FileNet Document Warehouse for SAP

Operations Manual

Release 5.1

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About This Manual

This manual is designed to assist the users to archive, retrieve and display the documents through the Document Warehouse for SAP (DWSAP) 5.1 product suite. The first chapter contains conceptual information about DWSAP, and the subsequent chapters contain task-oriented activities that enable the users to archive, retrieve or display the documents. The following is an overview of the information that the manual contains:

Chapter 1–Introduction – Introduces the DWSAP product.

Chapter 2–Document Processing – Explains various data archiving methods and usage of FileNet IDM Desktop for R/3 Views.

Chapter 3–Document & Data Archiving – Explains various archiving modes and archiving print lists to FileNet system.

Chapter 4–Document Retrieval & Display – Explains how to retrieve the documents stored on the FileNet system and display them on a workstation using either ArchiveLink viewer , FileNet IDM viewer or a Java based viewer.

Chapter 5–Provides an overview of the DMS Sample Application.

Glossary–This is an alphabetically ordered list, which gives a quick explanation to various important terms in this document.

Index–This is an alphabetically ordered list, which helps to locate appropriate information easily.

Target Audience

This manual is designed for the user of the DWSAP product suite. The user should be familiar with SAP.

New Features In This Release

Release 5.1 of the DWSAP has the following new features:

- Multiple simultaneous RFC requests.
- On-Line Administration.
- Windows Event Logging.
- SAP Namespace.
- Enhanced SAP Document Management System (DMS) support.
- Pure Thin Document Viewing.

- FileNet Capture For R/3 support for Panagon Capture 4.0.
- DMS Viewing and Linking ASP Sample Application.

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

Background: Explains the concepts behind specific features and provides helpful information for understanding the design of SAP Archive Link and DWSAP.

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

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*.*

Education

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

Comments And Suggestions

FileNet invites all customers to communicate with the Documentation group on any question or comment related to FileNet manuals and online help. Send email to docs@filenet.com. We will make every effort to respond within one week. Your suggestions help us improve the products we deliver.

1
Introduction

This chapter provides an overview of Document Warehouse for SAP (DWSAP) 5.1 product suite. For a more detailed discussion of DWSAP, refer to the FileNet DWSAP Installation and Configuration –Server .

Note: This manual contains periodic references to the SAP system where it works in conjunction with DWSAP Server Components and the FileNet IDM Desktop for R/3. These references are included for your convenience, as examples only, and to provide a clear understanding of DWSAP Server Components and FileNet IDM Desktop for R/3 procedures.

FileNet Document Warehouse For SAP

DWSAP integrates SAP and FileNet repositories like Image Serviices (IS) or Content Services (CS) using SAP ArchiveLink interface. It enables the business applications of SAP to process documents. It also allows archiving and retrieval of document as well as data.

The applications in DWSAP are:

- **FileNet IDM Desktop for R/3:** FileNet IDM Desktop for R/3 is installed on the client machine. It communicates with the SAPGUI client through SAP ArchiveLink interface, and with Image Services (IS) and Content Services (CS) using FileNet IDM objects.

- **FileNet IDM Services for R/3:** FileNet IDM Services for R/3 is installed on the server machine. It integrates the IS with SAP to provide automated document archiving and retrieval.

Note: FileNet IDM Services for R/3 will hereafter be called DWSAP Server Components.

Using DWSAP, you can:

- Process incoming documents before, during, and after archiving to the IS library. The archiving methods used are: early archiving, late archiving, and simultaneous archiving. For more information on these archiving methods, refer to section in Document Archiving Methods.

- Link the incoming documents to transactions in SAP system. To access the FileNet documents from SAP system, the documents should be indexed in SAP. This is called Document Indexing. This is

done by associating the document with SAP link table, which is performed automatically, when documents are linked to SAP transaction using FileNet IDM Desktop for R/3. Business attributes are not maintained for each archived document. Instead, the Link table in SAP database maintains relationships between SAP business objects and the documents associated with it.

- Link the incoming documents to work items that are routed and processed, using the SAP Business Workflow.

- Archive outgoing SAP generated documents such as order confirmations, print lists such as customer and vendor lists, and document images such as faxes received, directly from SAP system to IS library.

- Retrieve documents from IS that are linked to a transaction in SAP, and display these documents at the workstation.

- Store SAP generated data archive (REO) files on an optical library, instead of SAP application servers file system.

The following table contains examples of the types of documents in SAP that support ArchiveLink. Check the SAP documentation help files for a complete list for your release.

SAP Module	Original documents	SAP-generated Documents
Document Management System (DMS)	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.	
Materials Management (MM)	Credit Memo Invoice	LIFO valuation report Outline Agreement Purchase Order Schedule Line

		Master Material
Sales & Distribution (SD)	Complaint	Complaint
	Contract	Contract
	Delivery Note	Credit Memo
	Delivery Schedule	Delivery Note
	Order	Delivery Schedule
	Schedule Agreement	Order Confirmation
		Quotation
	Inquiry	Schedule Agreement
		Inquiry
		Invoice
Workflow (WF)	Any document	Any document

The list of ArchiveLink-enabled applications and individual transactions will increase over time. With ArchiveLink, the FileNet system will be able to process these new document types without modification.

2
Document Processing Using FileNet IDM Desktop For R/3

Document processing consists of entering, distributing, and incrementing data in appropriate modules on the SAP system. This data is taken from the documents located on the FileNet system.

This chapter describes the various procedures to process data on SAP system, using the FileNet IDM Desktop for R/3.

Note: SAP related screen shots are taken with SAP Application server 4.6B, so the actual screen in the users machine may differ from what is given in this Operations manual.

This section provides an overview of document archiving methods and then provides the procedure for document archiving using FileNet IDM Desktop for R/3.

Document Archiving Methods

Document archiving in SAP refers to the action of classifying the committed documents. FileNet commits all the documents prior to processing them in the SAP system, regardless of the archiving method. The archiving methods used to process documents are:

- Early archiving
- Simultaneous archiving
- Late archiving.

Early Archiving

This archiving method involves committing incoming documents to FileNet libraries and routing the documents to another user for processing. New work items are not forwarded directly to other users for processing. Instead, new work items are placed in a central SAP Workflow queue. This queue is emptied by a predefined job, WF_PROCESS Job, on the SAP system. This job runs periodically, and moves the new work items to specific Inboxes. This operation takes a few seconds.

Using the Early Archiving processing method, you can:

- Create a work item in the SAP Workflow program, representing the document to be processed. This workflow item can also be routed it to the Inbox of another user.

- Link the incoming document to the work item automatically.

- Retrieve the work item from SAP Workflow and display the image of the associated document.

- Process the Document Type associated with the work item, and book or post the document in an SAP application.

- Create a permanent link between the document and the new SAP transaction.

Simultaneous Archiving

The process of simultaneous archiving is similar to early archiving. In simultaneous archiving, incoming documents are classified for processing on the SAP system, and document's data is entered into the corresponding SAP R/3 transaction. The difference between the two methods of archiving is that the work item is not routed to another user for processing in simultaneous archiving.

Late Archiving

The process of late archiving commits documents to FileNet, and classifies the documents after processing them on SAP. Late Archiving can be done with or without using bar codes on the incoming documents.

Late Archiving Without Using Bar Codes

While processing incoming documents without bar codes, you can:

- Book the paper document into SAP system to create a new transaction.

- Note the transaction key on the SAP document for later reference.

- Retrieve and display the document in the FileNet viewer.

- Match an object in SAP application, using the SAP Object ID and other key data from the displayed document.

- Create an entry in the Link table, to link the object and the displayed document.

Late Archiving Using Bar Codes

While processing incoming original documents using bar codes, you can:

- Attach a unique bar code to each incoming document before it is distributed for processing.

- Book the paper document into SAP application and create a new SAP transaction.

- Create a temporary link between the document and the SAP object. This link is stored in SAP database.

- Retrieve the scanned document from a FileNet Workflow queue, and send a message to SAP system containing the FileNet document id and bar code value.

- Create a permanent link between the SAP transaction and the document, using SAP Object ID and FileNet document id. To create this link, match the message containing the FileNet document id and bar code value with the temporary record. This action is automatically performed by the cBarcode, which is a part of the DWSAP Server Components.

Using FileNet IDM Desktop For R/3 For Incoming Documents

FileNet IDM Desktop for R/3 main window represents the interface between DWSAP application and the FileNet Image Services (IS) or Content Services(CS).

The FileNet IDM Desktop for R/3 uses views to obtain a document from either IS or CS library for processing. The following standard views are provided with FileNet IDM Desktop for R/3:

- FileNet Browse for R/3.

- FileNet Capture for R/3.

- FileNet Queue for R/3.

Each of the above views is described in the later sections. Customers can also develop their own views that can be plugged into the FileNet IDM Desktop for R/3.

Accessing FileNet IDM Desktop For R/3

In order to access IDM Desktop for R/3, click **Start → Programs → IDM Desktop for R/3**. To view the three standard views, click **File → Open iView** menu; the following screen appears:
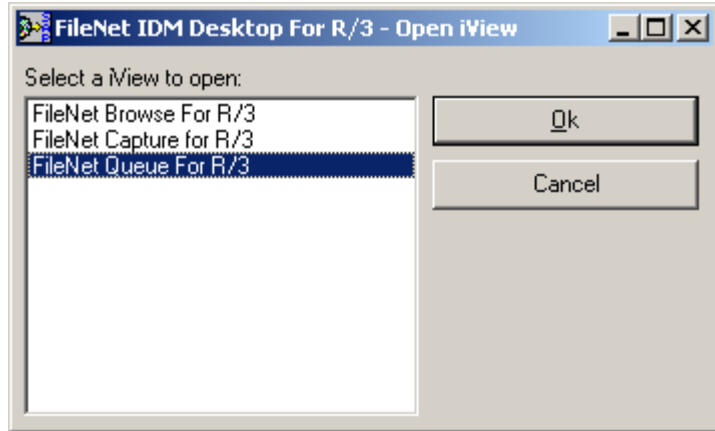
FileNet IDM Desktop for R/3 can be used to perform following operations:

- Open a view to link documents to SAP business transactions. To open any view, select it in the Open iView dialog box, and click **Ok**. The Open iView dialog box closes, and the chosen view appears as a child window inside the main window.

- Access already opened views. In order to find out which views are currently open, click the Window menu; below the horizontal separator line, all open views are displayed. Select any one of them to activate the corresponding view.

- Access Help and display the version for FileNet IDM Desktop for R/3.

- Exit FileNet IDM Desktop for R/3 Application.To terminate an application of FileNet IDM Desktop for R/3, click **File → Exit** menu.

Note: You can also double-click a view in the Open iView dialog box, to open it. There can be none, one, or more views opened simultaneously.

Menu And Command Summary

The following tables summarize the menus and commands available in the IDM Desktop for R/3 main window.

File Menu

Option	Function
Open iView	Opens a dialog that lets you choose a view and open it.
Close	Closes the currently active view.
Close All	Closes all open views
Save Settings On Exit	A check marked menu to enable or disable the saving of current settings automatically when FileNet IDM for R/3 is closed. A checkmark before this menu item will mean

Option	Function
	that this option is switched on.
Save Settings Now	Immediately saves the current settings.
Exit	Exits the FileNet IDM Desktop for R/3.

Window Menu

The options on the **Window** menu are:

Option	Function
Tile Horizontally	Tiles all open windows horizontally.
Tile Vertically	Tiles all open windows vertically.
Cascade	Cascade all open windows.
Arrange Icons	Arranges the icons of all minimized windows.
<Open view>	Activates the view. There will be a Menu item for each open view

Help Menu

The options on the **Help** menu are:

Option	Function
Contents	Displays FileNet IDM Desktop for R/3 help topics.
Search	Displays the Search Tab of the online help file.
About	Displays product and version information for FileNet IDM Desktop for R/3.

Archiving Incoming Documents

The following steps need to be performed to archive incoming documents using FileNet IDM Desktop for R/3:

Note: Before carrying out the Archiving of Incoming Documents, Customizing for archiving Incoming documents should be carried out as mentioned in the Installation and Configuration Manual-Client.

1. Launch FileNet IDM Desktop for R/3. If there is no open child window, open one of the views using the Open iView menu.

2. Logon to the desired IS library displayed in the tree view. The FileNet IDM Desktop for R/3 shows all the FileNet Workflo workspaces and queues in the selected IS.
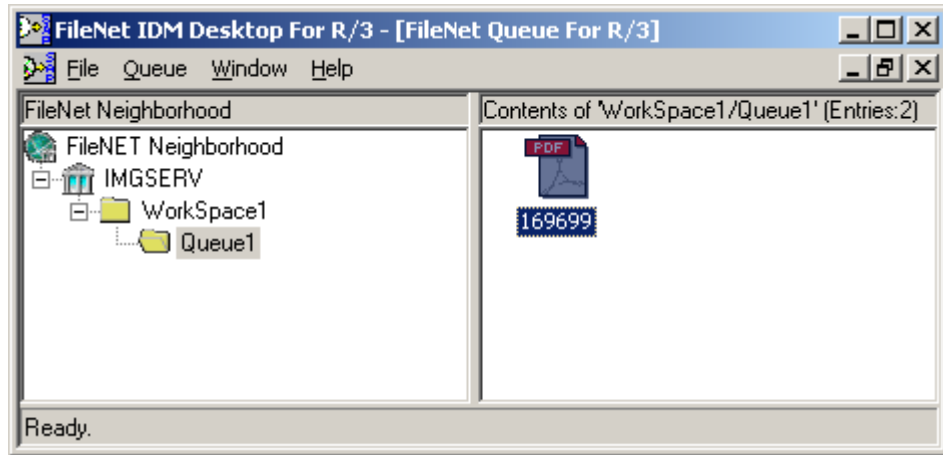
Note: SAP will subsequently request that FileNet IDM Desktop for R/3 to send the selected document number to be linked with SAP objects.

3. The first document of this Workflo Queue will be selected automatically. The FileNet IDM Desktop for R/3 opens the FileNet IDM Viewer to display the document.

4. Double-click the SAP icon from the Windows desktop or choose SAPLogon from SAP R/3 program group to open the main window of SAP R/3.

5. Logon to SAP System.

6. Click **Office → Business Document → Documents → Move** menu, or transaction **oawd** to get the default settings for stored documents, The following screen is displayed:
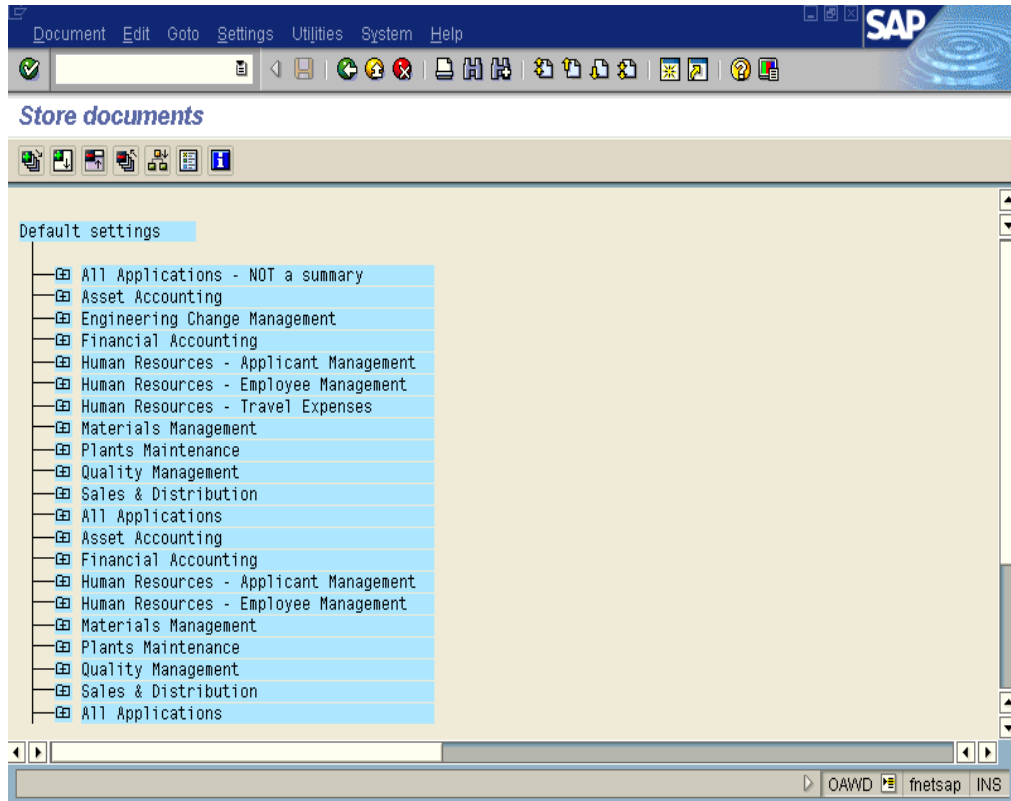
The default setting contains a list of work modules, where each work module contains groups of related document types. These document types classify the incoming original document to be processed. For example, incoming invoices and credit memos are grouped under a work module named Financial Accounting.

Note: Access to the default setting and associated document types can be controlled through the security features in SAP System. For information on security Features, see the appropriate SAP documentation.

7. From the default settings window, double-click the desired work module, such as Financial Accounting. The following screen is displayed:
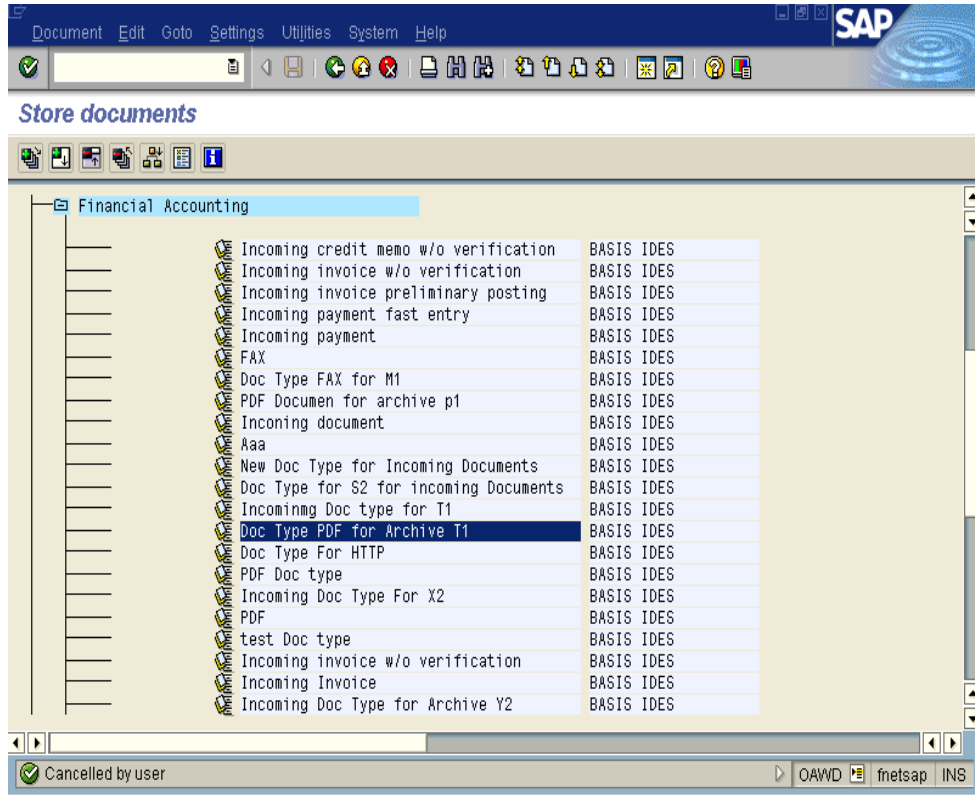
8. Select the document type and click the **Document** menu. The following drop down list is displayed.
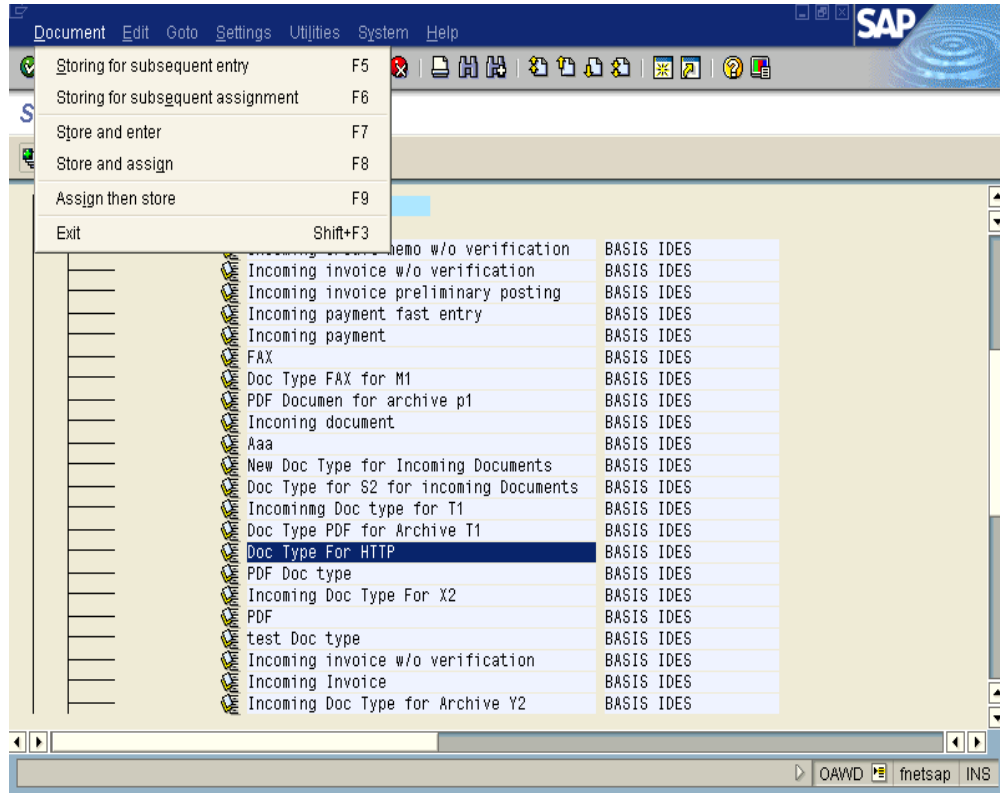
Select the following menu entries for different archiving methods:

a. **Storing for subsequent entry** option for early archiving. The following dialog box is displayed.

