FileNet Document Warehouse for SAP

Installation and Configuration Manual-Client

Release 5.1

March 2003

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FileNet Corporation
3565 Harbor Boulevard
Costa Mesa, California 92626
800.FILENET (345.3638)
Outside the U.S., call:
1.7 1 4 .3 2 7 .3 4 0 0
www.FileNet.com

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About this Manual

The FileNet Document Warehouse for SAP (DWSAP) Installation and Configuration Manual - Client, dated February 2003, supports the 5.1 release of the DWSAP software. It covers the IDM Desktop for R/3 as well as the possibility to use a web-based client.

Skill Level Requirements

The installer will need an in-depth understanding of FileNet and SAP systems, as well as a working knowledge of Windows 2000 and the corresponding hardware platforms. Specifically, the installer will need to understand the following:

- FileNet system operations.
- SAP R/3 System.
- PC operations.
- Windows 2000 procedures.

Related Publications

The DWSAP software integrates the standard FileNet system with SAP R/3 system through the SAP ArchiveLink interface.

The following FileNet manuals and SAP documentation will prove useful in the software installation, operation, and administration of DWSAP:

- System Administrator's Handbook for Image Services.
- System Administrator's Companion for your platform.
- Software installation procedure for your platform.
- Web Services online documentation.
- Online documentation for R/3 System, in particular SAP ArchiveLink documentation.

It is recommended that the SAP R/3 documentation for the SAP ArchiveLink interface be obtained and studied.

Tips, Notes, Cautions, and Background Information

Throughout this manual, there are assorted brief messages designed to draw your attention to different kinds of information:

***Tip**: Indicates hints to improve efficiency of performing a task.*

Note: Provides important information, such as situations that can affect the outcome of an operation or affect some other part of the system.

CAUTION: Signals, where possible loss of data or time may occur.

Background: Explains the concepts behind specific features and provides helpful information for understanding the design of SAP ArchiveLink and Document Warehouse for SAP.

Bold Type Indicates menu names, menu items, component names

Blue text Indicates a link to another topic, a link to another section in the same topic, or a link to an external topic**.**

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FileNet provides various forms of instruction. Please visit the Global Learning Services in FileNet's Service & Support area at www.FileNet.com.

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1
Document Warehouse for SAP

What's new in this Release?

DWSAP release 5.1 is an enhanced version of DWSAP release 5.0.1. The scope of this release is limited to certain functional enhancements. This release has been qualified to run with Web Services 3.2, Desktop 3.2 and Capture 4.0.

DWSAP release 5.1 supports all the features of DWSAP release 5.0.

Here is a brief overview of the major new functionalities that have been introduced, or enhanced in DWSAP release 5.1:

- Multiple, simultaneous RFC requests.
- On-line administration.
- Windows event logging.
- SAP namespace.
- Enhanced SAP Document Management System (DMS) support.
- Pure thin document viewing.
- Capture CIM support for Capture 4.0.
- DMS viewing and linking ASP sample application.

Multiple, simultaneous RFC requests

SAP with release 4.6c has changed the processing of data archiving requests. SAP processes the data archiving requests synchronously. This means that the requests are processed sequentially only. This may result in time out for the other requests present in the queue.

In this release, DWSAP registers multiple instances of RFC server at the SAP gateway. This enables DWSAP to process multiple RFC requests simultaneously.

The administrator can configure the number of RFC threads that are required for a particular SAP system using the configuration tool.

On-Line Administration

DWSAP Server components detect and use changes in configuration, without restarting the corresponding services, for example, FileNet RFC Service, WWW Service, and FileNet Barcode Service. Requests that are received by the Server components before the configuration changes are saved are processed with the old configuration. The requests received after re-initialization of the server components are processed with the new configuration.

Online Administration feature can be enabled/disabled through a check box in the configuration tool.

Note: This feature has been enabled only for IDM Services for R/3; it is not available for IDM Desktop for R/3.

Windows event logging

DWSAP supports logging of messages related to its operations in the Windows Application Event log. The log levels supported for logging in the Event log are:

- Log all information.
- Log errors and warning only.
- Log errors only.

Logging in the Windows event log is supported for the following DWSAP components:

- IDM Services for R/3.
- IDM Desktop for R/3.
- Thin-Client.

The log levels for the event logging are maintained separately from log levels for logging to a file.

Windows event logging feature can be enabled/disabled through a check box in the configuration tool.

SAP NameSpace

DWSAP differentiates among requests from different copies of the R/3 instances running on different servers but sharing the same authenticity id and archive id.

To identify different R/3 instances in the configuration program define the SAP system in the configuration, as

<SAP System Name> - <SAP Server Name (host name)>

For example, if FN1 is the SAP system, fnetsap, and fnsap are the servers that have this R/3 instance. The entries in the configuration tool in this case are FN1-fnetsap and FN1-fnsap.

Enhanced SAP Document Management Support

While creating a new Document Information Record (DIR) in DWSAP release 5.1, DWSAP end users can use the default value for DIR Description and Initial Status as defined in the configuration or are prompted to change the default values at run-time.

This feature can be enabled/disabled through a check box in the configuration tool.

Pure Thin Document Viewing

DWSAP supports pure thin viewing of documents. In a pure thin client scenario, only SAPGUI is installed on the client machine. There is no IDM component or DWSAP client component installed on the client machine. In the pure thin client scenario, communication occurs directly between SAPGUI and DWSAP server components installed on the Web server.

The end user can view the documents with either a Java based viewer, or IDM Viewer.

Pure thin client viewing of documents is not supported for documents that use Remote Function Call (RFC) protocol.

This feature can be enabled/disabled through a check box in the configuration tool.

FileNet Capture for R/3 Upgrade

DWSAP component FileNet Capture for R/3 is qualified to run with Capture version 4.0.

DMS Viewing and Linking ASP Sample Application

DWSAP has a new sample Document Management System (DMS) application, which demonstrates the instantiation of DMS objects in a web-based environment. To access DMS sample application, additional installation is required on the server. This is provided as Server Add-on for the Server Components.

2
Concepts

This chapter provides an overview of DWSAP and its interaction with SAP ArchiveLink.

Overview

DWSAP is an application that has resulted from the integration of FileNet's Image Services (IS) and Content Services (CS) with the SAP system using the SAP ArchiveLink interface. DWSAP enables the business applications of SAP to process FileNet document images and archiving of document and data archiving. DWSAP consists of two parts:

- **IDM Services for R/3**: Represents the product components that integrate SAP R/3 servers with IS and CS, by implementing the SAP ArchiveLink server-side interface. All components of IDM Services for R/3 run on server machines.
- **IDM Desktop for R/3**: Represents the product components that implement SAP ArchiveLink client-side interface on either the client desktop, or a Web server.

SAP ArchiveLink and DWSAP

SAP ArchiveLink connects document management & imaging systems such as, FileNet IS and CS to SAP R/3 systems. SAP ArchiveLink is an intermediate layer between SAP business application, and FileNet IS and CS.

SAP ArchiveLink provides a library of functions to all SAP application modules that manage documents stored on FileNet system. SAP ArchiveLink and the FileNet IS and CS communicate using a standard set of messages. These messages are independent of SAP business applications.

The SAP ArchiveLink interface requires the archive vendor to provide a server component that fulfils archiving-related requests, such as archive a document asynchronously, restore a document synchronously, and search for a pattern in a print list.

SAP supports two protocols, RFC and HTTP. The versions 3.0 and 3.1 of SAP ArchiveLink use the RFC protocol. The RFC protocol is proprietary to SAP. The version 4.5 of SAP ArchiveLink interface uses HTTP protocol.

In conjunction with the FileNet system, SAP ArchiveLink:

- Processes incoming documents before, during, and after archiving.
- Links incoming documents to transactions in an SAP system.
- Links incoming documents to work items that are routed and processed, using SAP business workflow.
- Archives SAP-generated outgoing documents and printlists to FileNet libraries.
- Retrieves documents linked to a transaction in an SAP application from FileNet libraries, and displays the documents.
- Automatically stores data archiving files on optical media, and transparently accesses the files as needed.

The following table contains examples of the types of documents that are SAP ArchiveLink enabled. Check the SAP R/3 online documentation for a complete list for each SAP R/3 release:

SAP Module	Original Documents	SAP-Generated Documents
Document Management System (DMS)	Any document	Any document
Financial Accounting (FI)	Credit Memo Invoice Payment	Line Item Journal Full Audit Trail Classic Audit Trail Document Journal
Human Resources (HR)	Applications Contracts and related correspondence Photo of Employee Regulatory documents Certificates.	No documents are generated
Materials Management (MM)	Credit Memo Invoice	LIFO valuation report Outline Agreement Purchase Order Schedule Line Master Material

SAP Module	Original Documents	SAP-Generated Documents
Sales & Distribution (SD)	Complaint Contract Delivery Note Delivery Schedule Order Schedule Agreement Inquiry	Complaint Contract Credit Memo Delivery Note Delivery Schedule Order Confirmation Quotation Schedule Agreement Inquiry Invoice
Workflow (WF)	Any document	Any document

New Component Names

To reflect the usage of DWSAP product, the component names have been changed. The following table lists the old and new names of the components, for the respective releases:

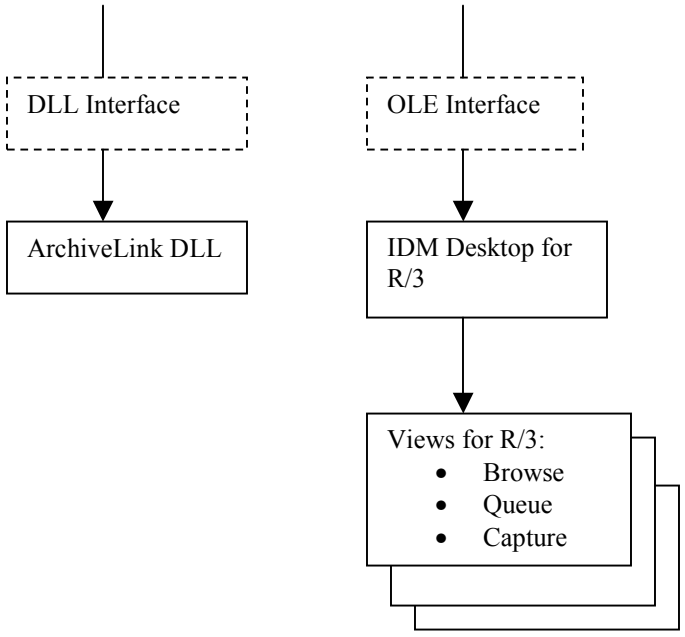
Old Name (Release 2.x)	Old Name (Release 4.0)	Release 5.x
Document Warehouse for SAP	Document Warehouse for SAP	Document Warehouse for SAP
ServerLink	IDM Services for R/3	IDM Services for R/3
SrvLink, SrvQLink	SrvLink, SrvQLink	cServer
LinkSAP	LinkSAP	cBarcode
SAPSearch, Search	SAPSearch, Search	SAPSearch
ClientLink, CliLink	IDM Desktop for R/3	IDM Desktop for R/3
Not Available	CIM, Custom CIM	View
Not Available	Browse CIM	FileNet Browse for R/3
Not Available	Queue CIM	FileNet Queue for R/3
Not Available	Capture CIM	FileNet Capture for R/3

System Architecture of IDM Desktop for R/3

The interfaces that IDM Desktop for R/3 supports to SAPGUI and Archive Link software of SAP are:

- DLL-Interface: This interface is used by ArchiveLink Viewer to access the documents, which is implemented in ArchiveLink DLL.
- OLE-Interface: This interface is used by SAPGUI to display documents in the IDM Viewer and linking them with the SAP transactions. It is implemented by IDM Desktop for R/3. To obtain a document for linking, the interface uses Views.

The figure below shows the different components of IDM Desktop for R/3:



Linking a Document

Linking a document means, that SAPGUI calls IDM Desktop for R/3, and requests a document id. This document id is the link between an SAP object, and a document in FileNet Image Services (IS) or Content Services (CS). The document id is used to display the document later. Prior to linking a document to an SAP transaction, the user opens IDM Desktop for R/3, selects the document to be assigned, and displays it in FileNet IDM Viewer, switches to SAPGUI, to complete the linking process.

There are several ways to select a document for assignment. Each way is implemented as a View. The standard Views shipped with IDM Desktop for R/3 are:

- FileNet Browse for R/3: Allows the user to browse through the folder hierarchy of IS or CS, with a Microsoft Explorer-style interface.
- FileNet Queue for R/3: Allows the user to access the contents of a FileNet queue, which holds documents that are ready for processing in an SAP system.

These Views provide flexible ways of finding or creating documents for linking.

DWSAP enables the user to write a custom View, which IDM Desktop for R/3 can use along with the standard Views. The Programmer's Handbook discusses the concepts involved in writing an own View and lists the interfaces, methods, and parameters the custom View supports.

Linking SAP Master Objects

The Document Management System (DMS) interface provided by an SAP system connects external documents, folders, and objects from FileNet repositories, with master data within an SAP system. Master data refers to a material master, an equipment master, or a customer master. Different dynamic link libraries delivered with DWSAP release 5.1 provide this functionality. The sample applications of DWSAP release 5.1 to illustrate the use of DMS objects are:

- Thick Client: IDM Desktop for R/3 is delivered with an out-of-the-box application to link FileNet objects with SAP material master records. This functionality is available through DMS menu integrated with the view FileNet browse for R/3.
- Thin Client: DMS sample Web application is delivered with DWSAP release 5.1 server components. It enables to link FileNet objects with SAP material master. The DMS components are packaged as a part of server Add-on. The sample application can be accessed through a URL.

3
Installation of IDM Desktop for R/3

IDM Desktop for R/3 components complements the SAP ArchiveLink module in integrating FileNet and SAP R/3 system, on a client workstation. IDM Desktop for R/3 components provide an interface, through which ArchiveLink accesses the FileNet services and, if needed, other viewer such as IDM Viewer application.

With DWSAP release 5.x, it is possible to work with three client scenarios:

- Thick client: In this scenario, SAP R/3 system's Graphical User Interface (SAPGUI) and IDM Desktop for R/3 is installed on the client machine. Communication between SAPGUI and IDM Desktop for R/3 occurs through Object Linking and Embedding (OLE) interface.
- Thin client: In this scenario, SAPGUI is installed on the client machine. DWSAP thin client component has to be down loaded. IDM Desktop is not installed on the client machine. This scenario supports only display of documents in a browser. Communication between SAPGUI and DWSAP client components occurs through OLE interface.
- Pure thin client: In this scenario, only SAPGUI is installed on the client machine. No IDM component, or DWSAP client component is required on the client machine. Communication between SAPGUI and DWSAP server components installed on the Web server occurs directly through HTTP.

The subsequent sections explain how to install and configure thick client IDM Desktop for R/3, and thin client environments.

Prerequisites to Install IDM Desktop for R/3

Hardware

The minimum hardware requirements are:

- P III processor
- 256 MB RAM.
- 34 MB hard disk space for installation.

Software

The software requirements are:

- Windows 2000 with Service Pack 2 or 3/ Windows XP.
- TCP/IP networking protocol.
- IDM Desktop 3.2.
- SAPGUI 4.x.
- Capture 4.0 in case FileNet Capture is used.

The DWSAP has been qualified to run with:

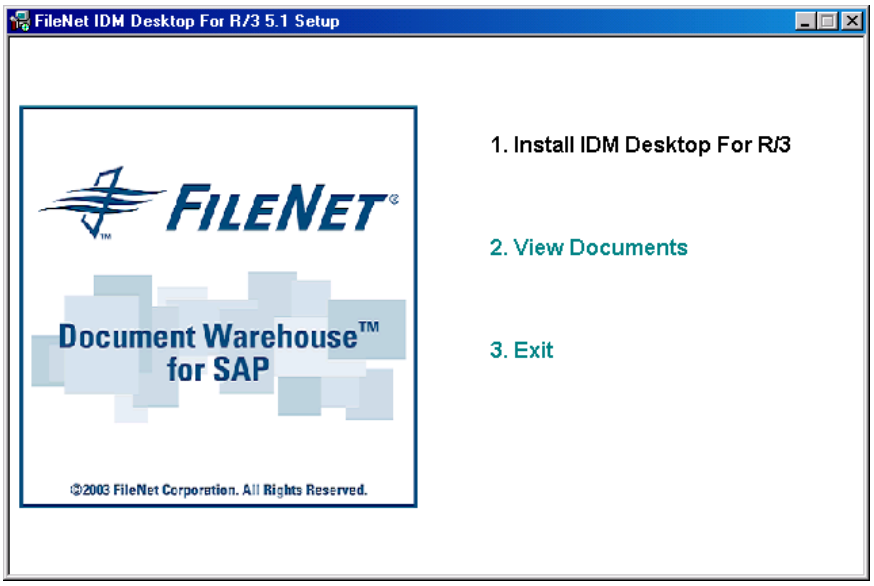
- Image Services 3.6.0.
- Content Services 5.2.

***Tip**: To access FileNet Services, IDM Desktop should be installed prior to installing IDM Desktop for R/3. If IDM Desktop is not installed, the installation program for IDM Desktop for R/3 will abort, with an appropriate message.*

Installation process

The installation program for IDM Services for R/3 is a GUI-based application. This application copies the program files to the target machine, registers the programs, and creates appropriate entries in the Start menu of Windows.

1. Click the **setup.exe** to begin installation. Following screen is displayed:



2. The following options are provided:

   a Install IDM Desktop for R/3.

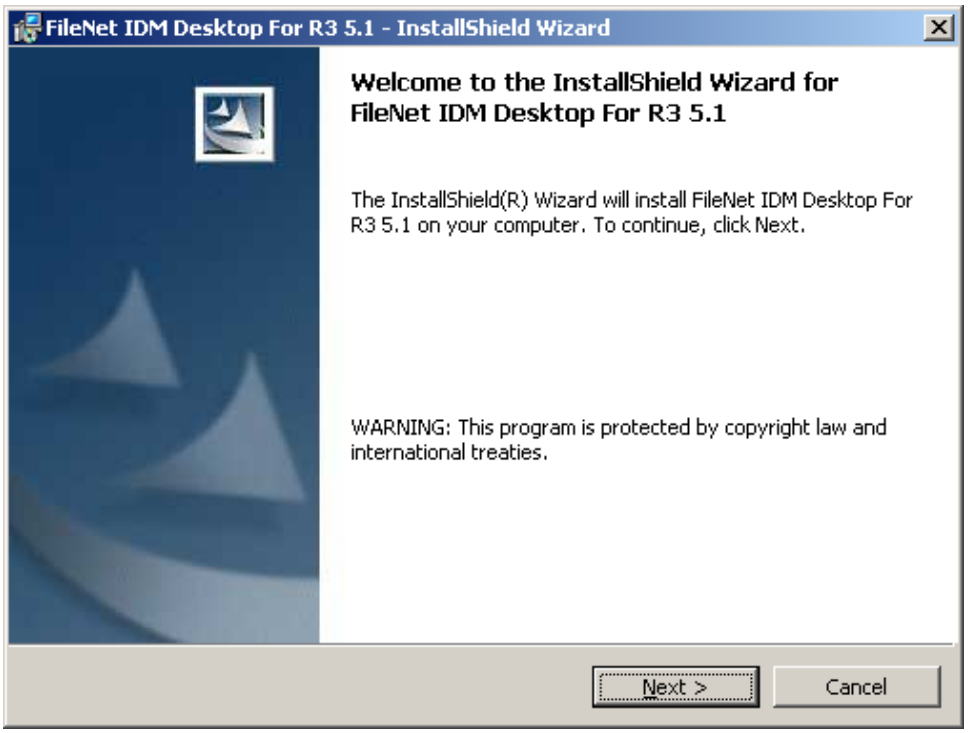
b View Documents: Facilitates the end user to view all DWSAP documents.

c Exit: Enables the end user to exit from the setup program.

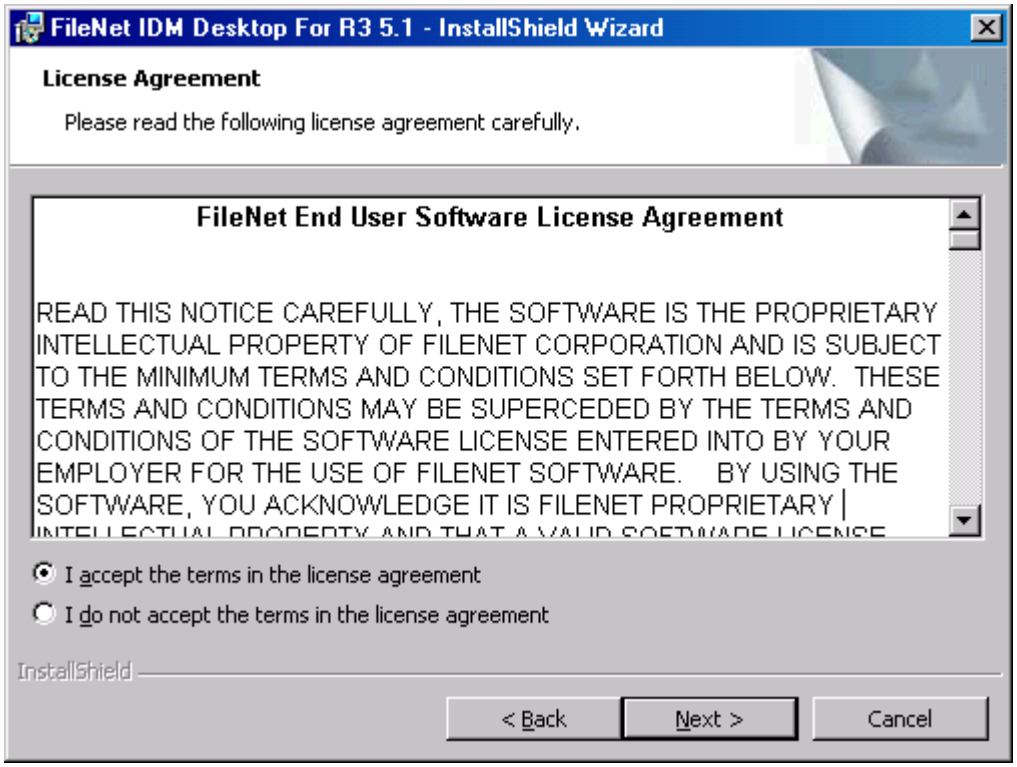
Install IDM Desktop for R/3

To install IDM Desktop for R/3:

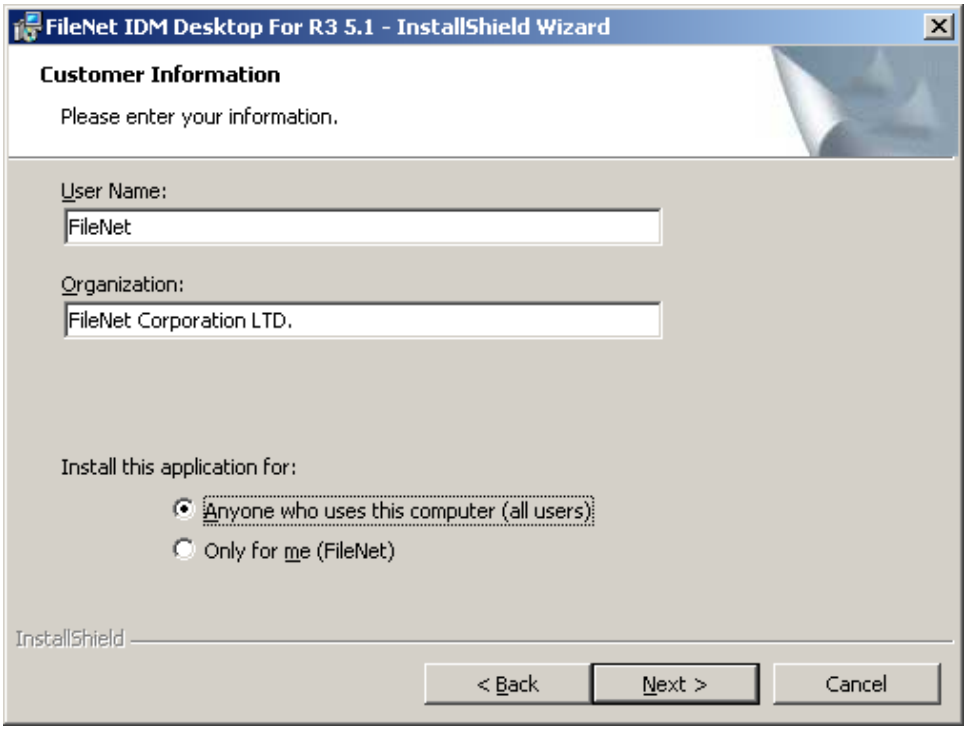
1. Click the **Install IDM Desktop for R/3** option in the splash screen. The following screen is displayed:



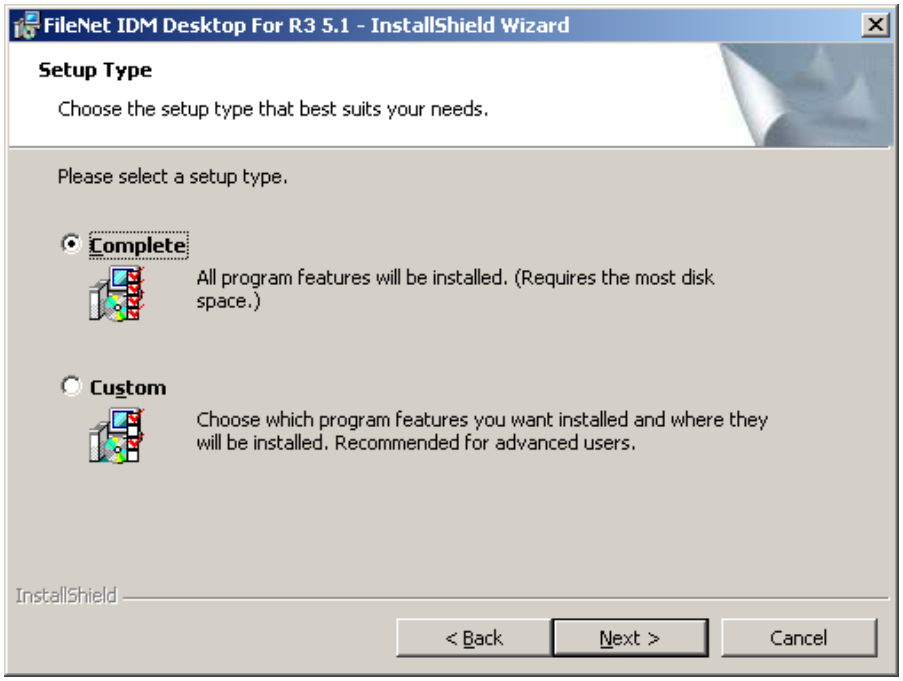
2. To continue, click **Next**. The following screen is displayed:



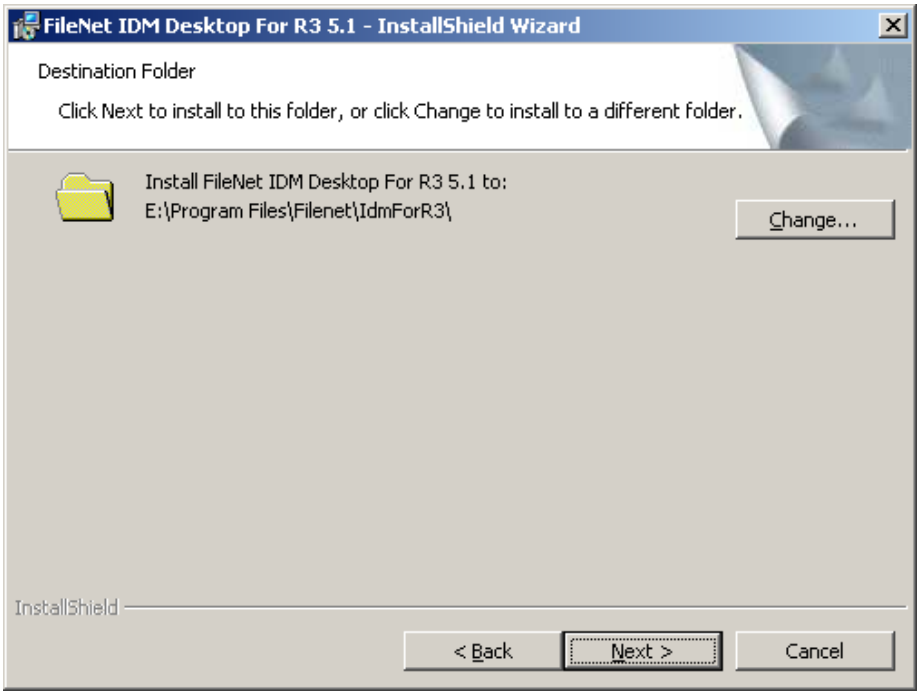
3. Accept the agreement and click **Next** to continue. The following screen is displayed:



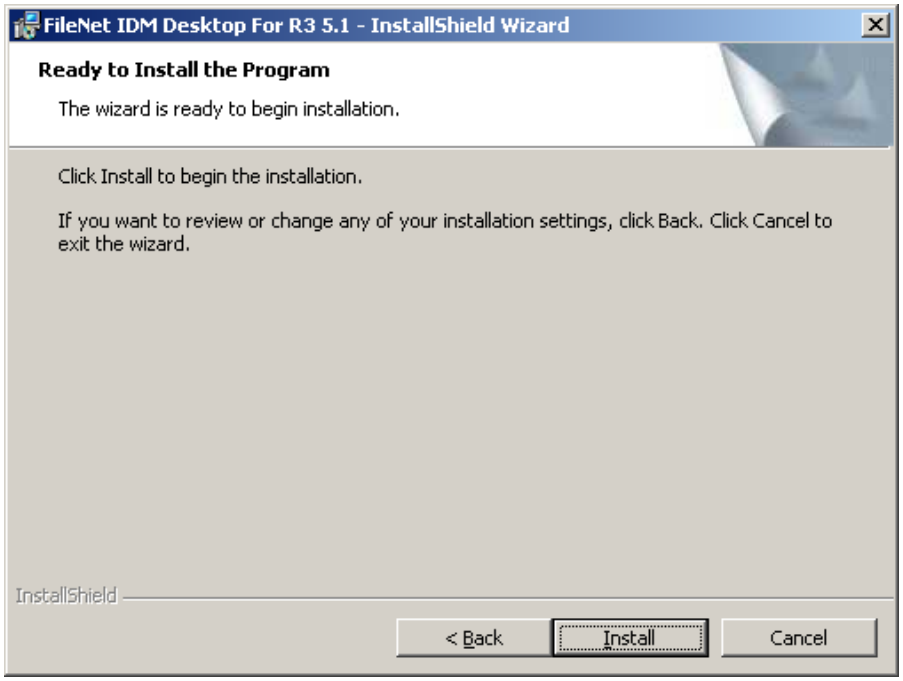
4. Verify that the entries in the Customer Information screen are correct. Click **Next** to continue. The following screen is displayed:



5. Select **Complete** option to install all IDM Desktop for R/3 components; else choose **Custom** option to install specific IDM Desktop for R/3 components. Click **Next** to continue. The following figure is displayed:

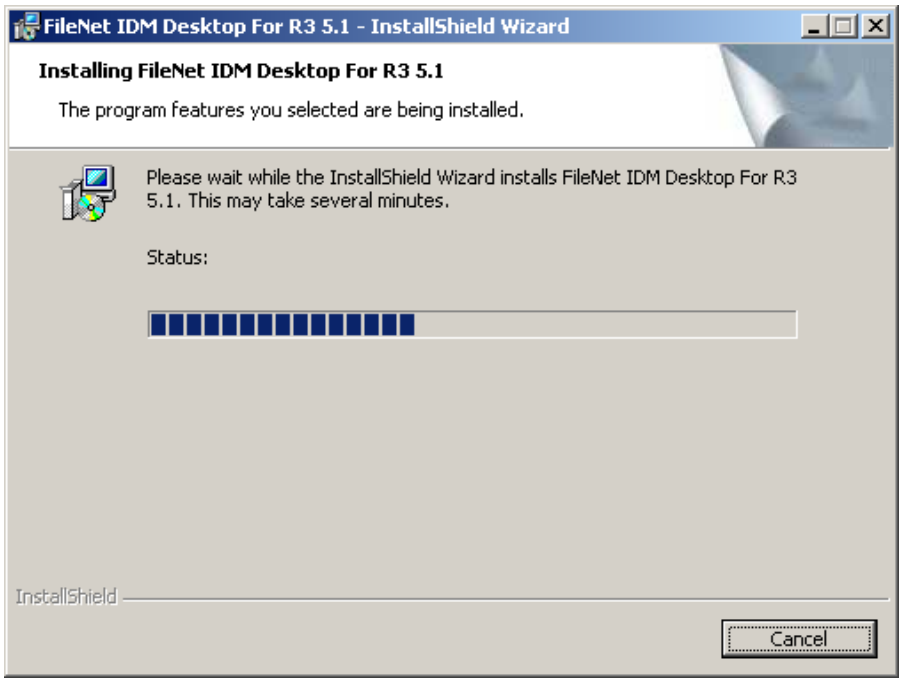


6. Change the installation folder if required. Click **Next** to continue. Following screen is displayed:

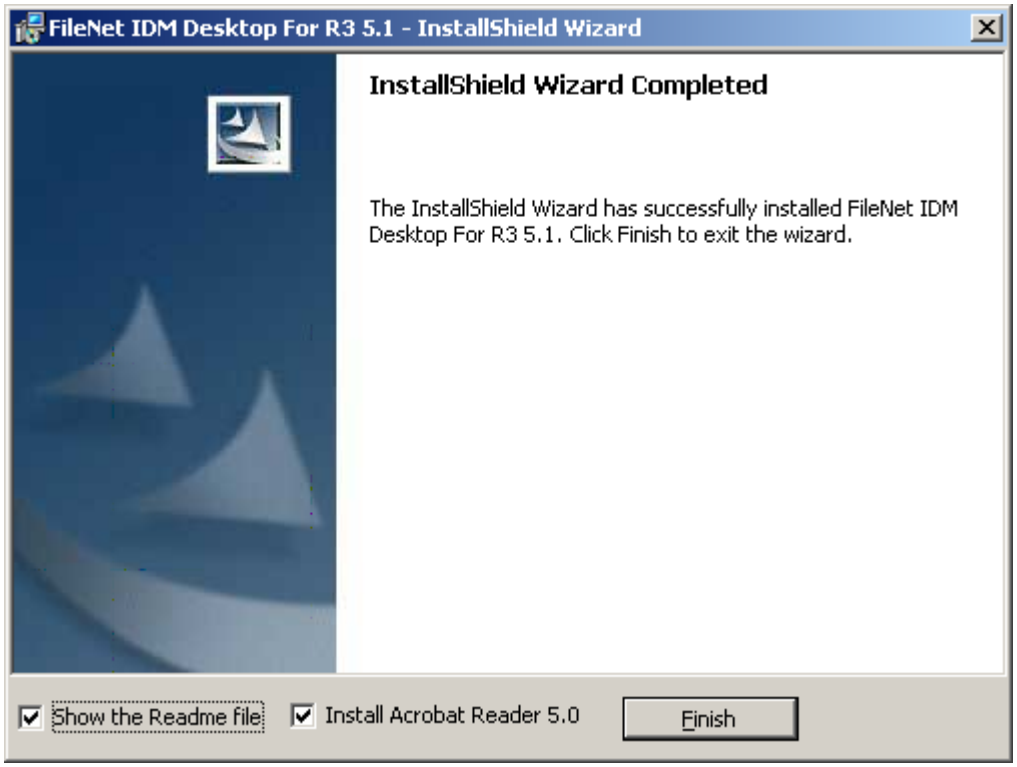


***Tip**: Until this point each screen allows the end user to cancel the installation, which would leave the system as it was before the installation program had been invoked.*

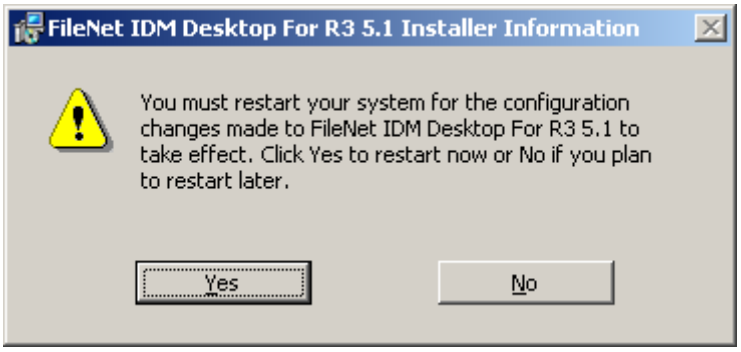
7. Click **Install** to continue. The following screen is displayed:



8. After the installation is completed, following screen is displayed:



9. Click **Finish** to continue. The following screen is displayed:



10. To complete the installation, click on **Yes** to restart the server.

Note: After installation is successfully completed, the configuration tool should be used to create the necessary settings for IDM Desktop for R/3 components.

