To use the number range as internal in MDG HUB and external in operational ECC, you can use any of the following methods:

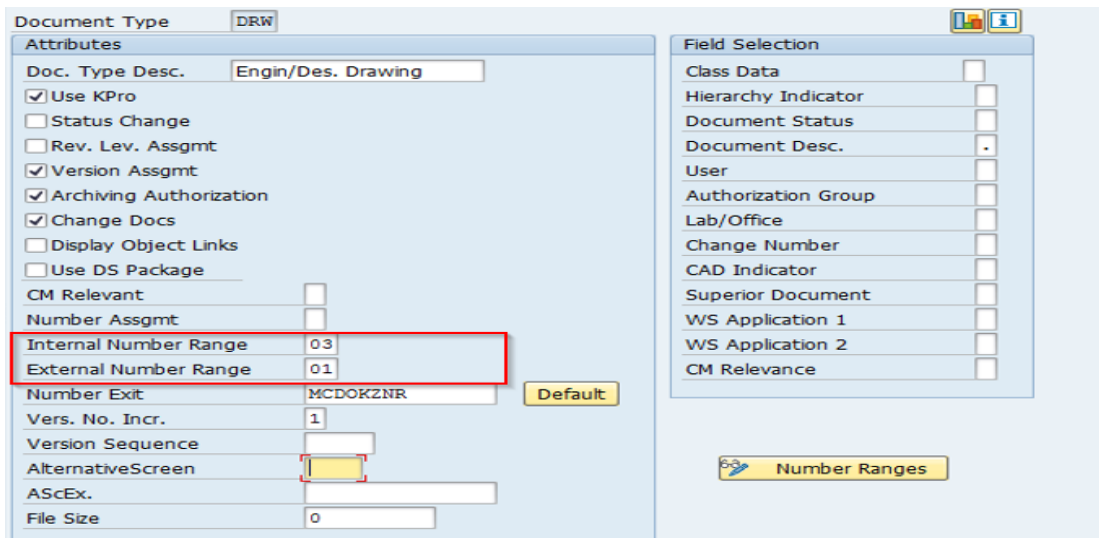
- With existing internal number: In Operational ECC, if an existing internal number needs to be changed to external number, first set the NR status to '0' and then set the flag for external number.
You need to adjust the external range to the internal range of the source system. Additional internal ranges are optional.
- Set internal number range to current NR status and have external number range start from next number: Set the "to number" to the current status. The external number range may start from next number. If there are multiple number ranges, you may also need multiple external number ranges to avoid overlap.
- With new interval: Create a new interval in both systems. Make the new interval as Internal in HUB and external in Operational ECC. Assign the newly created interval to the document type using the below section assigning number ranges to document types.
- In operational ECC combine all internal number ranges in one external Interval. Add internal if required for local creation.

Assigning Number Ranges to Document Types

IMG Path

Cross-Application Components > Document Management > Control Data > Define Document Types

Double click on the document type. For example: DRW



Document Type: DRW

Attributes

Doc. Type Desc.: Engin/Des. Drawing

Use KPro

Status Change

Rev. Lev. Assgmt

Version Assgmt

Archiving Authorization

Change Docs

Display Object Links

Use DS Package

CM Relevant:

Number Assgmt:

Internal Number Range: 03

External Number Range: 01

Number Exit: MCDOKZNR Default

Vers. No. Incr.: 1

Version Sequence:

AlternativeScreen:

AScEx.:

File Size: 0

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

Clear the Number Range Buffers

To clear the number range buffers in the target system, you can use the report NK_REORGANIZE.

Steps to Replicate Document Info record for an Object

Use the following steps to replicate document info record for Article:

- [ALE Setup](#)
- [Create Document Info Record](#)
- [Assigning Document Info Record to Article](#)
- [Replication of Document Info Records with Document Links](#)

ALE Setup

Use the following steps for ALE Setup:

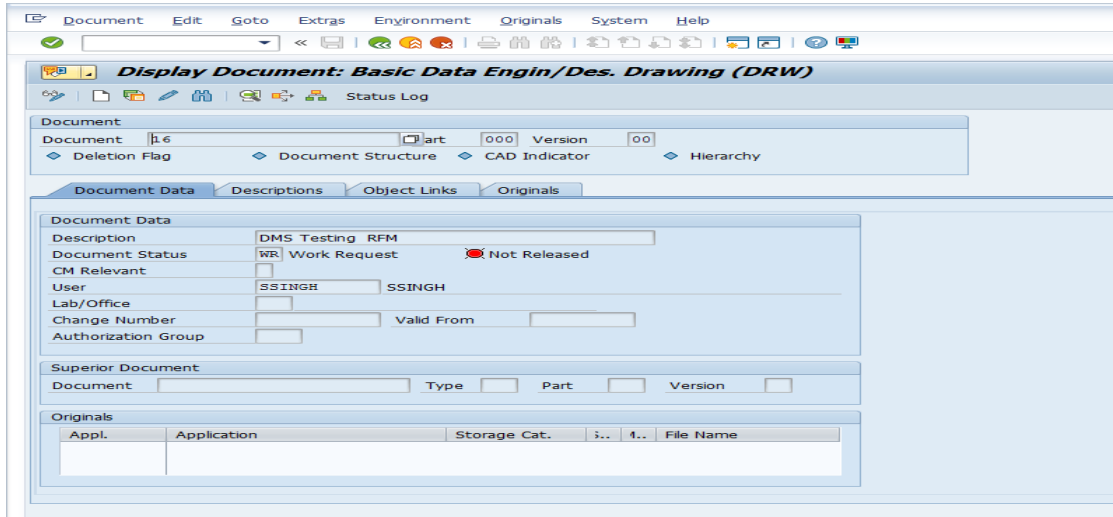
1. Create distribution model using t-code BD64.
2. Add the following message types:
 - ARTMAS
 - DOLMAS
 - DOCMAS
3. Distribute the model to the target systems using menu navigation as: Edit > Model View > Distribute
4. Generate the Partner Profiles using the menu navigation as: Environment > Generate Partner Profiles

Create Document Info Record

Use the following steps to create Document Info Record:

1. Run t-code CV03N.
2. Enter the required inputs:
 - Document Type (Mandatory)
 - Document Part
 - Document Version

- Document Number (External Number Range)



Assigning Document Info Record to Article

Use the following steps to assign document Info record to Article:

1. Launch NWBC
2. Select the role /UGI4/_MDGRFM_FMS_REQ

/UGI1/_MDGPROC_ALLUSR	/UGI1/_MDGPROC_ALLUSR
/UGI1/_MDGPROC_REQ	/UGI1/_MDGPROC_REQ
/UGI1/_MDGPROC_SPEC	/UGI1/_MDGPROC_SPEC
/UGI1/_MDGPROC_STEW	/UGI1/_MDGPROC_STEW
/UGI4/MDGRFM_DISP	Master Data Governance for RFM: Display
/UGI4/MDGRFM FMS DISP	Master Data Governance for FMS: Display
/UGI4/MDGRFM FMS MENU	Master Data Governance for FMS: Menu
/UGI4/MDGRFM FMS REQ	Master Data Governance for FMS: Requester
/UGI4/MDGRFM FMS SPEC	Master Data Governance for FMS: Specialist
/UGI4/MDGRFM FMS STEW	Master Data Governance for FMS: Steward
/UGI4/MDGRFM MENU	Master Data Governance for RFM: Menu
/UGI4/MDGRFM REQ	Master Data Governance for RFM: Requester
/UGI4/MDGRFM SPEC	Master Data Governance for RFM: Specialist
/UGI4/MDGRFM STEW	Master Data Governance for RFM: Steward
/UGI7/AIW MENU	/UGI7/AIW_MENU
/UGI7/AIW REQ	/UGI7/AIW_REQ
/UGI7/AIW SPEC EQUI	/UGI7/AIW_SPEC_EQUI
/UGI7/AIW SPEC FUNCLOC	/UGI7/AIW_SPEC_FUNCLOC
/UGI7/AIW SPEC MPLAN	/UGI7/AIW_SPEC_MPLAN
/UGI7/AIW SPEC MSPOINT	/UGI7/AIW_SPEC_MSPOINT
/UGI7/AIW SPEC PMBOMHDR	/UGI7/AIW_SPEC_PMBOMHDR
/UGI7/AIW SPEC TLEQHDR	/UGI7/AIW_SPEC_TLEQHDR
/UGI7/AIW SPEC TLFLHDR	/UGI7/AIW_SPEC_TLFLHDR
/UGI7/AIW SPEC TLGNHDR	/UGI7/AIW_SPEC_TLGNHDR
/UGI7/AIW SPEC WORKCNTR	/UGI7/AIW_SPEC_WORKCNTR
/UGI7/AIW STEW	/UGI7/AIW_STEW
/UGI7/_MDGPROC_ALLUSR	/UGI7/_MDGPROC_ALLUSR