Fill in the text description of the work item in the Note field. Click (√) button.

Click **Mass archiving** button to process a batch of similar documents.

b. **Storing and enter** option for simultaneous archiving.
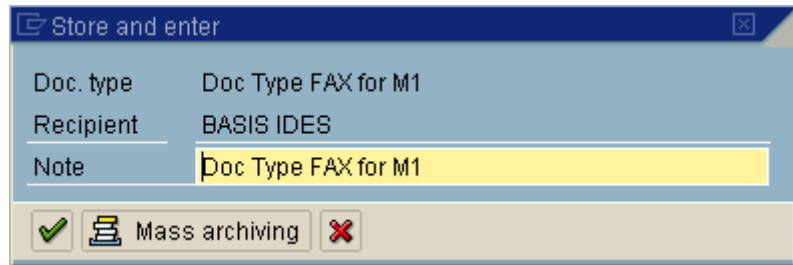
Fill in the text description of the work item in the Note field. Click (√) button.

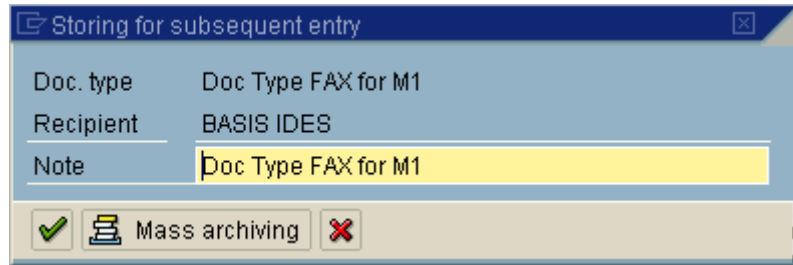Click **Mass archiving** button to process a batch of similar documents.

c. **Assign then store** option for late archiving without using barcodes.
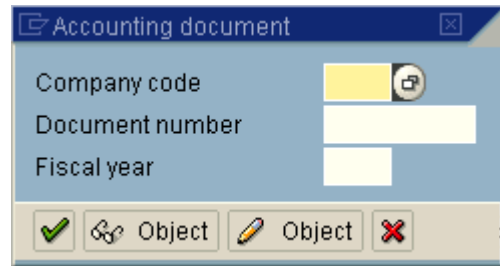
Enter the necessary information according to the selected System Setting and document type. To continue, click the (√) button.

SAP sends an OLE request to FileNet IDM Desktop for R/3, to obtain the document number of the top most selected item. After the document number is sent to SAP, FileNet IDM Desktop for R/3 deselects the item, or removes the document from the queue, and automatically selects the next document in the queue.

If Mass Archiving has been chosen, an identical work item is created for each document, and all selected documents, or remaining items in the selected FileNet Workflo queue are processed automatically.

When the queue is empty, processing stops and FileNet IDM Desktop for R/3 enters Advanced Interaction. For more information on advanced interaction, refer to section <u>Advanced Interaction FileNet Queue for R/3</u>.

Late Archiving Using Bar Codes

While processing incoming documents using bar codes, you can:

- Attach a unique bar code to each incoming document before it is distributed for processing.

- Book the paper document into SAP application and create a new SAP transaction.

- Create a temporary link between the document and the SAP object. To create this link, and the bar code into the SAP system. This link is stored in SAP database.

- Retrieve the scanned document from a FileNet Workflow queue, and send a message to SAP system containing the FileNet document ID and bar code value.

- Create a permanent link between the SAP transaction and the document, using SAP Object ID and FileNet document ID. To create this link, match the message containing the FileNet document ID and bar code value with the temporary record. This action is automatically performed by cBarcode component, which is a part of the DWSAP Server Components.

Using FileNet Queue For R/3

FileNet Queue for R/3 is one of the views shipped with FileNet IDM Desktop for R/3. It allows the user to access the contents of a FileNet Workflo queue that holds documents that are ready for processing in SAP system.

Accessing FileNet Queue For R/3

In order to access FileNet Queue for R/3, open FileNet IDM Desktop for R/3. Access the menu **File → Open iview → FileNet Queue For R/3.**

Menu And Command Summary

The following table briefly describes the menus and commands that FileNet Queue For R/3 adds to the standard menus of the FileNet IDM Desktop for R/3.

Queue Menu

The options on the Queue menu are:

Option	Function
Fetch Next Document	If 'Auto Fetch' is off and all documents in the list-view have been processed, the user can choose this option to display the next document(s) in the list-view. See Fetching Documents from a Queue.
Auto Fetch	When '**Auto-Fetch**' option is turned on FileNet Queue For R/3 to automatically fetch the next document when the document in the list-view has been processed. See Auto-Fetch
Pend Queue Entry...	Using this option the user can pend the selected document for a certain number of hours or days. See Pending Documents.
Skip Queue Entry	Using this option the user can skip a document and make that document to go to the end of the Workflo Queue. See Skipping Documents
Reroute Queue Entry	Using this option the user can Reroute a document, this means to remove it from the current Queue and insert it at the end of another Queue. For more information refer to Rerouting Documents
Search	This menu item invokes the 'Queue Search' dialog, which allows you to execute a search on the contents of a queue. See Searching a Queue
Configure Queues	This command invokes the '**Configure Queues**' dialog that allows configuring Queues that is the user can add or remove to the FileNet Queue For R/3 from different Workspaces.
Continue Assignment	Lets the user to continue with the current selection after starting advanced interaction. For more information refer to Advanced Interaction FileNet Queue for R/3.
Cancel Assignment	Lets the user to cancel advanced interaction. For more information refer to Advanced Interaction FileNet Queue for R/3.

Graphical User Interface

The FileNet queue for R/3 has a GUI similar to Microsoft Windows Explorer. In the tree-view, the configured IS libraries are displayed. To see the workspaces for a library, double-click that library, or click the

expand symbol (+) next to the library. If you are not logged on to the selected library, a logon dialog appears depending on the FileNet IDM Desktop settings. Click the expand symbol (+) next to the workspace, to see the Workflo Queues for the selected workspace.

Note: All Queues for the selected workspace will be displayed in FileNet Queue for R/3's tree view, even the queues without a DocumentNumber field. However, while selecting such a queue, the user will be notified with a message and the queue will be deleted from the tree view.

The right pane shows the contents of the selected queue in the tree view. A queue can contain several documents simultaneously; but only one queue entry will be displayed in the list view. The selected document will automatically be displayed in the FileNet IDM Viewer.

The list view supports four different views that can be selected using the list view's context menu.

- Large icons.

- Small icons.

- List.

- Details.

To display index values of the documents listed, select the option **View Details** from the context menu of the list view. FileNet IDM Desktop for R/3 uses the columns specified in Microsoft™ Windows Explorer for each library.

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*Tip : To configure different columns to be displayed for a specific library, open a FileNet library in Microsoft™ Windows Explorer and click **Options** in the context menu of the list view pane.*
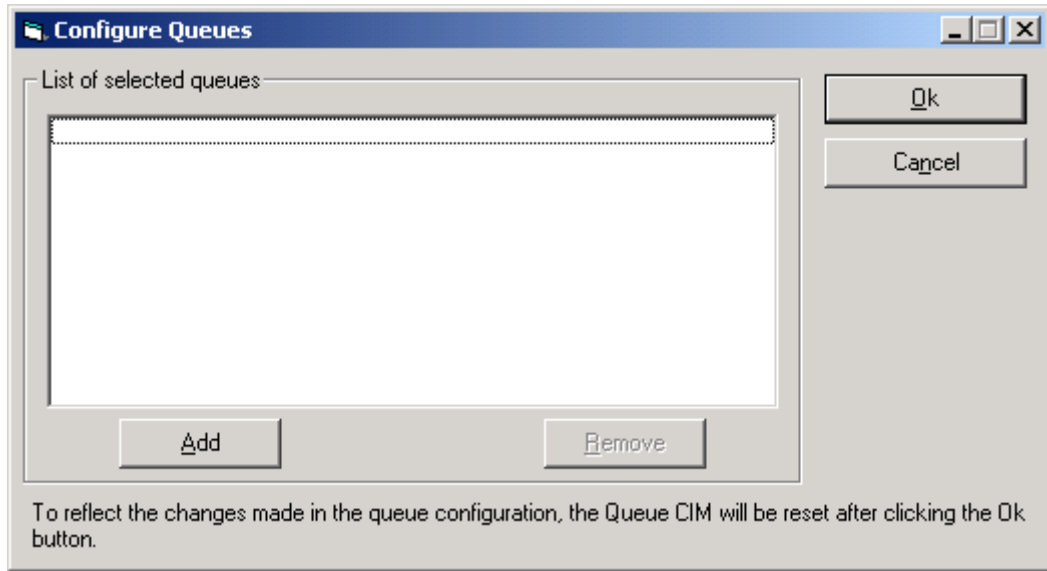

Configuring Queues For Display In FileNet Queue For R/3

In order to configure queues for display in FileNet Queue for R/3, perform the following steps.
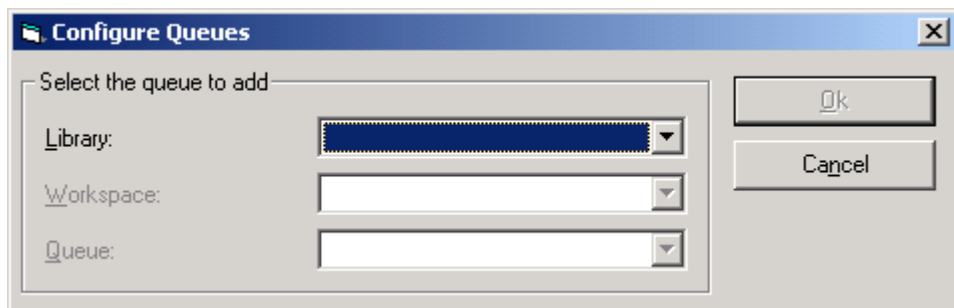
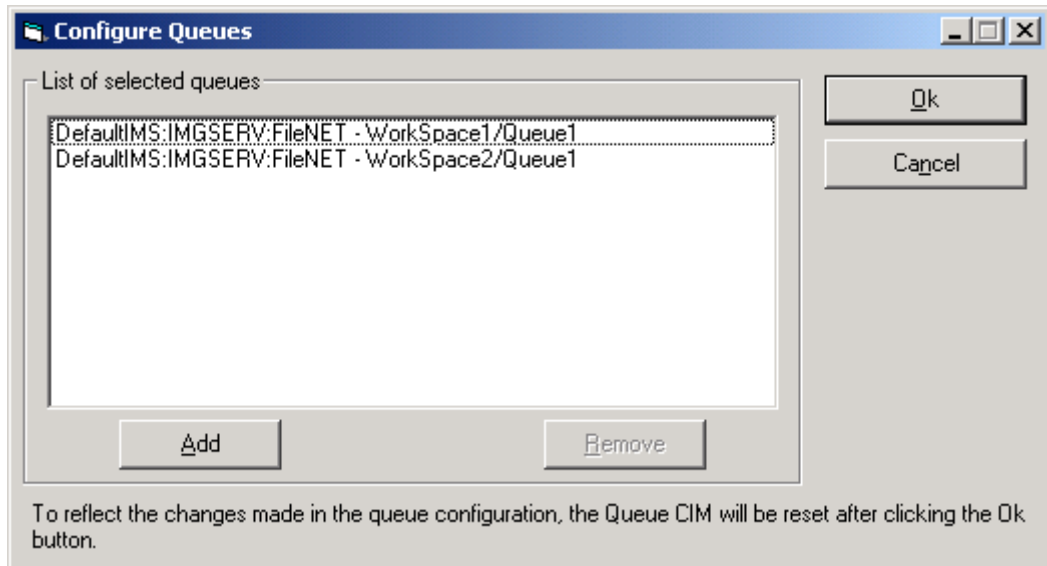1. Open FileNet Queue for R/3. The following screen is displayed:

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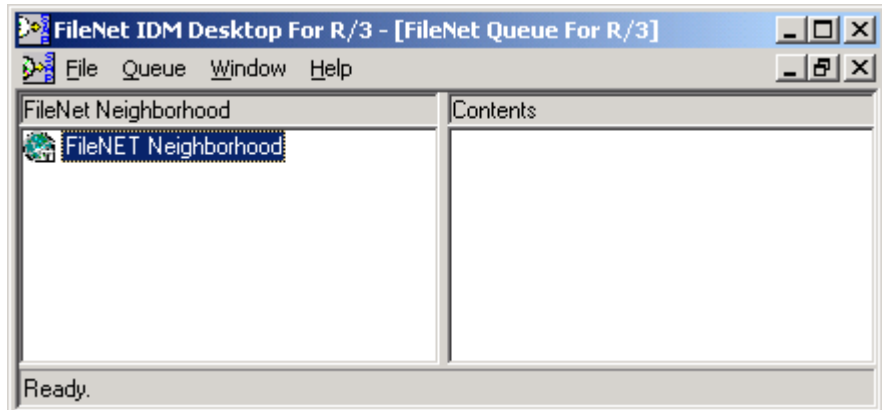
2. Access the menu **Queue → Configure Queues**. The following screen is displayed.
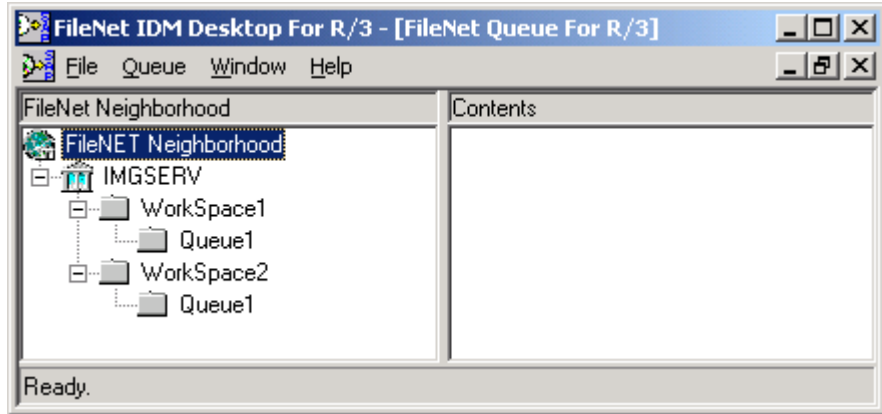

3. Click **Add** .The following screen is displayed:

4. Select the Library, Workspace and Queue and click **Ok**. The following screen is displayed:

5. Click **Ok**. The following screen is displayed:

Fetching Documents From A Queue

When a Workflo Queue is selected from the tree-view of FileNet Queue for R/3, the right pane displays a document. In order to fetch the next available document the **Fetch Next Document** command on the **Queue** menu can be used.

FileNet Queue for R/3 fetches the next available document from the Workflow Queue, when:

Queue entry is not busy, which means it is not in use by a different user.

- Queue entry is not delayed.

- Queue entry is complete.

- Priority of the queue entry is in the range of 1 to 9.

- Oldest queue entry with the highest priority is fetched.

When a document is fetched from the queue, the queue entry is locked until it is linked to an SAP object. After SAP has processed the document, FileNet IDM Desktop for R/3 fetches the next document in the queue if **Auto-Fetch** option is checked. Otherwise, Fetch **Next Document** command from the **Queue** menu can be used to retrieve the next document for processing.

Auto-Fetch

When **Auto-Fetch** option is checked, FileNet IDM Desktop for R/3 deletes the linked document, and fetches the next document from the Workflo Queue.

When **Auto-Fetch** option is turned off, FileNet IDM Desktop for R/3 does not fetch the next document automatically from the Workflo Queue after linking with SAP. To retrieve the next document, select **Fetch Next Document** option from the **Queue** menu.

Pending Documents

A document in a queue can be marked for processing later. The FileNet queue for R/3 returns the document to the queue, where it remains until the specified period elapses.

Note: A pend document is unavailable for processing and does not display as part of the queue contents. When the specified period elapses, the document automatically becomes available for processing.

To pend a queue entry:

1. Click **Queue → Pend Queue Entry** menu. The Pend Queue Entry dialog box appears, as shown in the figure below:
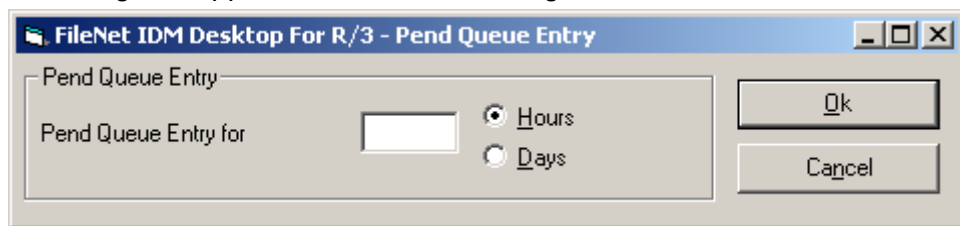
2. Select the respective radio buttons to specify whether the document be put on hold for **Hours** or **Days**.

3. In the **Pend Queue Entry for** text box, enter the number of days or hours you want to pend the document.

4. Click **Ok** button to place the document on hold and return to the FileNet IDM Desktop for R/3 window.

5. If **Auto Fetch** option is checked, the next document is fetched from the Workflo Queue; otherwise, list view will be empty.

Skipping Documents

Skipping documents option can be used in case it is not required to process the document in the queue immediately and make that document go at the end of the Workflo Queue. The FileNet Queue For R/3 deletes the document from the queue, and reinserts the document at the end of the Workflo Queue.

To skip a document:

1. Click **Queue → Skip Queue Entry** menu.

2. If **Auto Fetch** option is checked, the next document is fetched from the Workflo Queue; otherwise, list view will be empty.

Rerouting Documents

The user can also send a document to a different queue. The FileNet Queue For R/3 deletes the document from its current queue, and inserts it in the specified queue.


To re-route a document:

1. Click **Queue → Reroute Queue Entry** menu. The Reroute queue entry dialog box appears, as shown in the figure below:
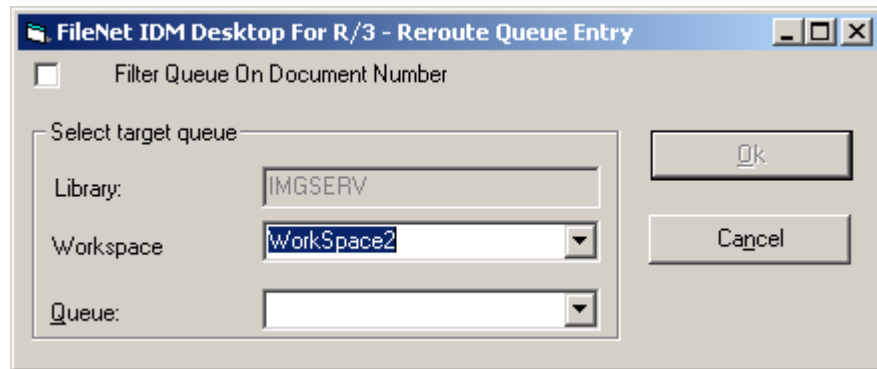
2. Enable or Disable the **Filter Queue On Document Number** check box.