Silent Installation

A silent installation requires no user input; all dialogs and messages are suppressed. Silent install is supported for new installations only and it is invoked through the command line options of the windows installer executable Msiexec.exe, which is an executable program that interprets packages and installs products. Therefore, Microsoft Windows Installer should be installed on the client machine.

To perform a silent Installation give the following command at the command line:

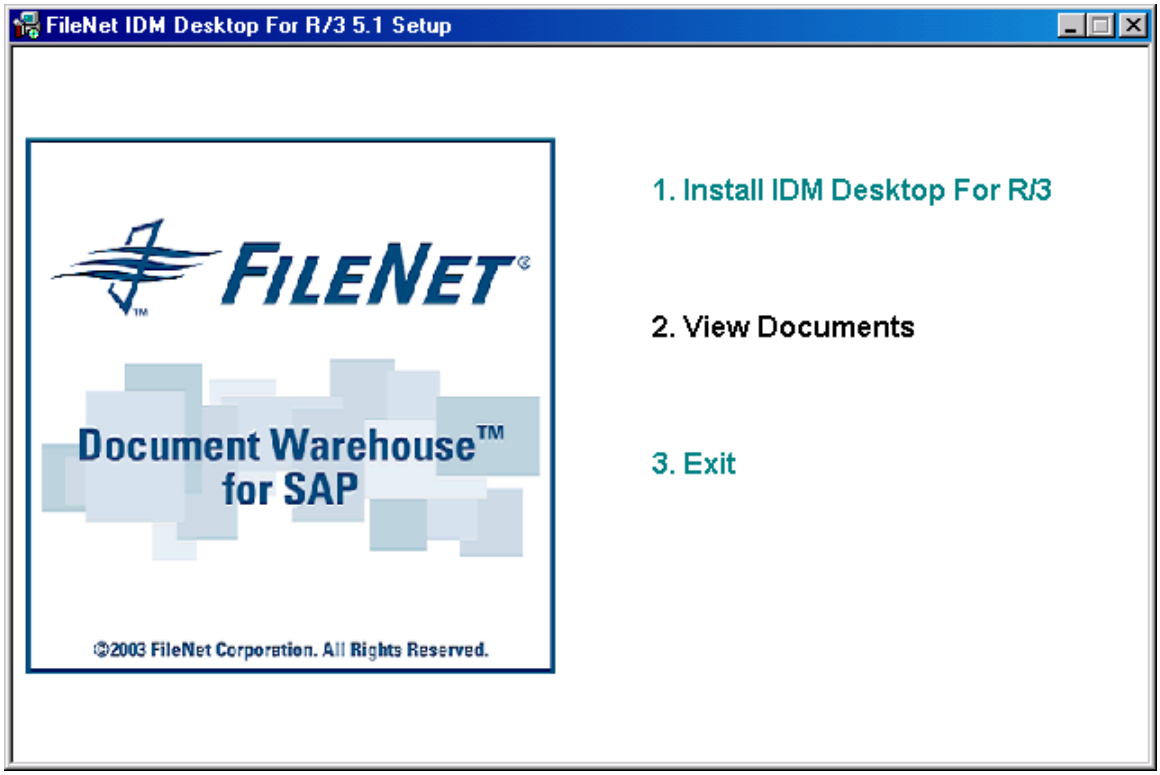
Msiexec.exe /I < complete path and name of the msi package> /qn INSTALLDIR=<path where the product should be installed> INSTALLLEVEL= < installation level of the product features> /L <path of the installation log file>*

INSTALLDIR and INSTALLLEVEL are the two properties of the package that can be set from the command line INSTALLDIR specifies the path where the product should be installed. INSTALLLEVEL specifies that features having an INSTALLLEVEL greater than what is specified at the command line will not be installed. In order to install the IDM For R/3 Capture the INSTALLLEVEL should be specified at the command line and it should be greater than 105 otherwise the capture CIM will not be installed.

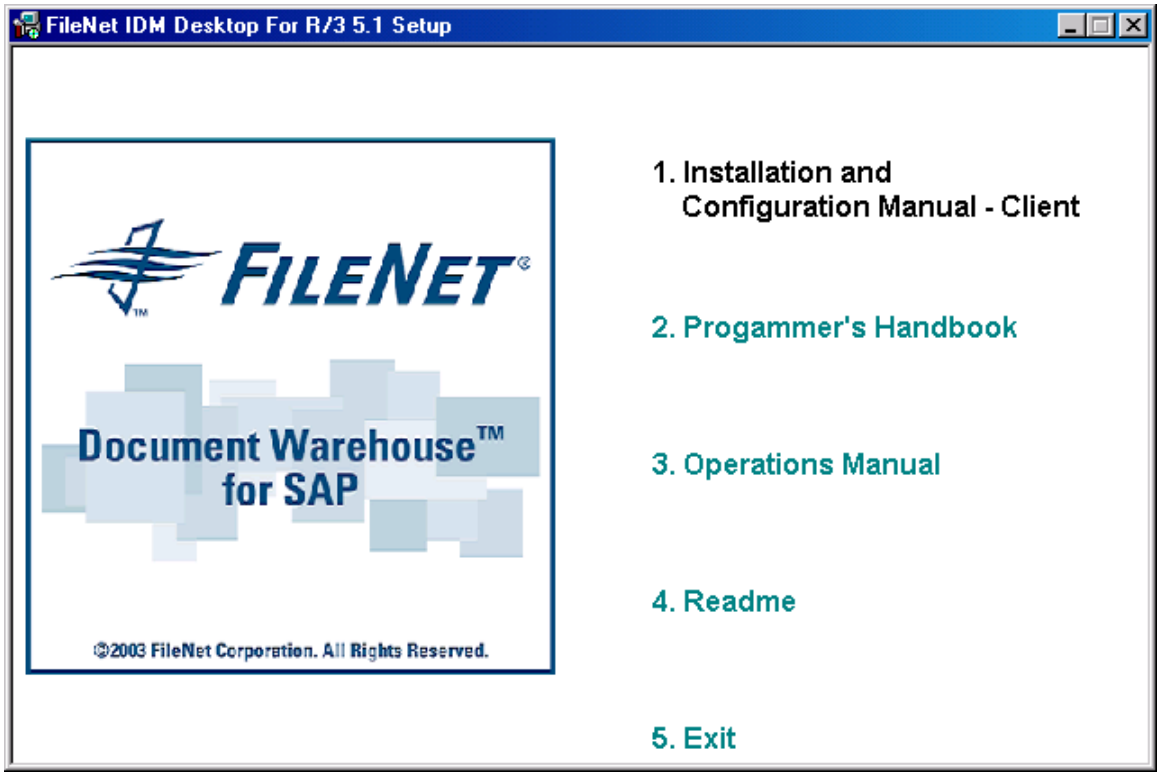
Include any white spaces and special characters in any of the strings between quotation marks ("").

CAUTION: When installing the product through the command line, some of the options like show readme and Install Acrobat Reader are not available. Once the installation is complete, the client machine reboots automatically closing any open applications. The rescheduling of reboot of machine is not possible.

View Documents



1. Click **View Documents**. The following screen is displayed:



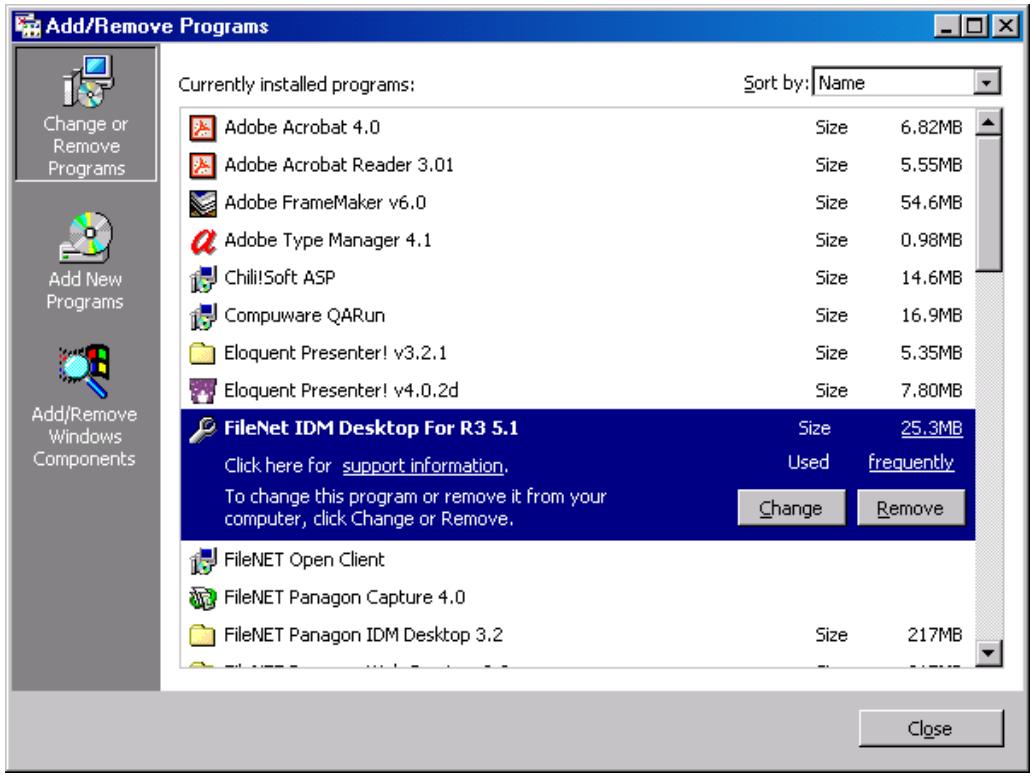
2. Click on appropriate option to view documents.

Note: To view all DWSAP documents **Acrobat Reader** must be installed on the system.

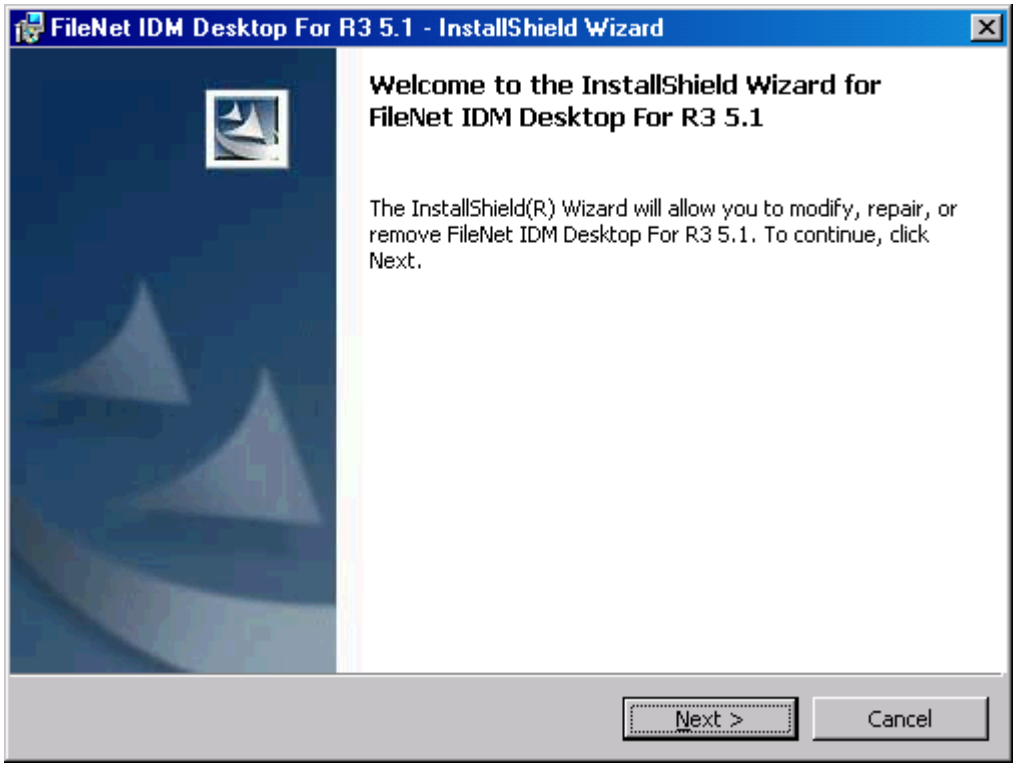
3. Click **Exit** to go back to the previous screen.

Modification of IDM Desktop for R/3

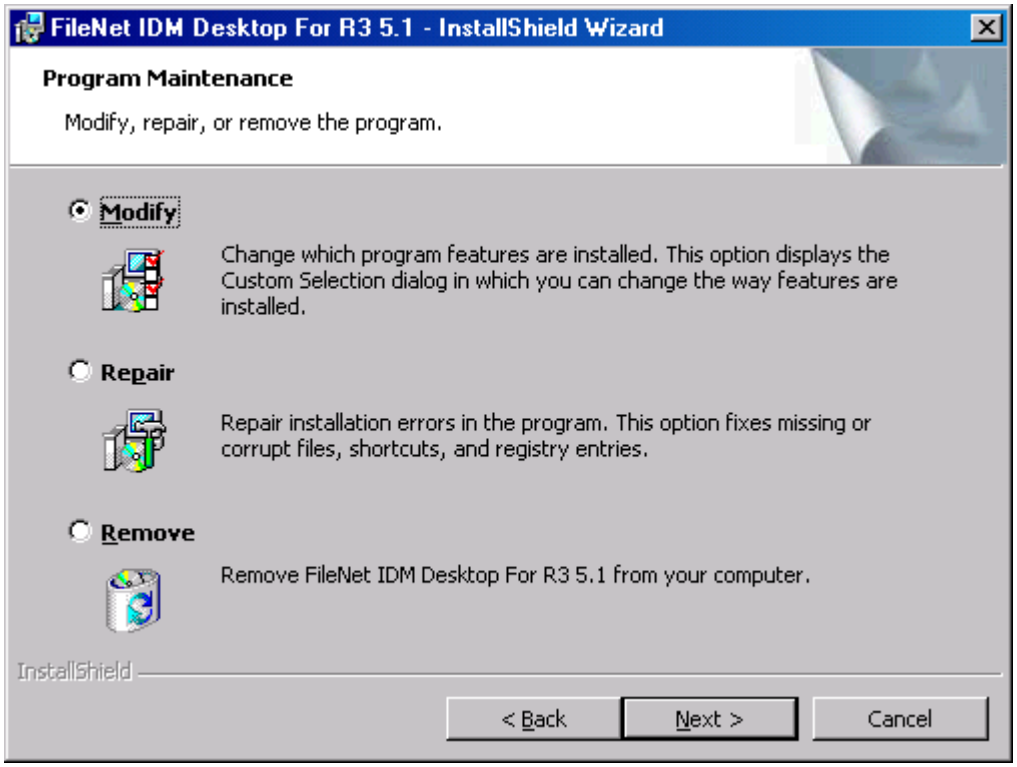
1. Choose the **Add/Remove Software** (Add/remove programs in Windows 2000) program of the Windows control panel. The following screen is displayed:



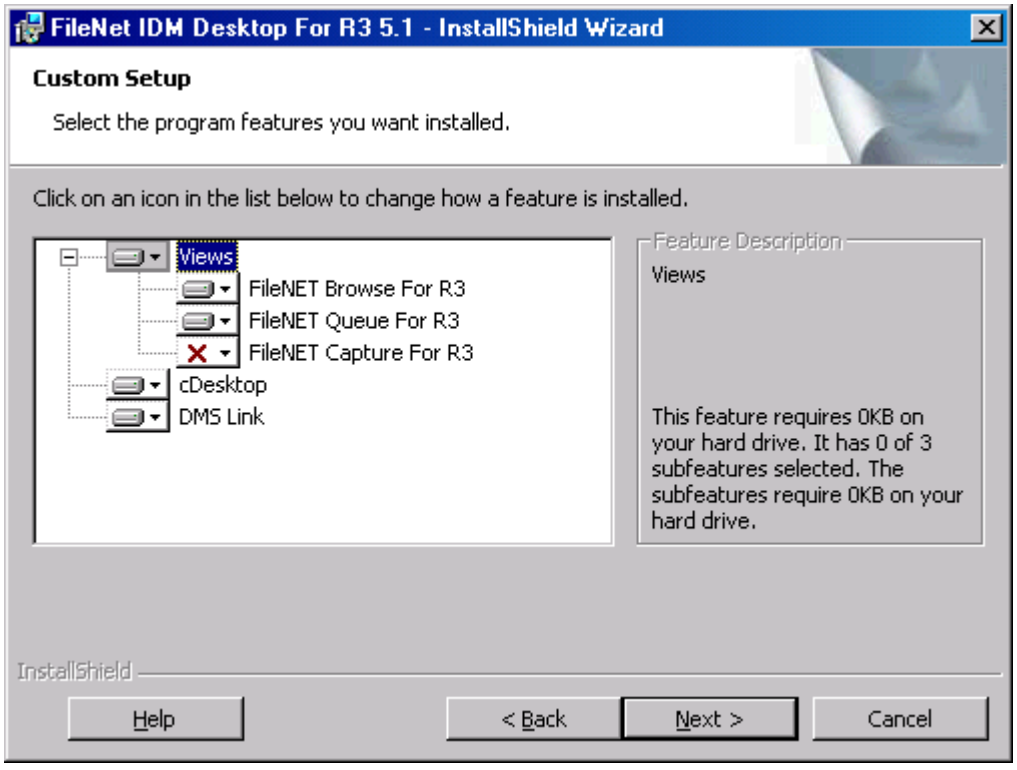
2. Select FileNet IDM Desktop for R/3. Click **Change**. The following screen is displayed:



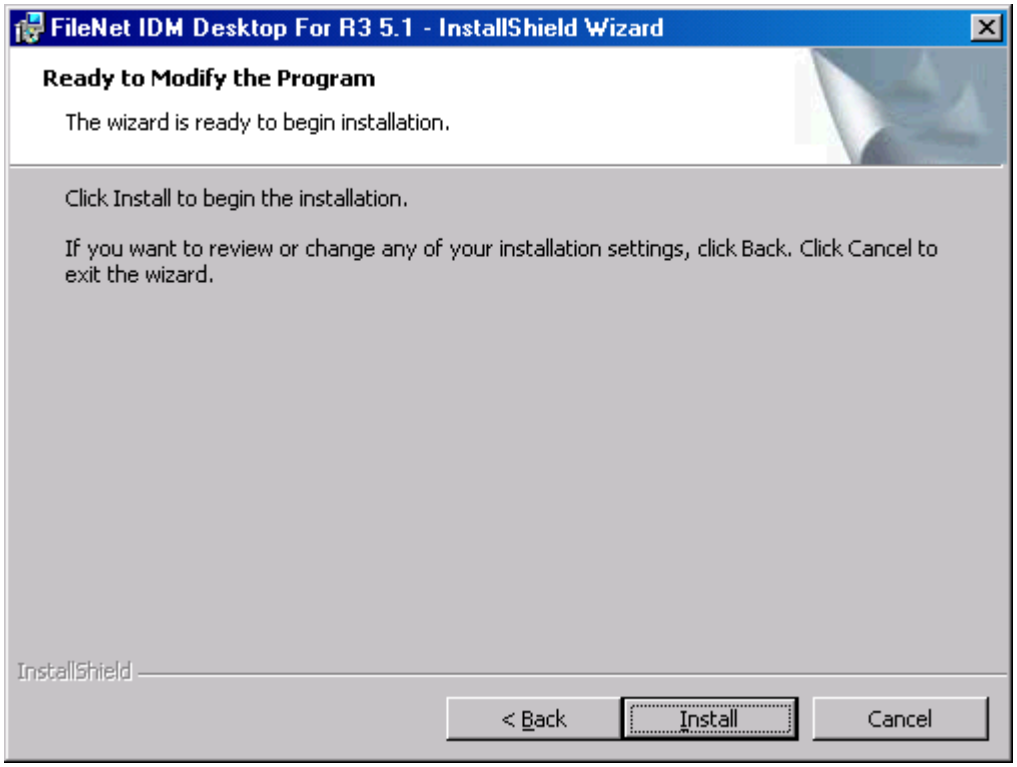
3. Click **Next** to continue. The following screen is displayed:



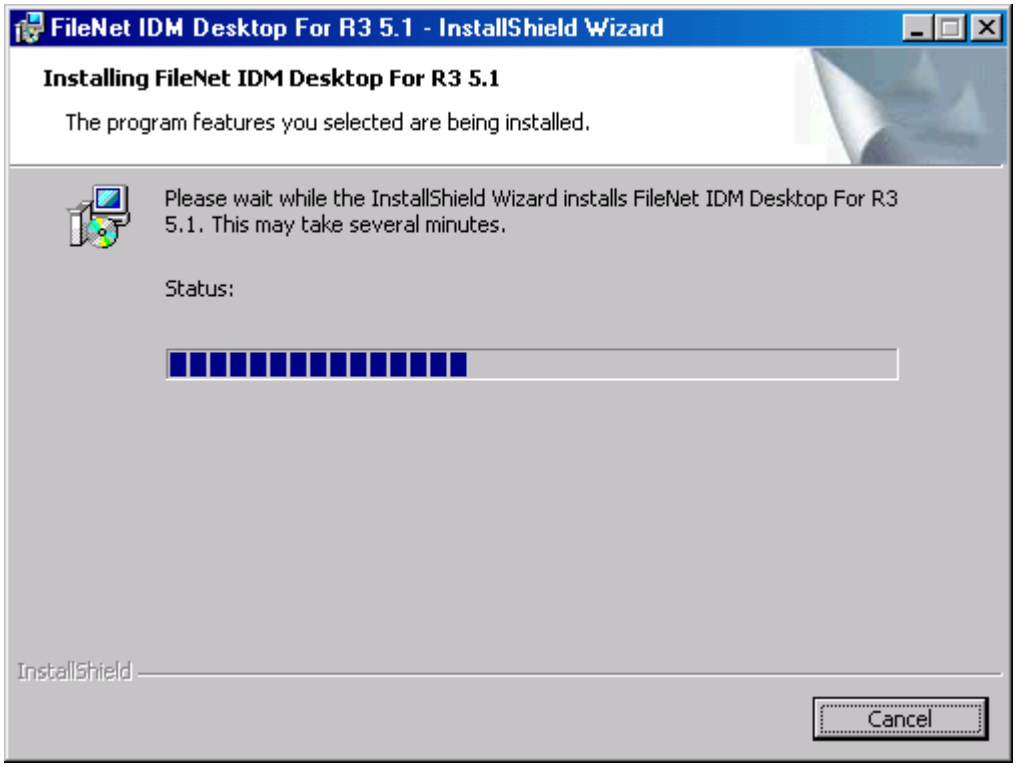
4. Select **Modify** option and click **Next** to continue. The following screen is displayed:



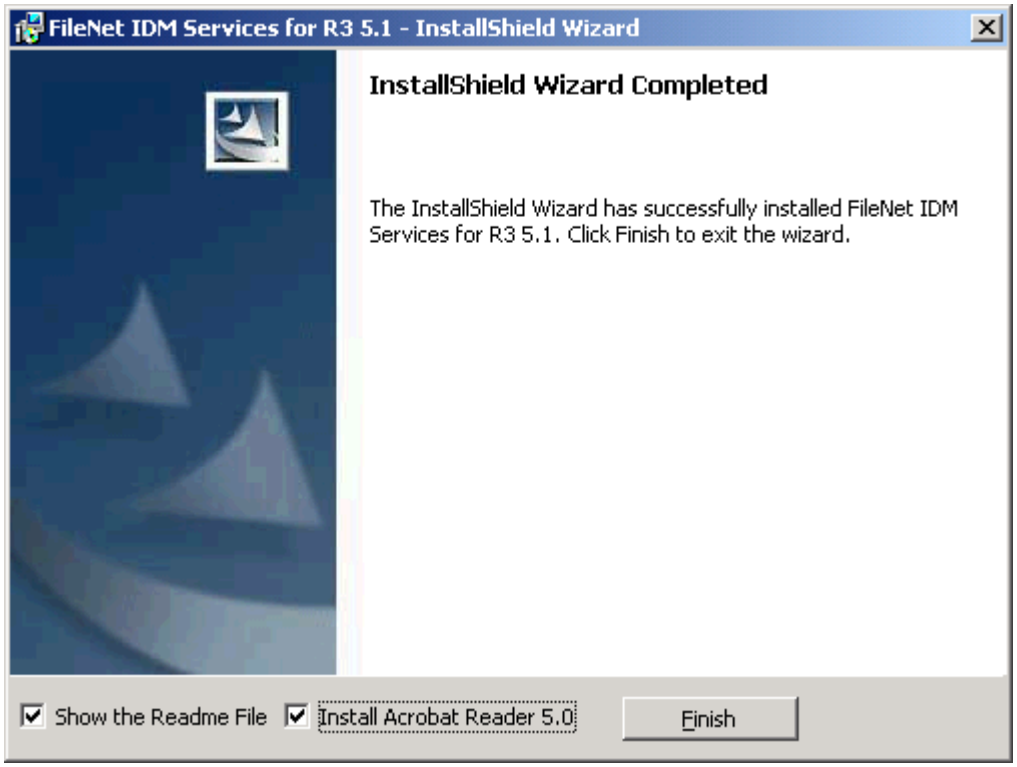
5. Select the features and click **Next** to continue. The following screen is displayed:



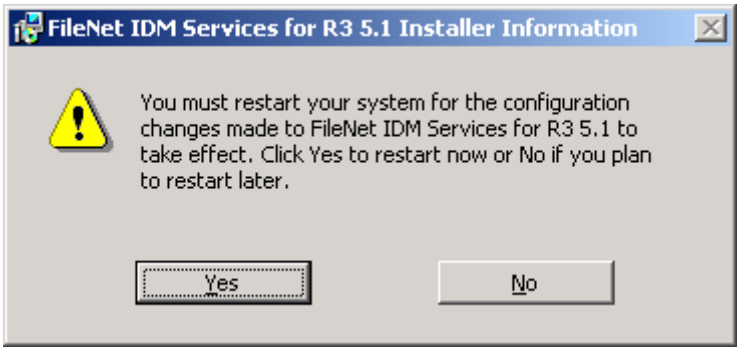
6. Click **Install** to continue. The following screen is displayed:



7. After the installation is complete, the following screen is displayed:



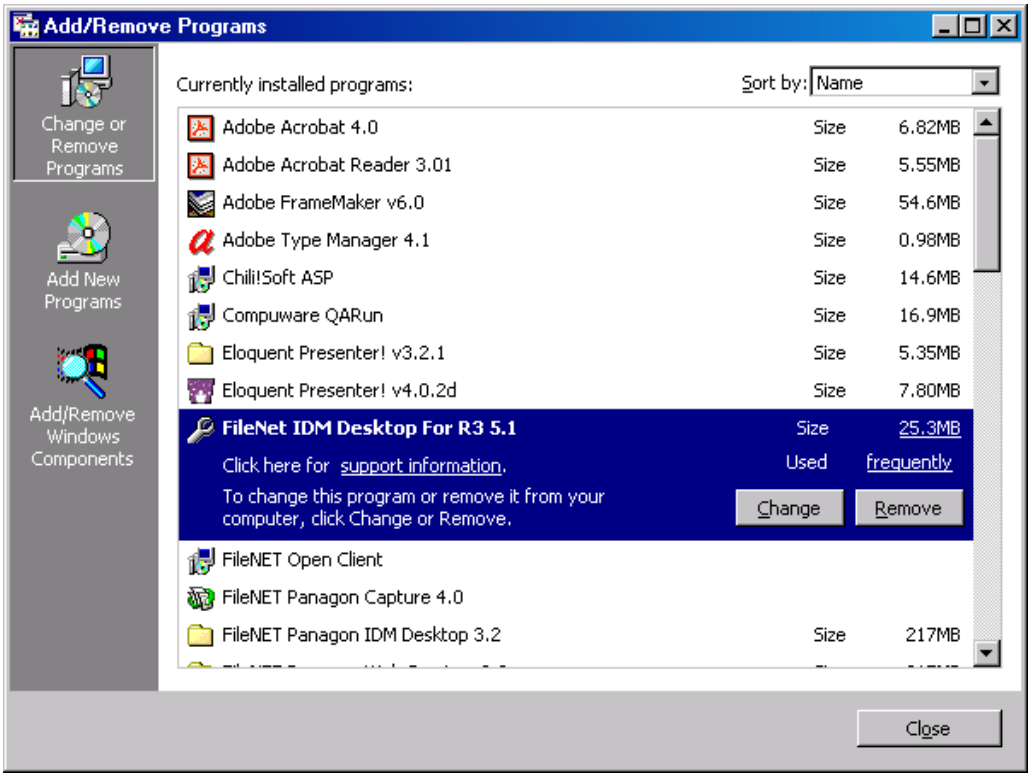
8. Click **Finish**. The following screen is displayed:



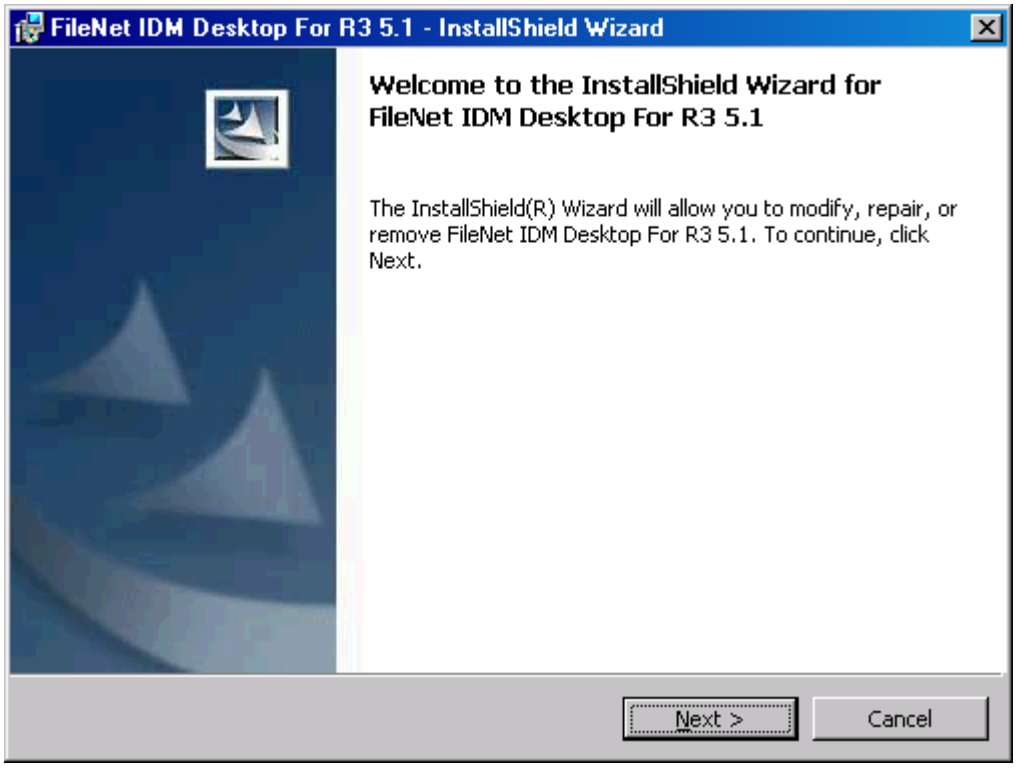
9. To complete the installation, click **Yes** to restart the machine.