3. Go to FMS Search application and Click on “New” button to create a new Change Request.

Search Criteria Saved Searches: []

Search Term: []

Article	is	[]	+ -
Article Type	contains	[]	+ -
Article Category	contains	[]	+ -
Merchandise Category	contains	[]	+ -
Description (medium text)	is	[]	+ -

Maximum Number of Results: 100

Search Clear Entries Reset to Default Save Search As: []

Result List

New Copy Mass Change Change Documents Replication Status Replicate

4. Enter the mandatory fields like Article Type, Merchandise Category, Article category, Base Unit of Measure, Loading Group, Description, Tax Classification

Create Article

Article Basic Data

Article: []

* Article Type: FMS_Trading Goods ZFMS

* Merchandise Category: MC210101 Mens Jeans

* Article Category: Single material 00

* Base Unit of Measure: EA each

Reference Article

Reference Article: []

Continue

SAP Article: @@1366, DMS Testing - (FMS_Trading Goods / Mens Jeans / Single material)

Expand All Collapse All Refresh Check Assignment Block: [] Side Panel [] []

Basic Data Edit Additional Data Components Listing Characteristics

* Article: @@1366 * Article Category: 00 Single material

Groupings

* Merchandise Category: MC210101 Mens Jeans * Article Type: ZFMS FMS_Trading Goods

* Industry Sector: 1 Retail Division: []

Product hierarchy: [] Ext. Mdse Catgry: []

Authorization Group: [] ABC Indicator: []

Pricing Ref. Article: [] Fashion Grade: []

Price Band Category: []

General Data

* Valuation Class: 3100 Trading goods With empties BOM: []

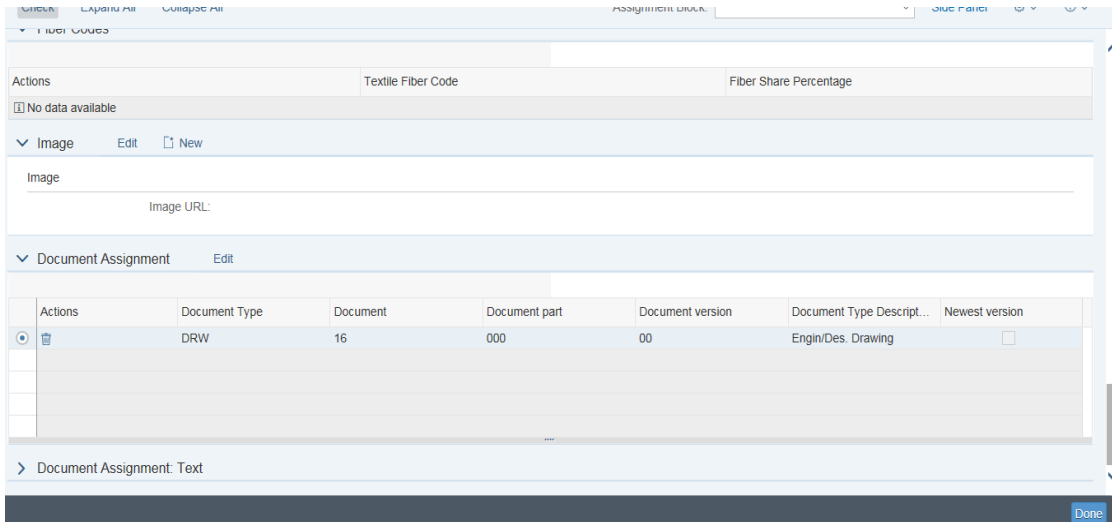
Country of origin: [] Region of origin: []

Commodity Code: [] Haz. Article number: []