3. If **Filter Queue On Document Number** check box is checked, only those queues of the workspace are visible that have the **DocumentNumber** field defined.

4. If **Filter Queue On Document Number** check box is not checked, all queues that belong to the selected Workspace are visible.

5. Select the destination queue to which the document is to be re-routed. The user can select a Queue from different Workspace, but not from another Library.

6. Click **Ok** button to reroute the document.

Searching A Queue

The Queue Search dialog box lets the user specify and execute a search on the selected Queue. Click **Queue → Search** menu, to invoke the Queue Search dialog box.
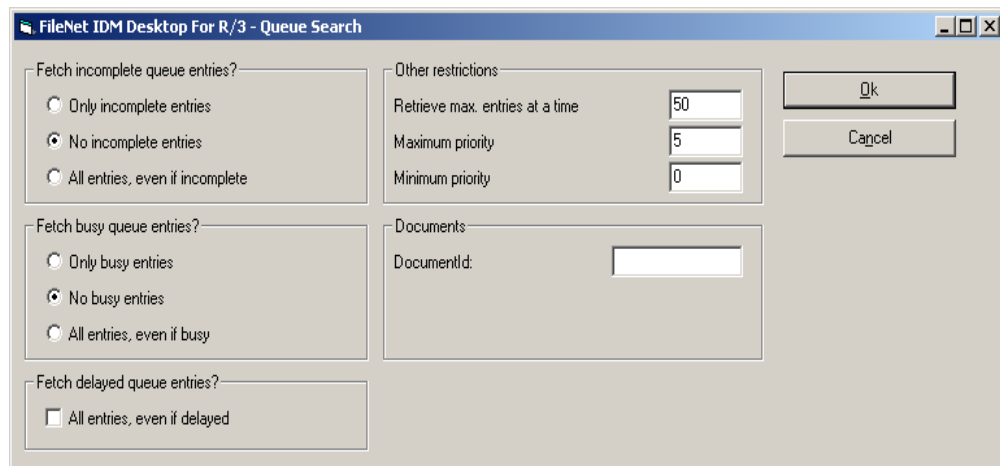
The various search options in the **Queue Search** dialog box are:

- Fetch incomplete queue entries.

- Fetch busy queue entries.

- Fetch delayed queue entries.

- Retrieve max entries at a time; the default value being 50.

- Minimum and Maximum priority.

- DocumentId.

Linking A Document To SAP R/3 Transaction

Prior to linking a document or folder to SAP R/3 transaction, a document should be selected from the list view of FileNet Queue for R/3. The selected document will be linked with SAP R/3 objects when SAPGUI sends a request. If the linking finishes without an error, the document is deleted from the Workflo Queue, and also, is removed from the list view of FileNet Queue for R/3. If an error occurs, a message is shown and the document is not deleted from the queue.

Advanced Interaction FileNet Queue For R/3

In some cases, a request from SAPGUI for a FileNet document id cannot be immediately satisfied. Instead of directly returning an error indication to SAP, the user is informed of the error and is given another chance to come up with a valid selection. This process is called Advanced Interaction.

Following are the examples of such cases.

Case 1: When a user tries to assign a document to an SAP object and the currently active View cannot provide a document id (e.g. because no document has been selected), SAPGUI displays an informational message that no documents were scanned in.
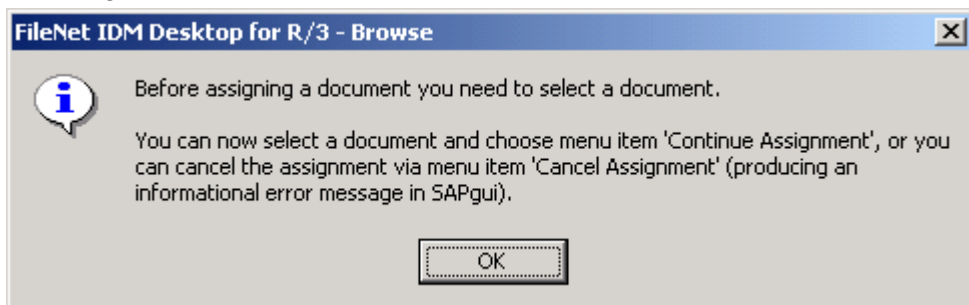

Case 2: If the user selects an object, but SAPGUI requests a document id from a different library. In this case, the user is informed about it, and the user is asked to make a new selection. The document id of the newly selected document is returned to SAPGUI.
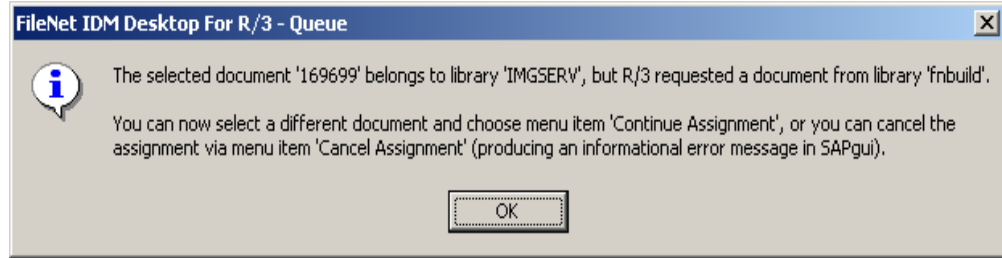
Using FileNet Browse For R/3

FileNet Browse for R/3 is one of the views shipped with FileNet IDM Desktop for R/3. It allows browsing through Image Services (IS) and Content Services (CS) Libraries. It also allows selecting documents and folders to link to SAP R/3 transaction. The following figure shows the user interface for FileNet Browse for R/3:
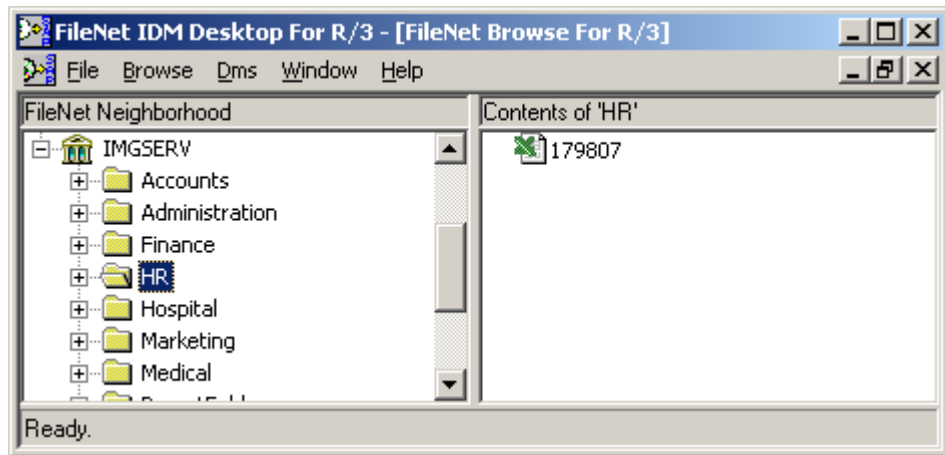
Menu And Command Summary

The following table briefly describes the menus and commands the FileNet Browse For R/3 adds to the standard menus of the FileNet IDM Desktop for R/3.

Browse Menu

The options on the Browse menu are:

Option	Function
Search	Lets you specify a search by opening the search dialog. See Searching Documents
Switch to View ...	Lets you choose whether Documents or Versions are displayed in the List View. See Working with document versions
Continue Assignment	Lets you continue with the current selection

Option	Function
	after starting advanced interaction.
	See Advanced Interaction FileNet Browse For R/3.
Cancel Assignment	Lets you cancel current assignment.
	See Advanced Interaction FileNet Browse For R/3.

Graphical User Interface

The FileNet Browse for R/3 has a Graphic User Interface (GUI) similar to Microsoft Windows Explorer. In the tree-view, all the configured IS libraries are displayed. If smartIds are enabled, then all the CS libraries are also displayed.

To see the top-level folders, double- click a library or click on the expand symbol (+) next to the library. A logon dialog will appear. After the user has logged on, the right pane, which is the list view, shows the contents of the currently selected library or a folder from the tree view. After selecting a document, the document will be displayed in the FileNet IDM viewer.

The list view supports four different views, each of which can be accessed via the list view's context menu. To display index values of the documents listed change to 'View Details'. The list view will then display several columns, each column representing a document index.

FileNet IDM Desktop for R/3 uses the columns specified in Microsoft™ Windows Explorer for each library.

*Tip: To configure different columns to be displayed for a specific library, open a FileNet library in Microsoft™ Windows Explorer and click **Options** in the context menu of the list view pane.*

Linking A Document, A Version Or A Folder

Prior to linking a document, a specific version or a folder to SAP R/3 transaction, a document, version or folder should be selected. The selected object is linked to SAP. If the linking finishes without an error, the object is deselected.

If more than one document, version, or folder is selected, the top-most selected object is linked. Subsequent to successful linking, the next top-most selected object is displayed in the FileNet IDM Viewer and this object is the next object to be linked.

Using SmartIDs

Using FileNet IDM for R/3 configuration tool, the user can enable or disable the use of SmartID. In Configuration Tool, go To **Client** →

General section, enable or disable **SmartIDs** option in the **Type of document ids** frame as shown below.
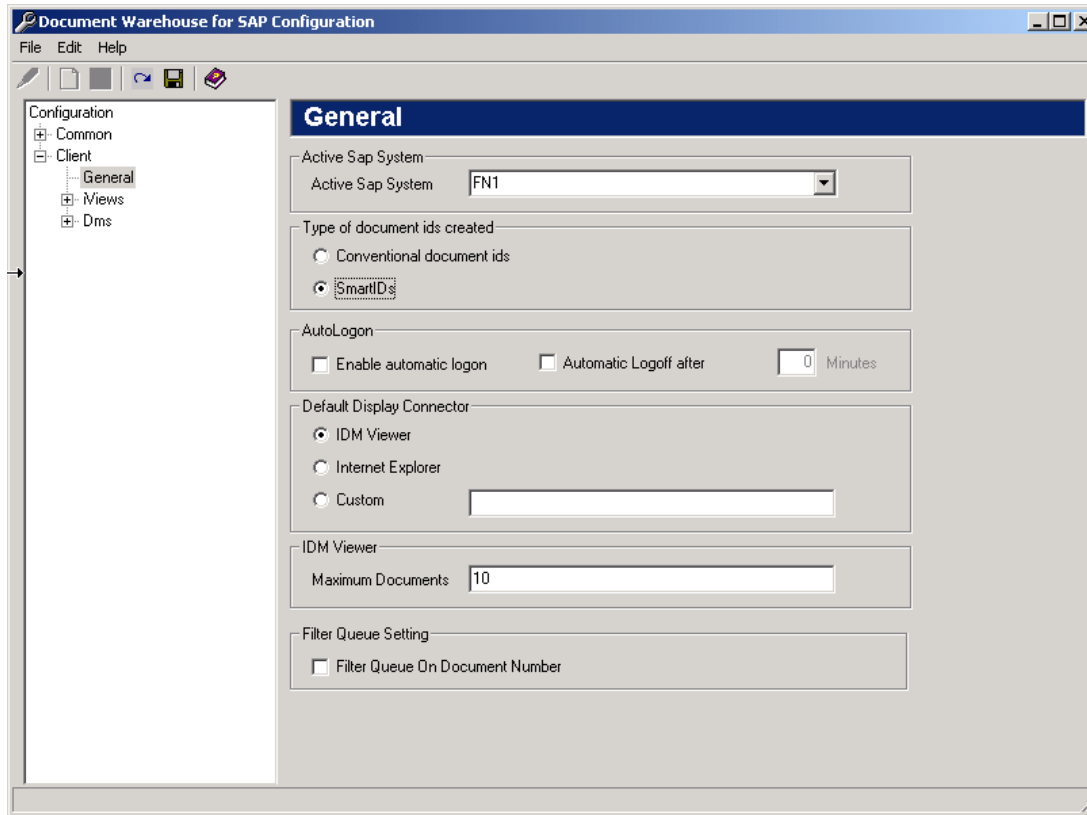

Note: If **SmartIDs** option is not enabled, user will not be able to link to a folder. The Content Service libraries will not be displayed in FileNet Browse For R/3.

Working With Document Versions

Content Services (CS) keeps track of the versions of its documents. User can access a document, which refers to the latest version of the document, or can specify a version of the document to be accessed. DWSAP allows linking a document or a specific version of a document to an SAP R/3 transaction.

To enable version linking, switch the list view to view the versions of the documents via menu item **Browse → Switch to View Versions**, as shown in the figure below:
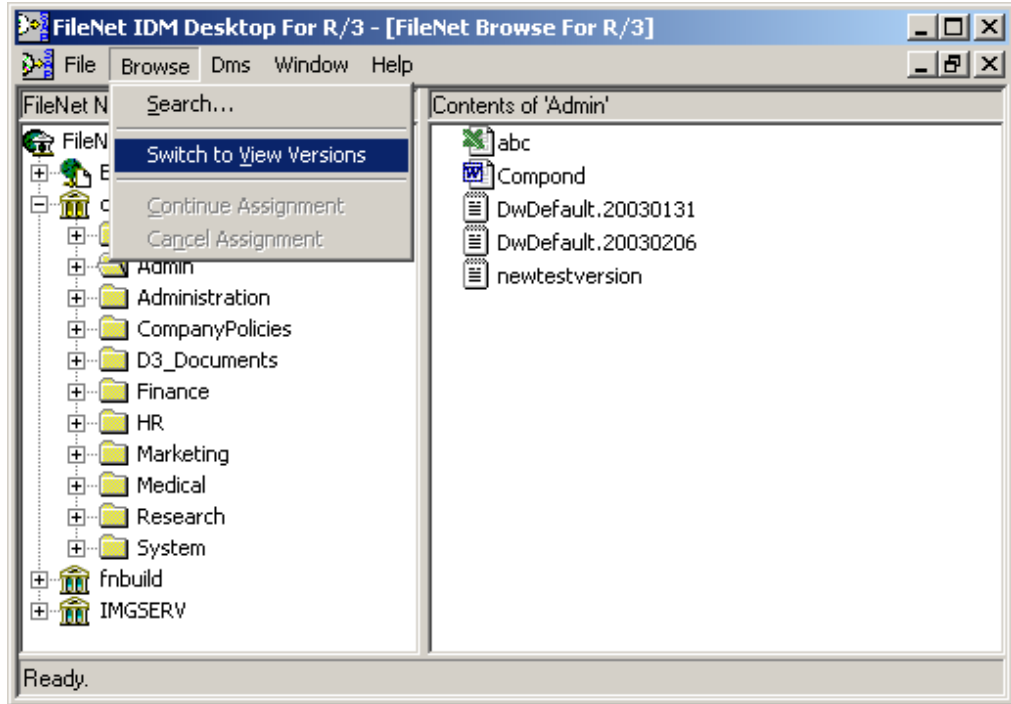
The list view will then display one item for each version. If a version of a document is selected, the status bar indicates this by adding the version number to the document id, such as **003682577:3**.
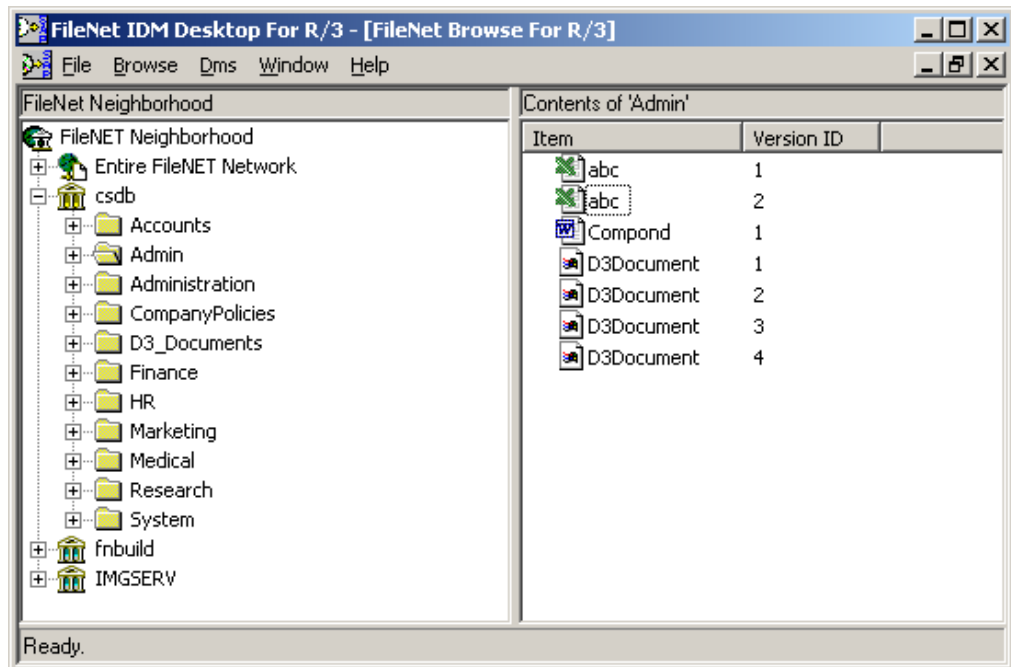

To switch back to document view, click **Browse → Switch to View Documents** menu. The list view will then display one item for each document.

Advanced Interaction FileNet Browse For R/3

Advanced Interaction as implemented in FileNet Browse For R/3. is similar to FileNet Queue For R/3.

If no document is selected when SAPGUI sends a link request, for an assignment, a message is displayed, as shown in the figure below:
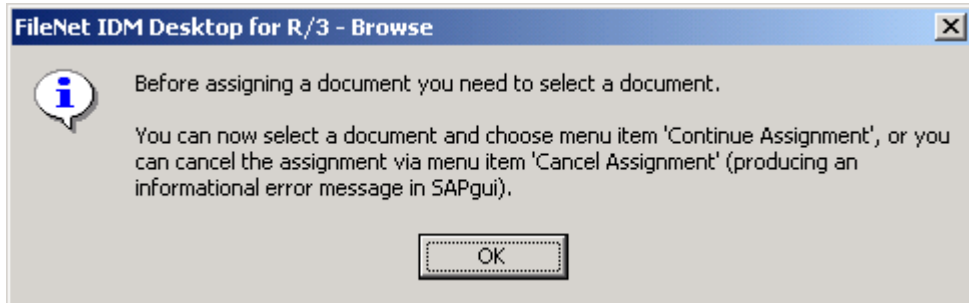
FileNet IDM Desktop for R/3 waits for the user to select either of the following two options:

- Cancel Assignment: User chooses not to select anything and cancel the current assignment by selecting menu item **Browse → Cancel Assignment**.

- Continue Assignment: User can select a document or folder and then proceed with the current assignment by selecting the menu item **Browse → Continue Assignment.**

Searching Documents

A search can be performed on a library on the basis of some characteristics of the documents. To search the documents within the FileNet library:
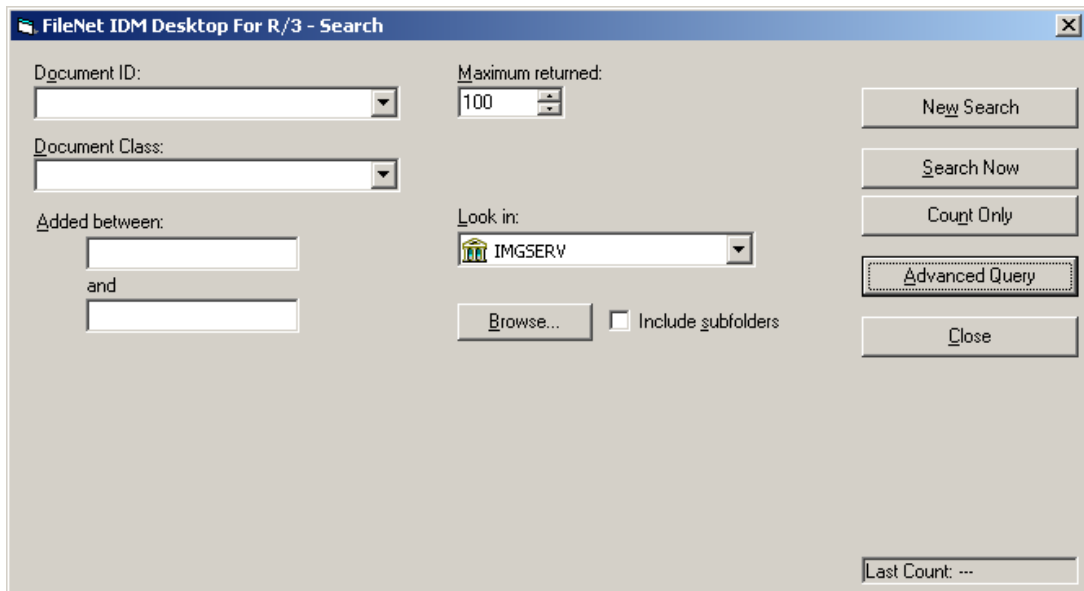
User can perform search by selecting the search menu item through **Browse → Search**. This opens the search dialog. The search dialog has the following two views:

- Advanced Query .