Re-installation of IDM Desktop for R/3

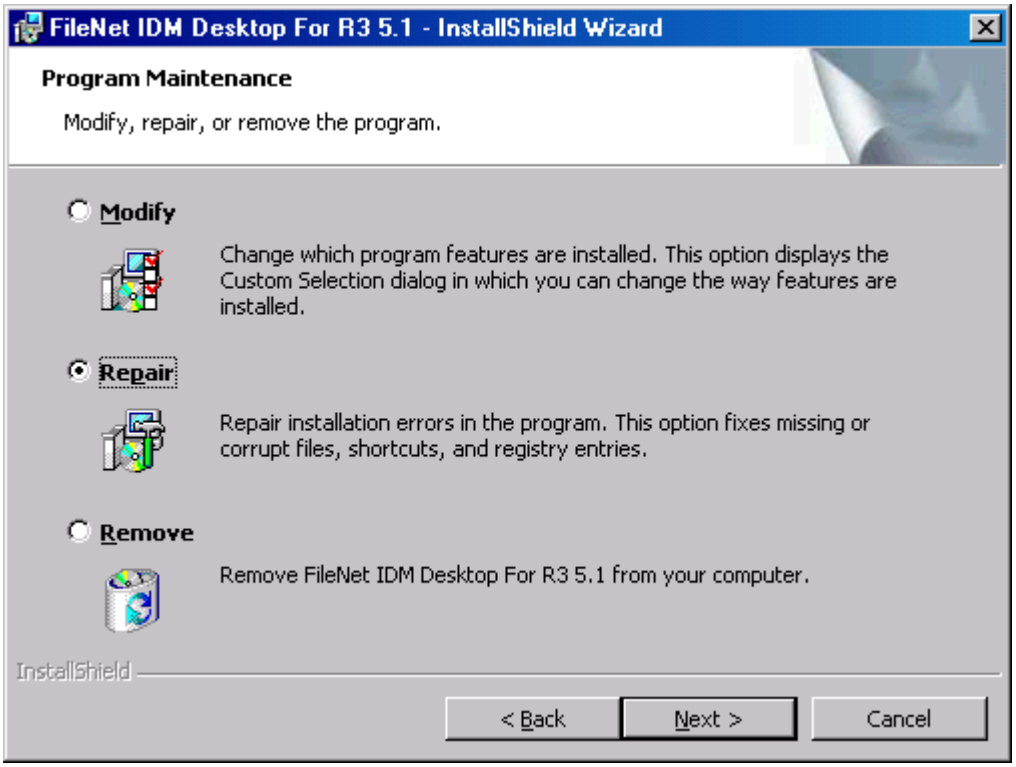
1. Choose the **Add/Remove Software** (Add/remove programs in Windows 2000) program of the Windows control panel. The following screen is displayed:



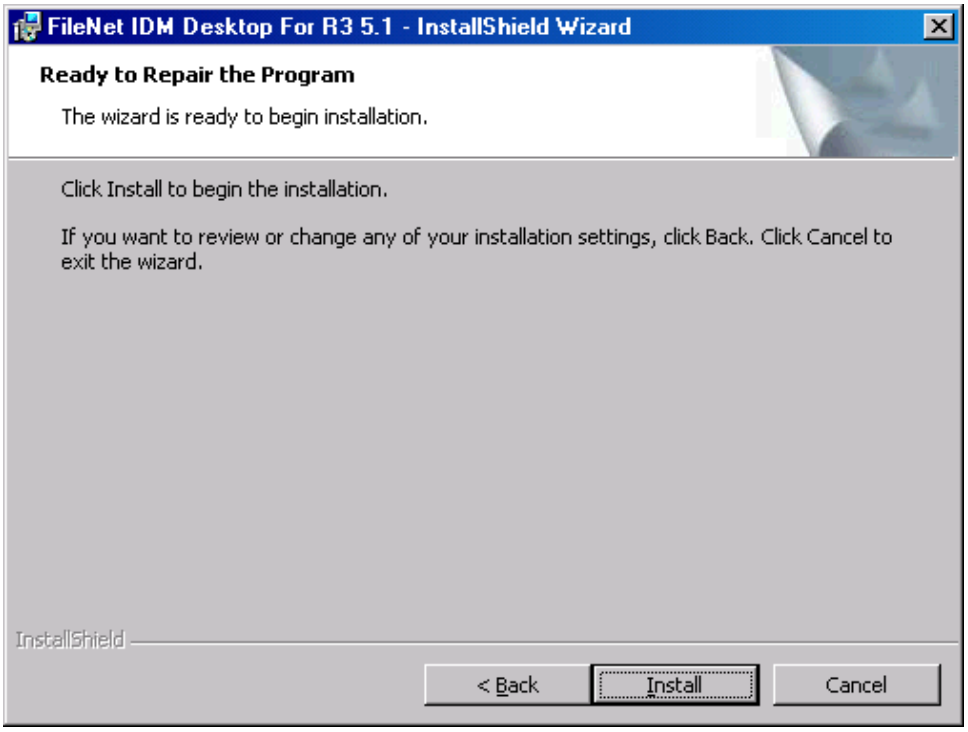
2. Select FileNet IDM Desktop for R/3. Click **Change**. The following screen is displayed:



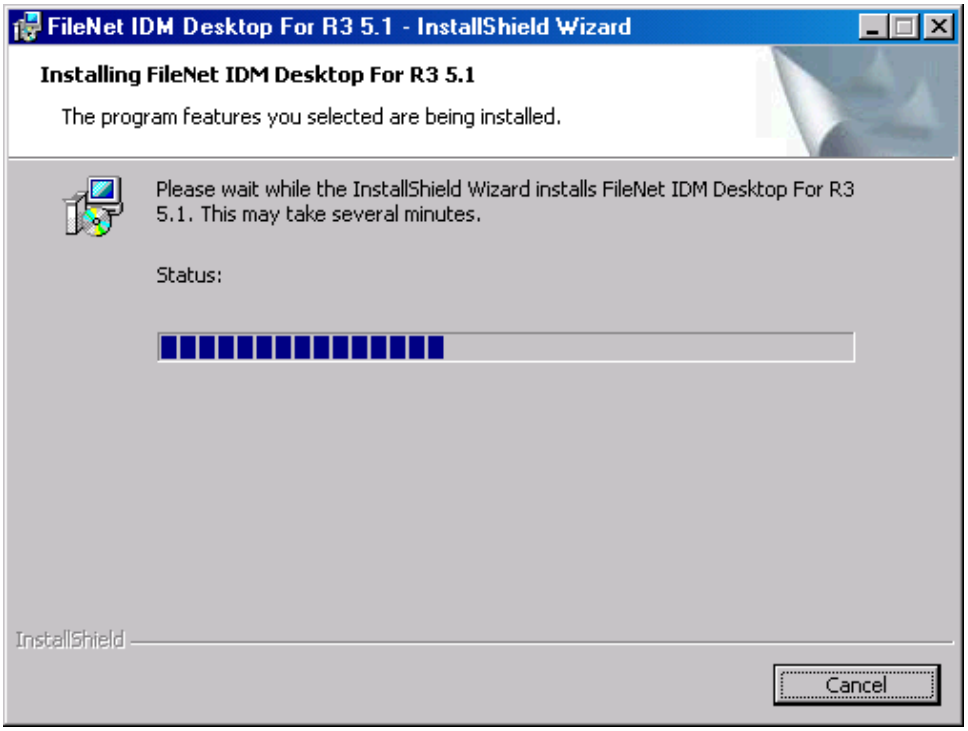
3. Click **Next** to continue. The following screen is displayed:



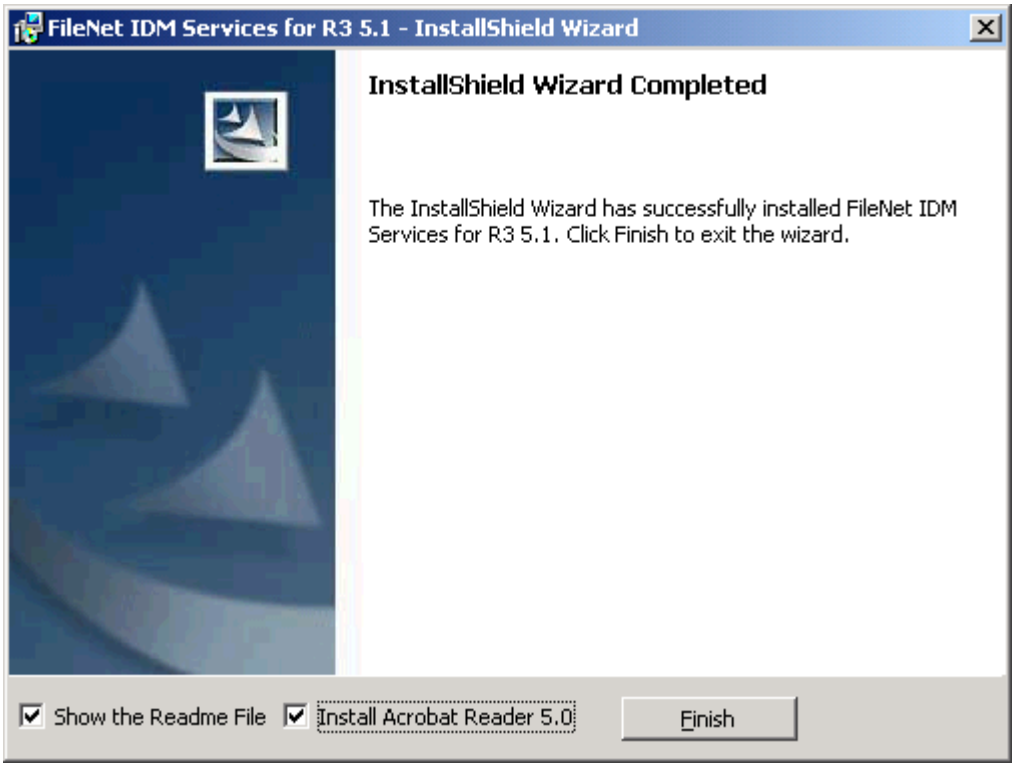
4. Select **Repair** option and click **Next** to continue. The following screen is displayed:



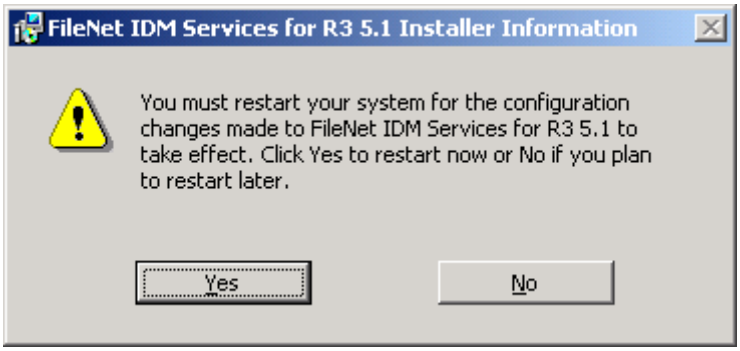
5. Click **Install** to continue. The following screen is displayed:



6. After the installation is complete, the following screen is displayed:



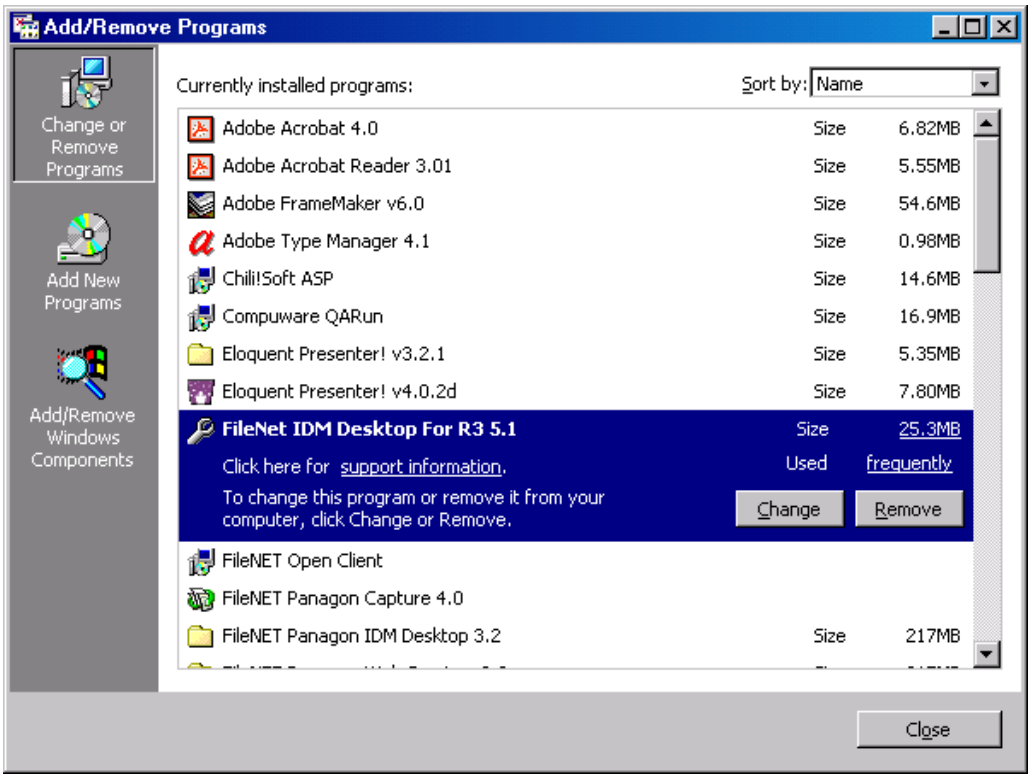
7. Click **Finish**. The following screen is displayed:



8. To complete the installation, click **Yes** to restart the machine.

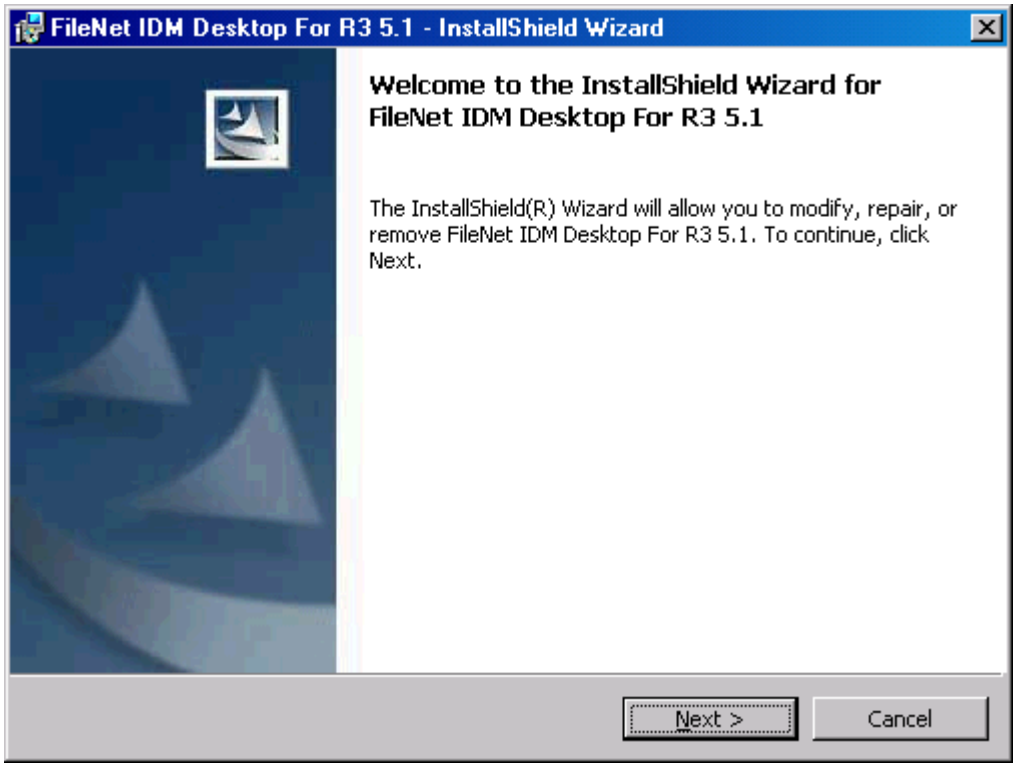
Removal of IDM Desktop for R/3

Choose the **Add/Remove Software** (Add/remove programs in Windows 2000) program of the Windows control panel. The following screen is displayed:

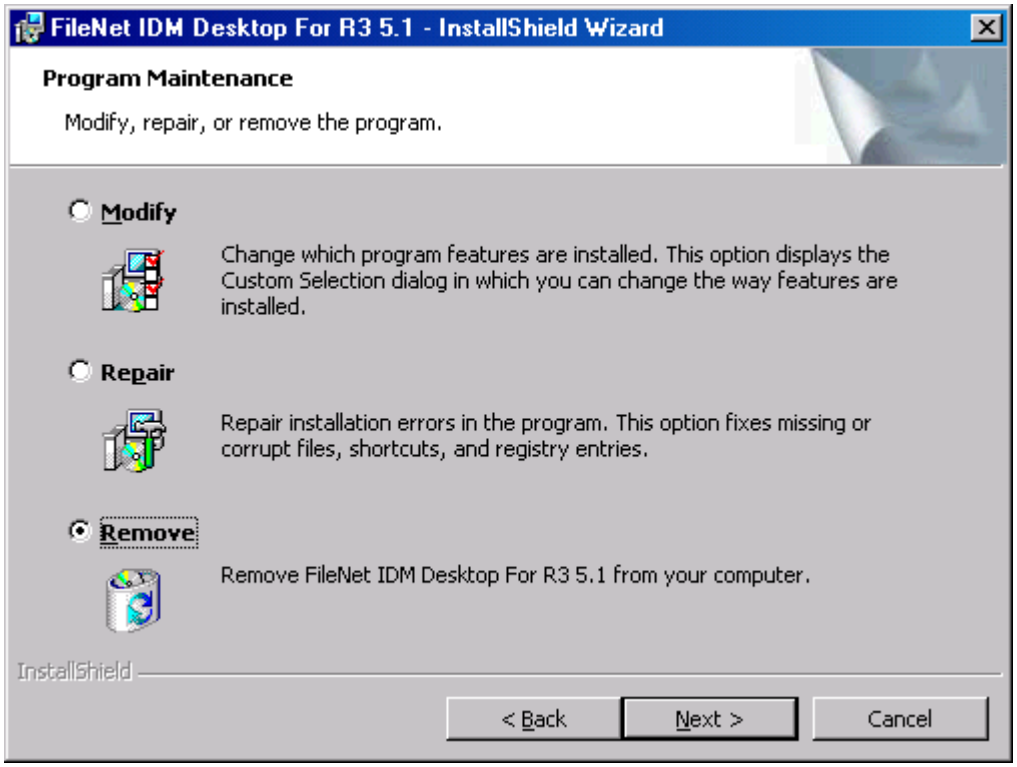


Removal of IDM Desktop for R/3 using Change Button

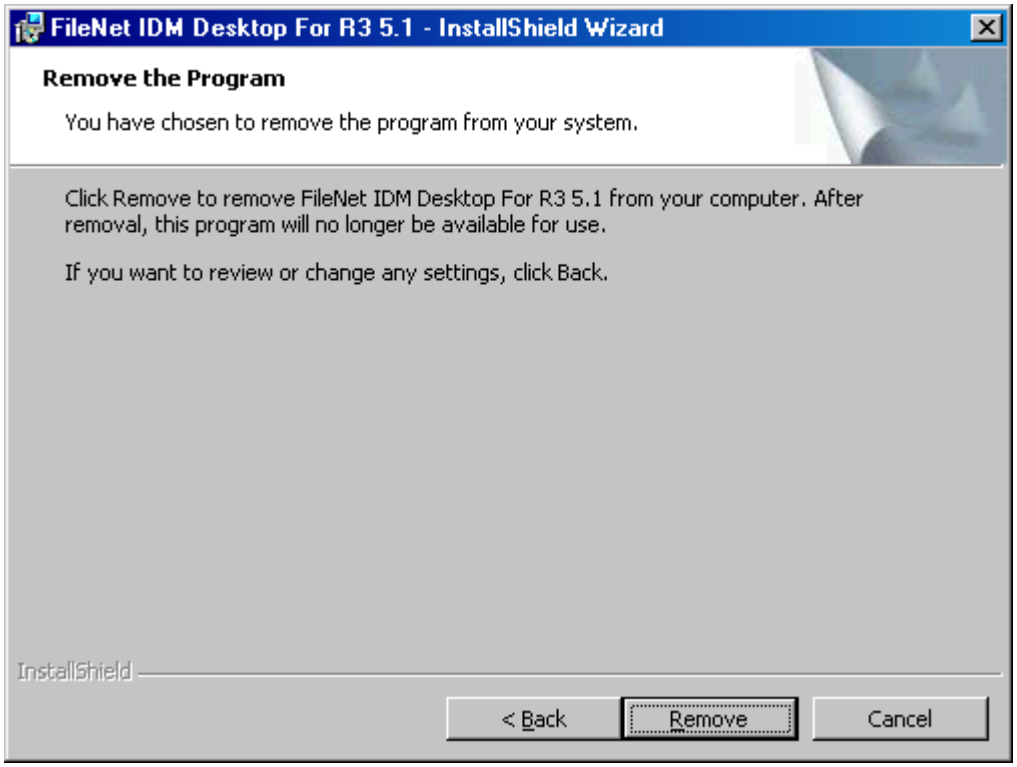
1. Select FileNet IDM Desktop for R/3. Click **Change**. The following screen is displayed:



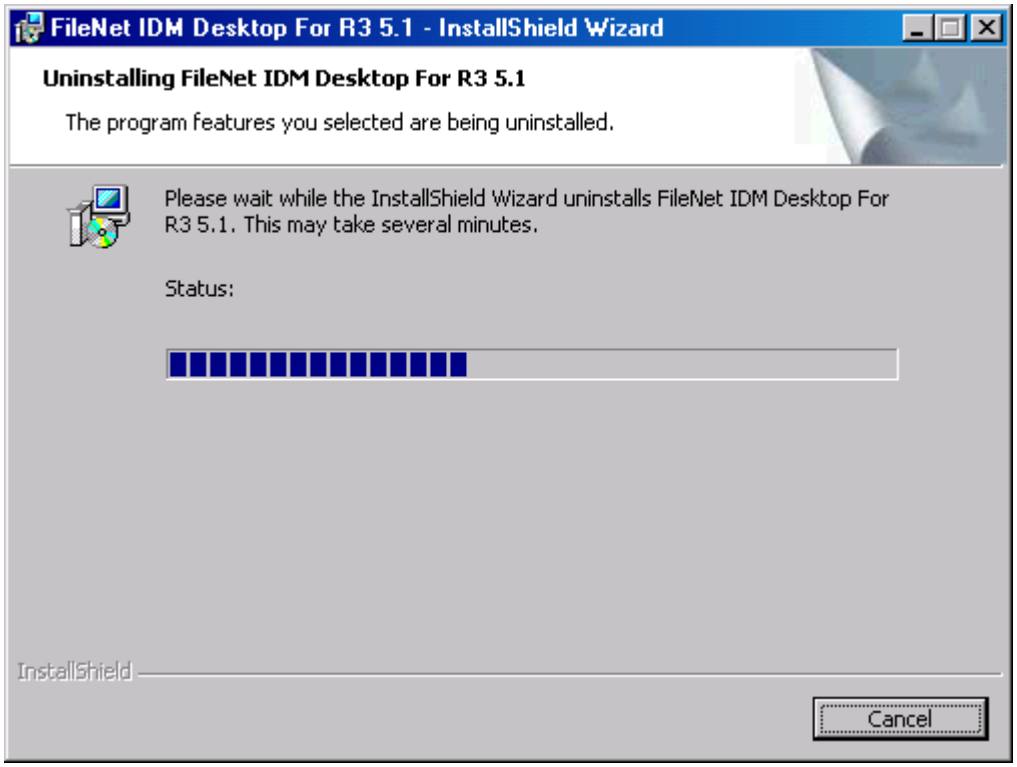
2. Click **Next** to continue. The following screen is displayed:



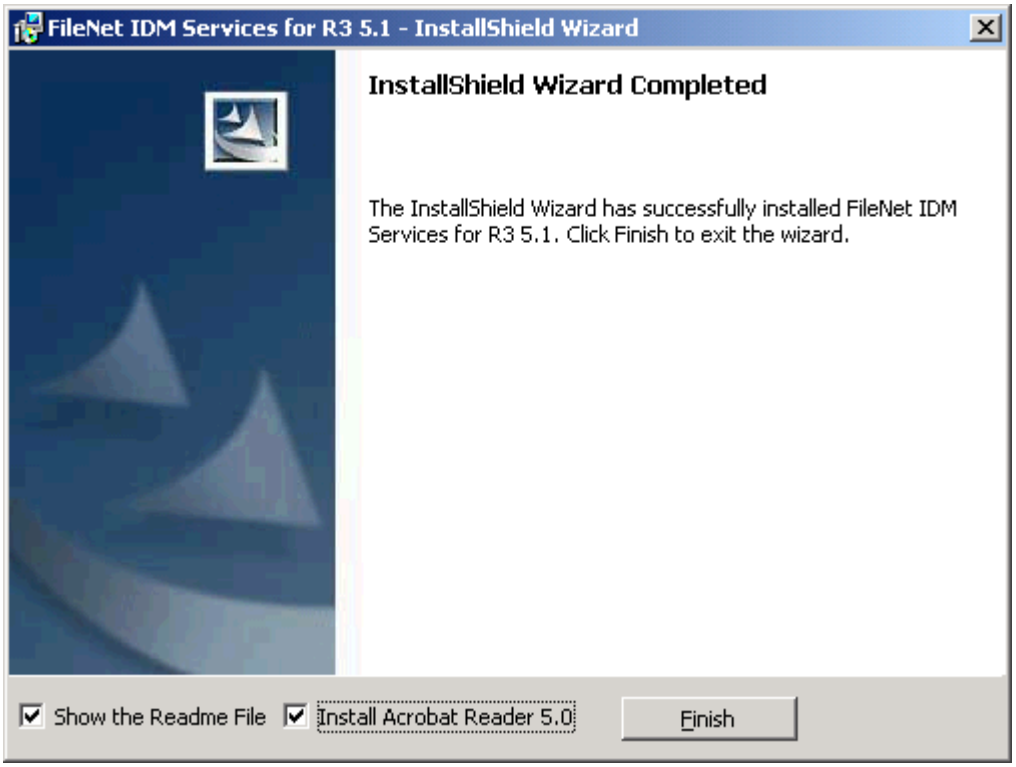
3. Select **Remove** option and click **Next** to continue. The following screen is displayed:



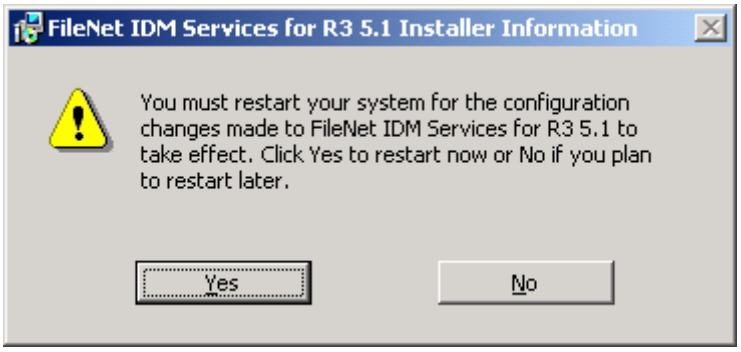
4. Click **Remove** to continue. The following screen is displayed:



5. After the installation is complete, the following screen is displayed:



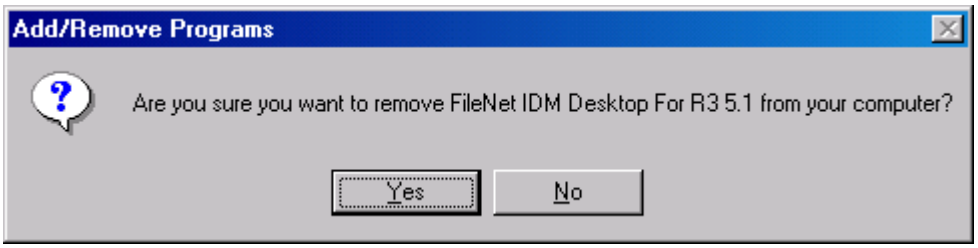
6. Click **Finish**. The following screen is displayed:



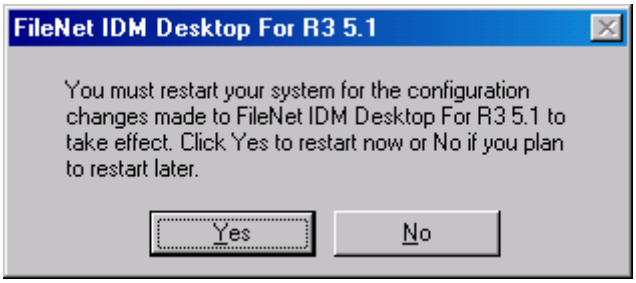
7. To complete the installation, click **Yes** to restart the machine.

Removal of IDM Services for R/3 using Remove Button

1. Select FileNet IDM Desktop for R/3 from Add/Remove program. Click **Remove**. The following message is displayed:



2. Click **Yes** to continue. The following screen is displayed:



3. To complete the un-installation, click **Yes** to restart the machine.

Upgrading from IDM Desktop for R/3 Releases 2.2, 4.0 or 4.01, 5.0, 5.0.1

IDM Desktop for R/3 does not perform automated upgrades from previous releases. If any former releases of IDM Desktop for R/3 are installed on the client, remove these releases using the Add/Remove Software program of Windows Control Panel. Subsequently, follow the installation instructions of IDM Desktop for R/3 release 5.1. For more information on how to install IDM Desktop for R/3, refer to section Installation process.

Prerequisites for SAPGUI/IDMWS Environment

Hardware

The hardware requirements are:

- P III.processor.
- 256 MB RAM.
- 10 MB hard disk space for installation.

Software

The software requirements are:

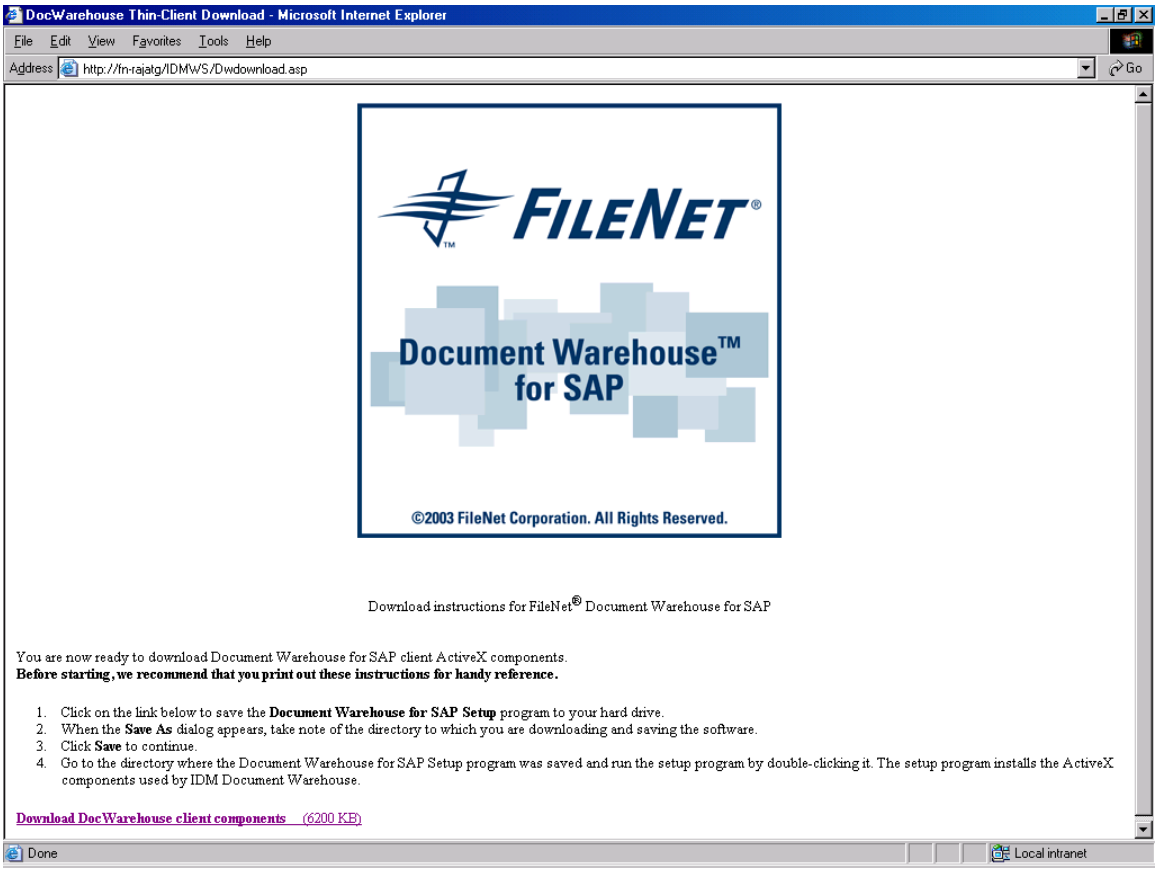
- Windows 2000 with Service Pack 2 or 3/ Windows XP.
- TCP/IP networking protocol.
- IDM Desktop 3.2.
- SAPGUI 4.x.
- Be logged on as a user with Windows 2000 Administrator rights on the machine.
- Check if an access to IDM Services libraries through the local browser is possible using the URL <servername>\idmws.

- Download and install the executable **viewer.exe** of IDM Web services, through the local browser.