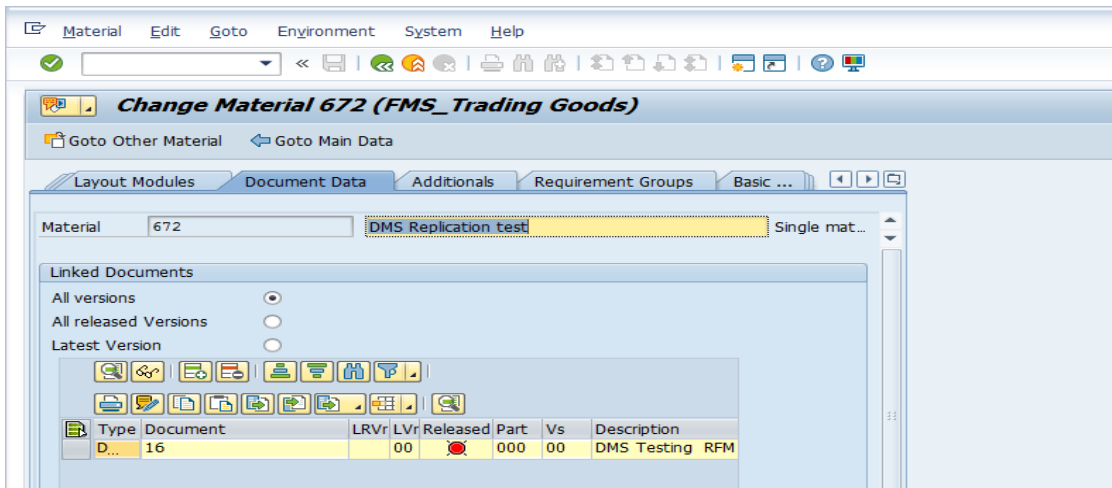
Storage conditions: [] Temp. conditions: []

Save Submit Edit

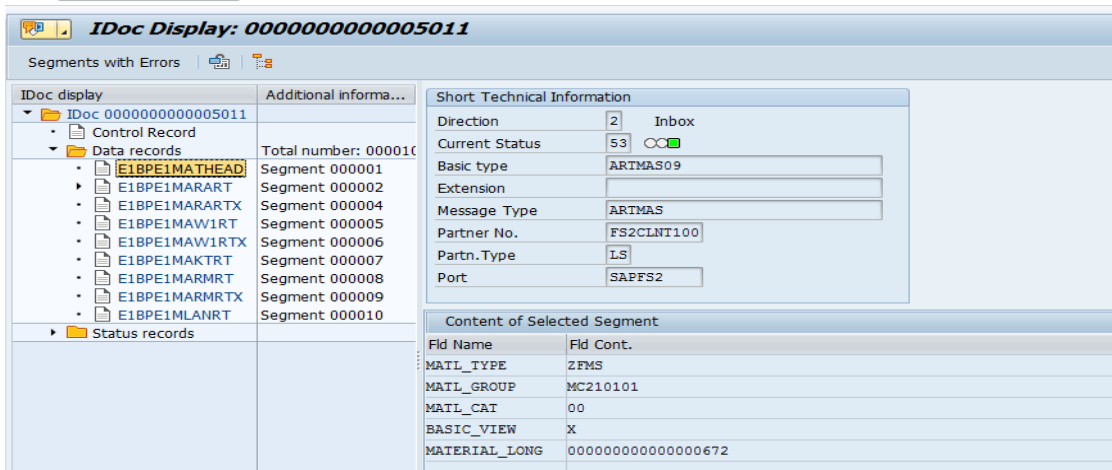
5. Click to Additional Data tab and go to "Document Assignment" assignment block and add the document by clicking on "Assign Existing Document" button. Provide the document that is created earlier.



6. Process the CR and Approve it.
The Article is created with DIR.



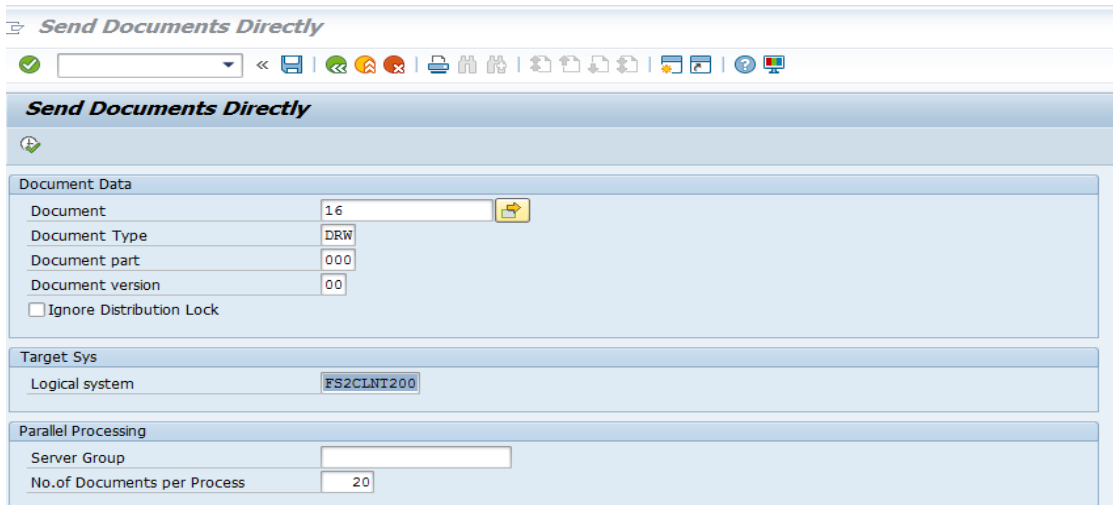
The Article is replicated to target system through an IDoc.