- Simple Query.

By default, the Advanced Query view is shown. The following screen shows the Advanced Query view:
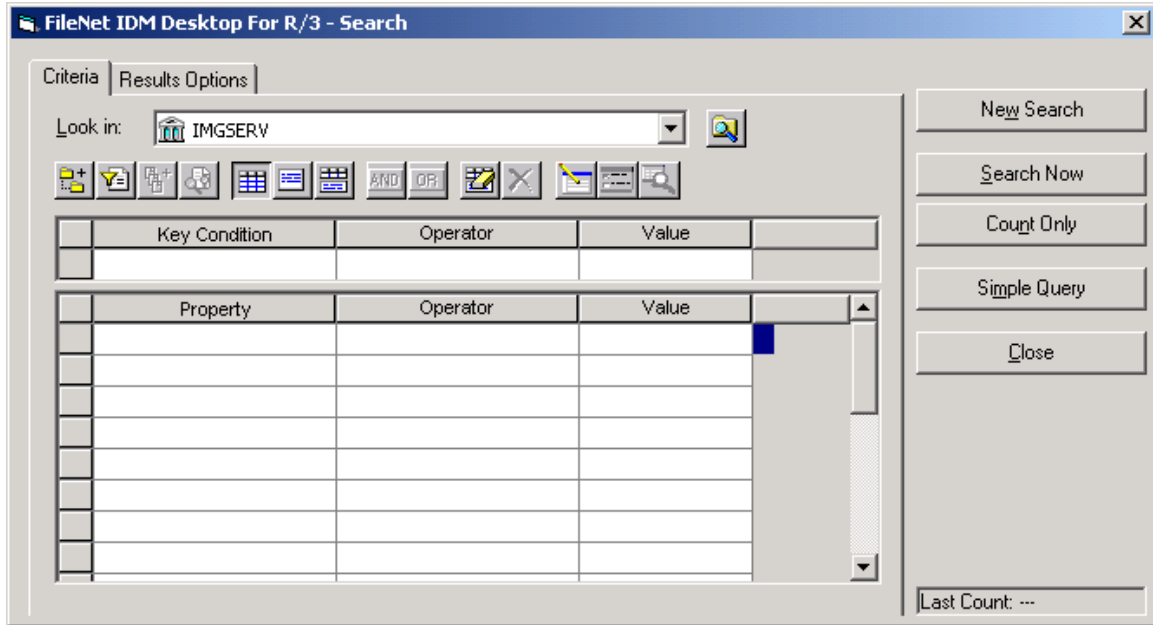
The following screen shows the Simple Query view:

Specify A Search

In both the search views, choose the appropriate library from the drop down field. After logging on to the library further search criteria should be entered.

Count The Number Of Documents Matching Search Criteria

To count the number of documents that match the search criteria, click **Count Only** button after specifying the search criteria. The number of documents that match the search criteria are counted and the result is displayed in the **Last Count** box in lower right corner.
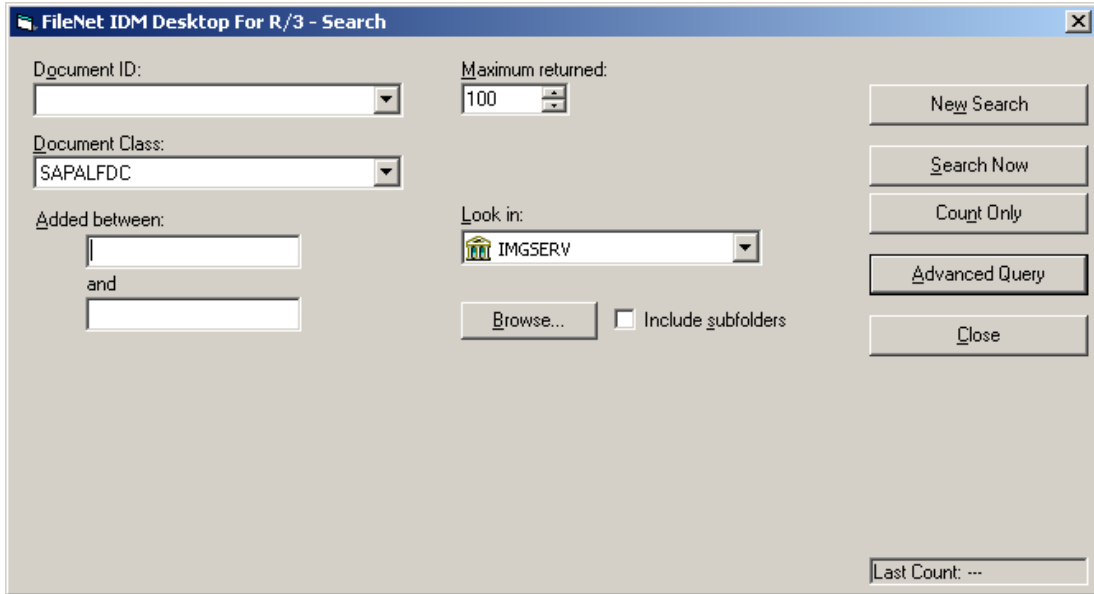
Display A List Of Documents Matching The Search Criteria

To list all documents matching search criteria, click the **Search Now** button. The search dialog closes and the result is listed in the list-view pane of FileNet Browse For R/3, as shown in the figure below:
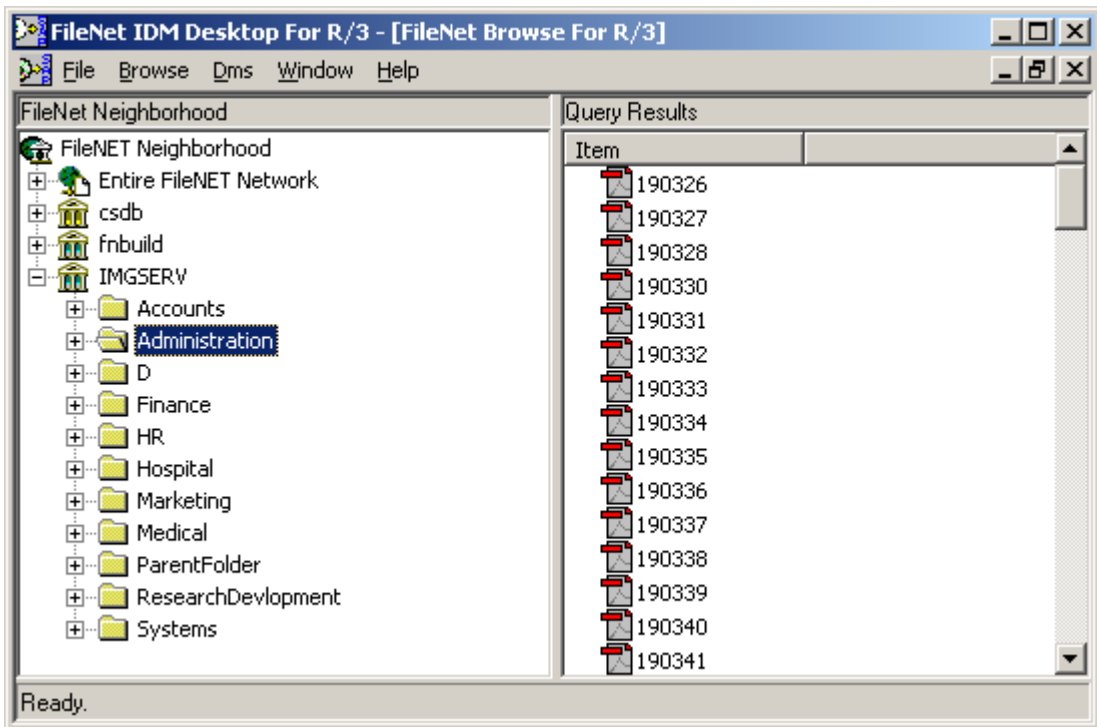
Specify A New Search

To clear the existing search criteria and specify a new search, click the **New Search** button. The search dialog is cleared of the search criteria and new criteria can be specified.

DMS Enhancements To FileNet Browse for R/3.

DWSAP provides DMS components for the following DMS functionality:

- Creating and modifying DIRs in SAP R/3.

- Linking objects from FileNet repositories such as document, specific version of a document, folder, and stored search to DIRs.

- Accessing information of SAP R/3 master records.

- Functions for to searching and selecting SAP R/3 master records.

DMS Menu

Option	Function
Publish document to SAP R/3	Lets you create new DIR in SAP and link it to the selected FileNet object. See Publish Document to SAP R/3.
Publish current document version to SAP R/3	Lets you create a new version of a DIR in SAP R/3 if **View versions** is enabled. In case, **View documents** is enabled, then this performs the same function as publish document to SAP R/3. See Publish current document version to SAP R/3.
Change Document status in SAP R/3	Lets you change the status of the DIR linked to selected FileNet object. See Change document status in SAP R/3
Link to Material Master	Lets you search for material master records in SAP R/3 and link the selected material master to the selected FileNet object. See Link to Material Master.
Display Material Master	Displays the material master records linked to the selected FileNet object. See Display Material Master
Unlink from SAP R/3 objects	Checks for all the DIRs linked to the selected FileNet object and delete all the links. See Unlink from SAP R/3 objects
Switch SAP R/3 system	Allows the user to logon to a different SAP system. See Switch SAP R/3 System

Using The DMS Components

FileNet Browse for R/3 has been enhanced, with a new DMS menu that allows the users to access the DMS functionality. This module allows

selecting a FileNet object and linking it to a DIR and a material master record in SAP. The following screen shows the DMS menu:
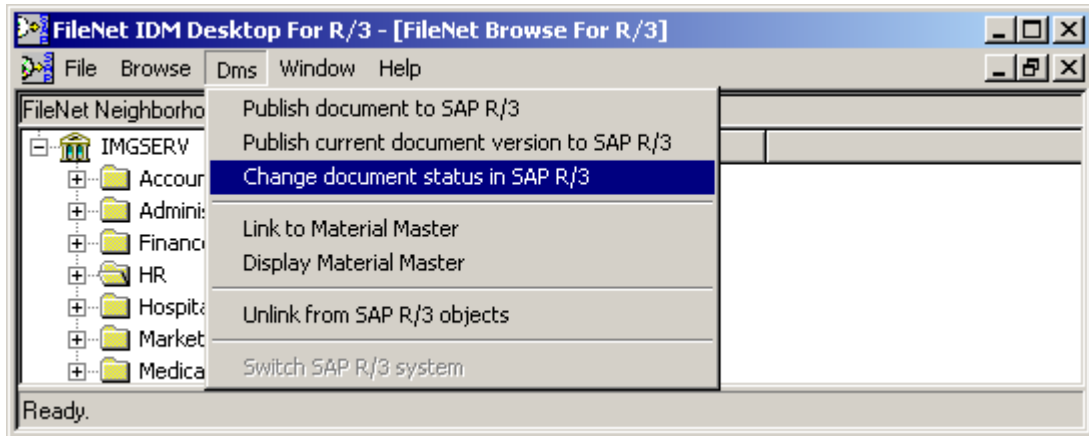

The DMS menu offers the following functions:

- Publish document to SAP R/3.

- Publish current document version to SAP R/3.

- Change document status in SAP R/3.

- Link to Material Master.

- Display Material Master.

- Unlink from SAP R/3 objects.

- Switch SAP R/3 System.

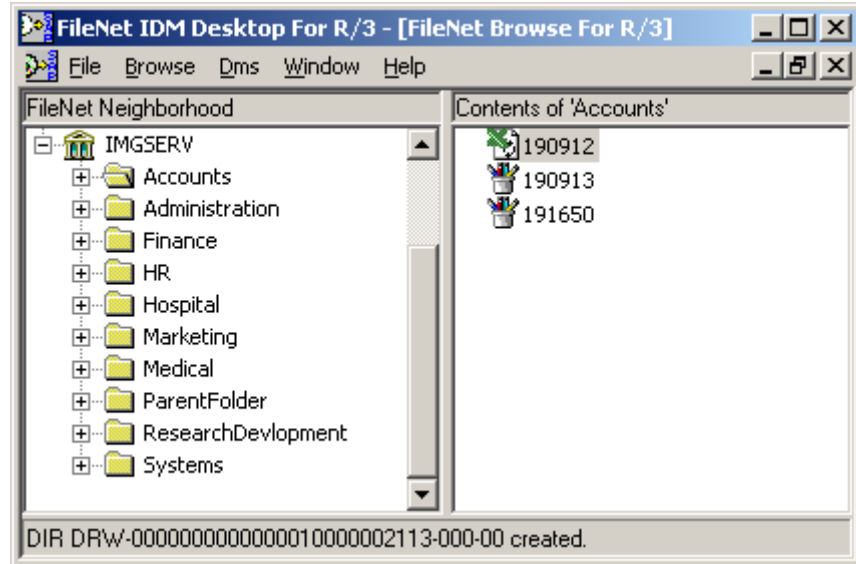### Publish Document To SAP R/3

The publish document to SAP R/3 object links the selected FileNet object to a SAP DIR object. In order to execute this function, follow the steps below:

1. Click on the menu item **DMS → Publish document to SAP R/3.** In case in the configuration tool the option **Prompt for DIR Status and Description** is enabled in **Client → DMS** , a dialog box is popped. If the option is disabled in Configuration tool , then skip to step4.
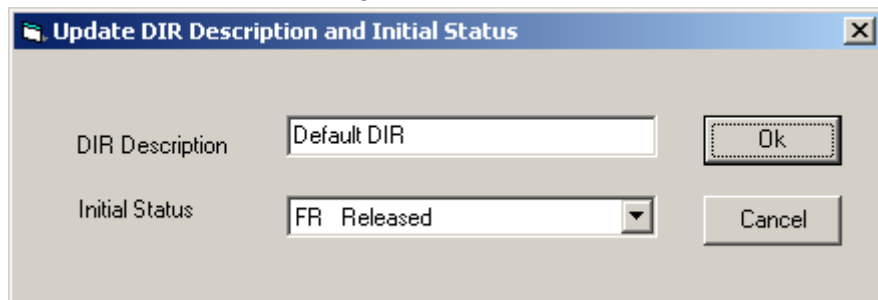
2. The dialog box has the default values same as that configured using the configuration tool. Enter the value for DIR description and select the status of DIR to be created.

3. If DIR with the default status and description is to be created, then press **Cancel**. Otherwise, if the DIR is to be created with the new parameters, then press **Ok**.

4. A new DIR is created and is displayed in the status bar as shown below.

### Publish Current Document Version To SAP R/3

The behavior of this function depends on whether display of versions is enabled or not. The display of versions can be enabled through the menu item **Browse → Display versions**. To disable display of versions for a document, this option should be set to display documents. This can be achieved through the menu item **Browse → Display Documents**. In case version display is disabled and view is set to display documents, then publish current document version works in the same fashion as Publish document to SAP R/3. In case, versions are displayed, then the system checks whether any former version of the selected document was linked to a DIR. If a DIR linked with a former version is found, then the version of the DIR is incremented by one and linked to the selected version object.

In order to publish current document version to SAP R/3, follow the steps below:

1. Click on the menu item **DMS → Publish current document version to SAP R/3**. In case in the configuration tool the option Prompt for DIR Status and Description is enabled in **Client → DMS** , a dialog box is popped. If the option is disabled in Configuration tool , then skip to step4.
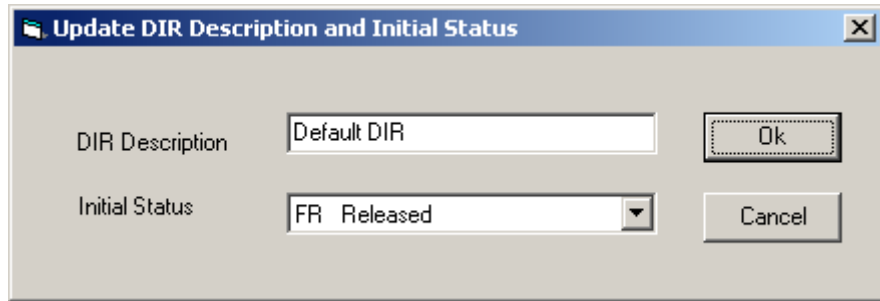
2. The dialog box has the default values same as that configured. Enter the value for DIR description and select the status of DIR to be created.

3. If DIR with the default status and description is to be created, then press cancel. Otherwise, if the DIR is to be created with the new parameters, then press **Ok**.

4. A new version for a DIR is created and is displayed in the status bar as shown below.
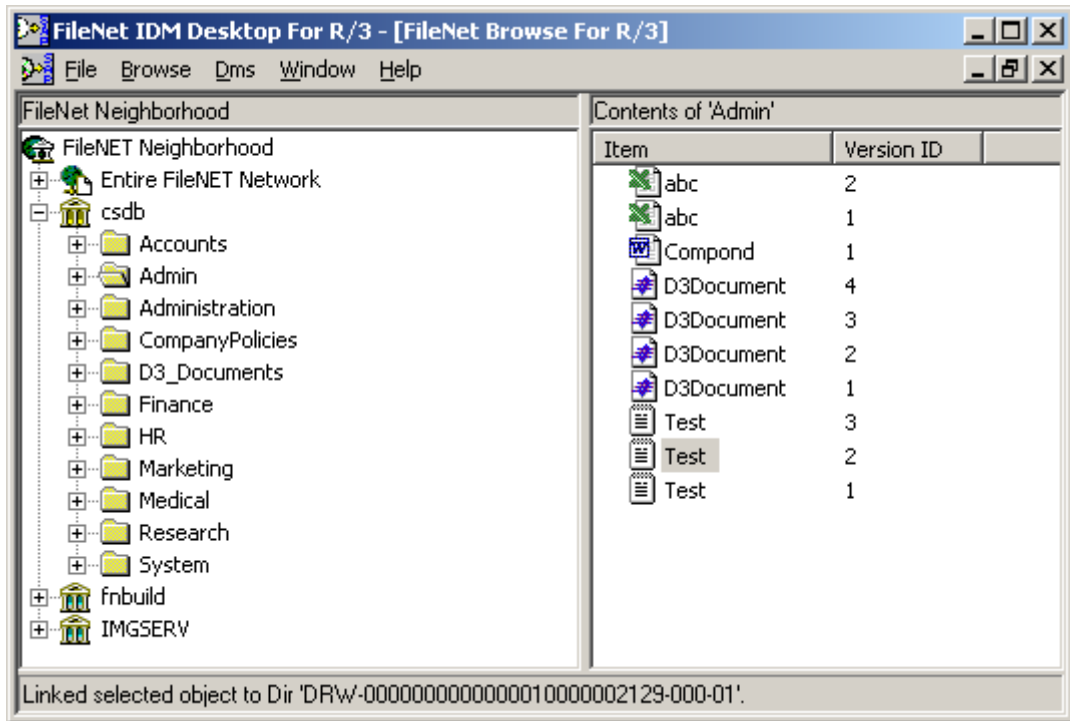
Change Document Status In SAP R/3

This function allows changing the status of DIRs linked to the selected FileNet object. To execute this function, follow the steps below:

1. Click on the menu item **DMS → Change document status in SAP R/3**. A dialog box is displayed which shows all the DIRs linked to selected FileNet object along with its current status and list of new statuses as shown below:
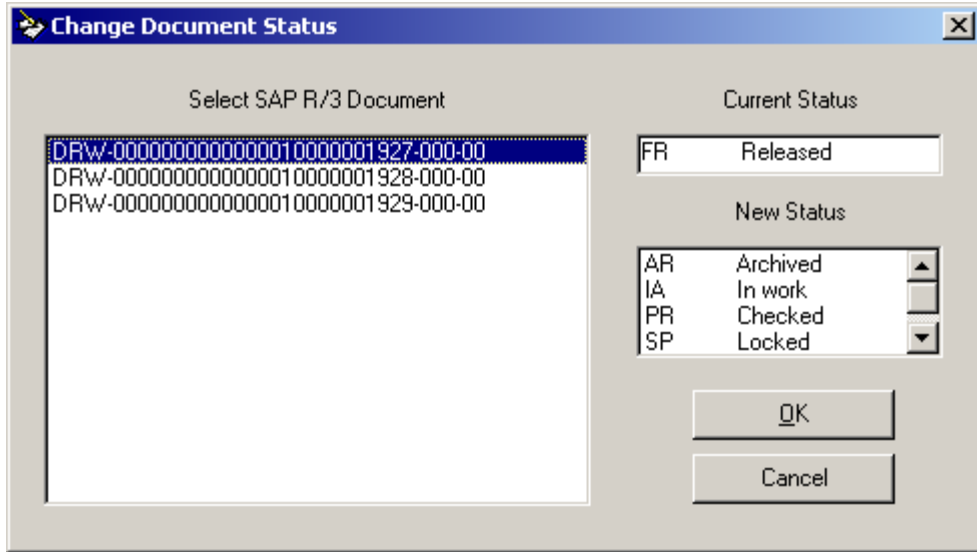
2. In the above dialog, select the DIR for which status is to be changed.