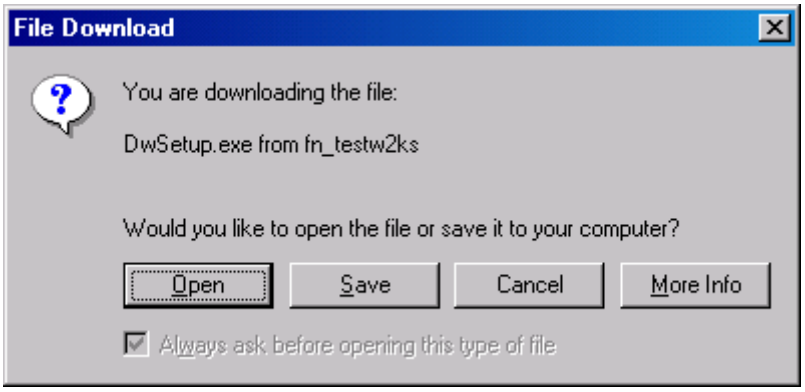
Installation process

To use the client in a Web-based environment:

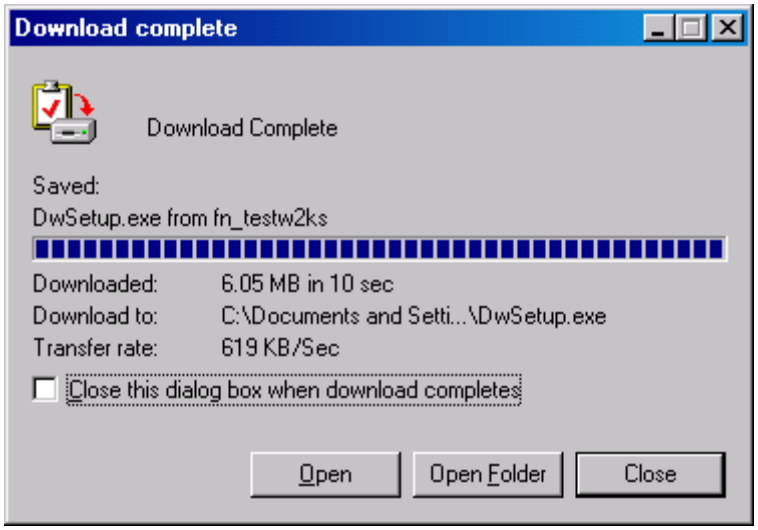
1. Open a local Internet browser and use the URL <servername>\idmws\dwdownload.asp. The following screen is displayed:



2. Click the link **Download DocWarehouse client components**. The following screen is displayed:

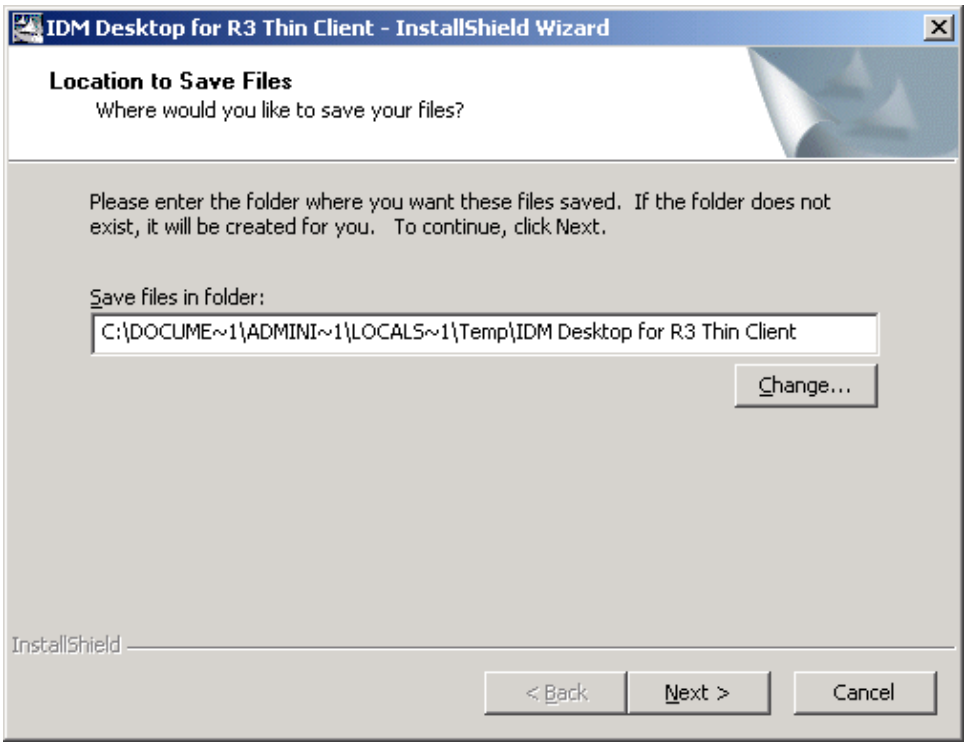


3. Click **Save** to save DWSAP client Activex components. The following screen is displayed:

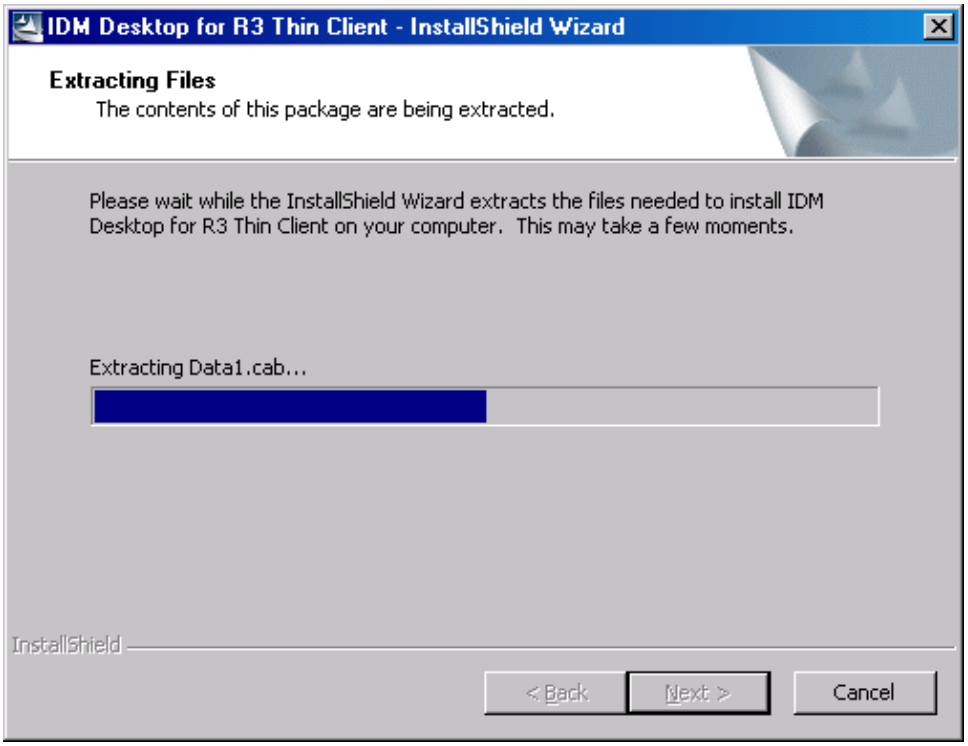


4. Click **Close** to close this dialog box.

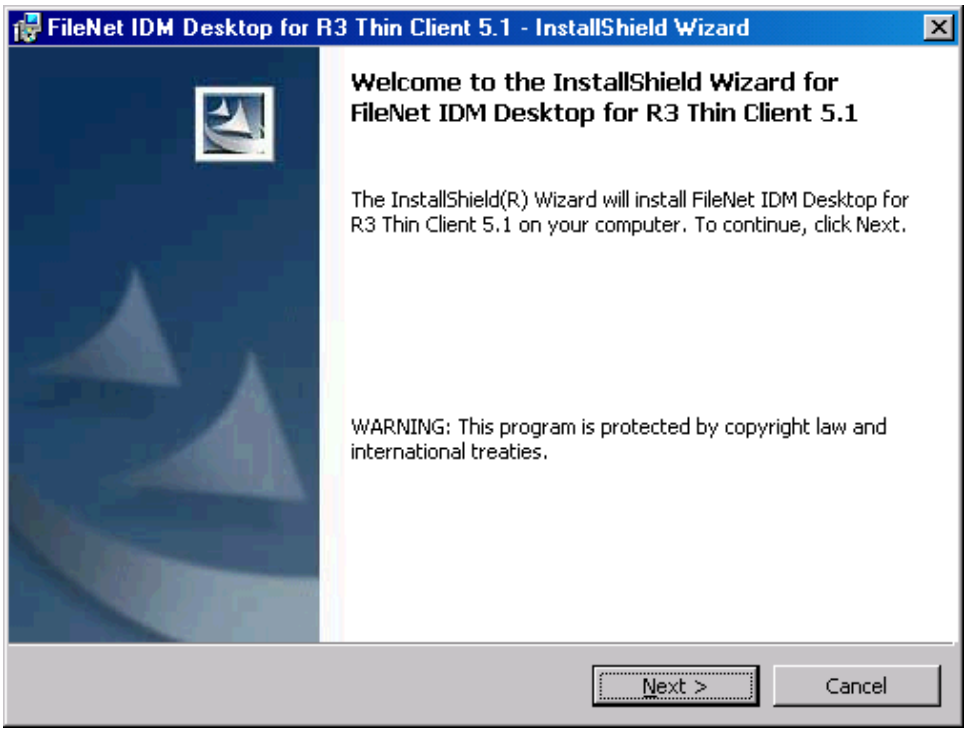
5. To start the installation program, run **Dwsetup.exe** from the directory where the downloaded client components are stored. The following screen is displayed:



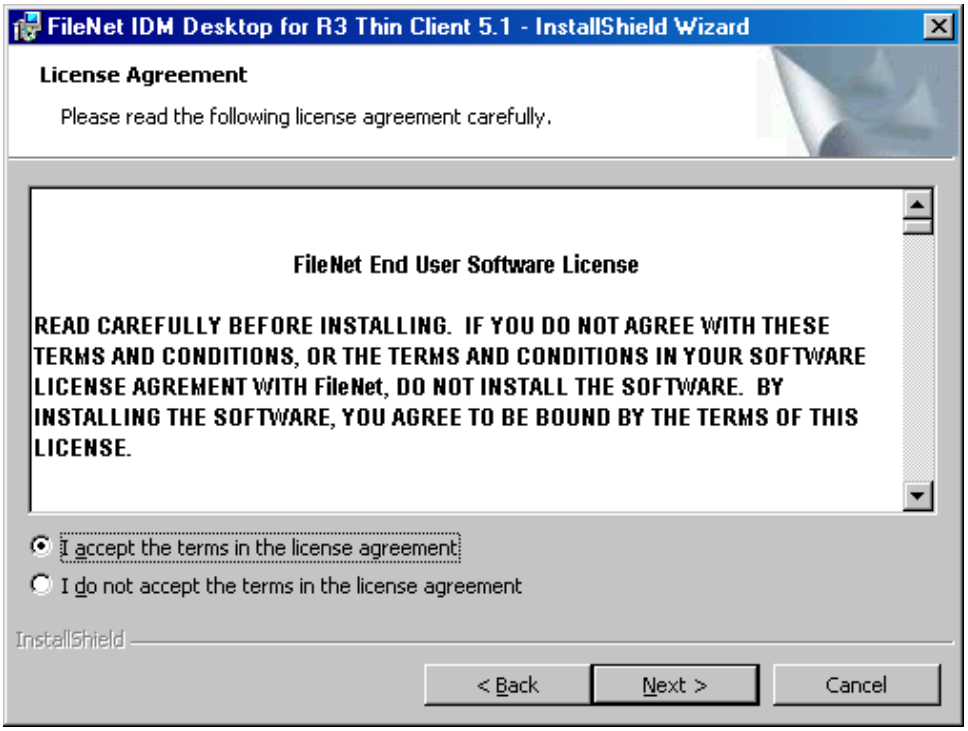
6. Click **Next** button. The following screen is displayed:



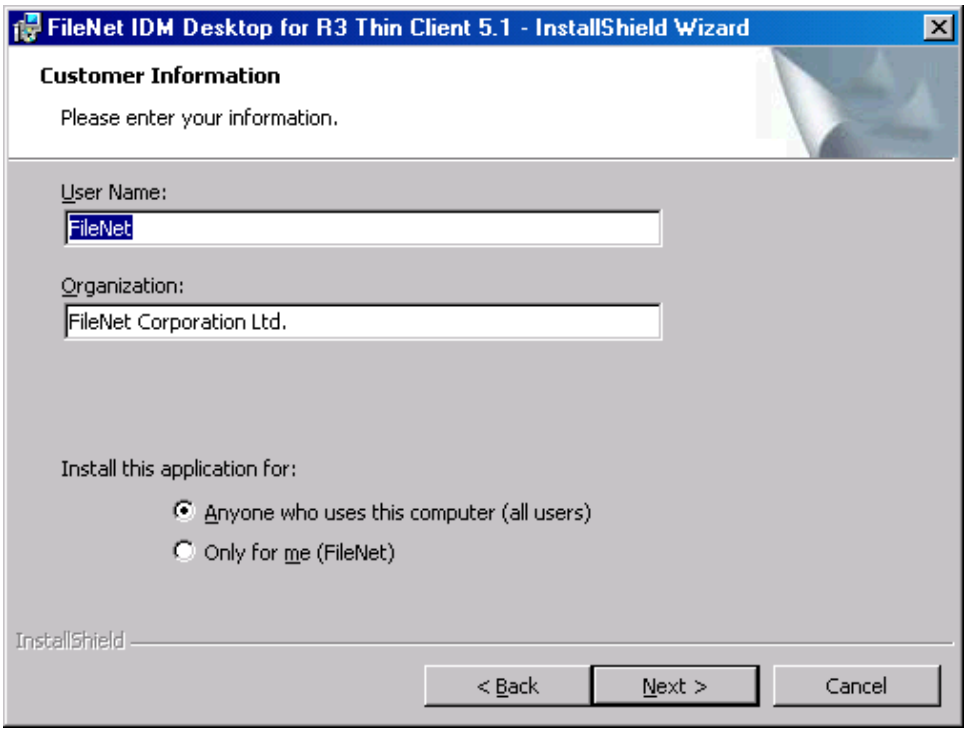
7. After the extraction of components is complete, the following screen is displayed:



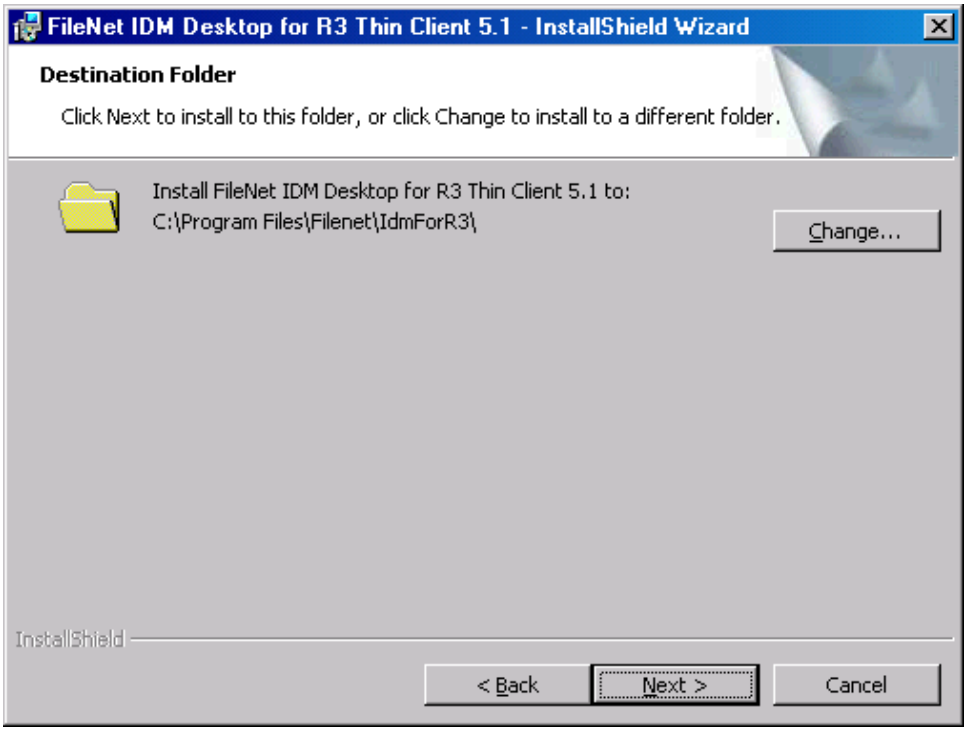
8. To continue, click **Next**. The following screen is displayed:



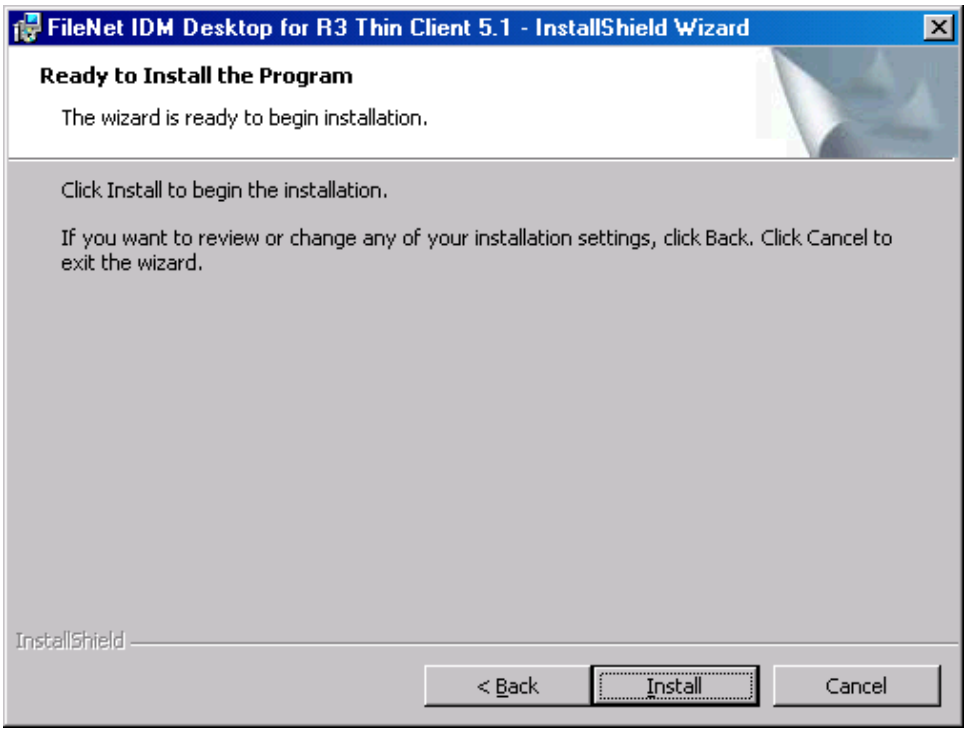
9. Accept the License agreement and click **Next** to continue. The following screen is displayed:



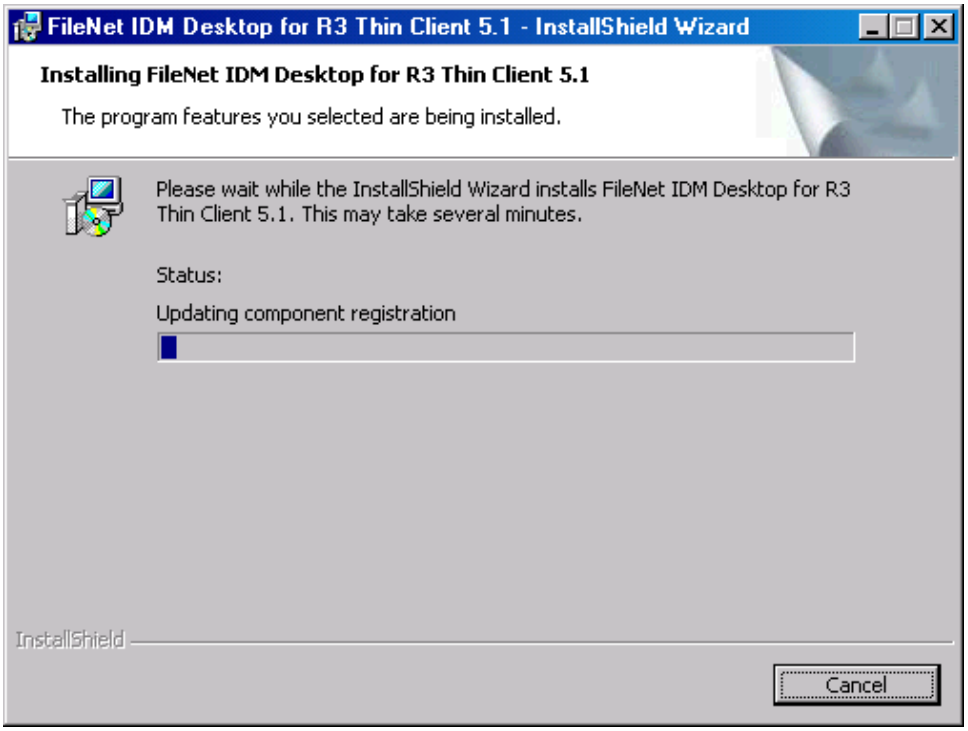
10. Verify that the entries in Customer information screen are correct. To continue, click **Next**. The following screen is displayed:



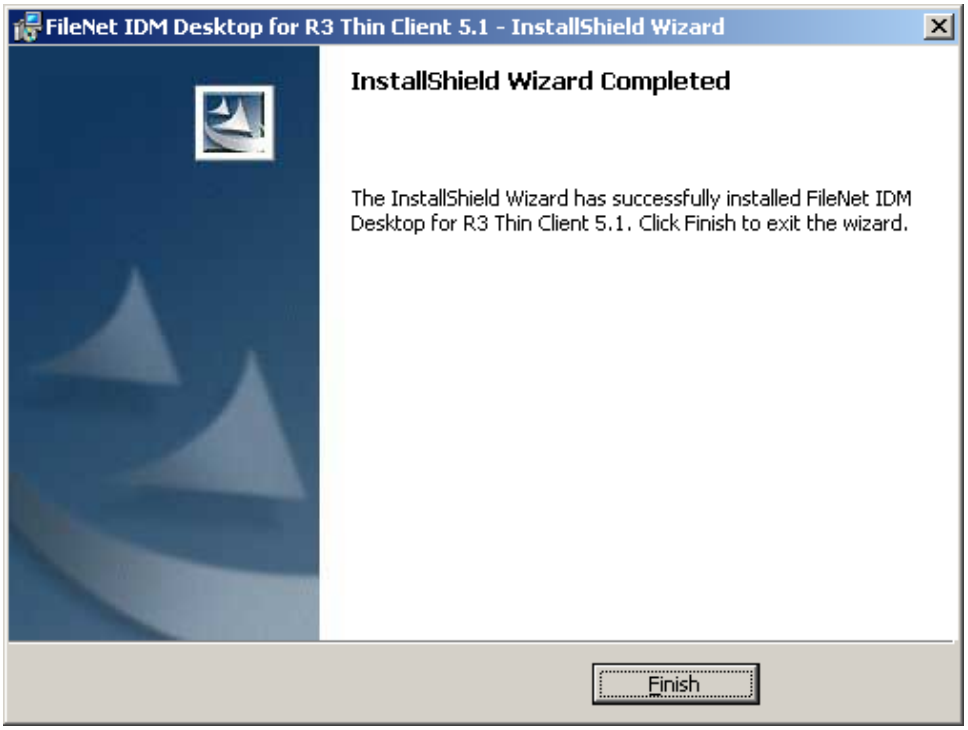
11. Change the installation folder if required. Click **Next** to continue. Following screen is displayed:



12. To continue click **Install**. Following screen is displayed:



13. After the installation is completed, following screen is displayed:



14. To exit the installation wizard, click **Finish**.

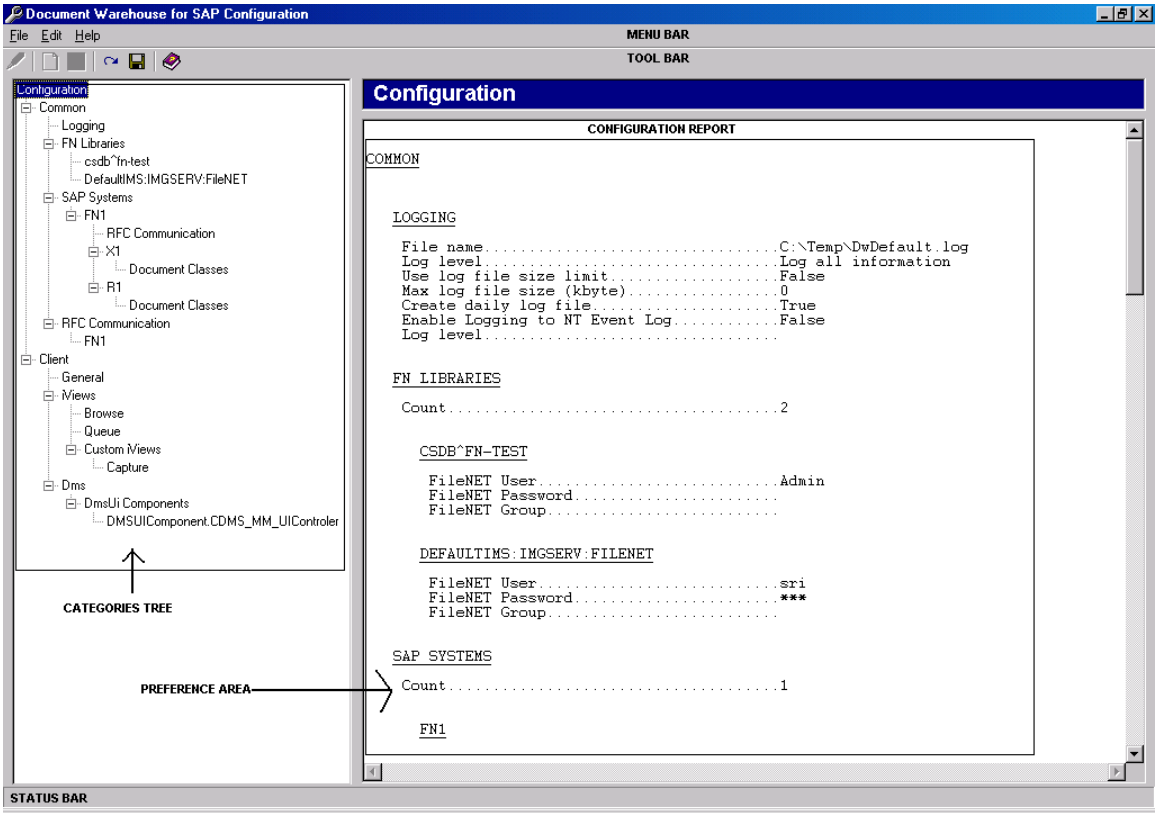
Note: When the installation has completed successfully, the configuration tool should be used to create the necessary settings for SAPGUI/IDMWS components. For more information on how to configure SAPGUI/IDMWS, refer to section Configuring SAPGUI/IDMWS Environment

4
IDM Desktop for R/3 Configuration

To start the configuration tool, click **Start → Programs → FileNet IDM Desktop for R/3 → Configure IDM Desktop for R/3**, in Windows.

The Configuration Tool

The configuration tool provides a menu bar, a tool bar, a tree of configuration categories, a status bar, and an area in which actual preferences are set and modified. These are illustrated in the following figure:



The following table lists the menus and menu items provided by the **menu bar**:

Menu	Menu Item	Description
File	Reload Configuration	Reloads the configuration from its storage location. All changes that have not been saved yet, will be discarded.
	Save Configuration	Saves the current configuration in the registry.

Menu	Menu Item	Description
	Import	Imports a configuration from a *.dwc file. The current configuration will be overwritten.
	Export	Exports the current configuration in *.dwc file, which is saved on the hard disk.
	Exit	Closes the configuration program without saving. If any information was changed, the user will be prompted to save the changes.
Edit	Rename	This option is enabled only when a selected category represents the name of an SAP system, SAP archive, or FileNet library.
	Add	This option is enabled only when a category contains a variable list of sub categories. This applies to the following categories: The SAP systems where Administrator can Add SAP systems or SAP Archives. FileNet Libraries where Administrator can Add FileNet Library.
	Remove	Removes the sub-categories that have been added using the Add function.
Help	Contents	Displays the **Installation & Configuration Manual - Client**.
	About	Displays the message box, which gives information about DWSAP configuration tool.

The **toolbar** provides fast access to more frequently used features such as add and remove a sub category. The following table lists all the features provided through the toolbar:

Icon	Name	Description
	Rename	Renames a sub-category.
	Add	Adds a sub-category.
	Remove	Removes a sub-category.
	Reload	Reloads the configuration from its storage location.
	Save	Saves the configuration in its storage location.
	Help	Displays the online documentation.

The **categories tree** provides a list of categories that should be configured. When a particular category or a sub category is selected, its related preferences are displayed in the preference area where configuration information can be altered. Other additional options, like

adding a sub category, renaming a category or removing a category are also available.

The **status bar** shows brief information such as status of the tool, the success or failure of the last action. The status bar is updated after an action is performed.

Note: All configuration information is currently stored in the Windows registry.

Configuration Overview

DWSAP configuration tool displays IDM Desktop for R/3-specific categories such as client in the categories tree.

The following table gives a description for each category:

Category	Sub Category	Sub Category	Description
Configuration			The preference area displays a summary report of the current configuration.
Common			No information in preference area. Top-level branch for Logging, FileNet Libraries, SAP Systems and RFC Communication.
	Logging		Configuration of logging related preferences.
	FileNet Libraries		Contains the list of FileNet libraries as sub categories.
		<fnlibid>	Refers to the Name (identifier) of a configured FileNet library, such as DefaultIMS:IMGSERV:FileNet.
	SAP Systems		Defines SAP systems known to IDM Services for R/3.

Category	Sub Category	Sub Category	Description
		<sapsystemname>	Names a configured SAP system, such as FN1. This name is arbitrary but it reflects the actual name of the SAP system that it represents.
		RFC Communication	RFC communication related preferences specific to an SAP system such as SAP gateway host and SAP gateway service.
		<storagesystemname>	Refers to name of an SAP archive used by an SAP system such as X1. An SAP system can have multiple SAP archives.
		Document Classes	SAP and FileNet document classes used for storing a document in a specific SAP archive.
RFC Communication			Configuration of preferences related to RFC communication.
		<sapsystemname>	RFC communication related preferences specific to an SAP system.
Client			No information in preference area. Top-level branch for General, ArchiveLink, Views, DMS.
	General		Configuration of commonly used Preferences.
	iViews		Configuration of display settings for Views
		Browse	Information about FileNet Browse for R/3.
		Queue	Information about FileNet Queue for R/3.

Category	Sub Category	Sub Category	Description
	Custom iViews		Option to create new, individual Custom Views.
	Dms		Configuration for DMS preferences.
		DmsUI Components	Possibility to create new, individual DMS UI components.

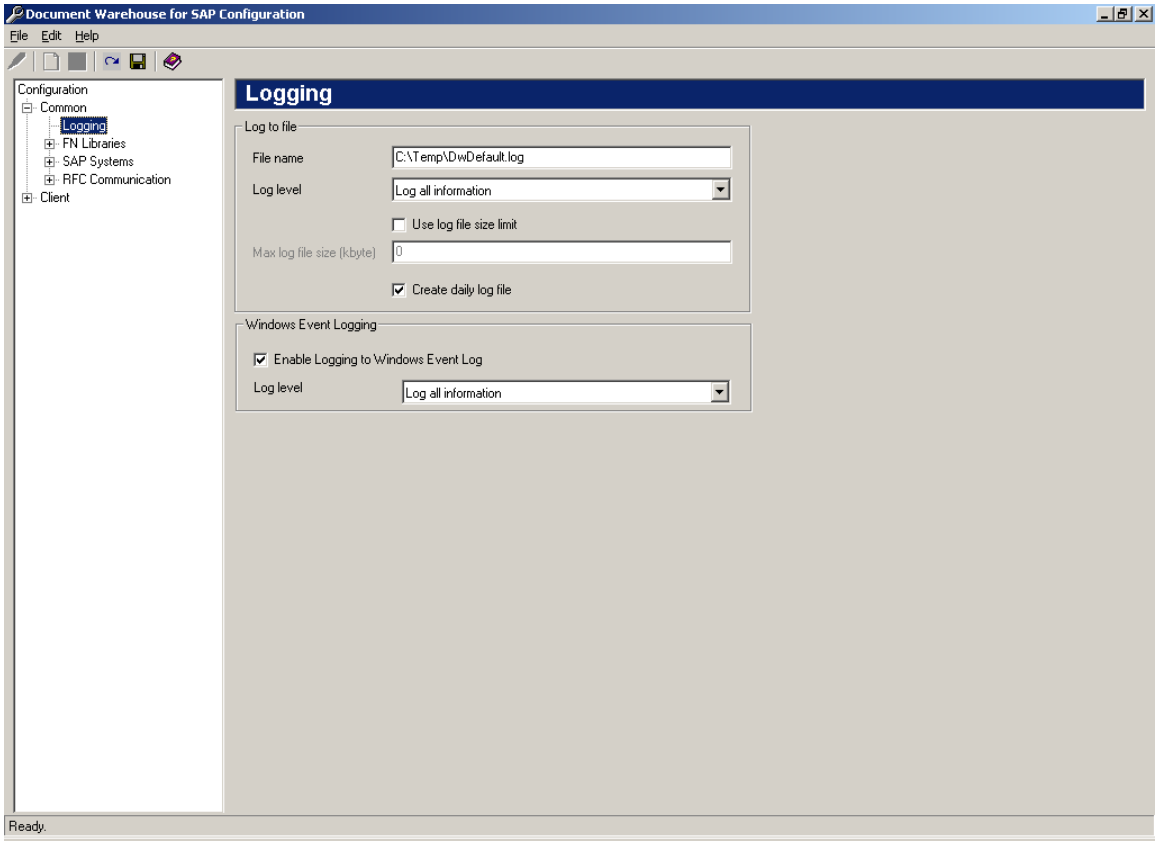
RFC Communication information is available through two sub-categories of the categories tree. For example, selecting the sub-category, Common / SAP Systems / <sapsystemname> / RFC communication, displays identical information in the preferences area, as the sub-category, Common / RFC communication.

***Tip**: The preferences altered under one of the two categories as specified above are instantly reflected under the other sub category because the information is identical.*

IDM Desktop for R/3 Category - Logging

Background: All IDM Desktop for R/3 components record information regarding the operations in the system. This information can be helpful in finding problems with the configuration or troubleshooting after an error has occurred.

The **Logging** category contains preferences that determine the amount and location of the logged information.



The following table lists the preferences specific to the IDM Desktop for R/3 category Logging:

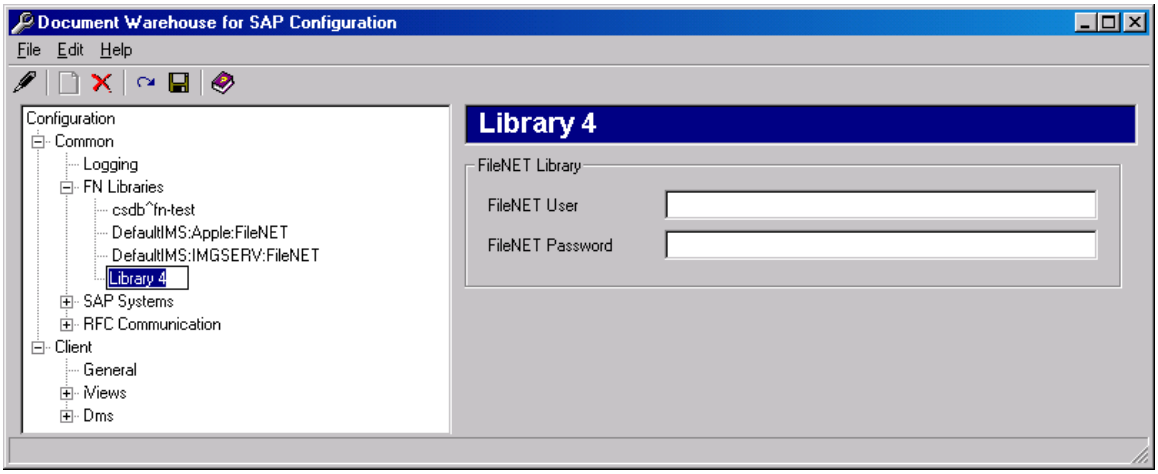
Preference	Description
File name	Enter a file name with path for logging the information.
Log level	Determines the category of information to be logged. The log levels available for logging to a file are: Log errors and warnings only (Recommended) Log all information.
Use log file size limit. Max log file size (Kbyte)	The size of the log file is restricted to the maximum file size. The Max Log file size option is enabled only if the Use log file size option is checked.
Create daily log file	Creates a new log file everyday. The file is named as <filename>_<yyyymmdd>_<extension>.
Enable Logging to Windows Event Log	The information is logged in the application log of the Windows event viewer.
Log level (Windows event log)	Determines the category of information to be logged. The levels available are: Log errors only, (Recommended) Log errors and warnings only Log all information.

Configuring FileNet Libraries

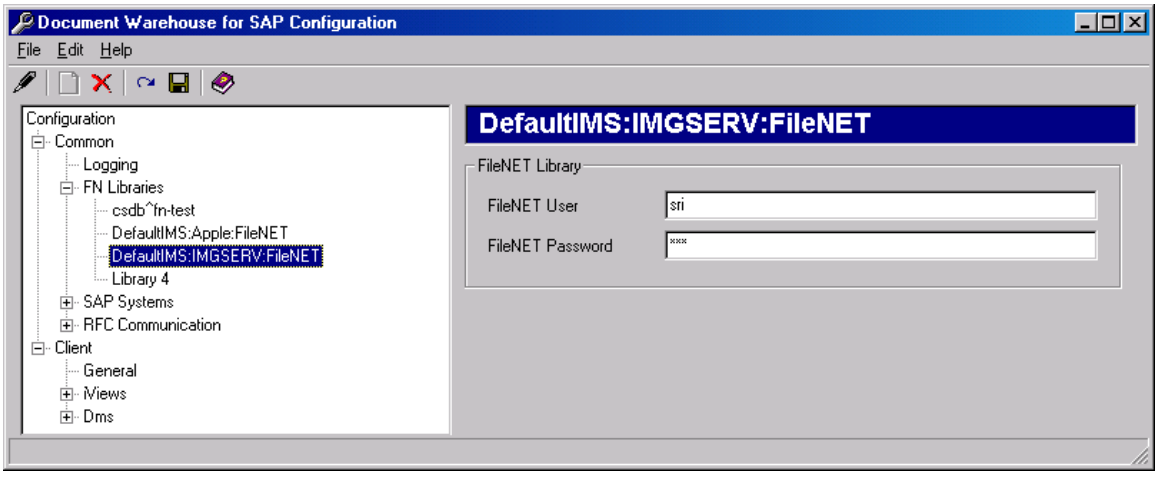
Background: The FileNet libraries used by IDM Desktop for R/3 should be defined in the configuration tool. Different SAP systems and SAP archives can access the same library. There can however be one set of credentials, containing user name and password that can be configured for each library.