Replication of Document Info Records with Document Links

Use the following steps to replicate Document Info Records with Document Links:

1. Run t-code BDA5 in the source system to replicate the Document.
2. Enter the DIR details to be replicated along with the Logical System to which DIR needs to be replicated.



Send Documents Directly

Document Data

Document: 16

Document Type: DRW

Document part: 000

Document version: 00

Ignore Distribution Lock

Target Sys

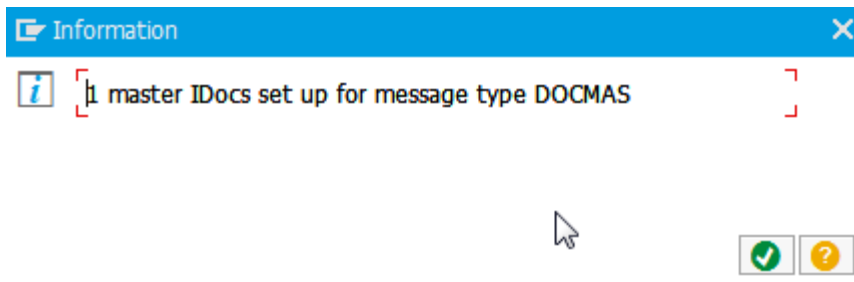
Logical system: FS2CLNT200

Parallel Processing

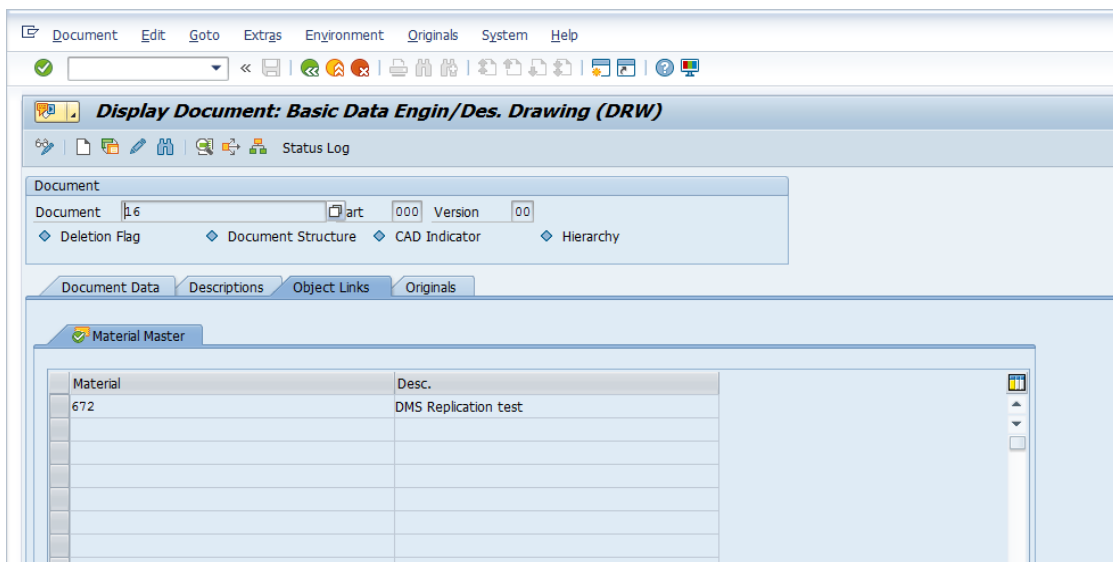
Server Group:

No. of Documents per Process: 20

3. Click F8 to replicate the DIR.



4. Login to the target system and verify the details using t-code CV03N.



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

Document: 16 Part: 000 Version: 00

Deletion Flag Document Structure CAD Indicator Hierarchy

Document Data Descriptions Object Links Originals

Material Master

Material	Desc.
672	DMS Replication test