3. On selecting a DIR, the current status and new status are displayed for the selected DIR.

4. Select the new status for the selected DIR and press **Ok**. This changes the status of the DIR to the selected status.
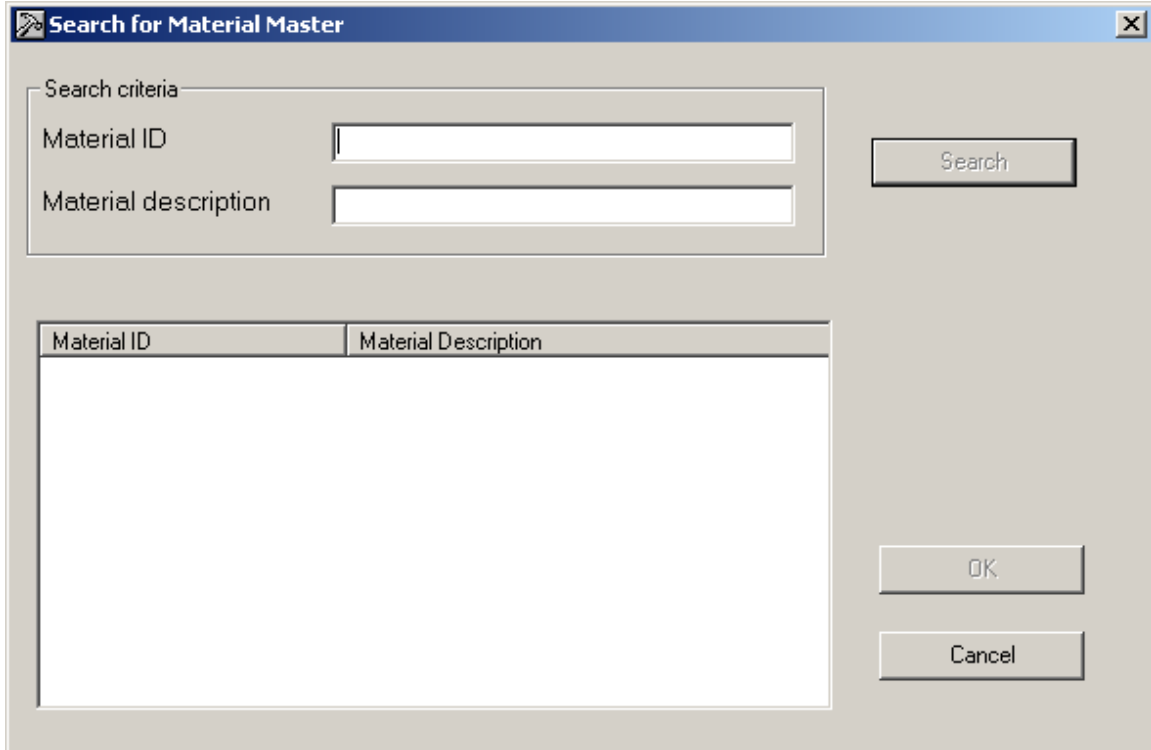
Link To Material Master

This function allows searching for material master records and linking the selected material master to the selected FileNet object. To execute this function, follow the steps below:

1. Click on the menu item **DMS → Link to Material Master** In case in the configuration tool the option **Prompt for DIR Status and Description** is enabled in **Client → DMS** , a dialog box is popped. If the option is disabled in Configuration tool, then skip to step 3.
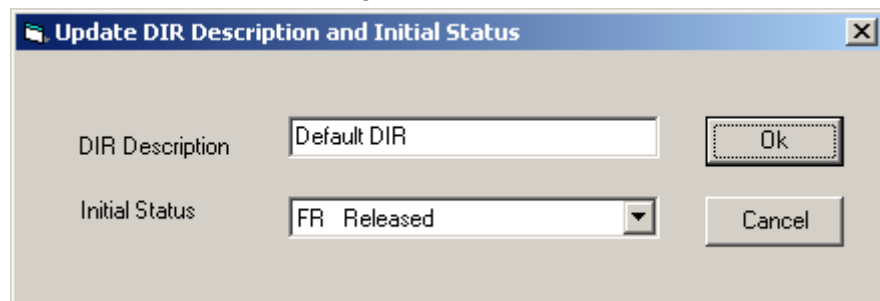
2. If DIR with the default status and description is to be created, then press **Cancel**. Otherwise, if the DIR is to be created with the new parameters, then press **Ok**. The following screen is displayed:

3. In the above dialog, enter the material Id or material description as search criteria and press **search** button. A list of available material master records is displayed as shown:
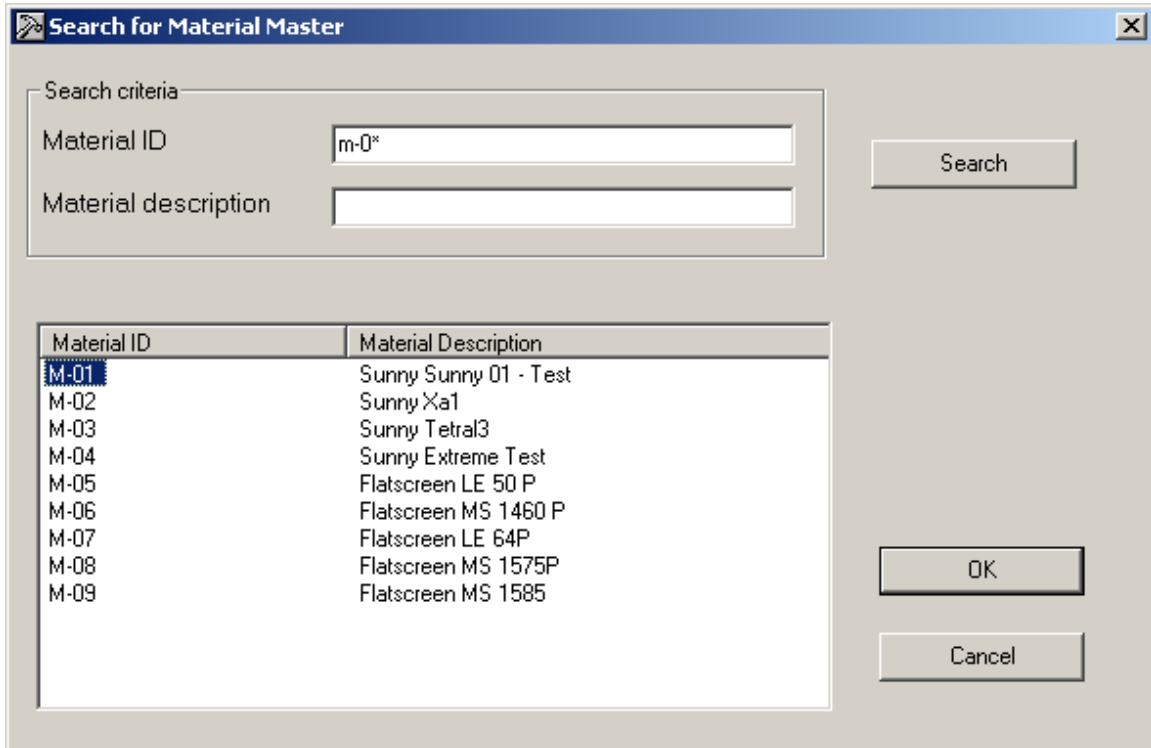
4. Select a material master record that is to be linked and click **Ok** to link this master record to the selected FileNet Object.

5. A new DIR is created and is displayed in the status bar as shown below.
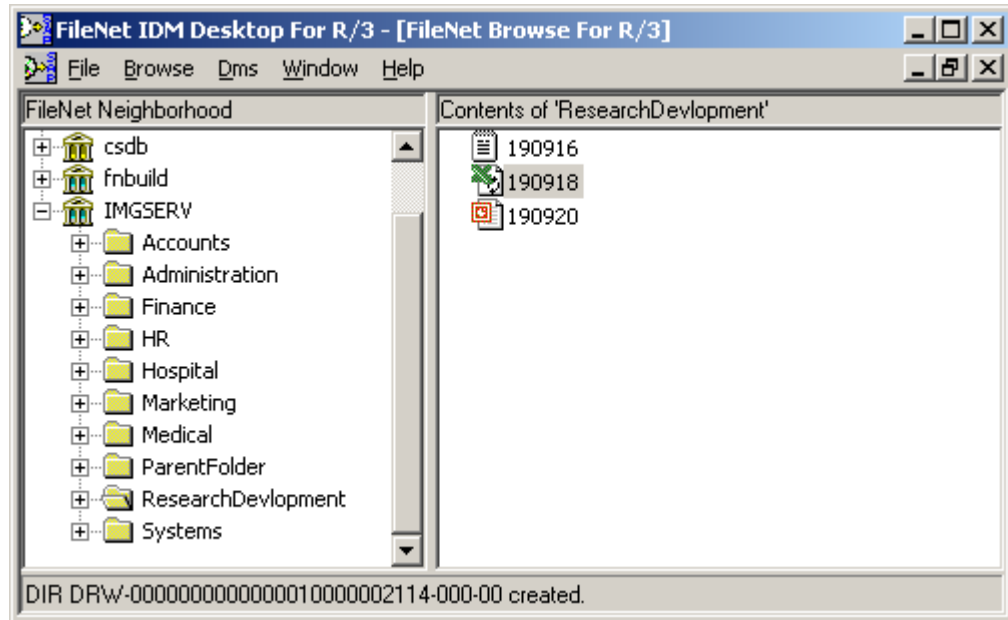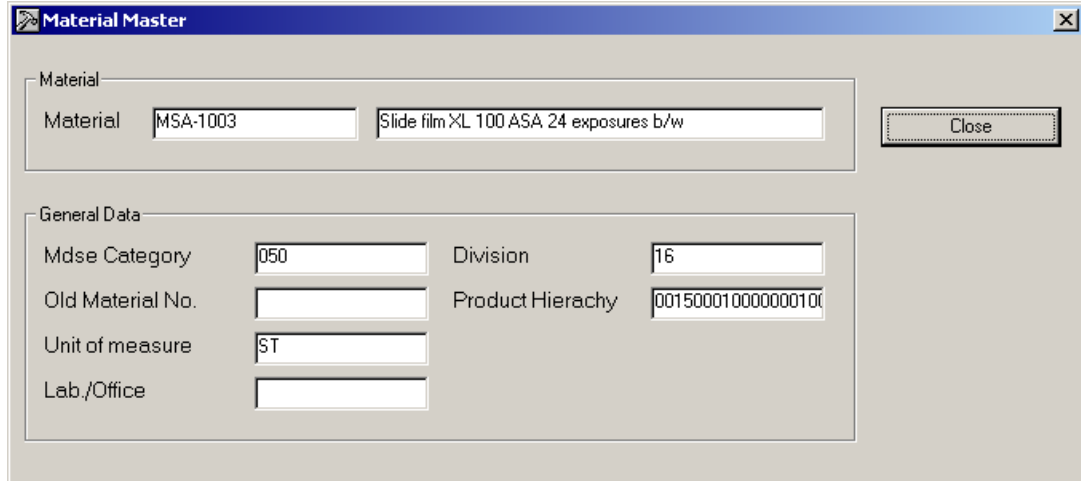

Display Material Master

This function searches for all the material masters linked to the selected FileNet object. In order to execute this function, follow the steps below:

1. Click on the menu item **DMS → Display Material Master**. This searches for all the material masters linked to the selected FileNet object. If the selected FileNet object is linked to more than one material master, a dialog is displayed showing all the linked material master.
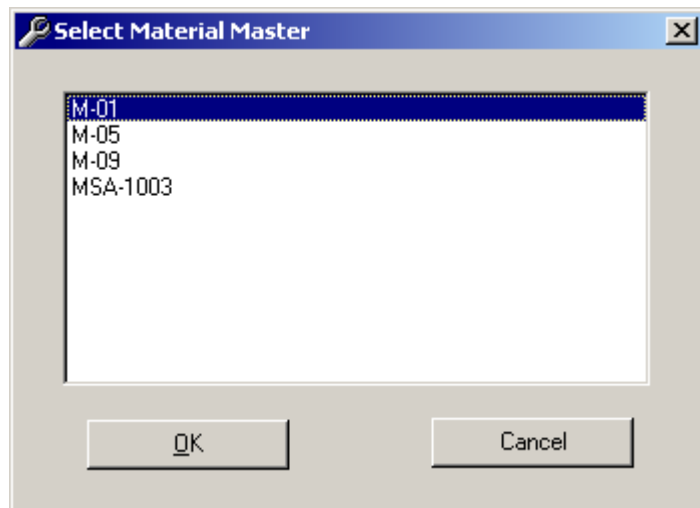
2. In the above dialog, select the material Id for which details are to be displayed and press **Ok**. This displays the detailed information for Material Id in a new dialog box as shown below:
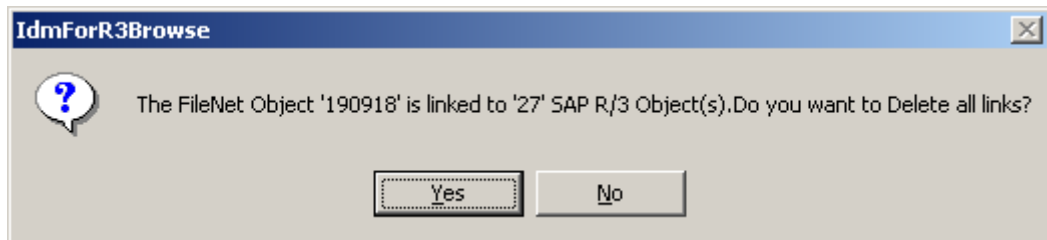
Unlink From SAP R/3 Object

This function checks whether the selected FileNet object is linked to any DIRs and removes all links. To execute this function, follow the steps below:

1. Click on the menu item **DMS → Unlink from SAP R/3 objects**. The following message box is displayed which asks for user confirmation for deleting all links.

2. Press **Yes** to remove all the DIRs linked to the selected FileNet object. The status of the links being removed is displayed in the status bar.

Switch SAP R/3 System

If this function is invoked, the following logon screen is displayed and the user is able to logon to a different SAP system. All used SAP systems need to be configured using the configuration tool.
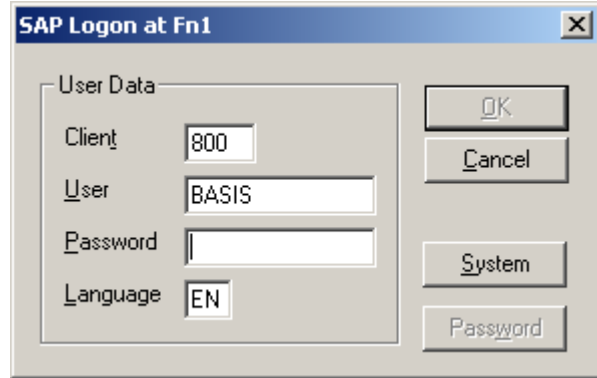
Using FileNet Capture For R/3

FileNet Capture for R/3 is one of the views shipped with FileNet IDM Desktop for R/3. It allows scanning and committing of paper documents and linking these paper documents to transactions in SAP R/3.

Using FileNet Capture for R/3, paper sheets are scanned and the scanned pages are assembled to documents. These documents can be committed to Image Services (IS) libraries. The committed document can then be linked to an SAP transaction. It is not possible to commit or assign more than one document in one step. The following figure shows the user interface for FileNet Capture for R/3:
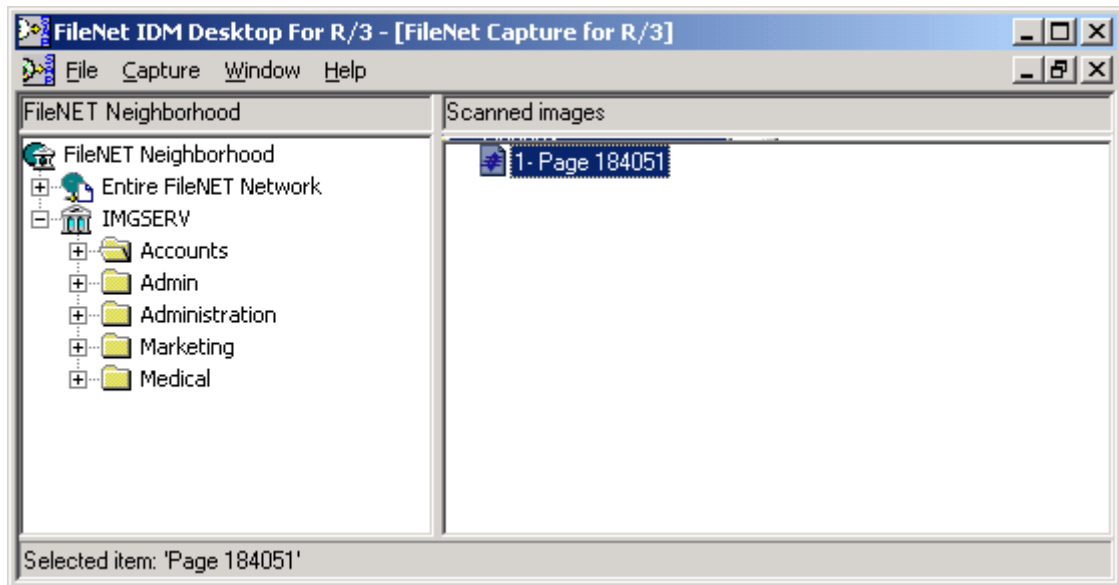
Menu And Command Summary

The following table briefly describes the menus and commands the FileNet Capture for R/3 adds to the standard menus of the FileNet IDM Desktop for R/3.

Capture Menu

The options on the Capture menu are:

| Option	Function
Scan	Lets you scan in pages. See <u>Scanning a document</u>.
Cancel session	Deletes the scanned in pages and starts a new session.
Continue Assignment	Lets you continue with the current selection after starting advanced interaction. See <u>Advanced Interaction FileNet Capture For R/3</u>.
Cancel Assignment	Lets you cancel advanced interaction. See <u>Advanced Interaction FileNet Capture For R/3</u>.
Options...	Opens the options dialog. See <u>Configuring FileNet Capture for R/3</u>.

Selecting A Library And Logging On

The Graphic User Interface (GUI) of FileNet Capture For R/3 allows to select the IS Library to which a document has to be scanned and committed. Before scanning any paper documents, the user should select and logon to a library by selecting a library from the tree view. If the user has not logged in then, a logon dialog appears for login credentials.