To add a new FileNet library:

1. Select the FN Libraries category in the categories tree.
2. Add a new sub category-using menu **Edit → Add**. To add a new FileNet library:



3. The newly added library name, for example Library 4, is in edit mode. Enter the identifier of the FileNet library. For example DefaultIMS:IMGSERV:FileNet for IS libraries, or csdb^fn-test for CS libraries. Selecting a FileNet library in the categories tree displays the library preferences in the preference area.



4. Enter the preferences referring to the following table:

Preference	Description
FileNet User	Represents the logon user name, and is mandatory.
FileNet Password	Represents the logon password.

Note: The user credentials and the library name will be validated when the configuration is saved. If the credentials are wrong, configuration will not be saved.

Configuring SAP Systems

Background: SAP System preference in IDM Desktop for R/3 configuration is a DWSAP internal logical name for an SAP system. An SAP system identifies itself to DWSAP through multiple means depending on whether RFC or HTTP communication protocol is used. Multiple archives can be defined for an SAP system.

To add a new SAP system:

1. Select the SAP systems category in the categories tree.
2. Add a new sub category using the menu **Edit → Add**. Default sub category of SAP Systems is created automatically.

***Tip**: With DWSAP release 5.x descriptive names can be used, unlike the earlier releases, in which the name had to be equivalent to the Logical System ID of SAP R/3 system.*

SAP system sub categories can be renamed or removed by similar means as described for adding.

SAP system does not provide any preferences except its name.

Each SAP system category has **RFC Communication** sub category. If SAP archives are defined for an SAP system, each archive is represented as a distinct sub category under the SAP system category. These sub categories are described in subsequent sections.

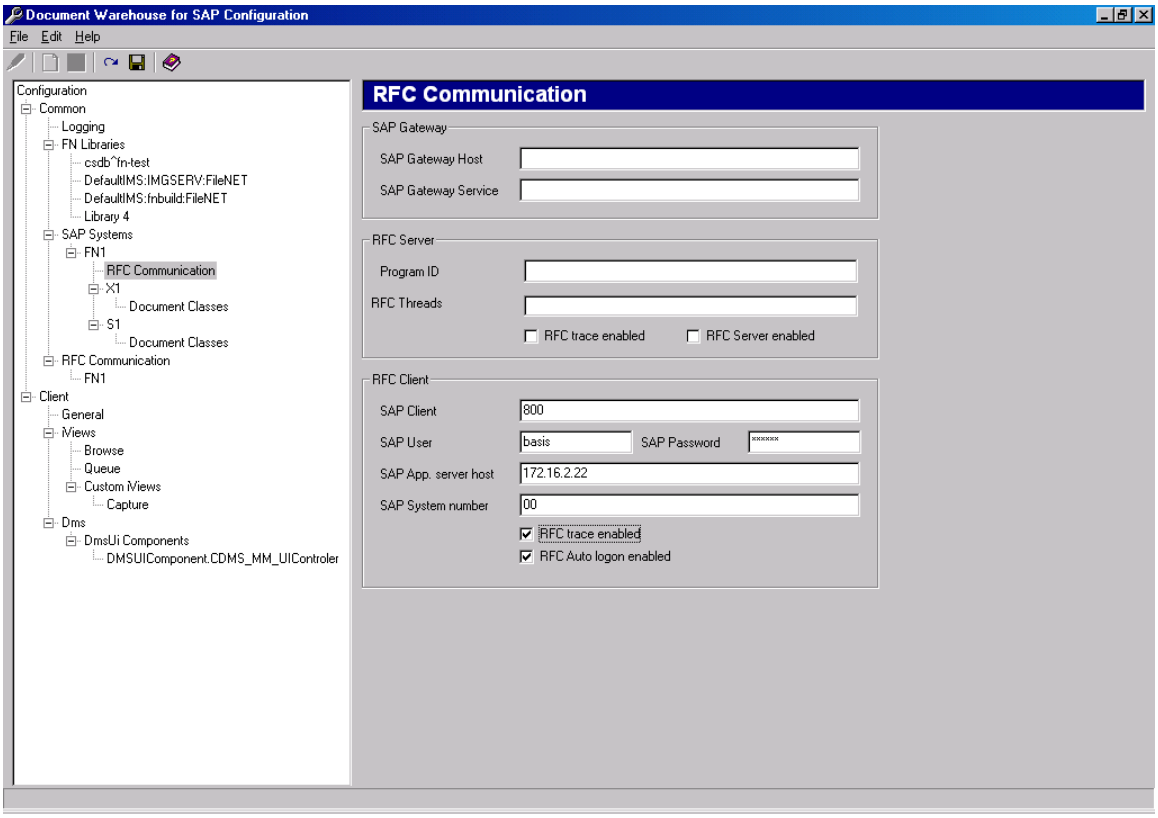
Configuring RFC Communication

Background: The SAP ArchiveLink Interface release 3.0 and 3.1 use SAP proprietary RFC protocol to communicate with IDM Desktop for R/3. RFC communication has a RFC client program that invokes a remote function implemented in a RFC server program.

With DWSAP release 5.x, RFC communication is always specific to SAP system. This means that for each SAP system which cDesktop communicates with, there is one set of connection information.

To configure RFC communication information for SAP system, select the appropriate SAP system sub category under the RFC communication category.

***Tip**: Most of these values are available with the SAP Administrator.*



The following preferences are displayed in the preference area:

Preference	Description
SAP Gateway Host	Required only while configuring IDM Services for R/3.
SAP Gateway Service	Required only while configuring IDM Services for R/3.
Program ID	Required only while configuring IDM Services for R/3.
RFC Threads*	Required only while configuring IDM Services for R/3.
RFC Trace enabled	Required only while configuring IDM Services for R/3.
RFC Server enabled	Required only while configuring IDM Services for R/3.
SAP Client	Represents the logon client number.
SAP User	Represents the logon user name.
SAP Password	Represents the logon password.
SAP Application Server Host	Represents the machine name of an SAP application server where the RFC server is registered.

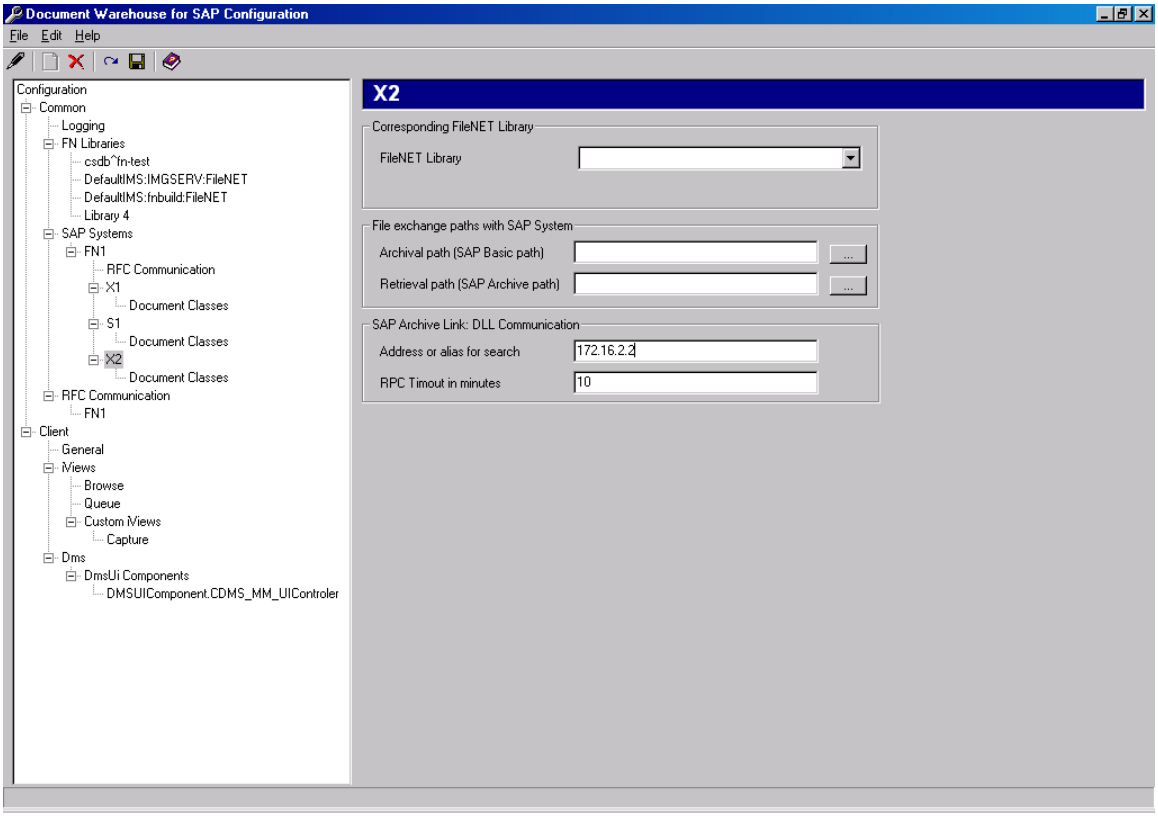
Preference	Description
SAP System Number	Represents the system number of an SAP system.
RFC Client Trace enabled	Enables logging RFC client trace information to a file. File can be found in the current directory of the application, and is named dev_rfc*.trc.
RFC Auto logon enabled	Enables the automatic logon of RFC to an SAP system.

Configuring SAP Archives

Background: An **SAP archive** corresponds to an archive, defined while customizing the SAP ArchiveLink. **Content Repository** is also a synonym for an SAP archive. Multiple SAP archives can be configured to point to the same FileNet library.

To add a new SAP archive:

1. Select the SAP system to which a new archive is to be added.
2. To add a new sub-category, click **Edit → Add** menu. A new archive is added under the category SAP system.



3. Enter the two-character name as defined in the SAP during archive definition.

Following table lists the preferences for the archive:

Preference	Description
FileNet Library	Refers to a FileNet library. This entry creates a logical assignment from SAP System + SAP archive to a FileNet Library.
Delete Document	Deletes the documents in IS when SAP requests to delete a document. If disabled, just sets the document status to closed.
Archival Path	Required only while configuring IDM Services for R/3..
Retrieval Path	Required only while configuring IDM Services for R/3..
Address or alias for search	IP number or alias name for machine where search is running on.
RPC timeout in minutes	Represents the timeout interval in minutes; the minimum value of this timeout interval is ten minutes

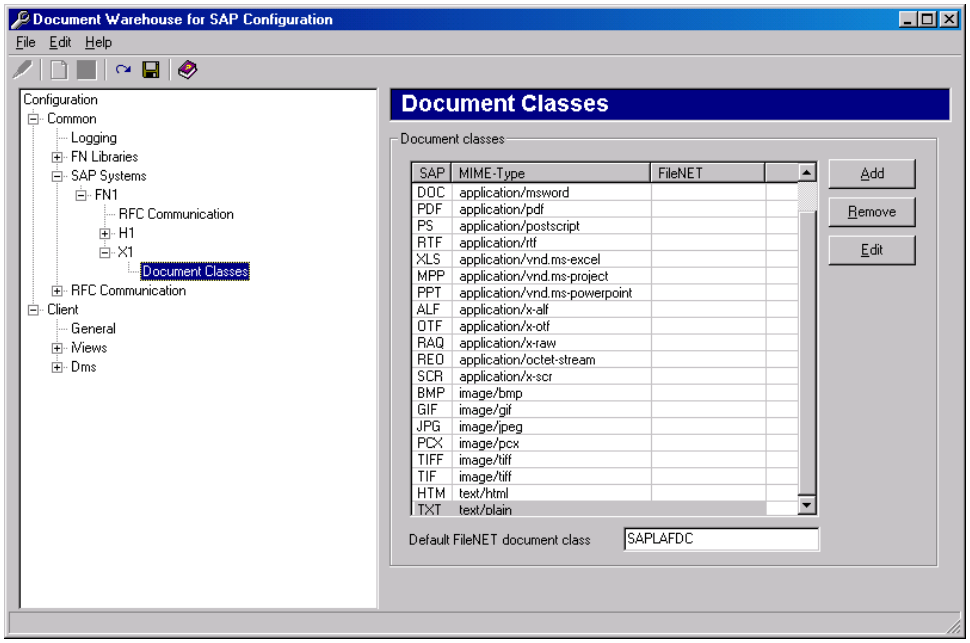
There is a sub-category to each SAP archive,

- Document Classes contain the mapping of SAP technical document classes and MIME types to FileNet document classes for storage. For more information on document classes and there configuration, refer to the section Configuring Document Classes.

Configuring Document Classes

Background: SAP uses technical document classes and MIME types to distinguish different classes of documents. Document class is passed on with the archive request. IDM Services for R/3 use this information to determine which document class to use, while storing the document in a FileNet library.

To configure the FileNet document class used for an archive, select **Document Classes** in the tree control. The following figure is displayed:



In the table in the figure above, for each SAP document class or MIME type, there is a corresponding FileNet document class to be used to archive documents.

- HTTP requests contain a MIME type, not an SAP type. This table determines the value for the mandatory FileNet index field **SAPType**.
- If there is no predefined mapping from a MIME type to an **SAPType**, **SAP Type ZZZ** is used.
- If SAP does not send a MIME type, the Web server adds a default MIME type of an application/octet-stream.
- cDesktop uses a default MIME type of application/octet-stream**.**

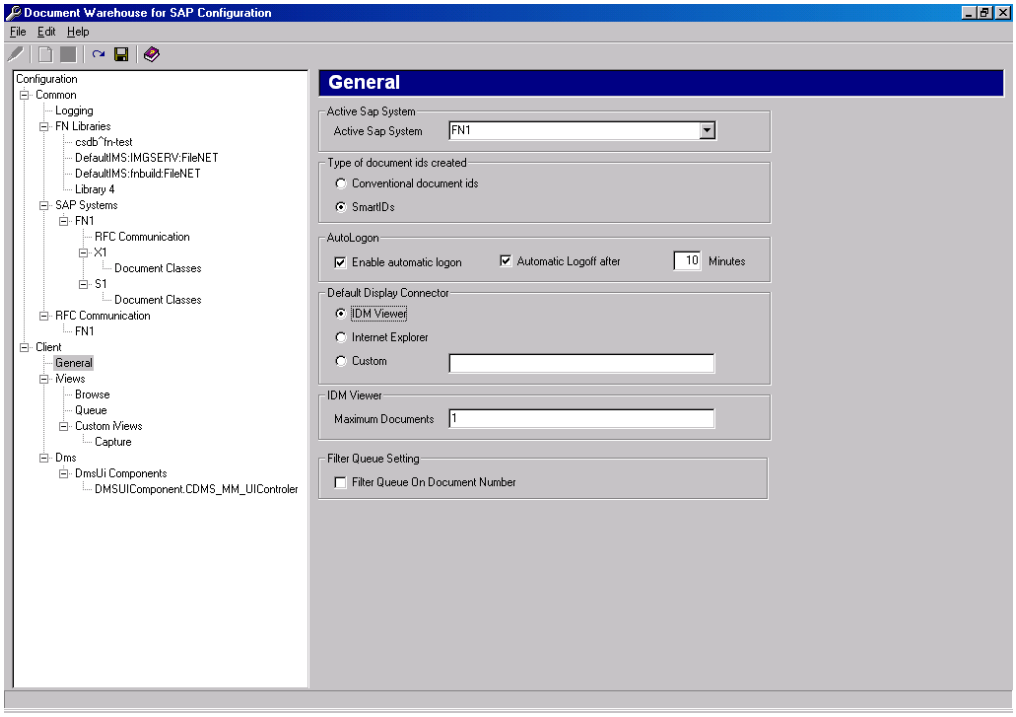
Default FileNet document class will be used in the following cases:

- If SAP sends an archive request for an SAP document class or MIME type that has no configured FileNet Document Class.
- An unknown SAP document class or MIME type is encountered.

IDM Desktop for R/3 Category – General

Background: The General category contains preferences commonly used by more than one IDM Desktop for R/3 components.

To configure the preferences, select **General** in the tree control. The following figure is displayed:



Following table lists the preferences in the **General** category:

Preference	Sub Preferences	Description
Type of document ids created		It determines the type of document ids, which are stored in SAP when a FileNet document is linked to an SAP transaction.
	Conventional document ids	If this option is selected, the document ids that are created do not contain any specific information for DWSAP. It is only possible to create links from IS documents to SAP transactions.

Preference	Sub Preferences	Description
	SmartIDs	If this option is selected, IDM Desktop for R/3 is able to create SmartIDs such as **DOC00119744.** Document IDs with Document Warehouse specific information will be created, allowing the system to link IS and CS documents and folders to SAP transactions. **Note:** If this box is unchecked CS library will not be displayed in FileNet Browse for R/3 of IDM Desktop for R/3. The user will also not be able to create a link to CS folder or documents.
Active SAP System		Select an active SAP system from the drop down list.
	AutoLogon	Configuration for the AutoLogon.
	Enable automatic logon	Check this box to enable automatic logon. The system will use the logon information, entered in the FileNet libraries sub-categories. In order to use operating system credentials for logon to FileNet library, refer to section, Use Operating System credentials for Logon to FileNet
	Automatic logoff after x minutes	Check, this box if automatic logoff should take place. Define after how many minutes this should happen.
Default Display Connector		Configuration for the default viewer
	IDM Viewer	Check, this box if the IDM Viewer application should be the default viewer for displaying documents. If this box is checked, a second line with **Maximum Documents** comes up.
	Maximum Documents	Configure the number of open panes in the IDM Viewer application in this line. If the user has reached this maximum number and issues another display request, the oldest document will be removed from the viewer.

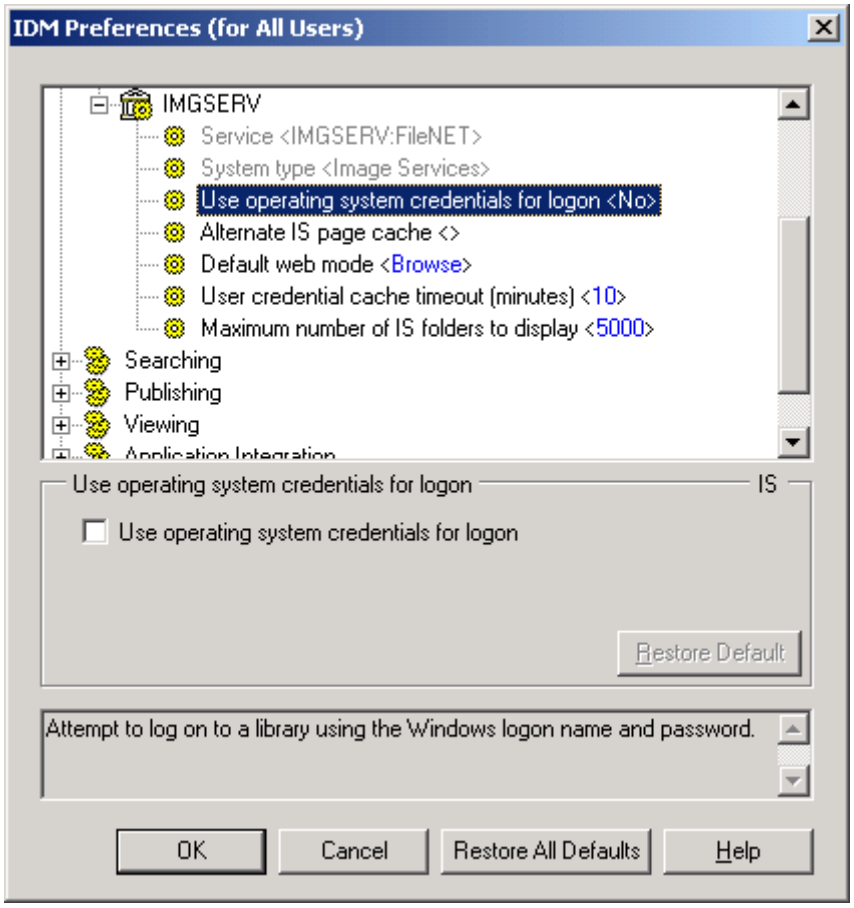
Preference	Sub Preferences	Description
	Internet Explorer	Check, this box if the Internet Explorer should be the default viewer for displaying documents. If checked, a second line with **IDM WebServices URL** will appear.
	IDM WebServices URL	Please enter the internet address of the Web Services, e.g. **http://<servername>/idmws/** .
	Custom	Enter <libraryname.classname> of an individual custom viewer, which should be the default viewer for displaying documents.
Filter Queue Settings		Configurable option which enables or suppresses the filtering of individual queues.
	Filter Queue on Document Number	If this option is checked then before displaying the queues for the workspace filter, the queues based on the field **Document Number** else display all the queues for the workspace.

***Tip**: For more information on how to create a custom Display Connector, refer to Programmer's Handbook.*

Use Operating System credentials for Logon to FileNet

To use operating system credentials for logon to FileNet follow the steps as outlined below:

1. Uncheck the **Enable Automatic Logon** checkbox in the Client/General/AutoLogon frame.
2. Enable the preference **Use Operating System credentials for Logon** for the library on the client desktop. In order to use these following steps need to be performed:
   a Open **FileNet Panagon IDM → Configure**.
   b Select the Library for which the use of operating system credentials is to be enabled. Click on **Additional Preferences**. The following screen is displayed:



c Enable the check box Use operating system credentials for logon.

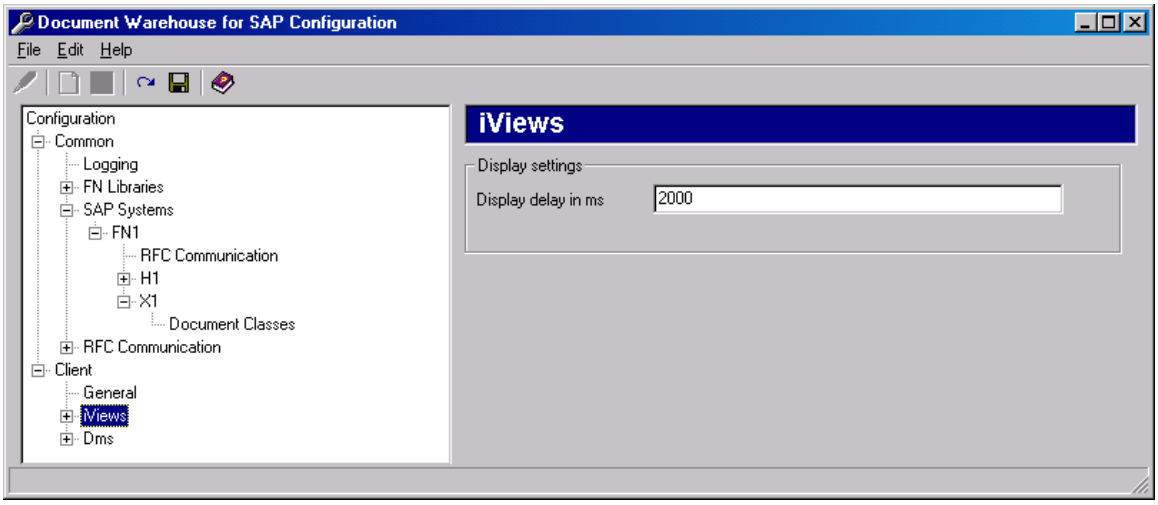
d Click on **OK** to save the settings.

Note: The domain user should be imported into IS using the utility sec_imp.exe.

IDM Desktop for R/3 Category Views

Background: The visual component IDM Desktop for R/3 determines a document or folder, within an IDM library to process it in an SAP R/3 transaction. There are several ways to determine such a document or folder. IDM Desktop for R/3 has two default components: FileNet Browse for R/3 and FileNet Queue for R/3. Other custom views can also be developed and added in this category.

Select **iViews** in the tree control. The following figure is displayed:

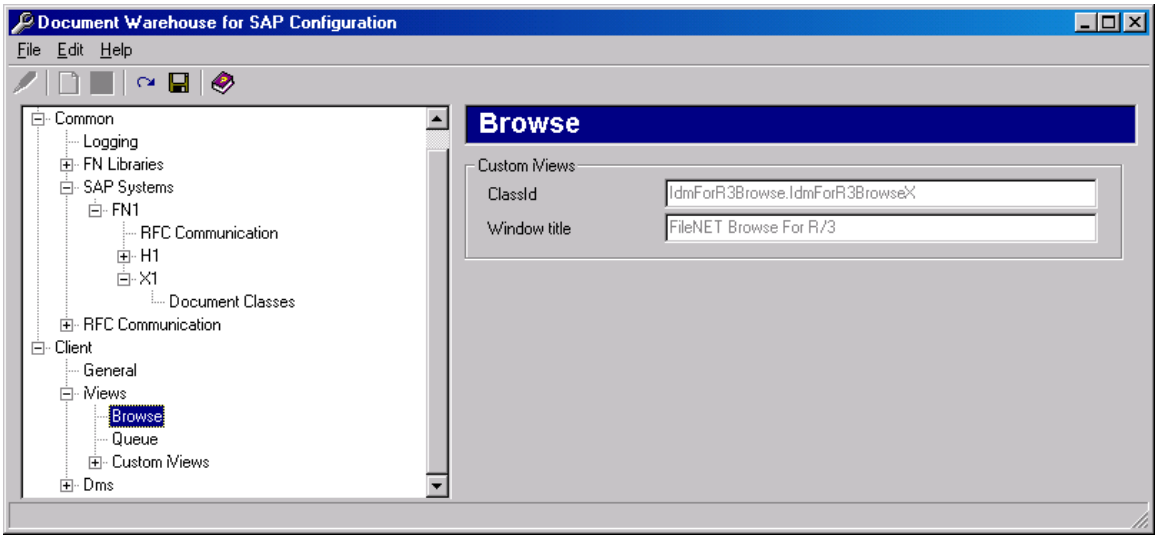


Following table lists the preferences in the **iViews** category:

Preference	Description
Display delay in ms	In order to display documents in the viewer after the user has changed the selection there needs to be a period to elapse. Please enter the number of milli seconds for this period (default=2000).

Note: The standard views: FileNet Browse for R/3 and FileNet Queue for R/3, are automatically configured during the installation process, and cannot be changed.

Select **Browse** in the tree control. The following figure is displayed:



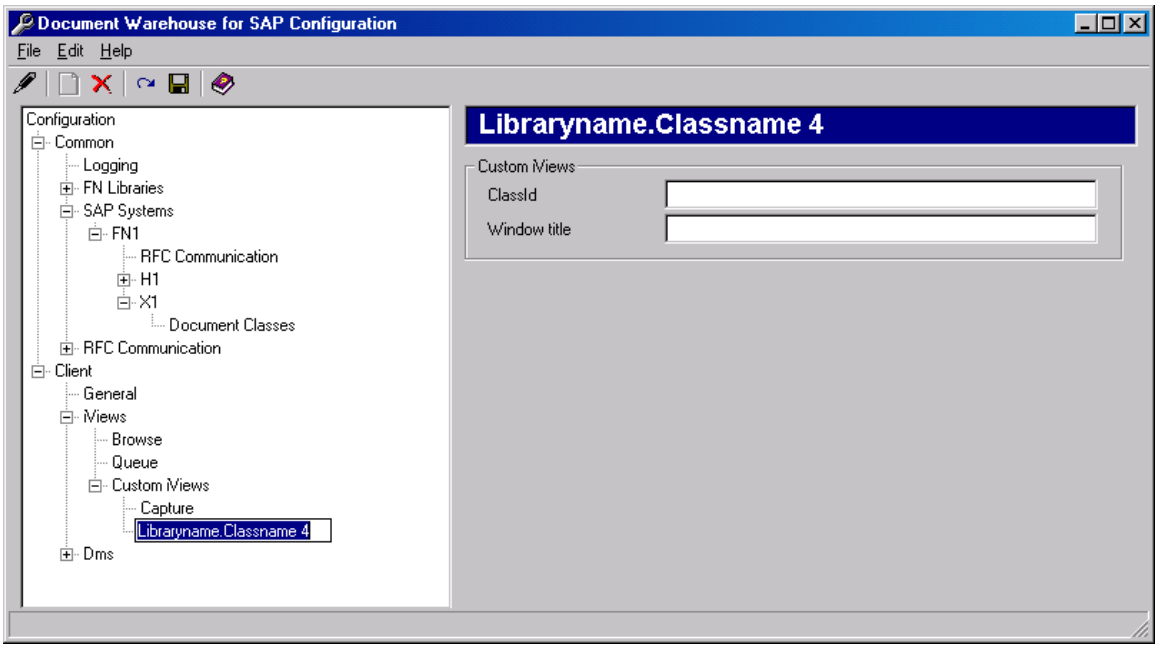
Following table lists the preferences in the sub-category of **iViews**:

Preference	Description
ClassID	This is the component's program id in the form '<libraryname>.<classname>'.
Windows title	This title will be used for displaying purposes.

Defining a Custom View

To add a new Custom View:

1. Select the sub category Custom View in the categories tree.
2. To add a new sub-category, click **Edit → Add** menu. The new sub-category represents the individual Custom View.



The chosen name in the categories tree should be the same as entered in the ClassId field, which appears in the preference area.

Preference	Description
ClassId	Enter the program id in form of '<libraryname>.<classname>'.
Windows title	Refers to the Window title. This title will be used for displaying purposes

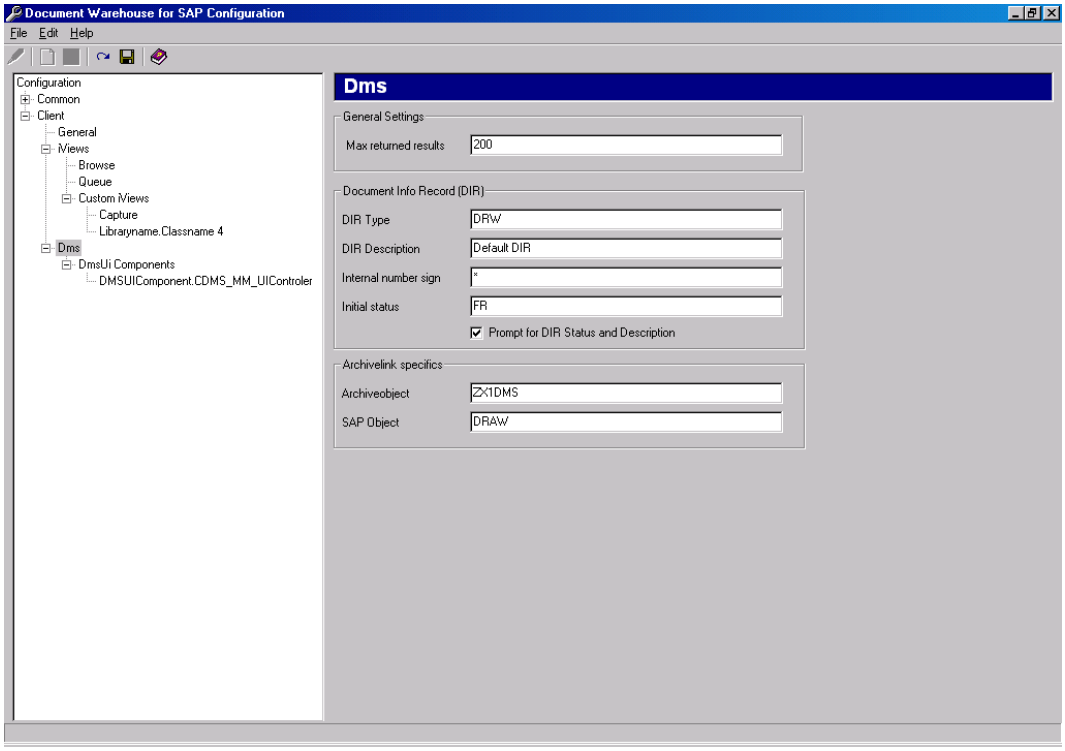
Note: A configured custom View should be registered as a Code Component, before you use it. This Code Component was formerly known as OLE Automation Server.

***For more information on how to create custom Views, refer to the** Programmer's Handbook.*

IDM Desktop for R/3 Category DMS

Background: DWSAP provides DMS functions to create and modify Document Info Records (DIRs) in SAP R/3 system, through DMS BAPI, as well as linking objects from FileNet repositories to SAP R/3 DIRs. These functions are encapsulated in two separate components: DMS Component and DMS UI Component. FileNet Browse for R/3 has been enhanced, with a new DMS menu, allowing the user to access these functions.

Select **DMS** in the tree control. The following figure is displayed:



Following table lists the preferences specific to the **DMS** category:

Preference	Description
Maximum returned results	Defines the maximum number of results returned, while issuing a search for SAP master records.

Preference	Description
DIR Type	Defines the name of the DMS document type (typical value **DRW** or **TST**). The document type defines the possible states a document can have and to what master records a document can be linked.
DIR Description	Describes the newly created DIR.
Internal number sign	Defines the numbering system of DIR. The predefined DMS document type DRW uses the **(*)** character to create a new available id.
Initial status	Defines the status of a DIR in SAP status network assigned to the document type (see transaction **cv01**). **FR** (released) is the initial status for **DRW**.
Prompt for Dir Status and Description	Refers to a checkbox which if checked will prompt the user to select values for Initial Status and DIR description when a new DIR is created.
Archive object	Defines an SAP document type, which was created in transaction **oac2**.
SAP Object	Defines an SAP Object type, needs to be **DRAW**.

DMS UI Components

Background: DMS UI Components offer functions such as, accessing information of SAP R/3 master records, and searching and selecting SAP R/3 master records. These functions have an interactive user interfaces.

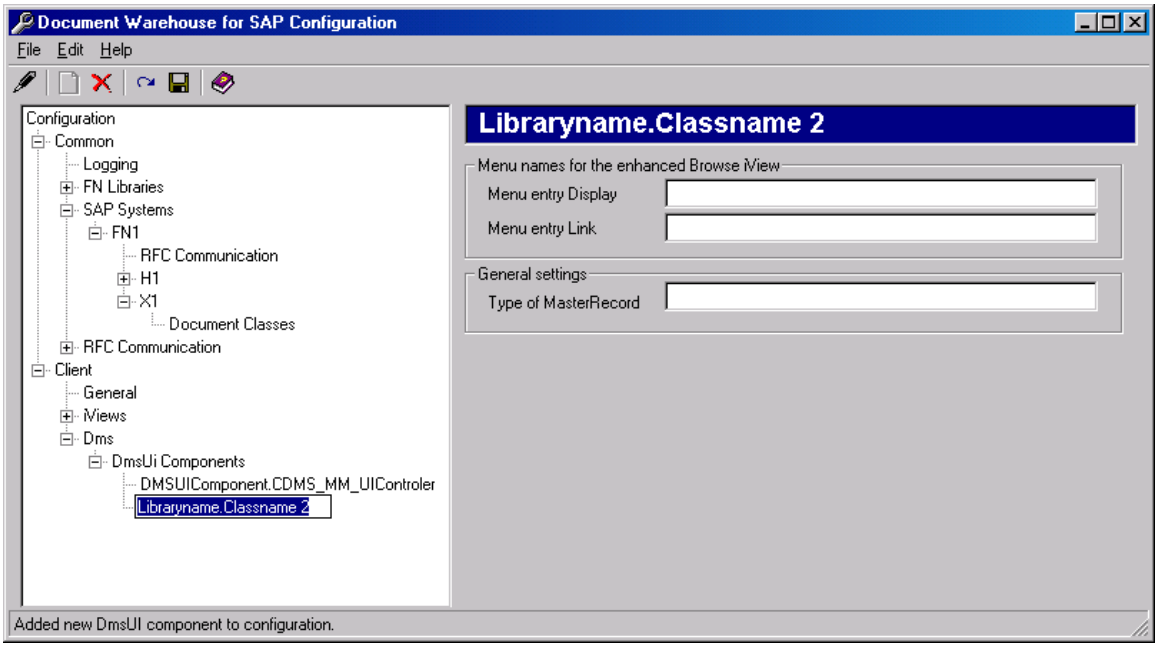
With IDM Desktop for R/3, a predefined DMS UI Component is configured along with the installation. This DMS UI Component enables the user to use the above-mentioned functions with SAP material masters.