Configuring FileNet Capture for R/3

FileNet Capture for R/3 needs to be configured before it can be used. To configure FileNet Capture for R/3, click **Capture → Options** menu as shown.
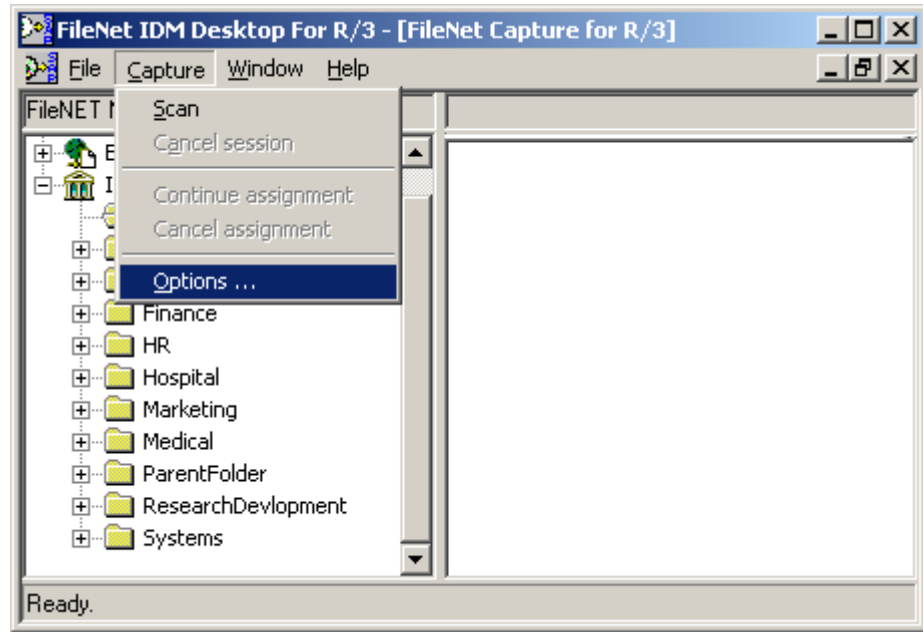
The options dialog is displayed as shown below.
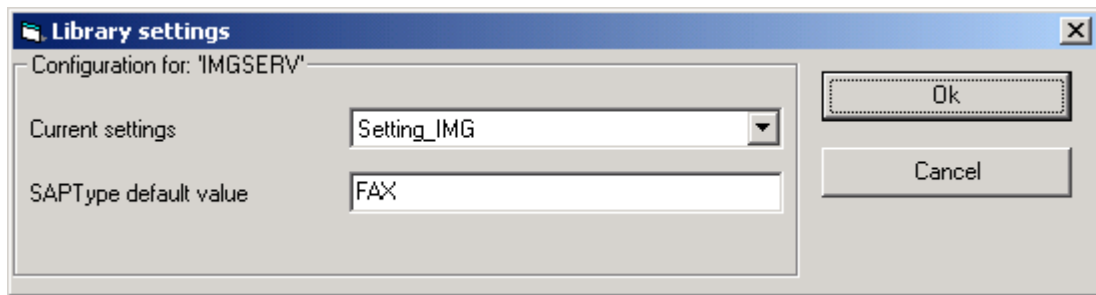
In the options dialog, the following settings need to be configured:

- Current Settings: refers to the Capture settings to be used for the selected library. The Capture settings specify the document class to which the document is to be committed. It also specifies the settings for scanner, assembly, indexing and other capture components. For information on configuring settings in Capture, refer to Installation & Configuration Manual -Client.

- SapType default value: refers to the default value of the document index SapType. For scanned documents, this is usually FAX.

Note: The document class must contain an index SAPType. For information on DWSAP conform document classes, refer to FileNet DWSAP Installation & Configuration Manual – Server.

Scanning A Document

To start scanning after logging on to a library, click **Capture** → **Scan** menu, as shown in the figure below.
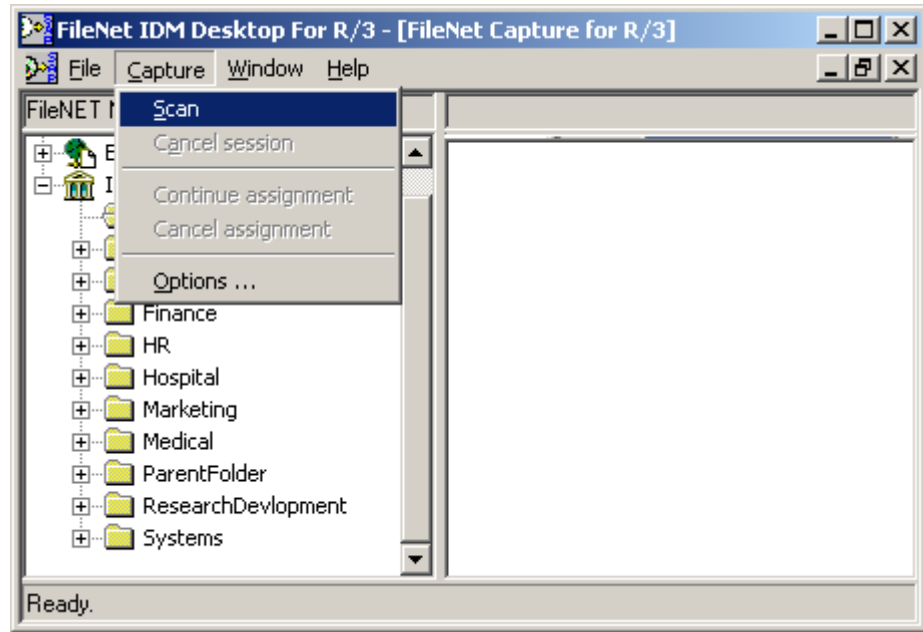
**Note:** The scan session is not initialized, when the user double-clicks a library. User has to single click on the label of the library, or logging on via the library's context menu to select the library. The **Scan** menu item will be disabled as long as the scan session is not initialized. After having started scanning the user cannot change the current library, until the scan session is cancelled or the document has been committed.

Depending on the scanner and driver used, the user will be prompted for various actions, if necessary. For example, user might be asked to insert paper or to press a specific button on the scanner. The scanned pages are displayed in the list view of FileNet Capture For R/3. When the user selects a page in the list view, it is displayed in the FileNet IDM Viewer.

Different Views In The List View

Scanned pages are displayed in the list view of FileNet Capture for R/3. The user can change the way the pages are displayed in the list view using the context menu item **View** of the list view. The different options available with this menu item are:

- Thumbnail: The pages are displayed as thumbnails

- Small Icon: Each page is represented by a symbol and the page's name

- List : The pages are displayed in a list format.

- Details: The pages are displayed in a list format, with additional information about each page in several columns.
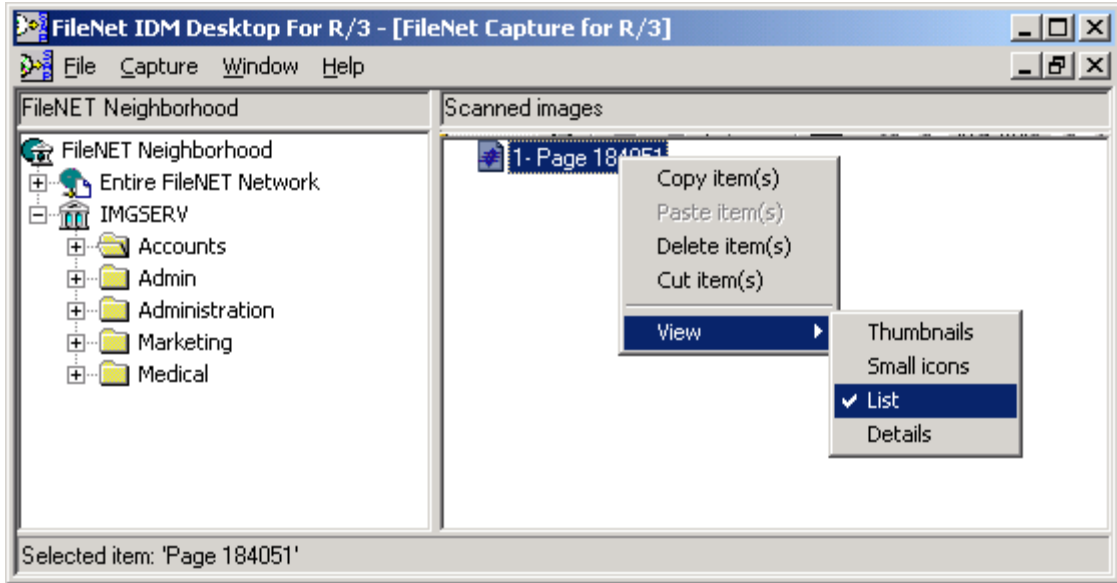
The following actions are available for documents displayed in the list view:

- Delete: The selected pages are deleted and the user cannot revert back deletion.

- Copy: The selected pages are copied to the clipboard.

- Cut: The selected pages are moved from the list view to the clipboard.

- Insert: The contents of the clipboard are appended to the list of pages in the list view. User can change the sequence of pages within the document by dragging and dropping the pages in the list view pane. The dragged page is inserted right after the page dropped to.

Linking A Document

Prior to linking a document or folder to an SAP transaction, the user should scan at least one page. All the pages of the current scan session are then assembled into one document. This document is committed to the selected library. This document can be linked to an SAP R/3 transaction

If the linking finishes without any error, the scan session is closed and the list view is cleared. If any error occurs, the user is informed and the scanned pages remain in their batch. The list view is not cleared.

Advanced Interaction FileNet Capture For R/3

Advanced Interaction as implemented in FileNet Capture For R/3. is similar to FileNet Queue For R/3.

3

Document And Data Archiving

FileNet DWSAP application archives documents generated by SAP, to FileNet. These documents are called outgoing documents. This chapter describes the synchronous and asynchronous archiving of outgoing documents generated by SAP.

Archiving Modes

DWSAP supports both synchronous and asynchronous archiving of outgoing documents generated by SAP R/3.

- **Synchronous** archiving refers to the process in which an archiving request is sent directly from SAP to DWSAP server components which process the request and sends the response back to SAP. SAP waits for the response from DWSAP. If the request is processes successfully, the FileNet document Id is returned in an acknowledgement message.

- **Asynchronous** archiving refers to the process in which the archiving requests are sent to DWSAP server components which sends an acknowledgement immediately. The request is processed later and the FileNet document Id is returned in a separate confirmation message.

Archiving Outgoing Documents

While configuring output, the user must first verify that the definitions exist in the Global Document Type list and in the Links list. For information on these configuration steps, refer to FileNet Installation and Configuration Manual –Server.

The following tables list examples of the documented output types that SAP indicates are achievable as of the 4.6c release. For details, refer to the SAP documentation.

Material Management Purchasing Documents (MM - PUR)

Description	Document Type	SAP Business Object Type
Outline agreement	MEOAGREEM	EKKO

Purchase order (PO)	MEOORDER	EKKO
Request for quotation (RFQ)	MEOREQUOTE	EKKO
Delivery schedule (issued under a scheduling agreement)	MEOSCHEDUL	EKKO
Reminder/expediter re: ordered goods	MEOREMIND	EKKO
Acknowledgment expediter	MEOACKNOWL	EKKO

Sales and Distribution (SD)

Description	Document Type	SAP Business Object Type
Sales activities	SDOACTIV	VBKA
Quotation	SDOQUOTAT	VBAK
Order confirmation	SDOORDER	VBAK
Delivery schedule	SDODELPLAN	VBAK
Picking list	SDOPICKLIS	LIKP
CMR Bill of lading	SDOCMRBOL	VTTK
Foreign trade data	Rebate credit memo	VTTK
Delivery note	SDODELNOTE	LIKP
Invoice (cash sale)	SDOINVOICE	VBAK
Invoice list	SDOINVLIST	VBRK
Rebate credit memo	SDOBONUS	VBAK

Plant Maintenance (PM)

Description	Document Type	SAP Business Object Type
Maintenance notification	PMONOTFPAP	BUS2038
Service notification	PMOSERVPAP	BUS2080
Maintenance order	PMOWORKPAP	BUS2007

Quality Management (QM)

| Description	Document Type	SAP Business Object Type
Complaints field by customers	QMOLETTER1	BUS2078
Complaints against vendors	QMOLETTER2	BUS2078
Internal problem notifications	QMOLETTER3	BUS2078

Module Specific Settings

Once the Global Document Class is created, it must be assigned to the Output Type. Configuration steps for each module can vary. For more information, refer to SAP documentation.

Note: SAP documentation provides valuable information about optical archiving of incoming and outgoing documents, data, and print lists.

Archiving Print Lists

SAP R/3 has the ability to create a Printlist from SAP R/3 database. SAP R/3 creates this printlist and stores it in a temporary location. This printlist is stored onto FileNet IS via DWSAP. Follow the procedure below to generate a printlist and send the archiving request to DWSAP:

1. Start SAPGUI, logon to an SAP System and go to transaction **sa38.**
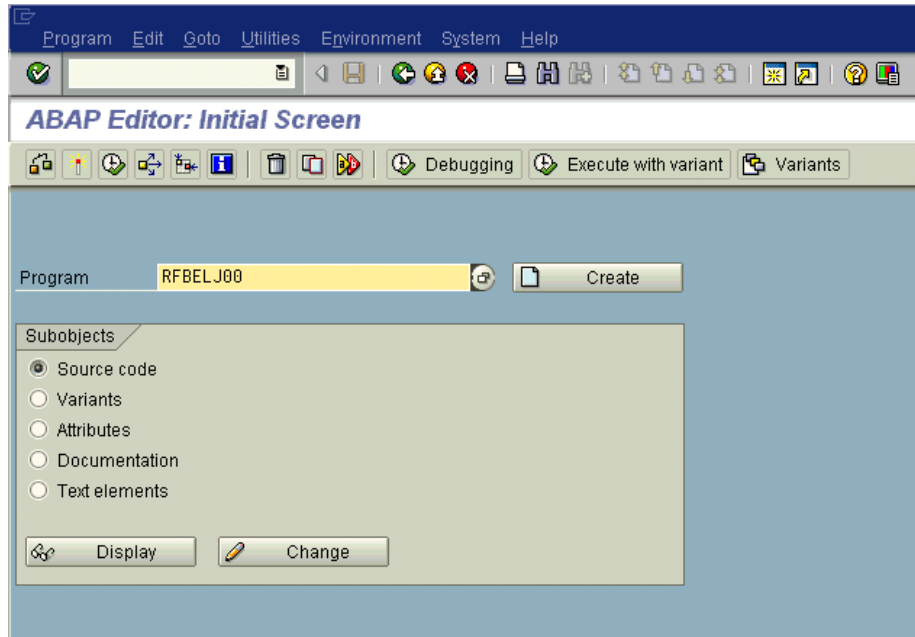
2. Use the program name as **RFBELJ00** and **Execute** or press **F8** key.
The following screen is displayed:
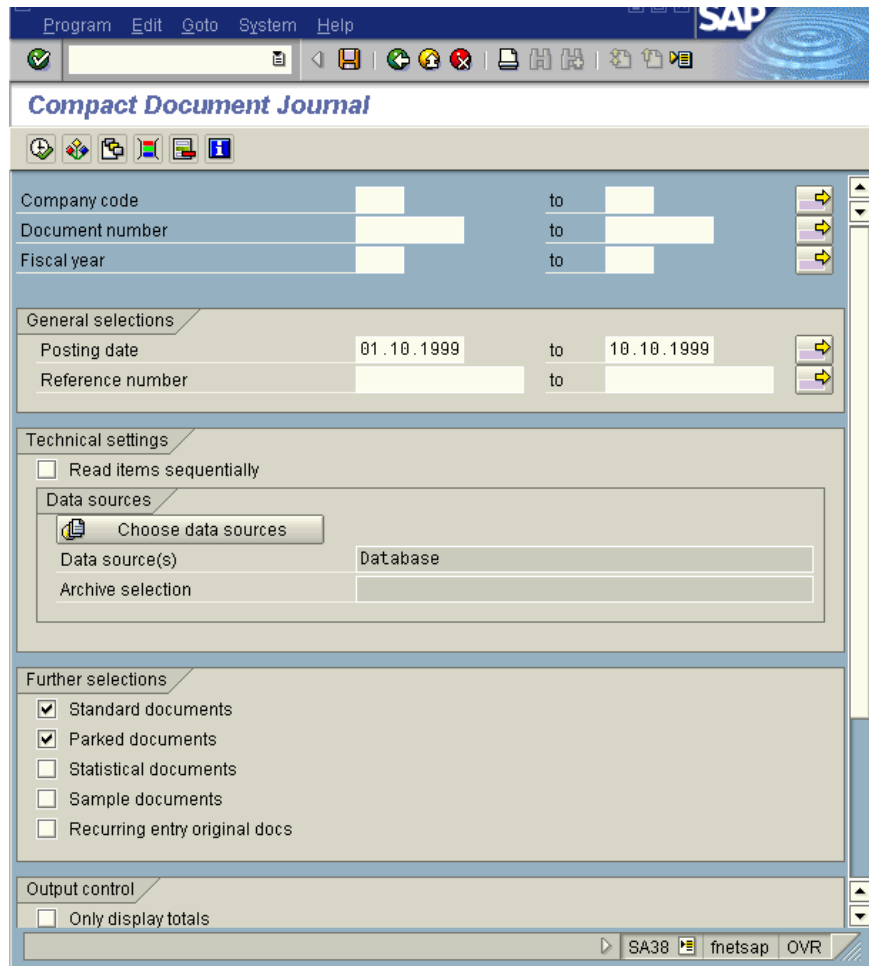
Note: RFBELJ00 is one of the many reports in Financial Accounting (FI) supported by ArchiveLink interface. For details of different object types and document types supported by ArchiveLink, refer to the SAP R/3 online documentation.

3. Enter the selection criteria. Generate the printlist by pressing **Execute** or **F8** key.

4. A Compound Document Journal is displayed. This is the content of the Printlist.

Note: There are two ways to generate printlists – in the foreground or in the background. Foreground generated printlists do not create an Index file that gets stored when it is archived. Background generated printlists create an Index file that is stored when it is archived. Printlists searching can only be performed on printlists that were generated in the background. To create and archive the printlists in the background, the **Optical Archiving** box must be checked.
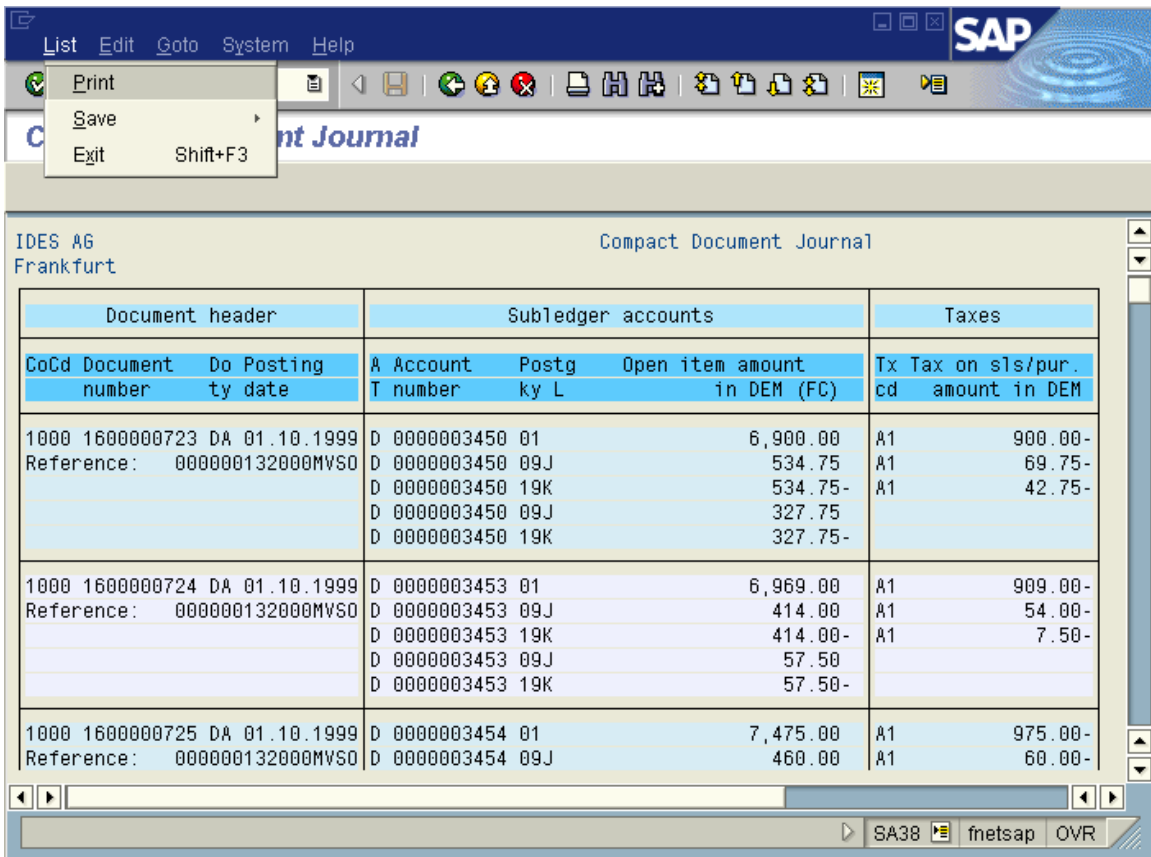
5. Archive the displayed printlist by choosing the command **List → Print** under the list option. The following screen is displayed:
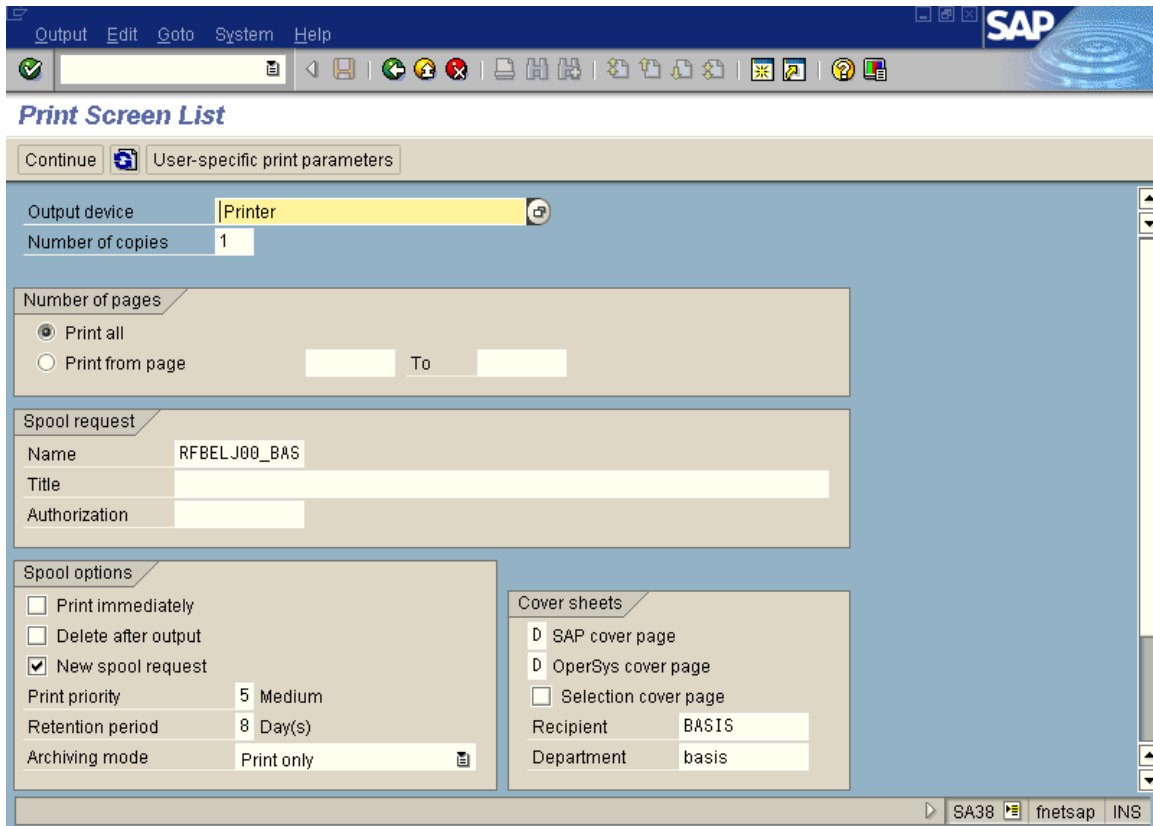
6. Enter the following parameters for the print job and press the **Print** or **Enter** button.

    -   Output Device: Printer defined on the SAP system (the ARCH output device does not display in this list).

    -   Title: Text description of the print job.

    -   Print immediately: Select this option to force immediate printing.

    -   Delete After Print: Select this option to delete the document from the work list after archiving/printing.

    -   Archiving Mode: Determines the output of a Printlist. It can have values Archive Only, Print Only and Print and Archive.

    The following screen is displayed:
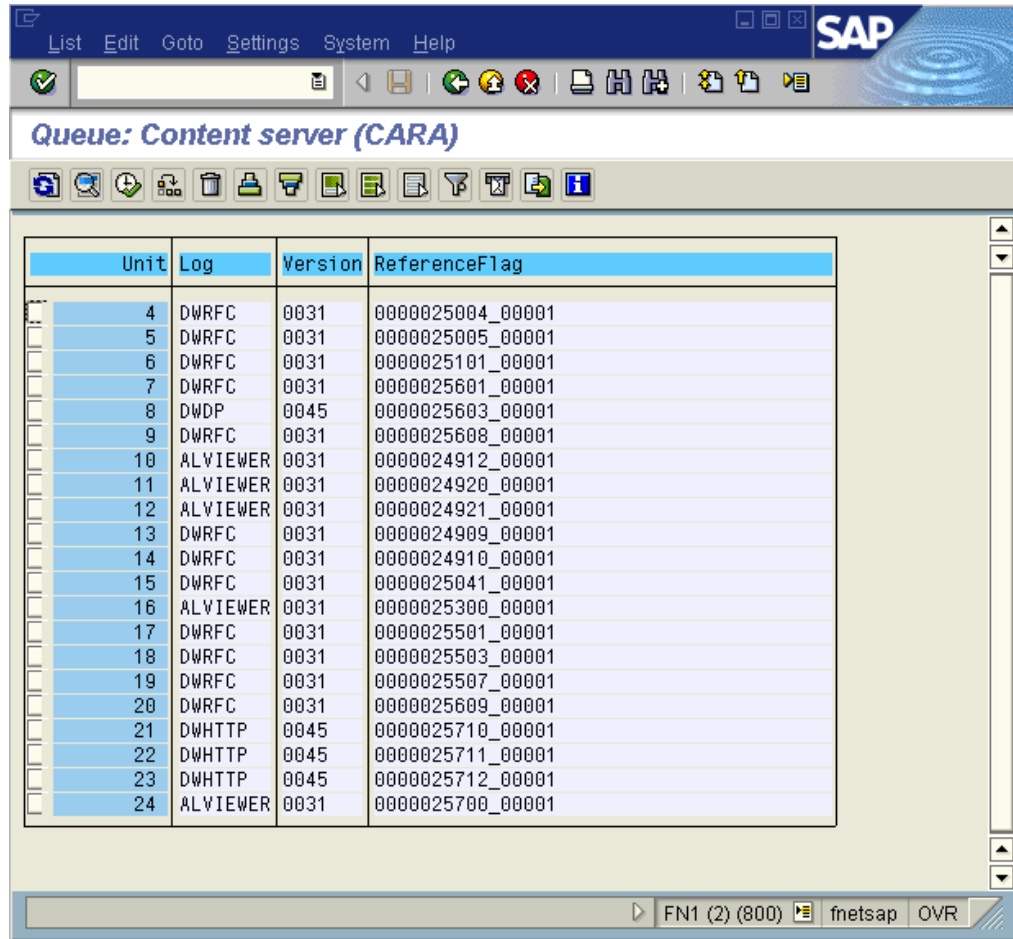
7. Complete the following parameters:

    *   Object Type: Object Type defined in SAP R/3. The object type determines the link table where the printlist is indexed and determines the archive where the document is stored.

    *   Document Type: Type of document defined in SAP R/3. The object type determines the link table where the printlist is indexed and determines the archive where the document is stored.

    *   Information: Any information that can be used to identify the Printlist easily.

    *   Text: Text description of the printlist. This description displays as an attribute on the resulting output request.

8. Press the **Archive** or **Enter** button. The following screen is displayed:
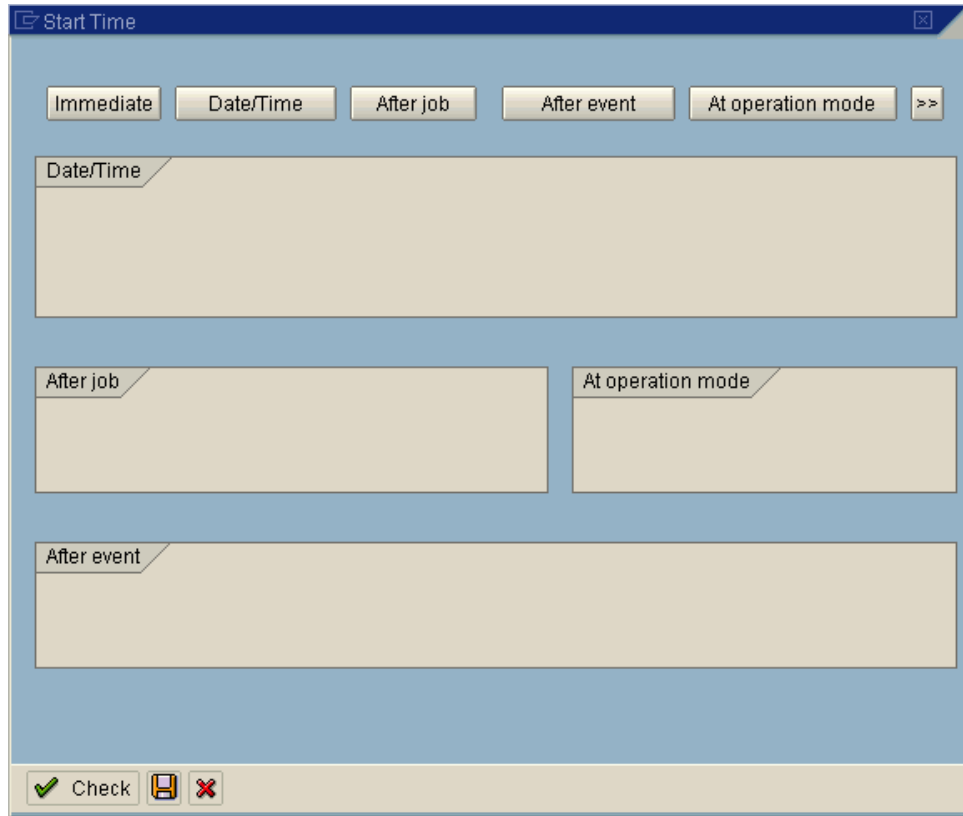
9. Enter the start time for the background job. Press the **Immediate** and **Save** buttons to execute the job immediately. This will start the process of generating the output file.

10. A message is displayed in the status line indicating that a background job has been generated.

11. Depending on the size of the Printlist, generating the printlist can take some time. The status of the job can be checked by choosing **Own jobs** from the **System** menu.

12. Asynchronous archiving, which is used for archiving Printlists, is usually scheduled only once a day in the off-peak operating hours. In order to archive the printlist immediately, an archive request must be triggered.

13. Go to transaction **oam1**. The following screen is displayed:
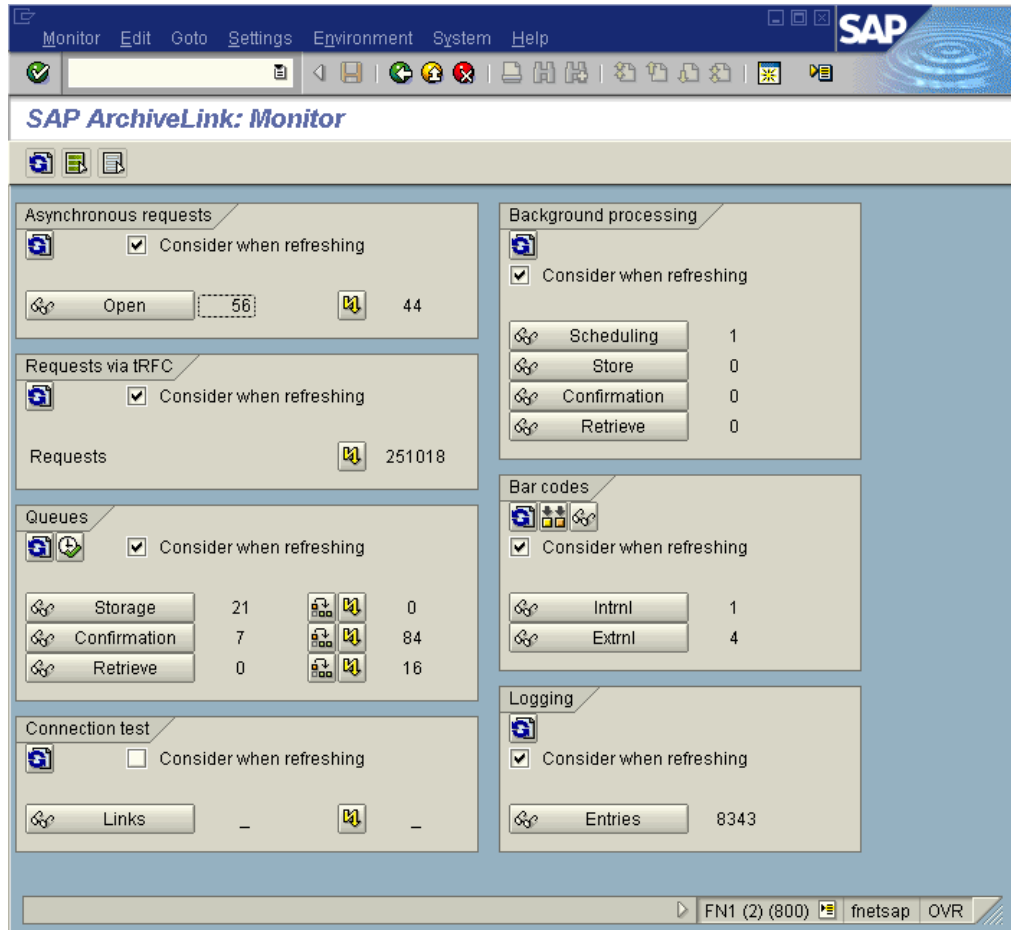
14. In the **Queues Group** Box, click the **Storage** button. A list of open requests referenced by spool request number will be displayed.

```
                                                              SAP
  List  Edit  Goto  Settings  System  Help

  Queue: Content server (CARA)

       Unit  Log       Version  ReferenceFlag
          4  DWRFC     0031     0000025004_00001
          5  DWRFC     0031     0000025005_00001
          6  DWRFC     0031     0000025101_00001
          7  DWRFC     0031     0000025601_00001
          8  DWDP      0045     0000025603_00001
          9  DWRFC     0031     0000025608_00001
         10  ALVIEWER  0031     0000024912_00001
         11  ALVIEWER  0031     0000024920_00001
         12  ALVIEWER  0031     0000024921_00001
         13  DWRFC     0031     0000024909_00001
         14  DWRFC     0031     0000024910_00001
         15  DWRFC     0031     0000025041_00001
         16  ALVIEWER  0031     0000025300_00001
         17  DWRFC     0031     0000025501_00001
         18  DWRFC     0031     0000025503_00001
         19  DWRFC     0031     0000025507_00001
         20  DWRFC     0031     0000025609_00001
         21  DWHTTP    0045     0000025710_00001
         22  DWHTTP    0045     0000025711_00001
         23  DWHTTP    0045     0000025712_00001
         24  ALVIEWER  0031     0000025700_00001

                                        FN1 (2) (800)   fnetsap  OVR
```

15. Double click on the spool request number representing the newly created printlist. Press the **Execute** button or **F8** to start the archiving process. The request is sent to DWSAP for processing.
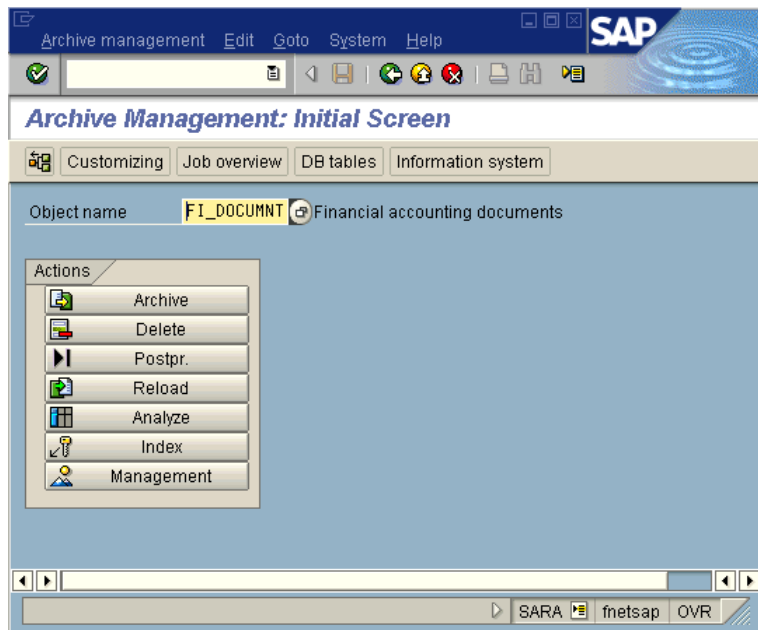
Data Archiving

The data archiving process is used to reduce the size of the SAP R/3 database primarily for performance reasons. SAP R/3 has the ability to create a data archive file that contains data records from tables. This data archive file is created and stored at a temporary location. SAP R/3 does not have a permanent storage archiving system to store the data archive file that it creates. The data archive files created are stored on FileNet Image Services (IS) via DWSAP. After the data archive file has been created, data is deleted from SAP R/3 database. Then, data archive is stored or archived onto FileNet IS via DWSAP. The temporary data archive file is deleted after the archival is complete.

Follow the steps listed below to create a data file and archive it to FileNet IS:

1. Go to archive management screen through **Tools → Administration → Administration → Archiving** (Transaction **sara**). The following screen is displayed:
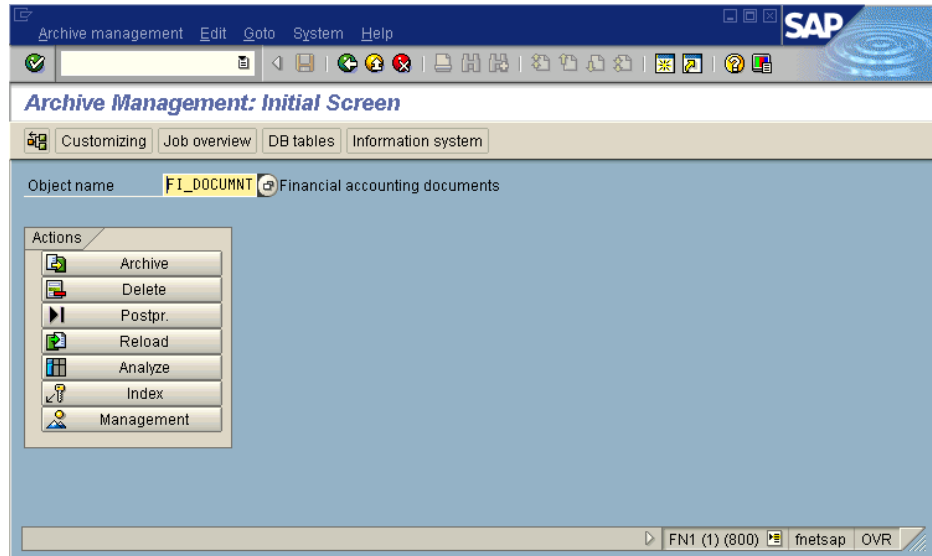

2. Enter the archive object name as **FI_DOCUMNT** and press enter. The following screen is displayed:


Note: Archive objects are the core of SAP data archiving. It specifies which data is archived and how it is archived. It also describes which database objects must be handled together as a single business object and which must be interpreted independently.