It is possible to create a custom DMS UI Component, for example to use the same functions for other SAP master records, e.g. equip masters, etc.

Defining a new DMS UI Components

To add a new DMS UI component:

1. Select the sub category DMS UI Components in the categories tree.
2. To add a new sub-category, click **Edit → Add** menu. The new sub-category represents the individual DMS UI component.



The chosen name in the categories tree should be the same as entered in the ClassId field, which appears in the preference area.

Preference	Description
Menu entry Display	Description that appears in the **DMS** menu of the FileNet Browse for R/3.
Menu entry Link	Description that appears in the **DMS** menu.
Type of MasterRecord	The ID of the master record, that should be used, e.g. **EQUI** for Equipment Master. **Background**: The master records in the SAP R/3 system are identified by an id and type id. The type id is a combination of four characters, and is a part of the record's primary key.

For more information on the functions of DMS, refer to **Programmer's Handbook.**

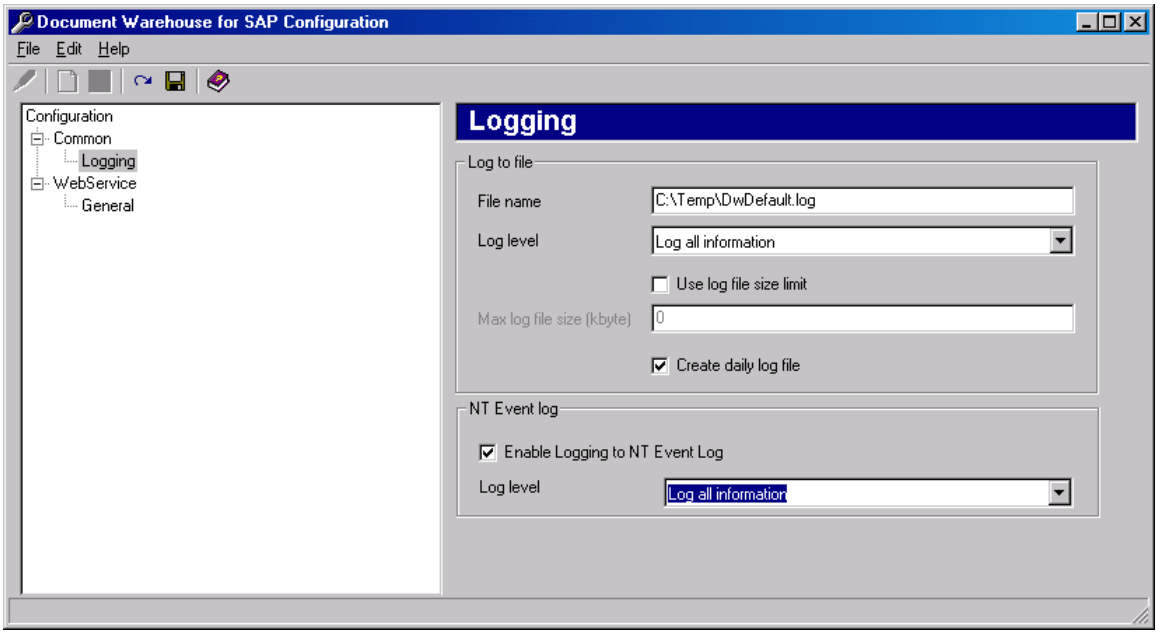
Configuring SAPGUI/IDMWS Environment

The configuration tool of the Web-based client environment depends on the configuration tool of IDM Desktop for R/3.

Configuration Category Logging

Background: All client components record information regarding the operations in the system. This information can be helpful in finding problems with the configuration or troubleshooting after an error has occurred.

The **Logging** category contains preferences that determine the amount and location of the logged information.



The following table lists the preferences specific to the IDM Desktop for R/3 category Logging:

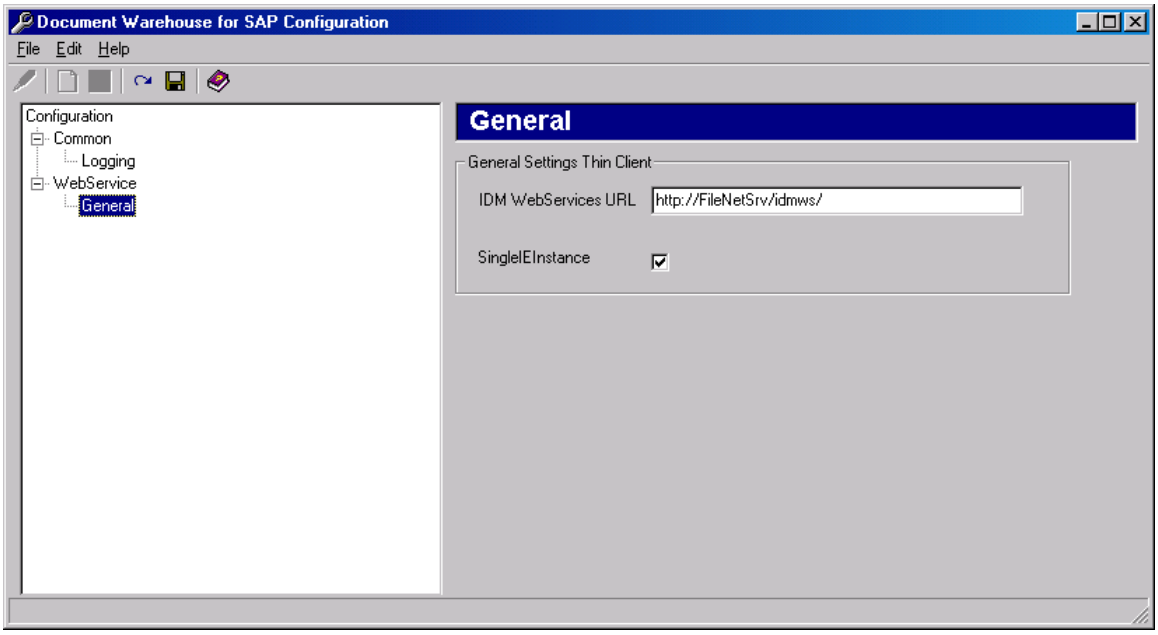
Preference	Description
File name	Enter a file name with path for logging the information.
Log level	Determines the category of information to be logged. The log levels available for logging to a file are: • Log errors and warnings only (Recommended) • Log all information.
Use log file size limit. Max log file size (Kbyte)	The size of the log file is restricted to the maximum file size. The Max Log file size option is enabled only if the Use log file size option is checked.
Create daily log file	Creates a new log file everyday. The file is named as <filename>_<yyyymmdd>_<extension>.
Enable Logging to Windows Event Log	The information is logged in the application log of the Windows event viewer.

Preference	Description
Log level (Windows event log)	Determines the category of information to be logged. The levels available are: • Log errors only, (Recommended) • Log errors and warnings only • Log all information.

Configuration Category General

Background: The General category contains preferences commonly used by client components.

To configure the preferences commonly used, select **General** in the tree control. The following figure is displayed:



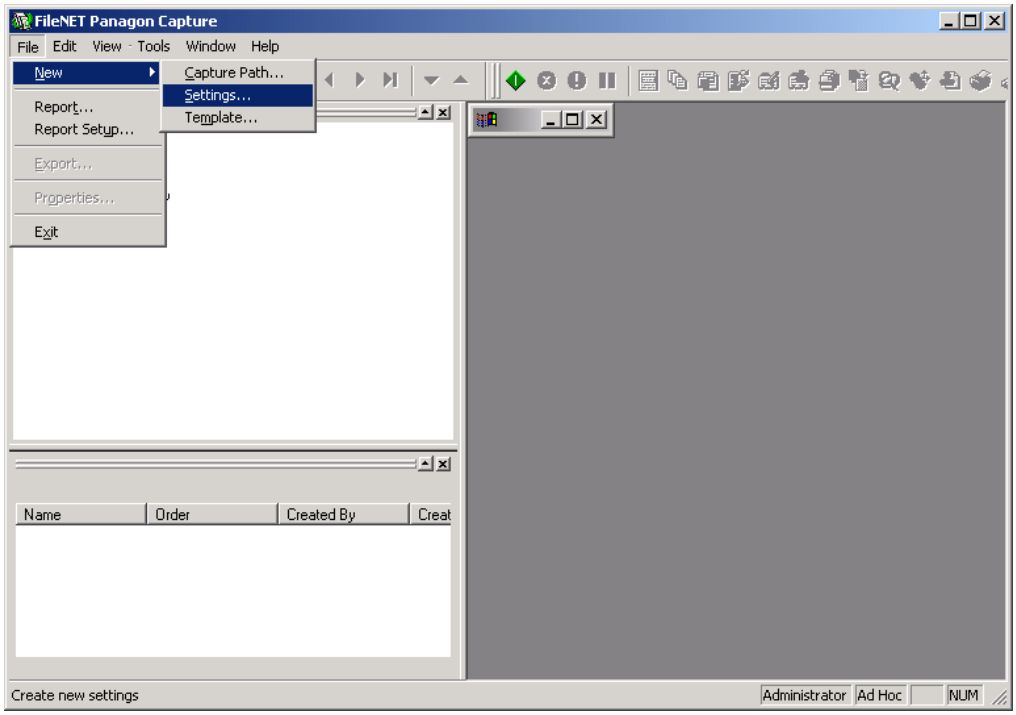
Following table lists the preferences in the **General** category:

Preference	Description
IDM WebServices URL	The internet address of the Web Services, e.g. http://<servername>/idmws/.
SingleIEInstance	If checked, each display request will open the document in the same IE window else, will open in separate IE window.

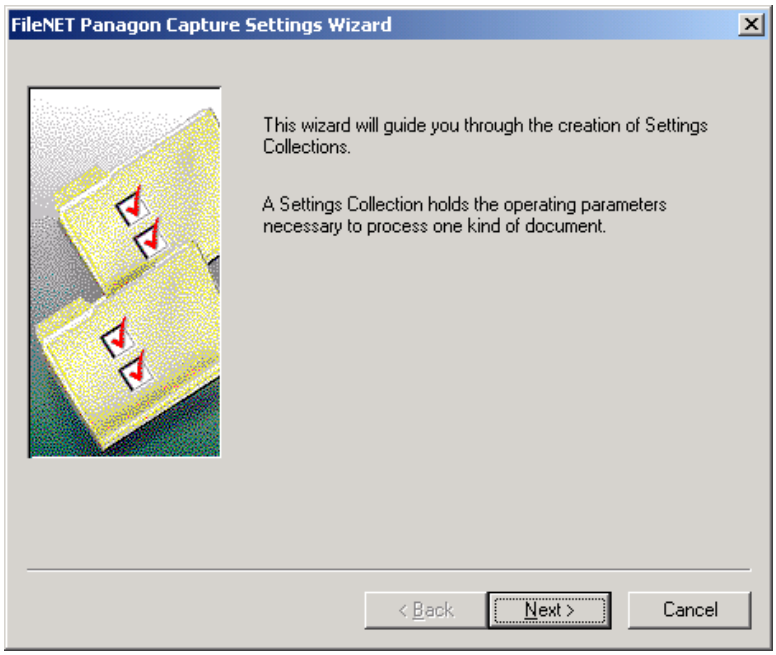
Creating Capture Settings for FileNet Capture for R/3

To create Panagon Capture settings for FileNet Capture for R/3:

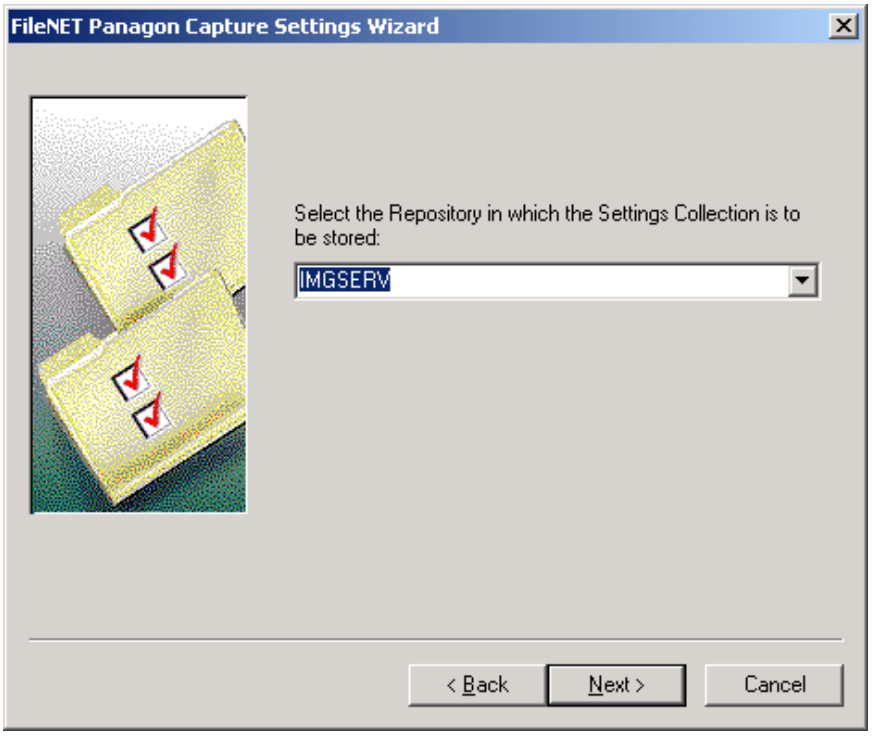
1. Start FileNet Panagon Capture and log on to the library.
2. To create a new setting, select **File → New Settings** menu. The following screen is displayed:



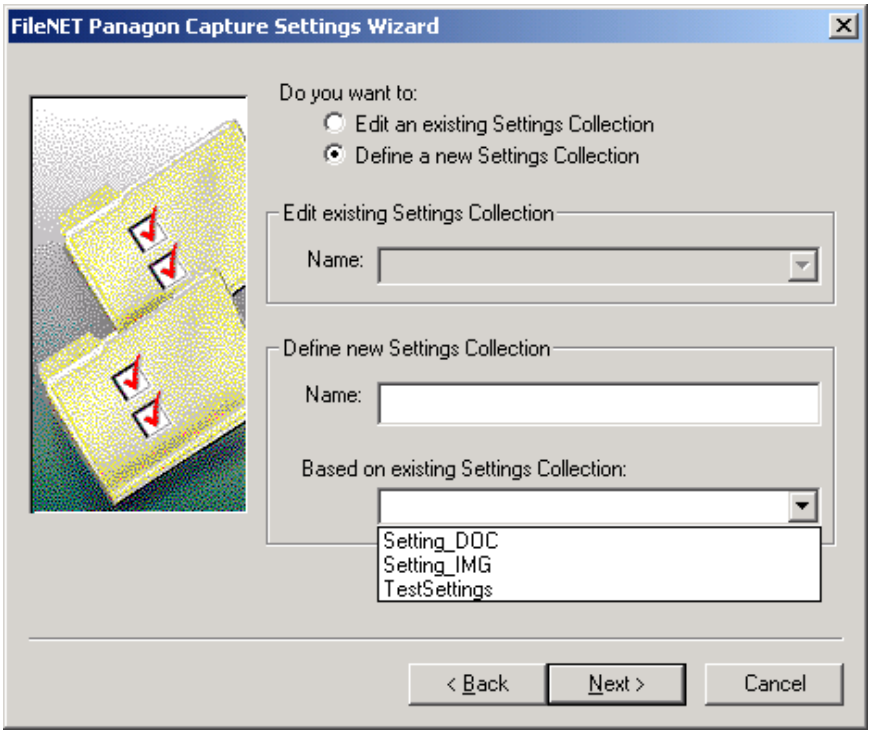
3. Click **Next** to continue. The following screen is displayed:



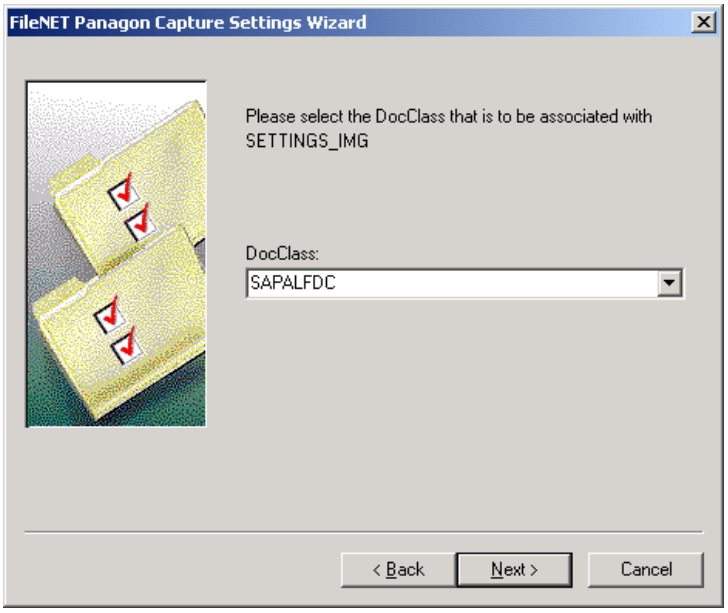
4. Click **Next** to continue. The following screen is displayed, which gives the option to select repository, where the scanned documents should be stored:



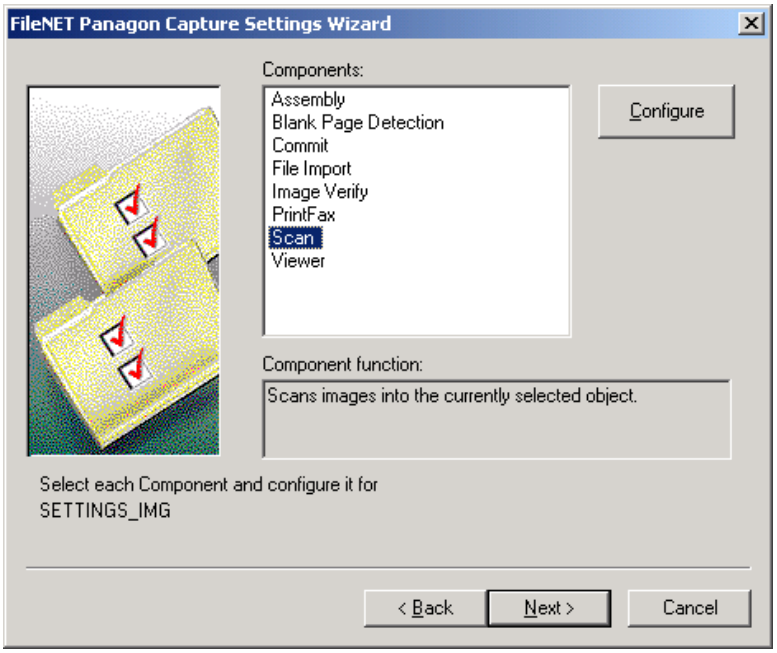
5. Click **Next** to continue. The settings collection screen is displayed:



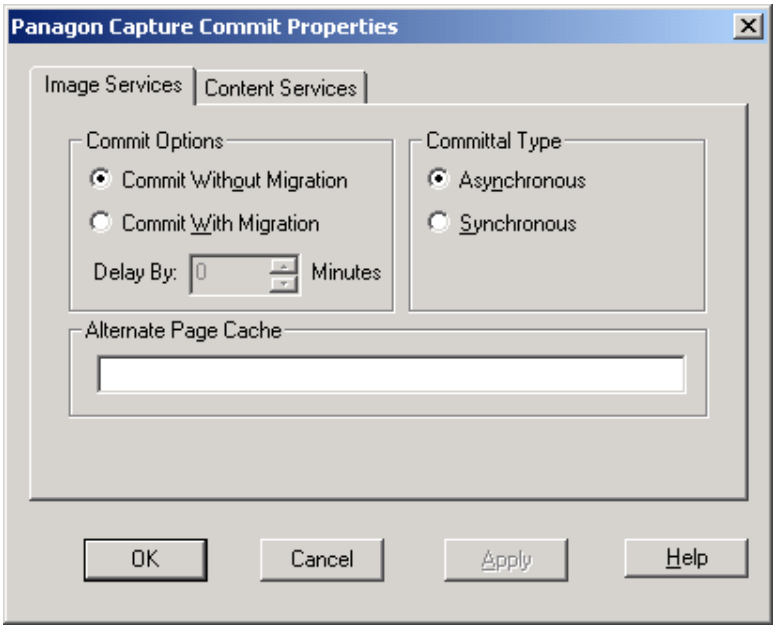
6. Click **Next** to continue. The following screen is displayed, which allows the user to choose a document class:



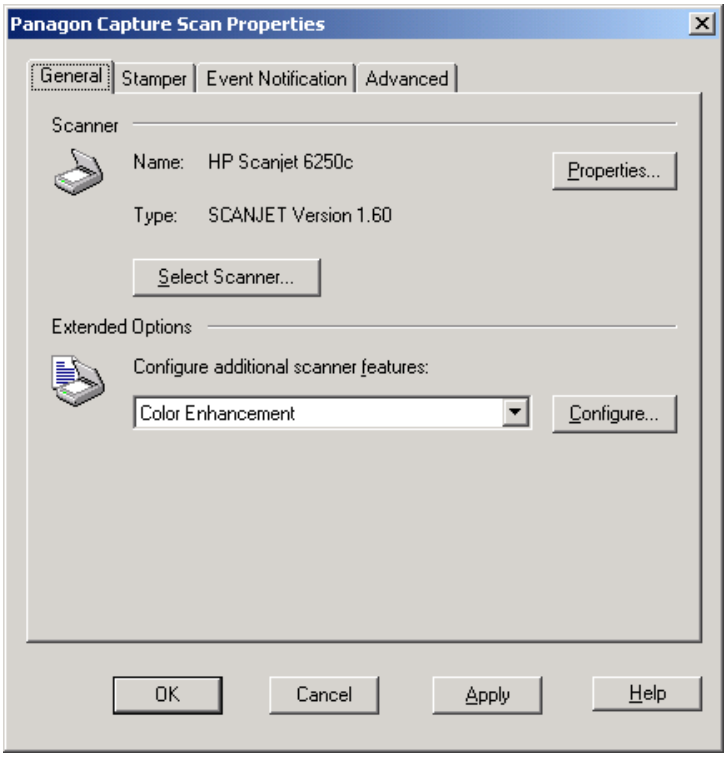
7. Choose a document class to which the scanned documents will be committed. This document class should already be defined in Image Services.
8. Click **Next** to continue. Following screen is displayed:



9. To select the commit component, either double-click it, or select the entry in the list, and click the **Configure** button. The commit properties screen is displayed:

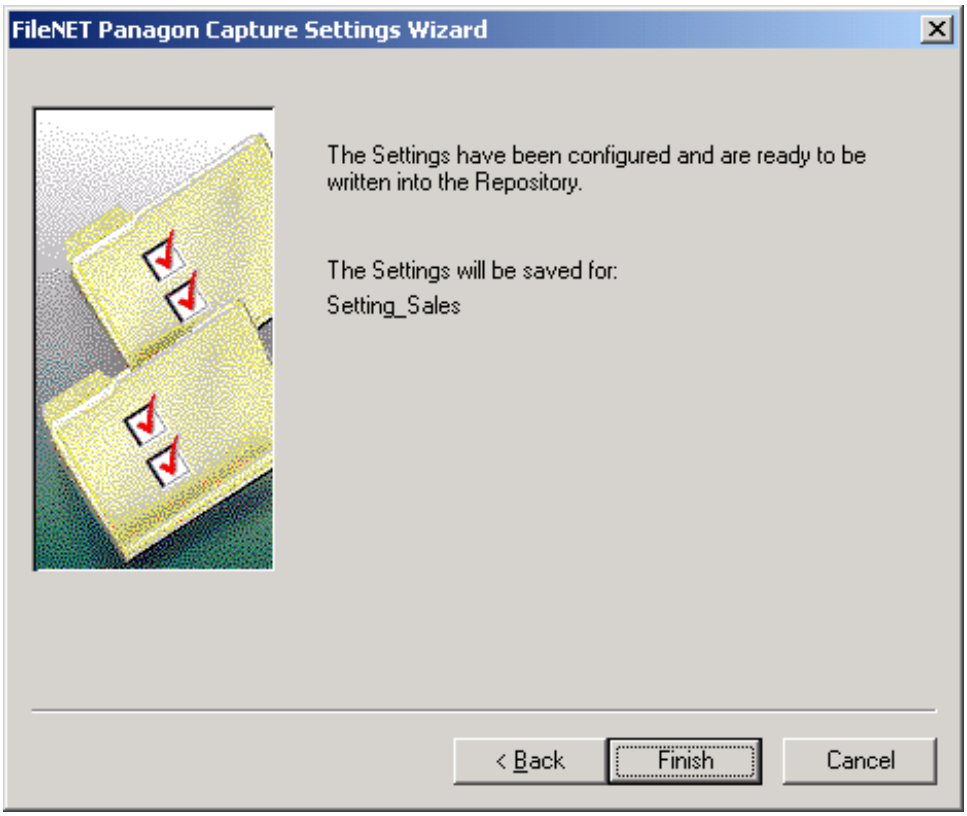


10. Select the **Synchronous** committal type. Click **OK** button to return to the Component list.
11. Select the **Scan** component. The Scan properties screen properties is displayed:



12. Choose the scanner attached to your workstation, and then configure the other options. Click **Ok** button to return to the component list. A confirmation window comes.

13. Click **Ok** to continue. In the component list dialog, click the **Next** button. The following save setting screen is displayed:



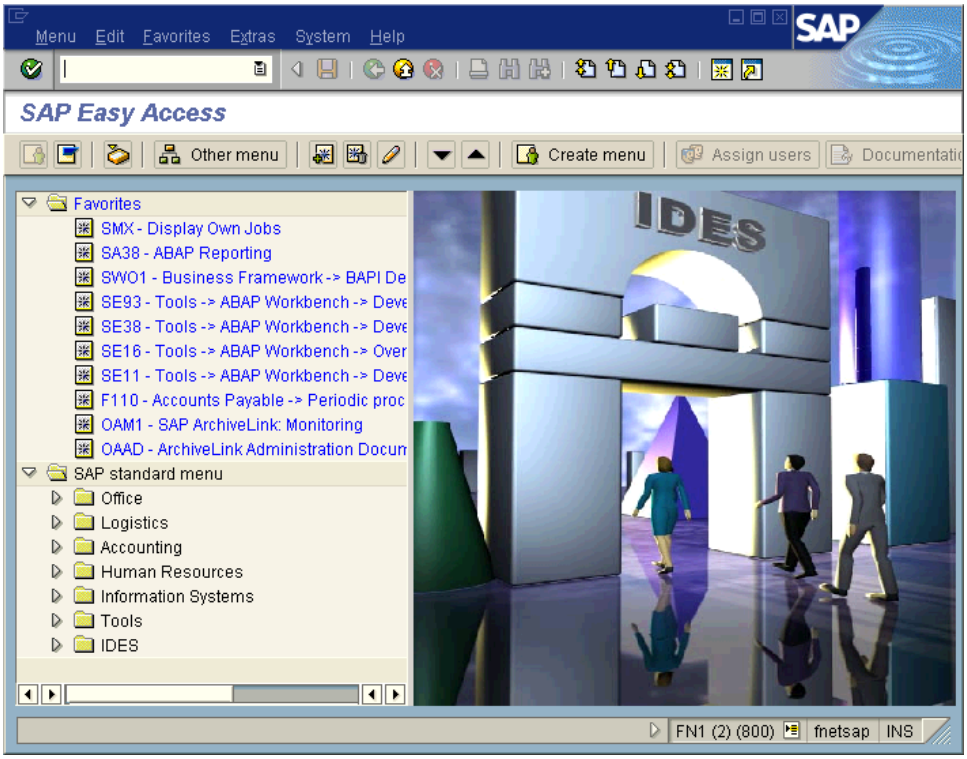
14. If you click **Finish**, the settings will be created and written in the repository. You can go back by clicking **Back** button to review, and change the settings that you entered. After saving the settings in the registry, to change them, click **Edit** → **Setting** menu, in Panagon Capture.

5
Customizing SAP

SAP ArchiveLink requires customization of R/3 systems, to work with a Content/Archiving system vendor such as FileNet. The following sections describe the necessary customizing for SAP R/3 system. The documentation is based on a 4.6B system. The figures in this manual have been produced using a SAPGUI Version 4.6B.

Overview

SAP ArchiveLink customizing starts in, **SAP Easy Access**, which displays the possible choices such as basic settings in a hierarchical structure as shown in the following figure:



Note: As an alternative, to customize your SAP system, use the SAP Implementation Guide (IMG). The IMG guide lists the necessary steps, provides context-sensitive SAP online documentation, and automatically displays the customizing screens for all SAP related functions. The IMG can be found under **Tools → AcceleratedSAP → Customizing** menu, or through transaction code **spro**.

There are two types of SAP ArchiveLink customizing required, which are as follows:

- Customizing specific to DWSAP. The tasks necessary for this type of customization are SAP Archive definition, SAP Archive Protocol definition.
- Customizing for SAP modules such as FI and SD, which is independent of the archive used. This type of customization is not part of this documentation. Refer to SAP Online documentation for more information on the customizing of SAP modules.

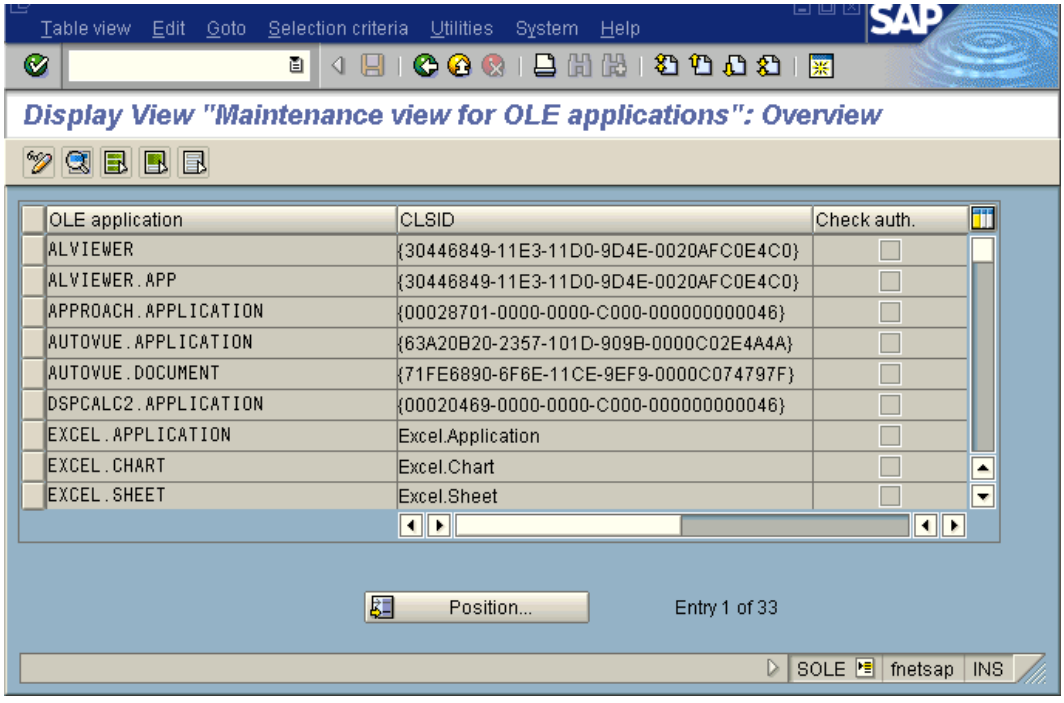
Customizing SAP for IDM Desktop for R/3

This section explains the procedures that are necessary to configure client/server communications.

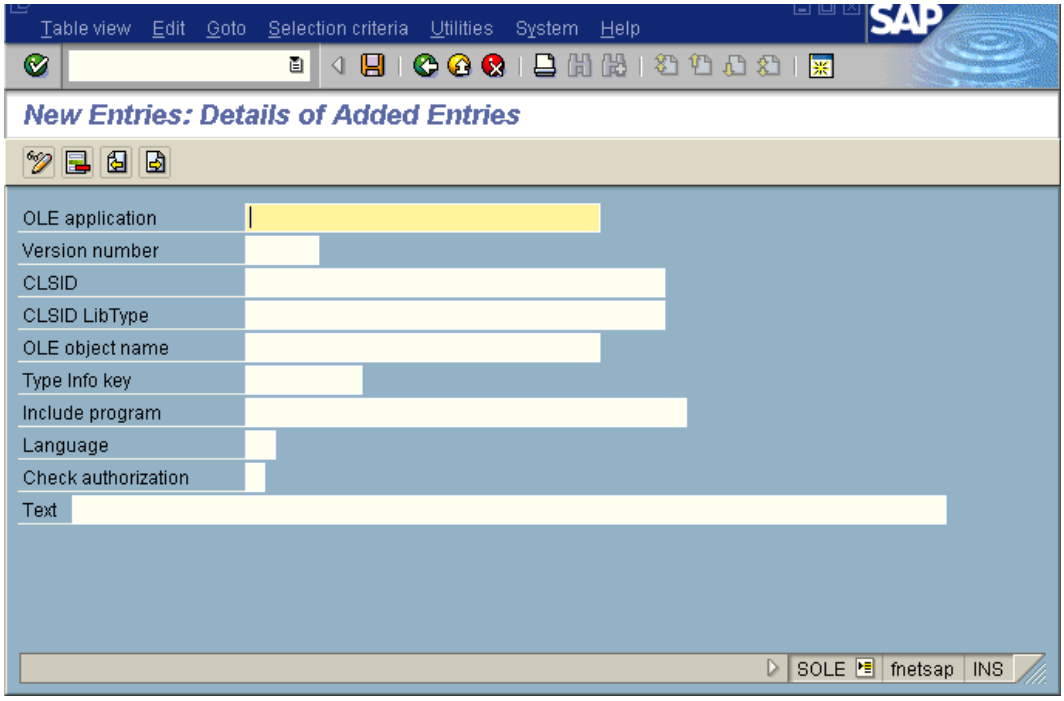
Defining IDM Desktop for R/3 as an OLE Application

To declare IDM Desktop for R/3 as an OLE server to SAP follow the steps outlined below:

1. Go to the transaction code **sole**. The following screen is displayed:



2. To switch to Change mode, chose **Table View → Display → Change** menu. A message box will state that this transaction is client independent.
3. To add new entries, click **Edit → New** entries menu. The following screen is displayed:



4. Enter the value for each edit box as listed in the table below:

Field	Entry
OLE application	For example, IDMFORR3
Version number	5.1
CLSID	CLILINK.SAPLINK
CLSID LibType	Leave blank
OLE object name	CLILINK.SAPLINK
Type Info key	NO_TYPELIB
Include program	Leave blank
Language	Leave blank
Check authorization	Leave blank
Text	Leave blank

***Tip**: Make a note of the OLE Application name because it is used later in the configuration, while defining the IDM Desktop for R/3 to SAP.*

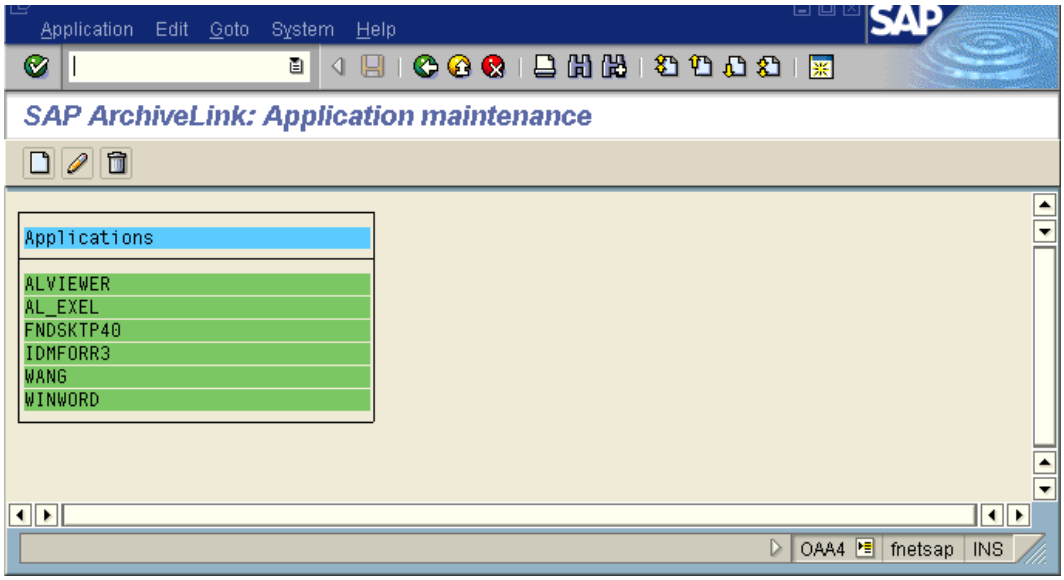
5. To save the changes, click **Save**.

Defining IDM Desktop for R/3 to SAP

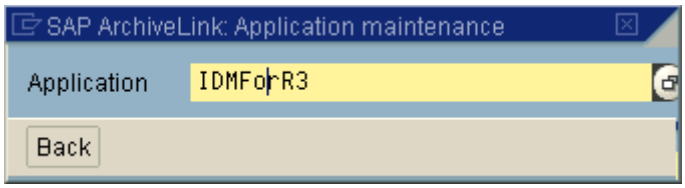
> **Background**: For DWSAP to communicate with SAP system IDM Desktop for R/3 should be defined to SAP as an OLE application. This involves defining methods and parameters that are sent and returned for each application.

Following are the steps to be performed for defining IDM Desktop for R/3 as an OLE application:

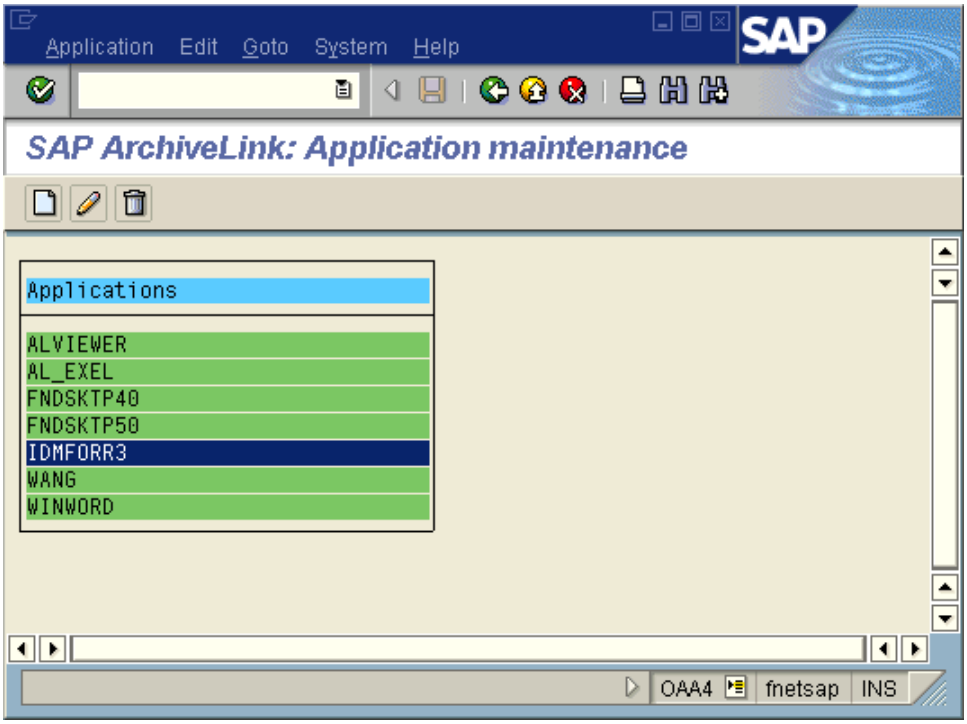
1. Go to the transaction **oaa4**. The following screen is displayed:



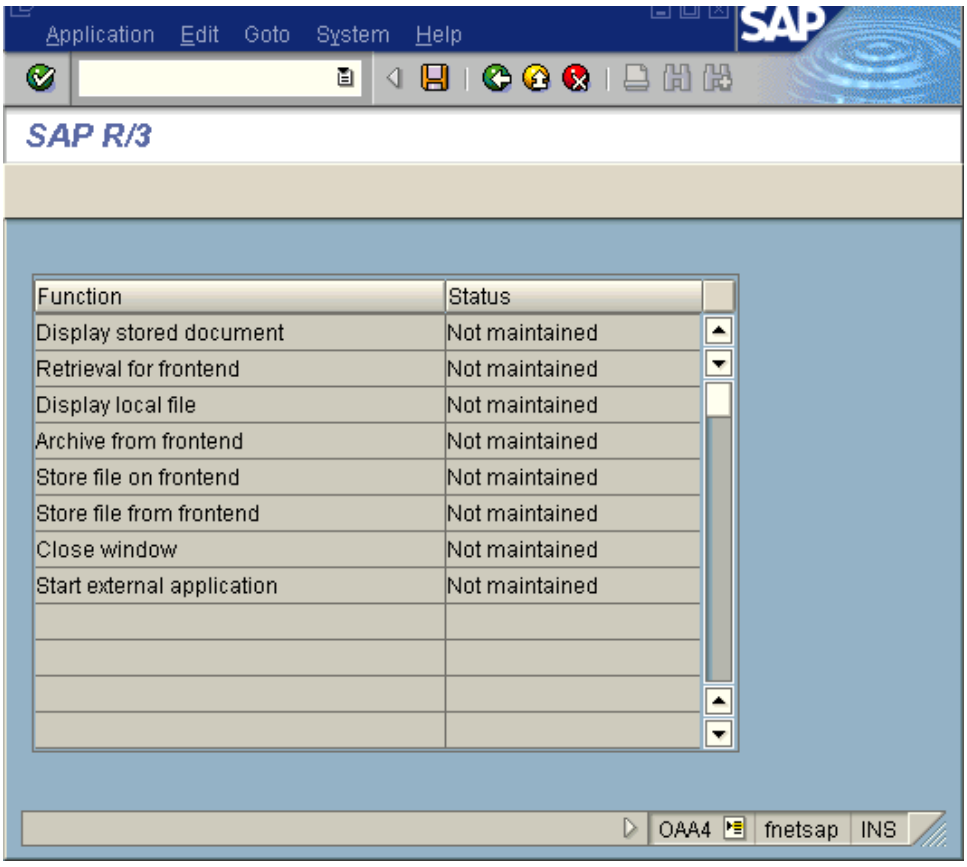
2. Click **Application → Create** menu. The following screen is displayed:



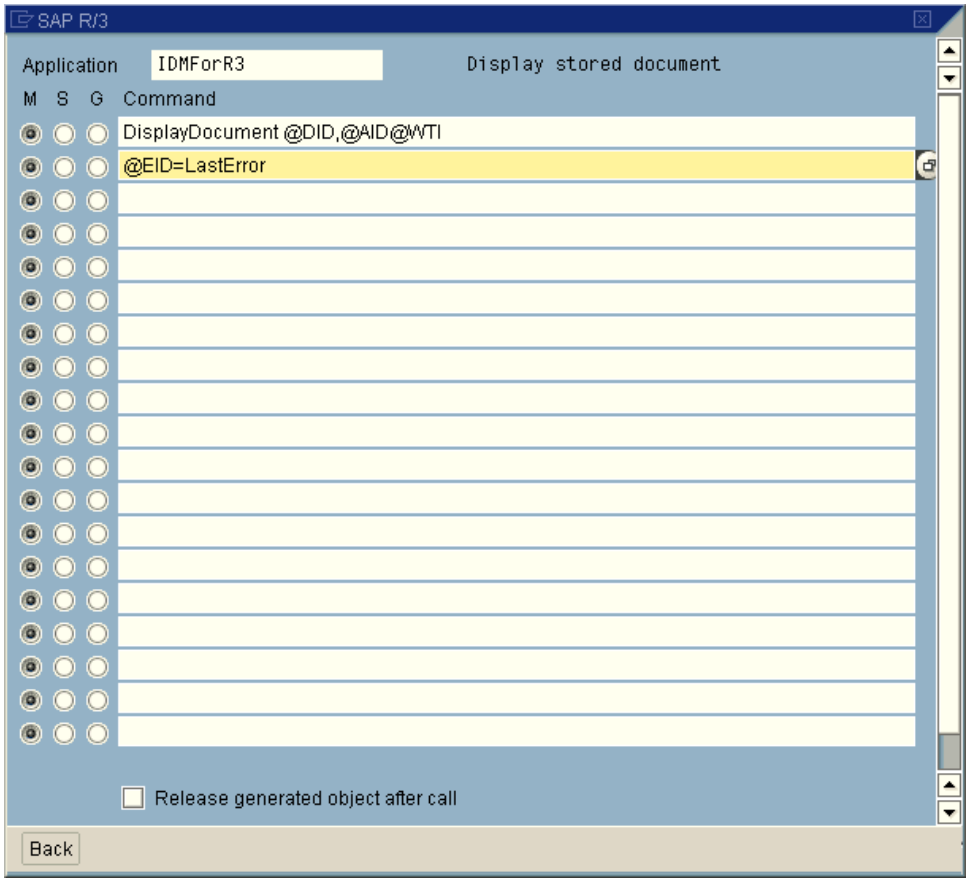
3. Enter a unique application name for e.g. IDMForR3. Click the **Back** button. The new application, in this case IdmForR3, appears in the displayed list as shown in the screen shot below.



4. Double-click on the new application for editing. The following screen is displayed:



5. To modify each of the functions, double-click one of the OLE function line, for example, **Display stored document**. The following edit screen displays:



6. Enter name of the OLE Application, for example, IDMFORR3, in the Application field.

7. Enter the Methods (M), Sets (S), and Gets (G). To select the type, click the radio button at the beginning of each line and enter the command to be executed referring to the following table:

Operation	Type	Command
Display object	M	`DisplayDocument @DID,@AID,@WTI`
	G	`@EID=LastError`
Retrieval for frontend	M	`RestoreFile @DID,@DPA,@AID`
	G	`@EID=LastError`
Display local file	M	`DisplayFile @DPA`
	G	`@EID=LastError`
Archive from front end	M	`ScanArchive @DTY,@AID`
	G	`@DID=DocumentId`

Operation	Type	Command
end	G	`@EID=LastError`
Store file from frontend	M	`ArchiveFile @DPA,@DTI,@AID`
	G	`@DID=DocumentId`

8. Click **Back** button after each operation, and select the next operation to be defined.
9. To save the changes, click **Save**.

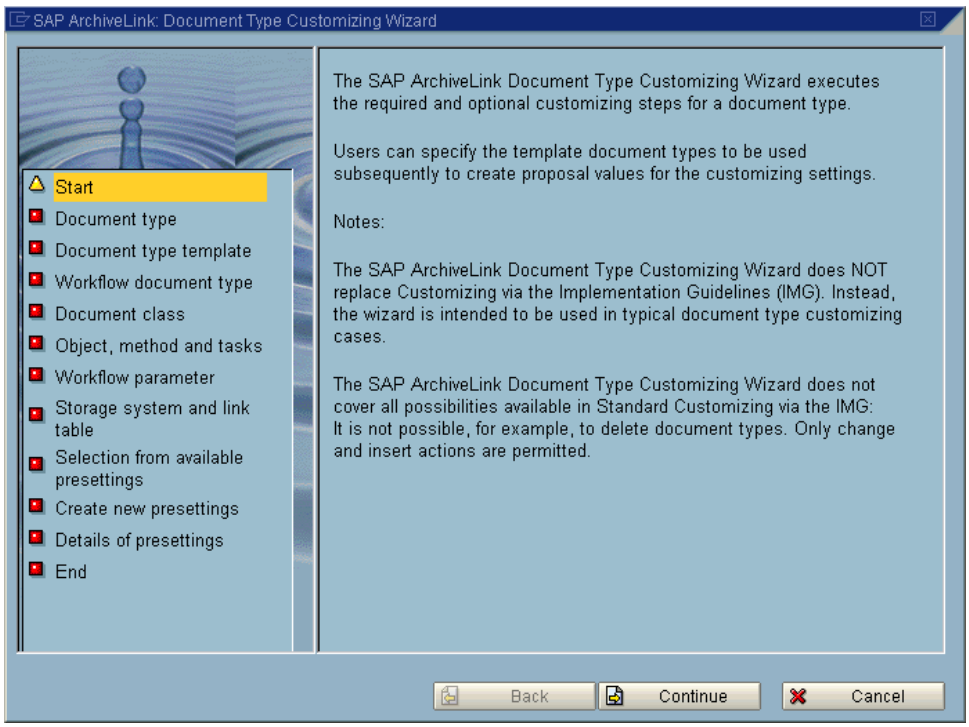
After you enter the configuration tasks, the modified entries are displayed as maintained in the OLE column.

Note: There should be no space between the parameters in a method call, or in an assignment. There is a space between a function name for example, **DisplayFile** and the first parameter `@DPA`.

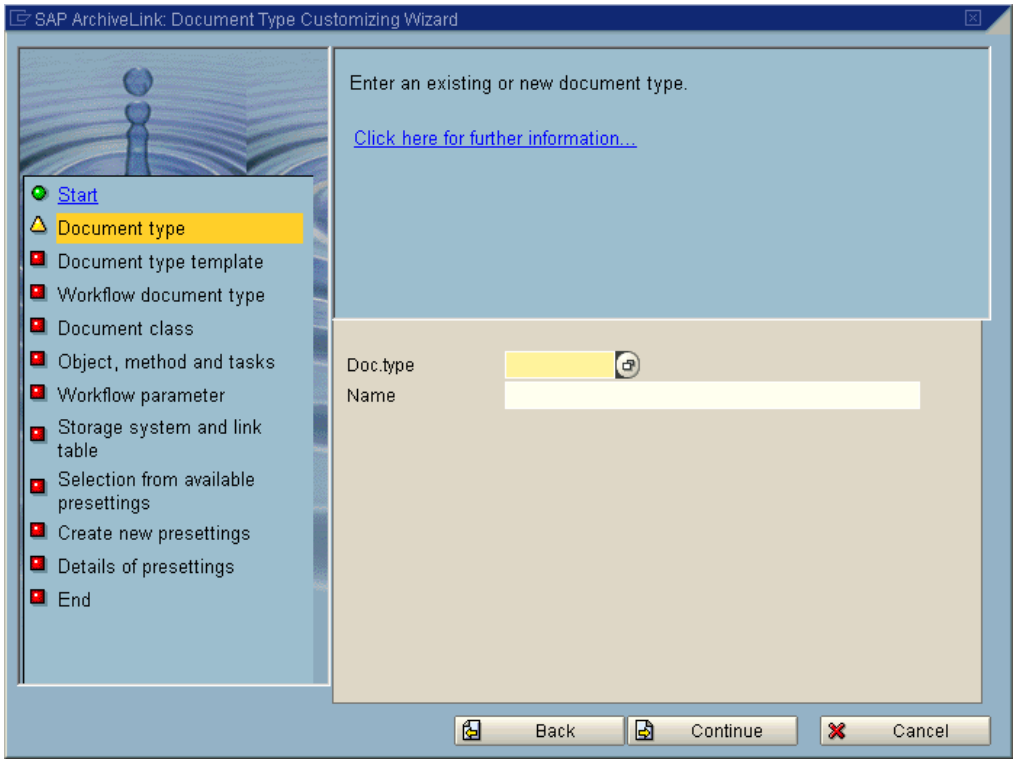
SAP Customizing for Incoming Documents

The following steps need to be performed for defining a workflow document type to be used for Incoming Documents:

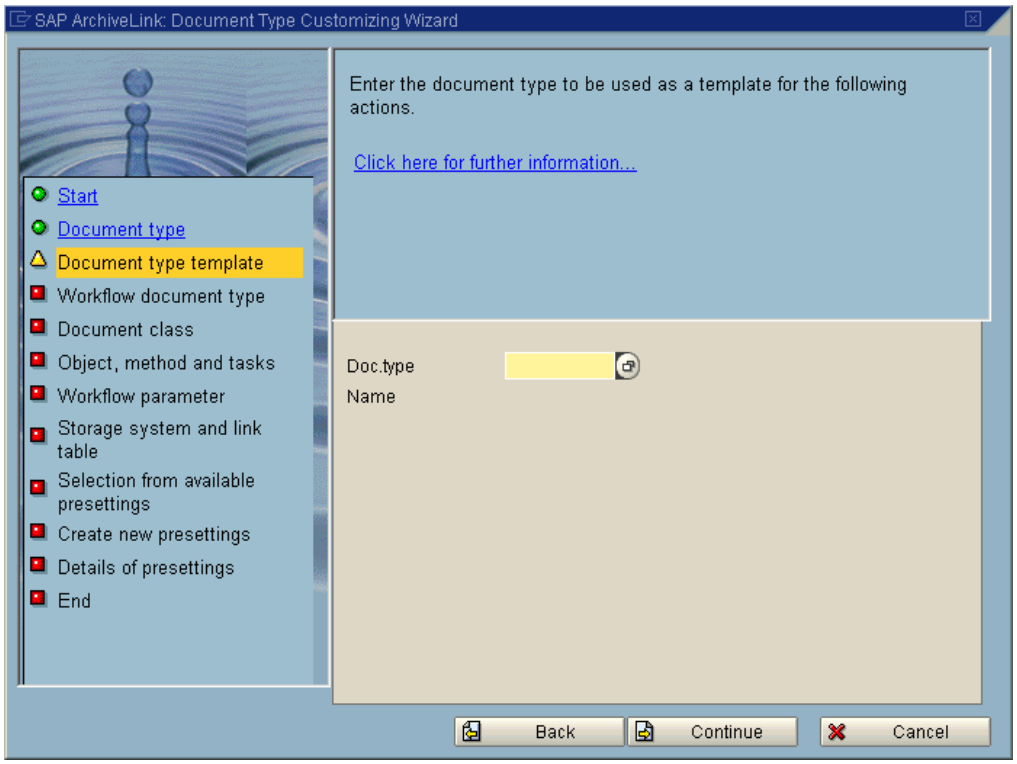
1. Access the Menu: **Tools** → **Business Documents** → **Document Types** → **Customizing wizard**. The following screen is displayed:



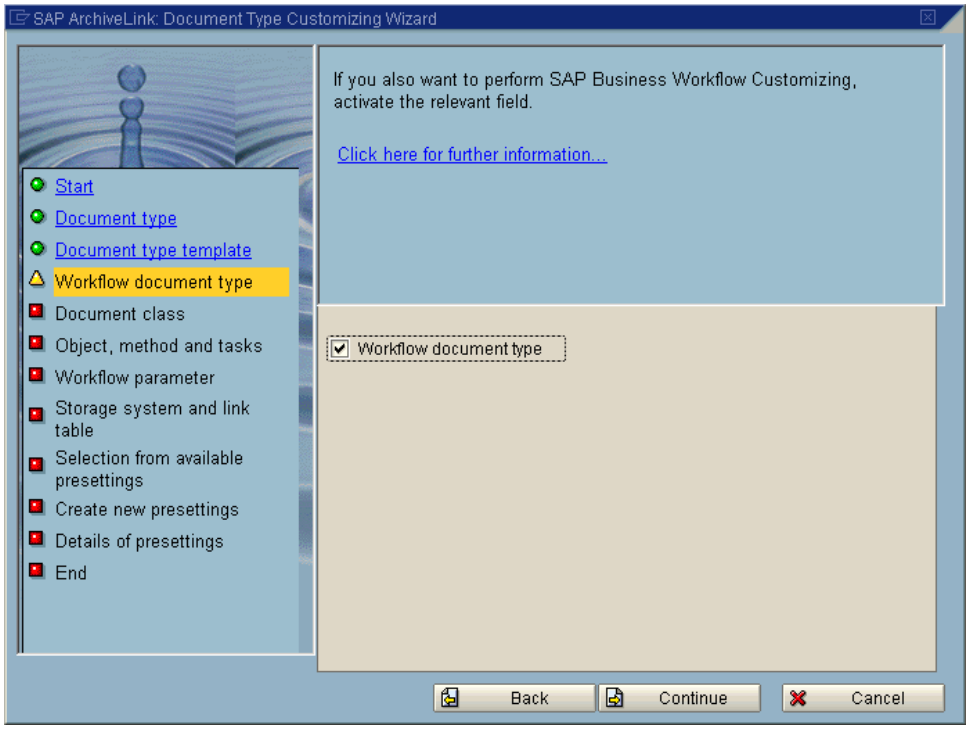
2. Click **Continue.** The following screen is displayed:



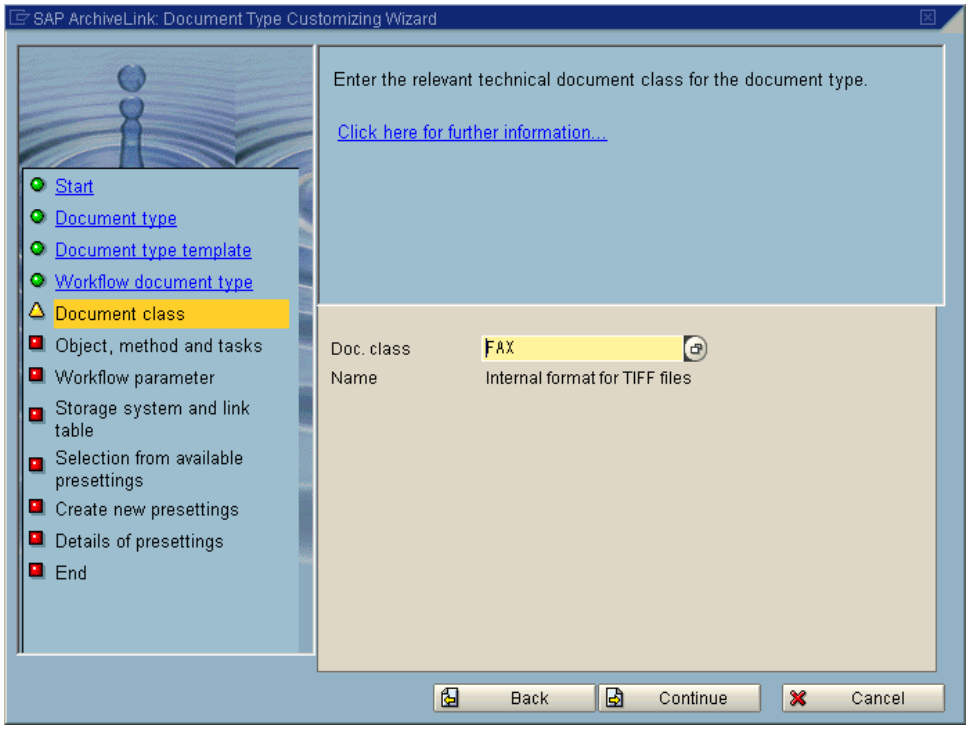
3. Enter the name of the Document type and a description for the document type. Click **Continue**. The following screen is displayed:



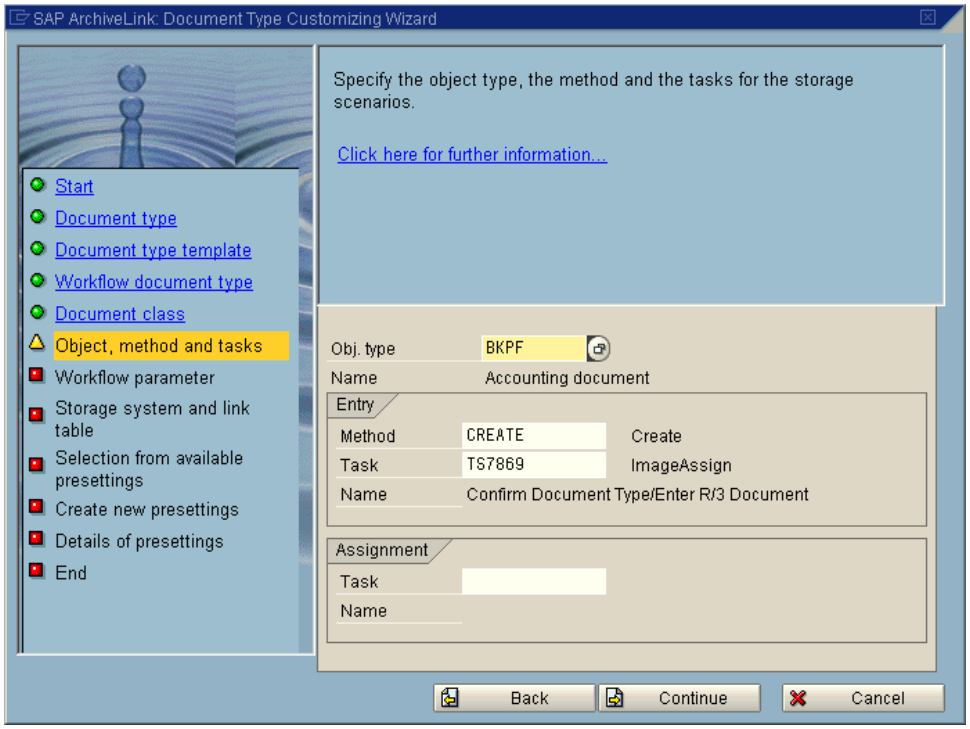
4. Enter the Doc type as FIIINVOICE and click **Continue.** The following screen is displayed:



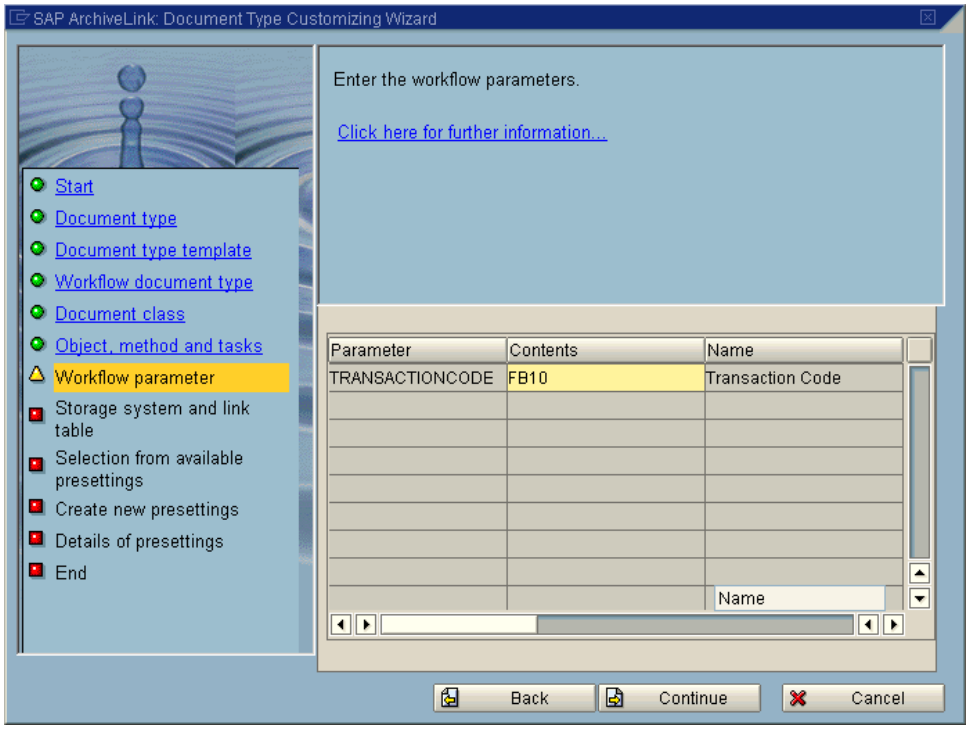
5. Click the checkbox **Workflow Document type**. Click **Continue.** The following screen is displayed:



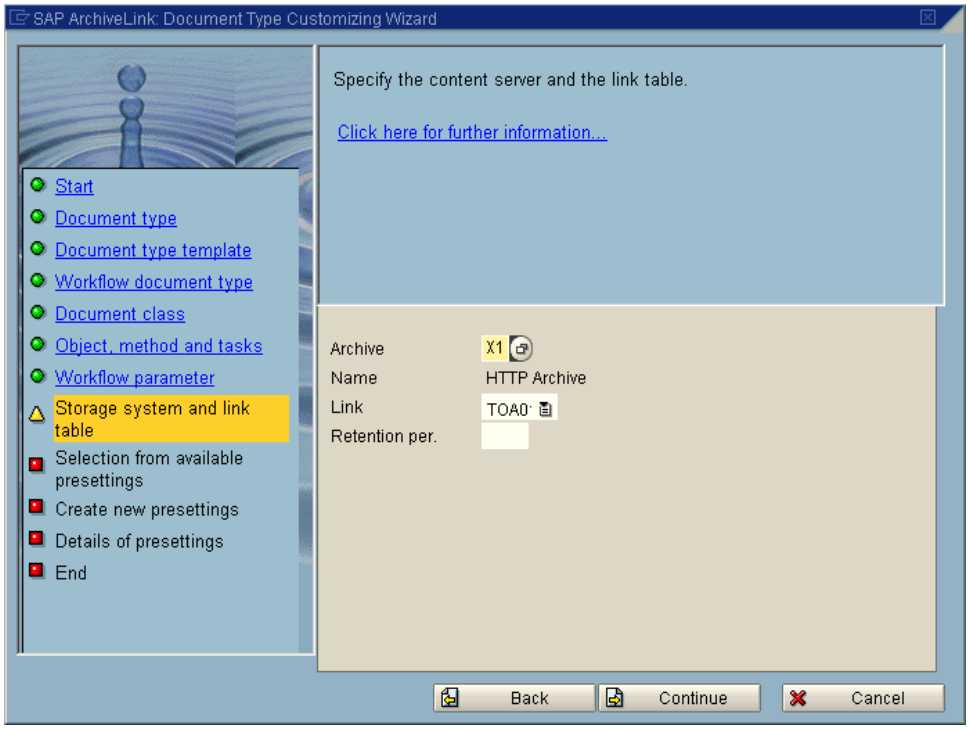
6. Enter the Doc Class as **FAX.** Click **Continue.** The following screen is displayed:



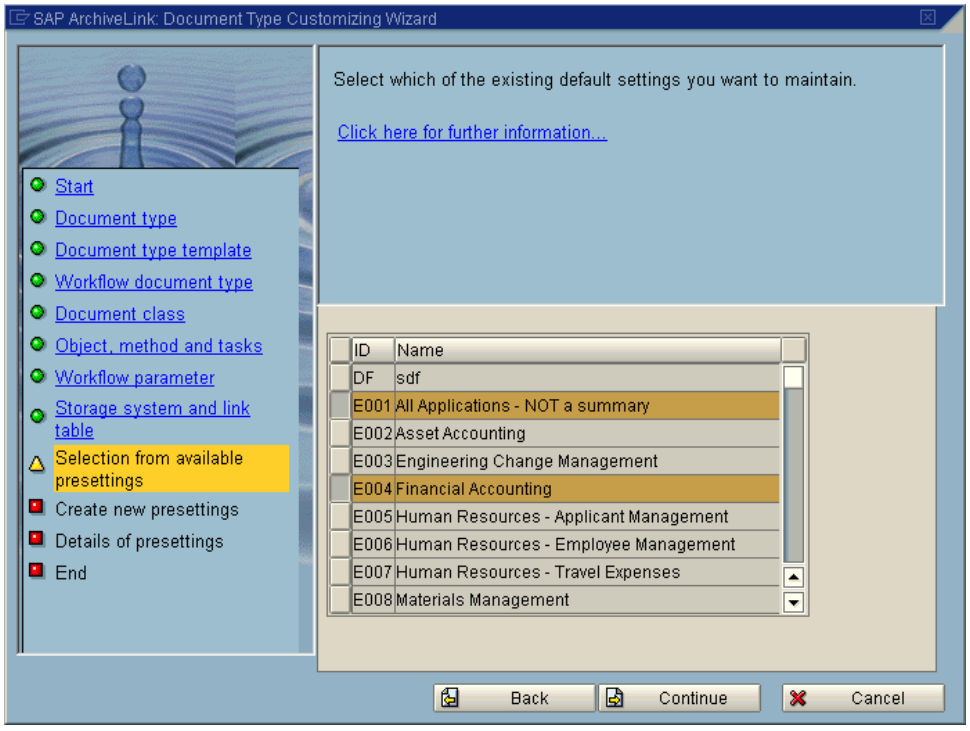
7. In the Assignment tab, enter the task as TS7869. The following screen is displayed:



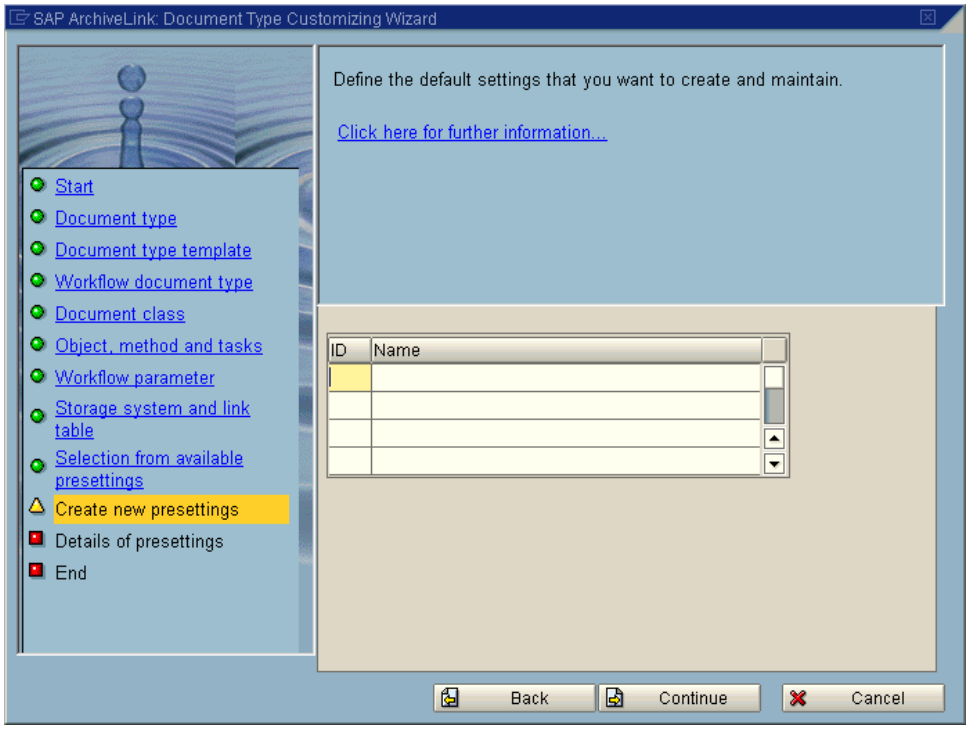
8. Click **Continue**. The following screen is displayed:



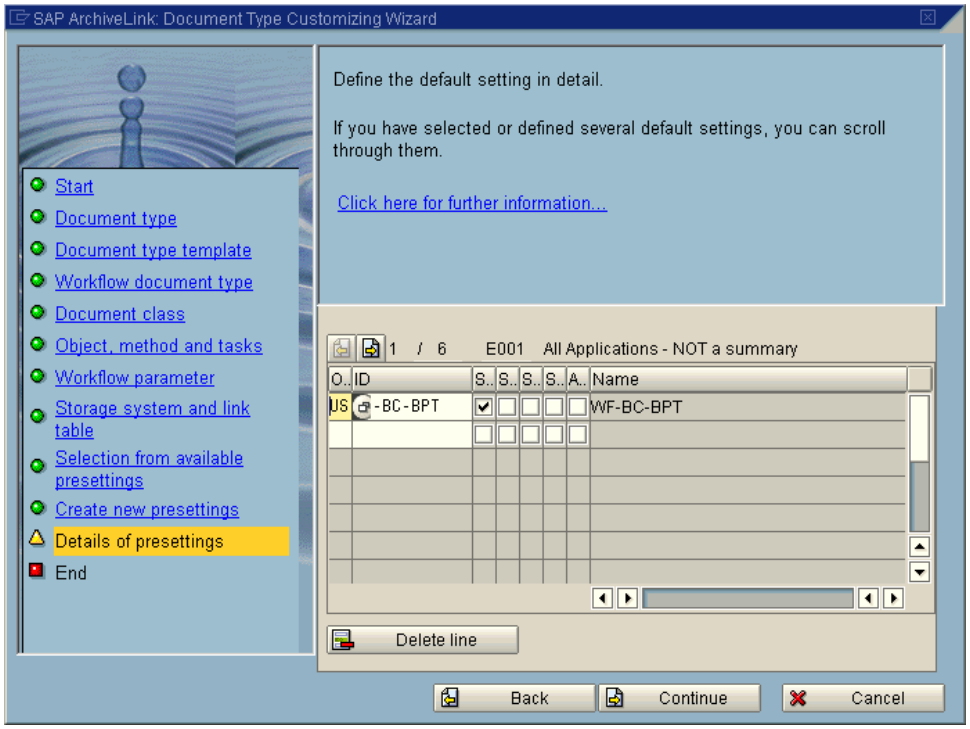
9. Enter the Archive as X1. The following screen is displayed:



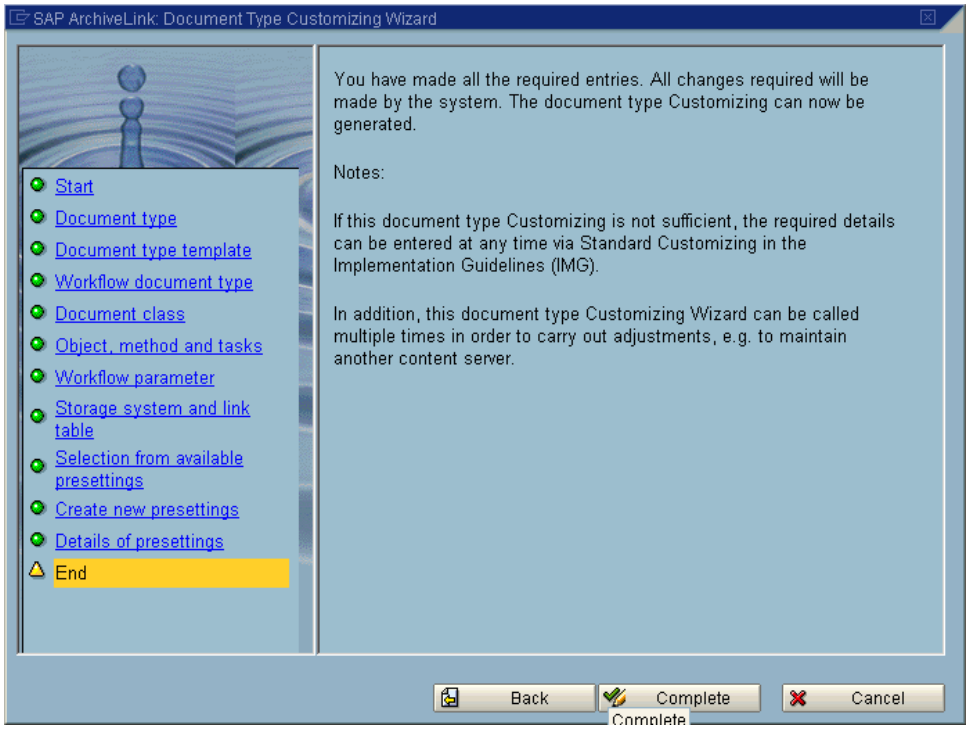
10. Click **Continue**. The following screen is displayed:



11. Click **Continue**. The following screen is displayed:



12. Enter the User name as an SAP user. Click **Continue.** The following screen is displayed:



13. Click **Complete** to exit the Customizing Wizard.

SAP Customizing for DMS Components

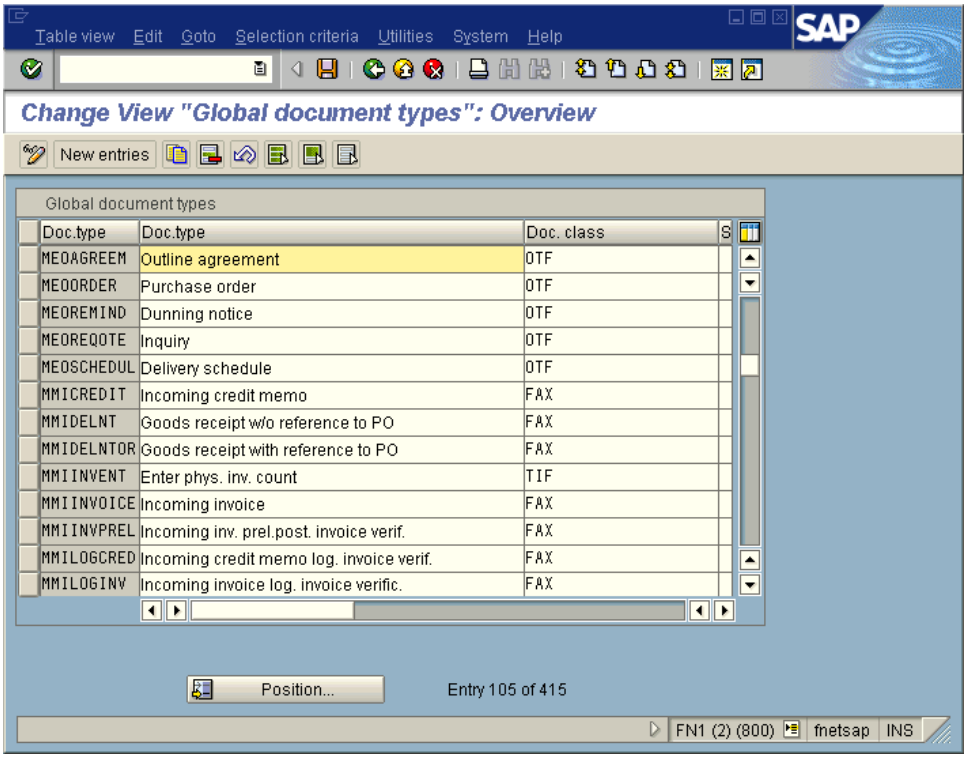
If the new feature of DWSAP, DMS components, is used, additional SAP customizing should be done.

Creating a New Document Type for DMS

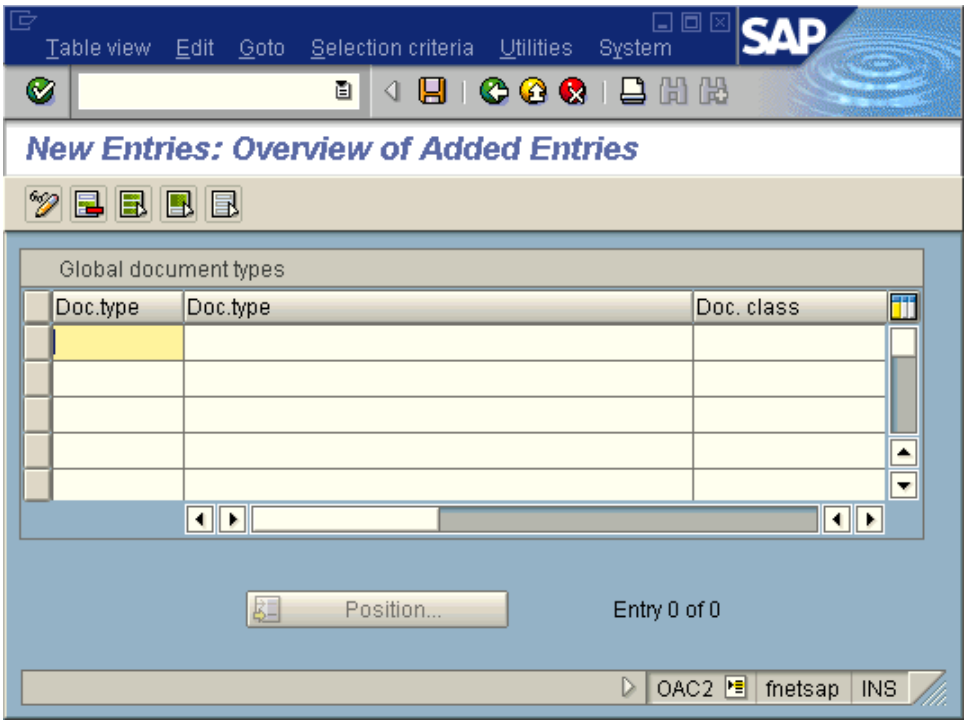
If DMS components are used, it is necessary to define a specific document type, which is used by DIR.

To create a new document type, follow the steps outlined below:

1. Access the menu **Tools → Business Documents → Document types → global** Document types or use the transaction **oac2**. The following screen is displayed:



2. To add a new document type, click **Edit → New Entries** menu. The following screen is displayed:



3. Enter a unique Document Type name and a description. Enter the Doc. class for this Doc type as **FAX**.
4. To save the document type, click **Save**.

5. Enter the change request information, depending on SAP R/3 system administrative customization.

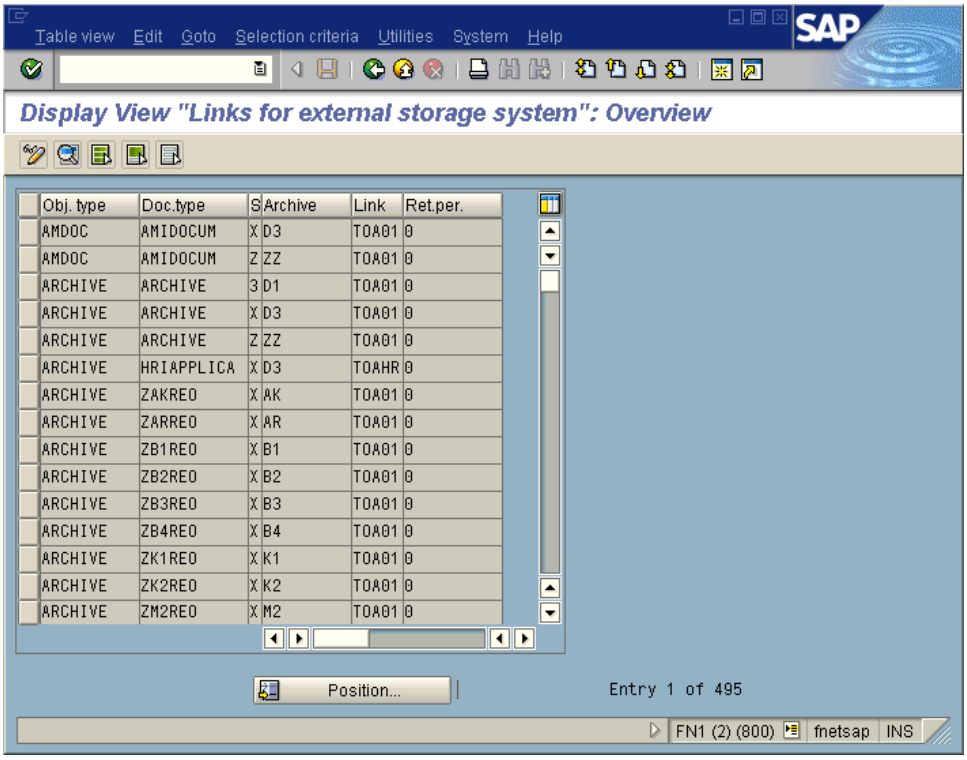
Note: Names of document type beginning with Y or Z alphabets, cannot be overwritten, or deleted, while updating SAP system software.

Linking the Document Type for DMS to an Archive

The newly created document type should be linked to the specific archive, which is used to store DIRs.

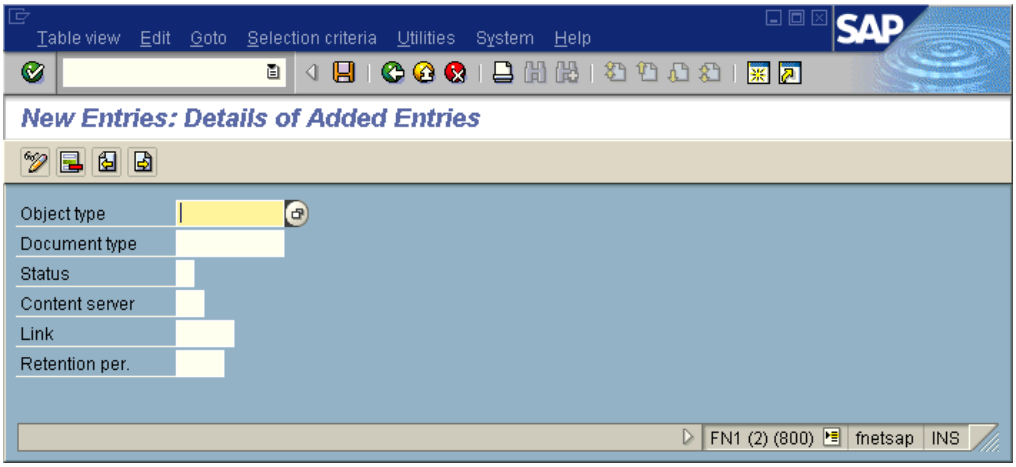
To create a new link follow the steps outlined below:

1. Access the menu: **Tools → Business documents → Basic Settings → Links** or use the transaction **oac3**. The following screen is displayed:



2. Click **Table view → Display → Change** menu to switch to Change mode,

3. Click **Edit → New entries** menu. The following screen is displayed:



4. Enter the following values for the new link:

Setting	Remark
Obj. Type	Refers to the object type. Enter the values as DRAW**.**
Doc. Type	Refers to the document type created.
S	Refers to the SAP ArchiveLink status. Enter **X** to activate the entry.
Archive	Refers to the archive.
Link	Selects a link table. Reference from objects or business objects to stored documents, is managed in Link Tables. SAP ArchiveLink predefines these tables.
Ret.per	Specifies the retention Period. Retention Period refers to the number of months after which an entry for a stored document can be removed from a link table.

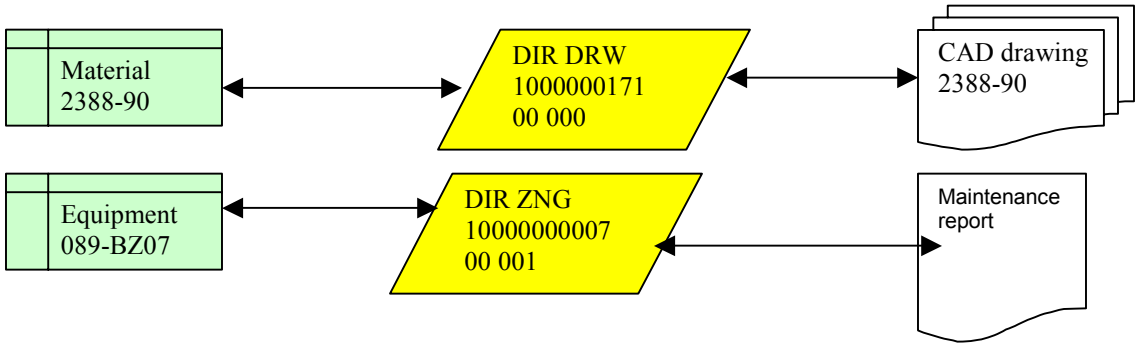
5. Click **Save** to save the settings.
6. Enter the change request information, depending on SAP R/3 system administrative customization.

6
SAP DMS Functionality

Functionality within the SAP R/3 System

Each SAP R/3 system comes with a built-in document management system. SAP R/3 offers no functionality to store documents, such as PDF files, Word files, and AutoCAD files. SAP R/3 offers functionality to organize documents and connecting document files from external repositories to objects within SAP R/3.

The base unit of SAP R/3 document management system is Document Info Record (DIR). DIR is a meta data record, which provides information about a document. A DIR can be connected to SAP R/3 master record, depending on the DIR type, and an external document file. The external document can be a file in a file system, such as on a local hard disk, a file available through FTP, for example, in an FTP server known as vault, or an object in an optical archive available through the ArchiveLink interface. This means that DIR acts as a connector between SAP R/3 master data and external document files, as shown in the figure below:



7

Attribute and Free Search with the SAP ArchiveLink Viewer

Printlists committed using the Remote Function Call (RFC) can be displayed in SAPGUI but free search and attribute search cannot be performed on them. By customizing an SAP protocol, SAP Archivelink Viewer can also be used to display stored printlists. It can also be used for performing attribute search or free search for printlists. In order to use SAP Archivelink Viewer free search and attribute search, DWSAP release 4.0 component SAPSearch is required.

Following sub-sections describe the steps to prepare and use attribute search with SAP ArchiveLink Viewer:

Background: The search component SAPSearch of DWSAP release 4.0 performs attribute and free searches on printlists stored in Image Service (IS). Search requests are issued from SAP ArchiveLink Viewer to ArchiveLink DLL of the client component. The DLL passes search requests to the Search Component on a server. Communication between the ArchiveLink DLL and the SAPSearch Component occurs through Remote Procedure Call(RPC) .

Beginning with ArchiveLink 4.5, attribute and free search requests are issued by R/3 application server, and sent directly to the Server Components, through HTTP.

SAP ArchiveLink Viewer

SAP ArchiveLink software is part of the SAP Presentation client software. If ArchiveLink is already installed, it resides in archlink-directory below the SAPGUI software. To check that all ArchiveLink viewer is properly installed, run **alviewer.exe** from the archlink subdirectory. If ArchiveLink is correctly installed, the viewer is launched containing no document.

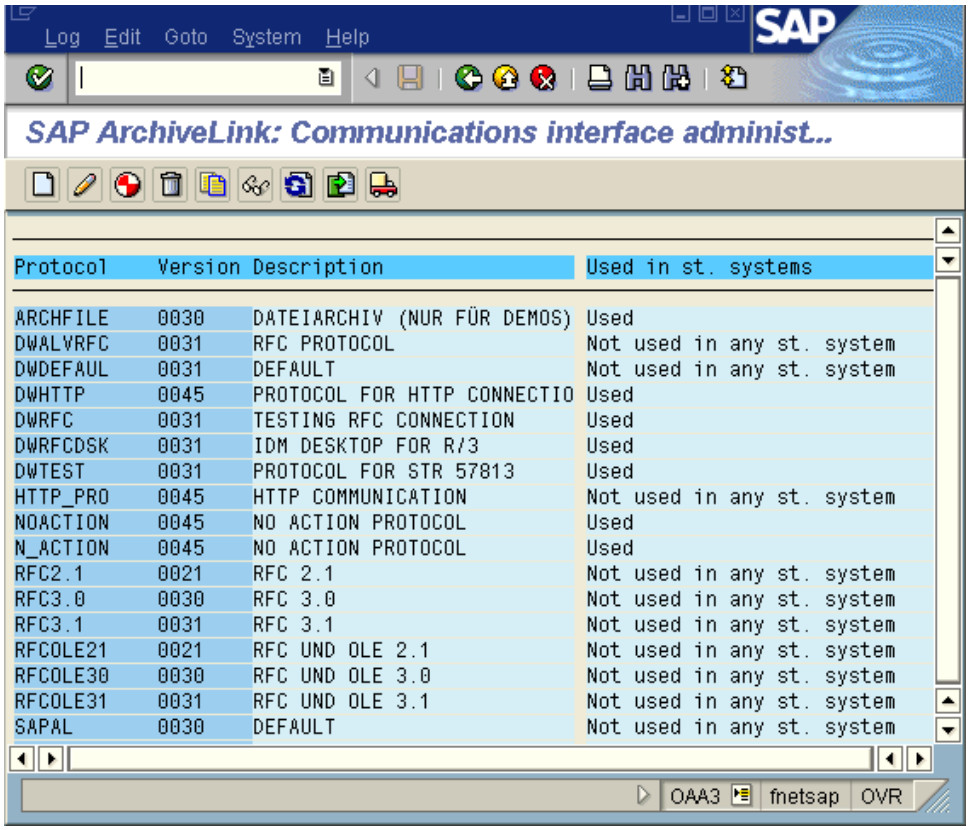
Note: As the SAP ArchiveLink Viewer will not be developed any further, SAPGUI version 4.5 is the last version, which delivers the ArchiveLink Viewer.

SAP Customizing

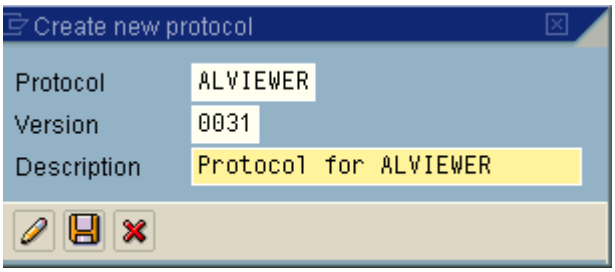
To customize an SAP archive for displaying the print lists in ALViewer, a new RFC protocol has to be defined and customized for using **ALVIEWER** application.

The following steps explain how to create a new customized RFC protocol:

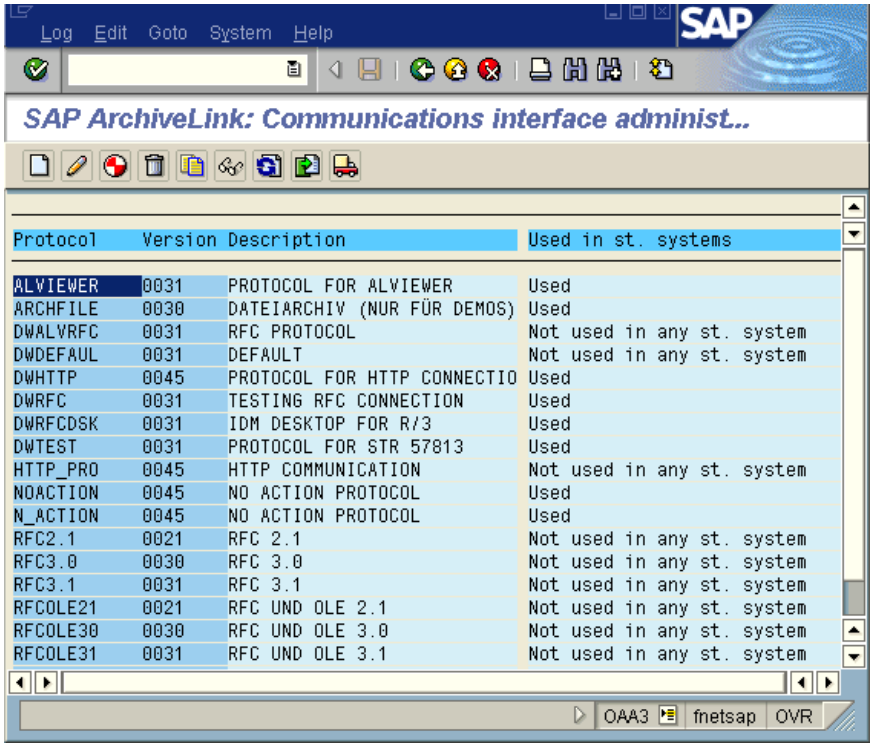
1. Go to transaction **oaa3.** The following screen appears:



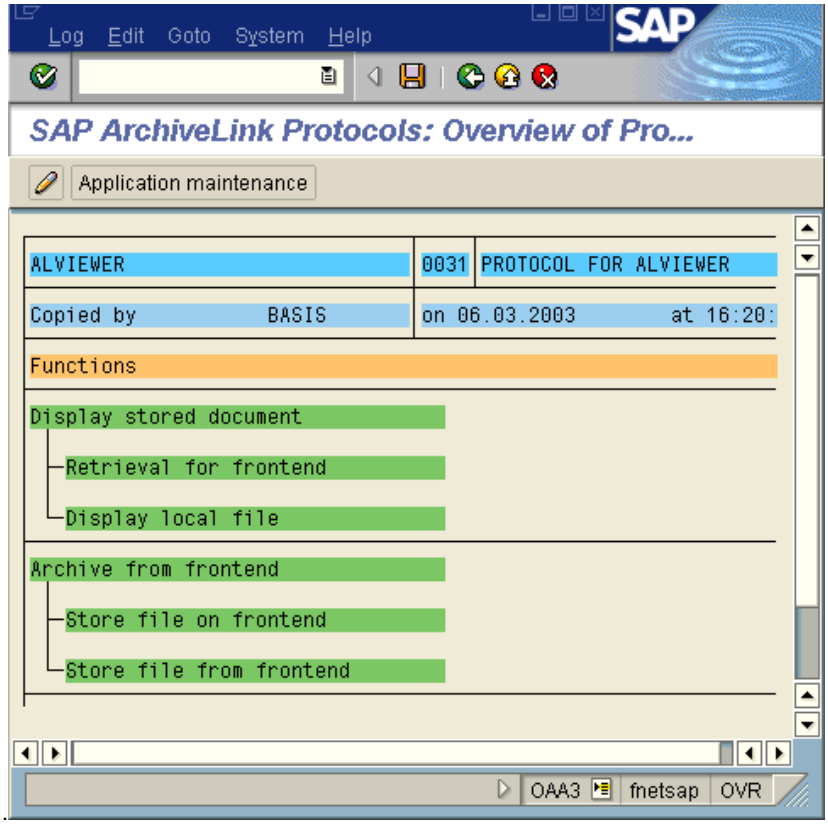
2. Choose **Log** → **Create** menu to create a new protocol. The following screen is displayed:



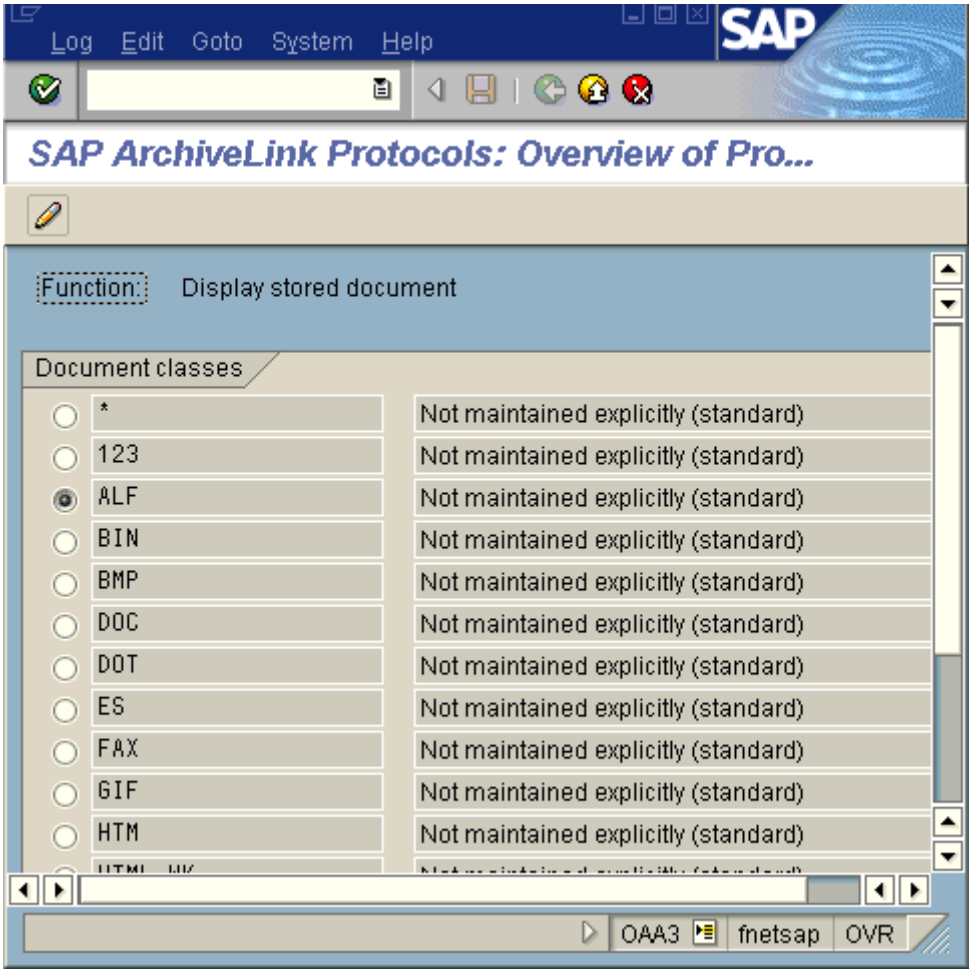
3. Enter the protocol name, version and description as shown in the above screen and click **Continue** to return to SAP ArchiveLink Communication interface administration screen.



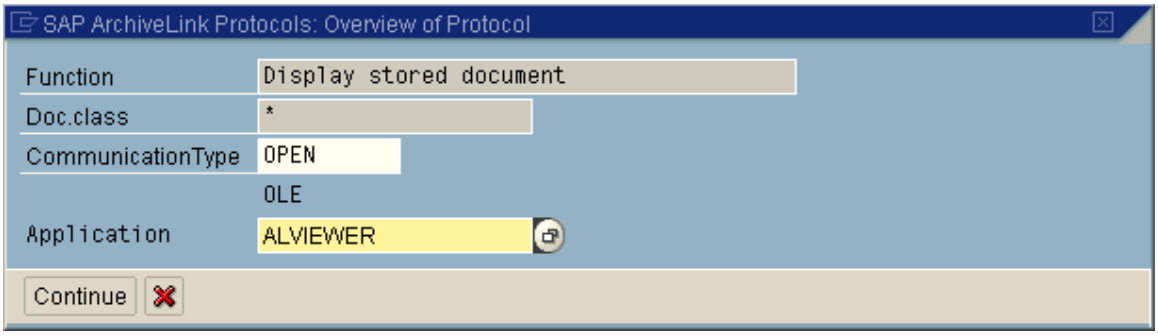
4. Choose the **ALVIEWER** protocol and select **Edit** → **Change.** Following screen is displayed:



5. Select **Display stored document** function and click **Edit → Change** menu. The following screen is displayed:



6. Choose ALF document class and select **Edit → Change,** the following screen appears:



7. Enter the **Communication Type** as OPEN, alternatively, it can be chosen from the possible entries list by pressing **F4** key. Enter the

Application name as **ALVIEWER** and click Continue to back to the over view of protocols screen. Press **Save**.

To customize an archive for using **ALVIEWER** protocol, go to **oac0** transaction and change the protocol to **ALVIEWER**.

Configuring ALViewer

To set up an SAP ArchiveLink software, use **setup_al.exe** program, which resides in the archlink subdirectory of SAPGUI software. Each archive must be registered to ArchiveLink.

Complete the following fields for each archive:

- Archive ID:Two-character code identifying an archive system connected to an SAP R/3 system. This must match an Archive ID defined inside an SAP system.
- Link DLL: Path and file name of the Archive DLL used by an SAP ArchiveLink to access documents stored on the archive system. This must point to the ldmForR3.dll, which is provided with FileNet DWSAP and is installed in the IDM Desktop for R/3 directory (default: C:\Program Files\FileNet\IDMForR3\).

Note: The Link DLL entry field in the setup program allows only entering paths up to 52 characters in length. If it is necessary to enter a longer path change the values directly in the ALViewer.ini and ArchLink.ini files.

```
[ALViewer]


Archives=X1


Path=C:\Program Files\SAPpc\ARCHLINK

[Archive-X2]

ArchiveLinkDLL=C:\programfiles\FileNet\IDMForR3\IDMfor
R3.DLL
```

To see the location of the ALINKLOG.txt and the log level, check the following entry in the ALViewer.ini and ArchLink.ini :

```
[Logging]

LogFile=c:\logs\ALINKLOG.TXT

MaxFileSize=1000000

LogLevel=6
```

Installing of SAPSearch

To use the SAP ArchiveLink Viewer to search in print lists, Windows NT Service **SapSearch** or UNIX daemon **Search** of DWSAP 4.0 should be used, and kept running.

It is not possible to run **SAPSearch** on DWSAP 5.x server anymore. This means, install it on IDM Image Services Server, or any other stand-alone server.

Note: WAL 3.4.0 with SP1, which is now referred to as Image Services Toolkit, should be installed on the machine as well.

Appendix A – OSS Notes

As Document Warehouse for SAP is an interface between FileNet Libraries and an SAP system, certain issues can occur without finding the reason for it within Document Warehouse for R/3. During testing, certain issues with SAP R/3 have been observed. Consult the following SAP OSS notes for the required SAP coding corrections:

# 0193715	In 4.6B system, OLE calls do not work for an RFC archive. Error message: "The content repository is not configured completely."
# 0357207	In 4.6B to 4.6D systems, attribute search in printlists does not work. Error message: "No attribute information available." or an endless loop in SAPGUI occurs.
# 0368569	In 4.6A to 4.6C systems, in transaction FB03, existing document links are not available.
# 0144097	In 4.5B, Files which are stored by the application server via HTTP, are not accessible. The problem does not occur there if the document class FAX or ALF is used.
# 0164203	No specific SAP release, Problems with SAPHTTP Customer's help for how to use HTTP Tracefiles
# 0387010	In 4.6D system, SAPHTTP generates Dr. Watson errors. SAPHTTP is terminated and the following error message appears: Exception number: c0000005 (access violation)

***Tip**: While using the search mask of SAP Notes, enter search key words such as **SAPHTTP** or **ArchiveLink** for receiving a result with more helpful information regarding SAP and ArchiveLink.*

Appendix B – Software License Agreement

FileNet End User Software License Agreement

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