3. Click **Archive**. The following screen is displayed:
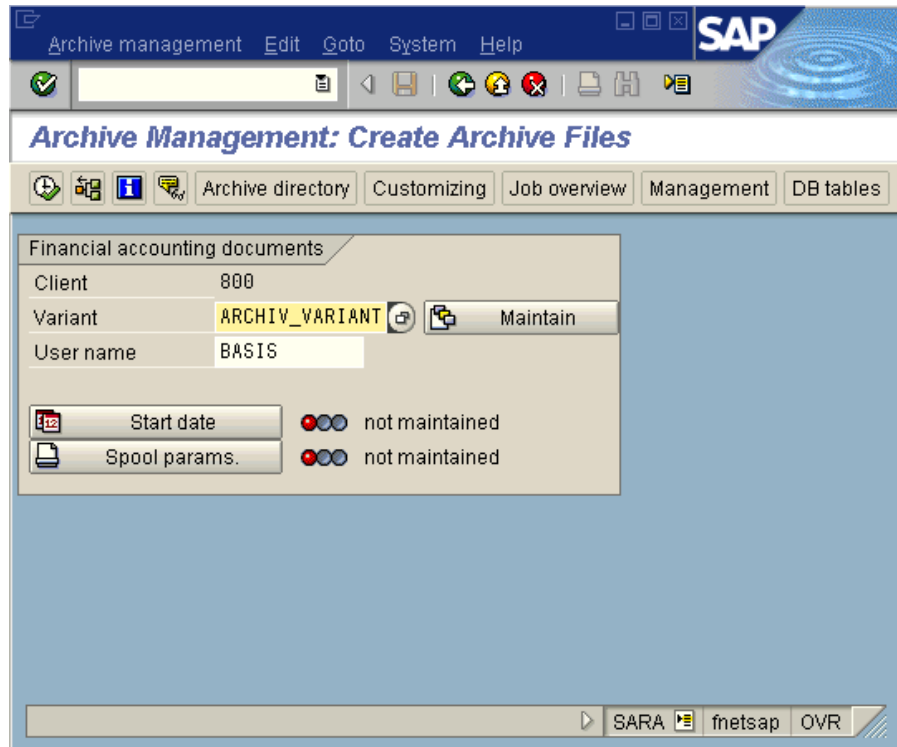
4. Enter the name of a variant to be created. This variant is used to specify the values of financial documents that will be archived. Click **Maintain** button. The following screen is displayed:
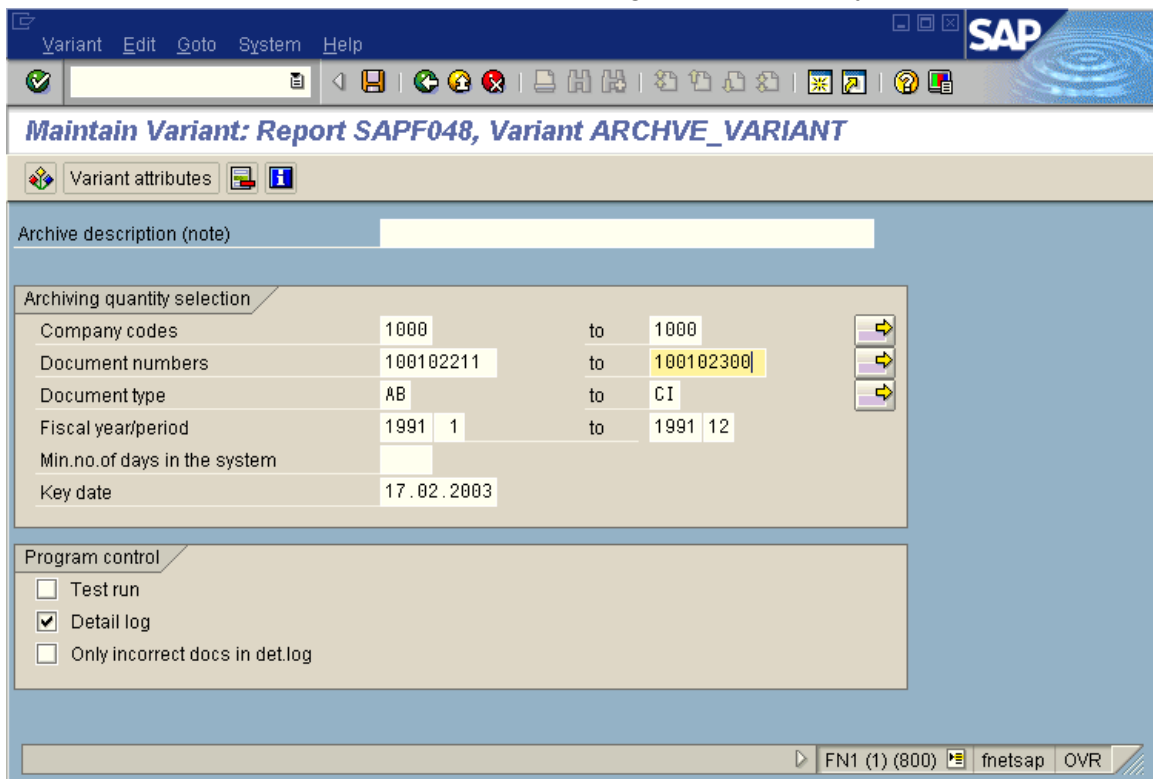
5. On the screen for variant maintenance, enter the selection criteria to identify the financial documents that need to be archived. Press **Save**

to save the variant. Make sure that the check box **Test Run** is not selected. If it is selected, then the data will not be archived and just a test run would be executed. After saving the variant return back to Archive management screen.
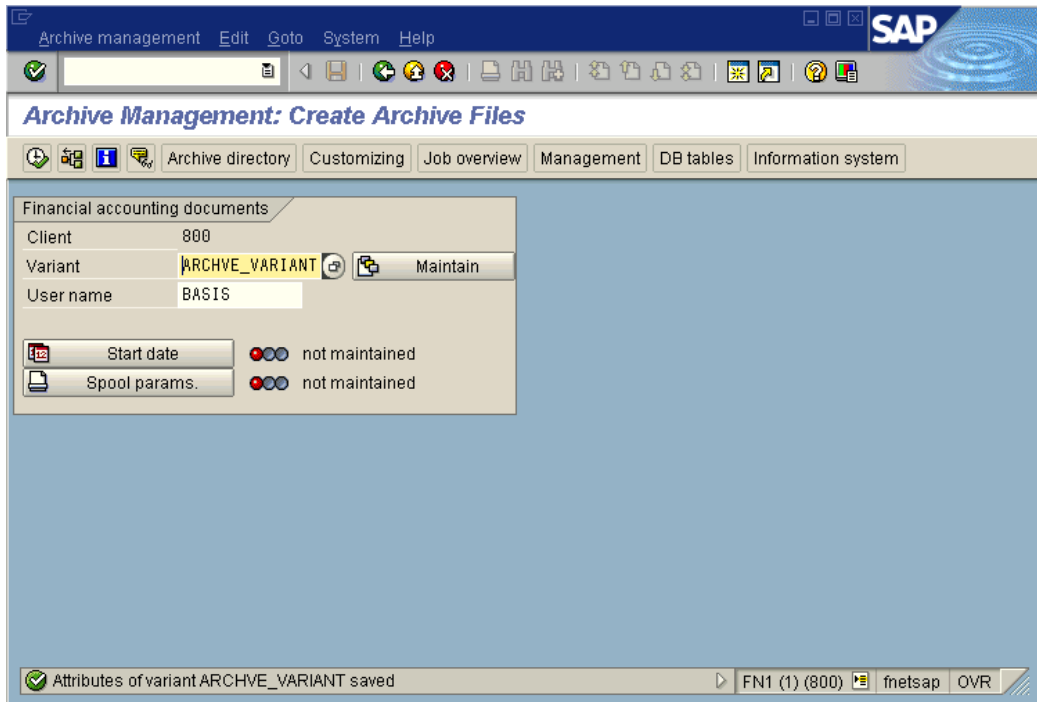
6. On the archive management screen, click the **Start date** button. The following screen is displayed:
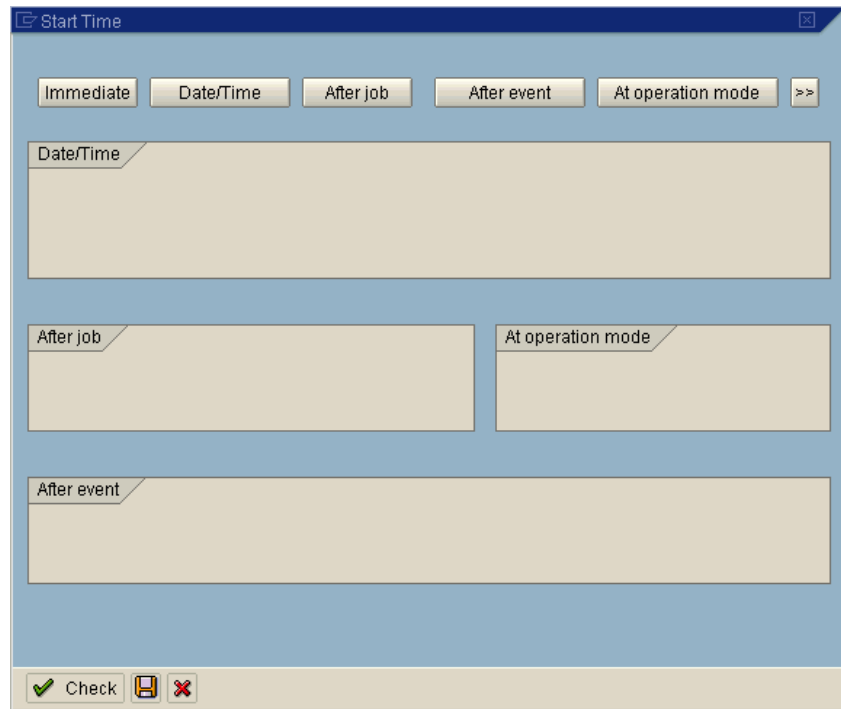
7. Click **Immediate** and then **Save** the settings. On the archive management screen click **Spool params** button. The following screen is displayed:

8. Maintain spool settings and select do not output immediately.

9. Press **Execute** or **F8**. Go to Job overview **sm37.** The following screen is displayed .After a while, three archiving jobs are displayed and have a status of finished.

10. On archive management screen, click **Management** that brings Archive Session Overview screen:

Archive Management: Archiving Session Overview

11. Under the complete archiving sessions branch, there is a new session with the current date.

12. Select this session and click the **Archive system** button. The following screen is displayed:

13. Click the **Store files** button. The following screen is displayed:

14. A request is issued to DWSAP server components. The status of storage will change from **Not Stored** to **Request Made**. After some time and refreshing the screen, the status eventually changes to **stored.** This means that archive file has been stored in the FileNet IS.

Display Archived Data

Follow the steps listed below to retrieve a data file:

1. Go to display document screen of financial accounting, transaction **fb03**.

2. Enter the same document number that has been archived in the previous steps and press **Enter**.

3. The dialog box comes up saying that the document is not in the database.

4. Click **Yes** and a request is made to DWSAP and the document is displayed from archive. This is called a partial restore.

5. In order to do a full restore of the data, go to archive management screen, transaction **sara**, enter archive object as **FI_DOCUMNT** .The following screen is displayed:

6. Select **Management**. The following screen is displayed:

7. Select the archive run and click **Archive system**. The following screen is displayed:

8. The screen shows the status of the archive run as stored. Click on **Retrieve files**. A retrieval request is made to DWSAP and the complete file is restored from the archive.

9. Leave the management screen. And return back to Archive Management. The following screen is displayed:
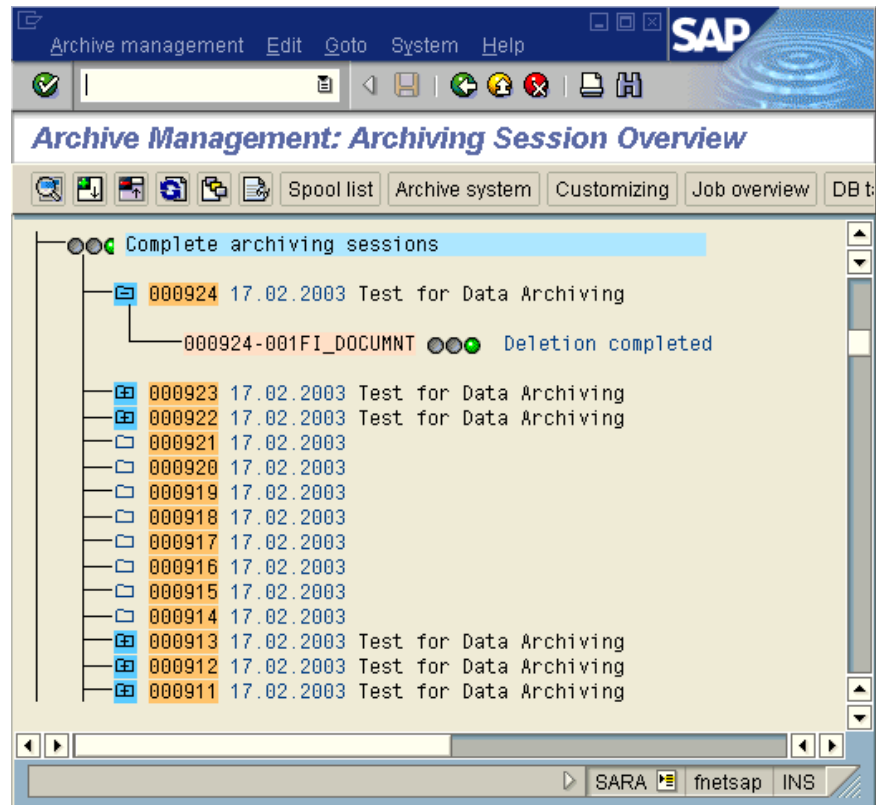
10. Now, choose the function **reload** for the archive object **FI_DOCUMNT**.

11. Maintain a variant for this reload and enter the document numbers that you want to reload into database.

12. Click the **Archive** selection button. The choose files to reload screen is displayed which shows all the complete archiving sessions. Select the archive session from which the data is to be reloaded. Also, specify the start date and spool parameters as above.

Note: Reloading data is not possible for all the archiving objects.When reloading data, SAP R/3 can only process complete archiving sessions.

13. Press **Execute** or **F8** key. This will generate new jobs for reload. These jobs can be verified in the job overview, transaction **sm37**.

14. The completion of these jobs means that the data has been restored in the SAP R/3 database.

15. Display the financial document from transaction **fb03**. Now, the document will be displayed from the database and not from the archive.

4
Document Retrieval And Display

This chapter describes how to retrieve and display documents and printlists stored on the Image Services (IS) library. The following viewers are supported for document display by DWSAP:

- FileNet IDM Viewer.

- Internet Explorer.

- Custom Viewer.

Printlists can be displayed in either SAPGUI or ArchiveLink viewer.

Displaying PDF Documents

For document types other than printlists, the following viewers are supported:

- FileNet Viewer.

- Internet Explorer.

- Java Based Viewer

- Custom Viewer.

In order to display all the documents other than printlists stored in IS library perform the following steps:

1. Click **Tools → Business Documents → Miscellaneous → Stored documents** or transaction **oaad**, in the main window of SAP R/3, the following screen is displayed:
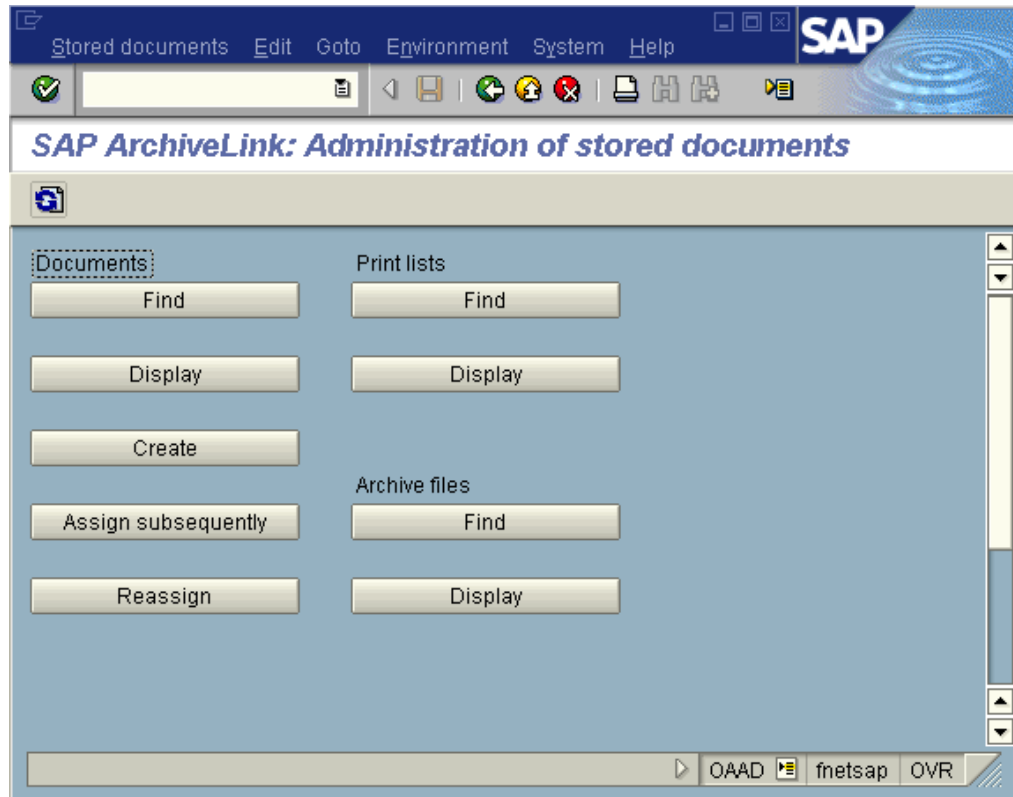
2. Click **Find** button. The following screen is displayed:
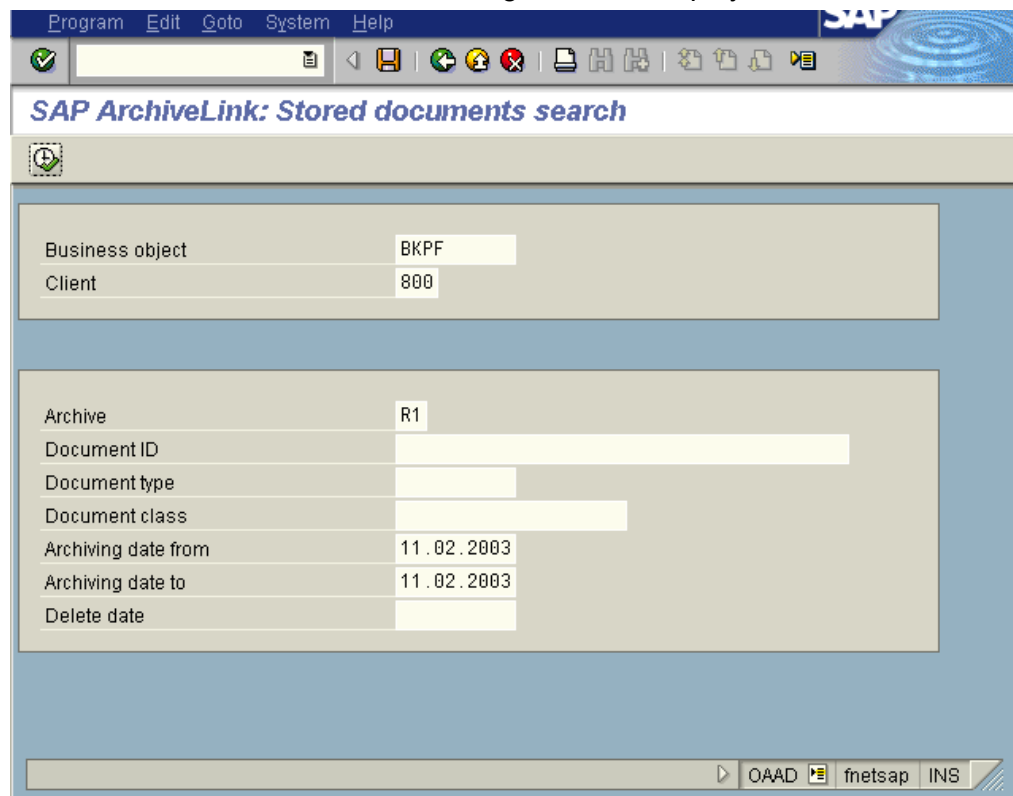
3. Enter selection criteria to search for linked documents. Any combination of the above criteria can be used to get the linked documents. Press **Execute** or **F8** key to continue.

4. The linked documents corresponding to the above search criteria are displayed as shown below.
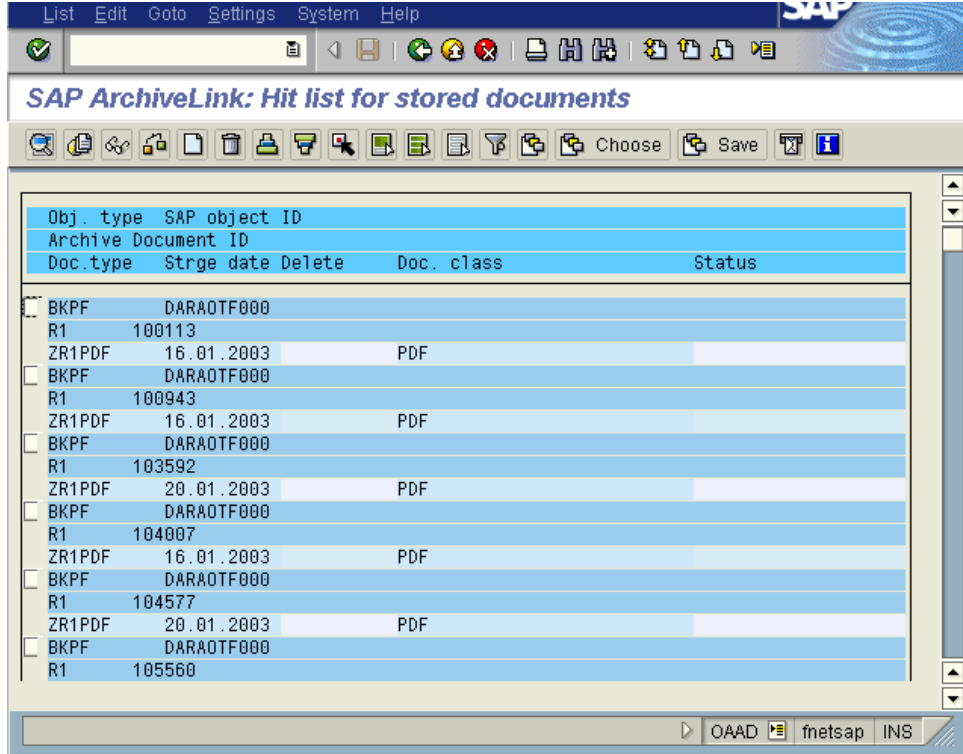
5. Double click on one of these entries. The following screen is displayed:
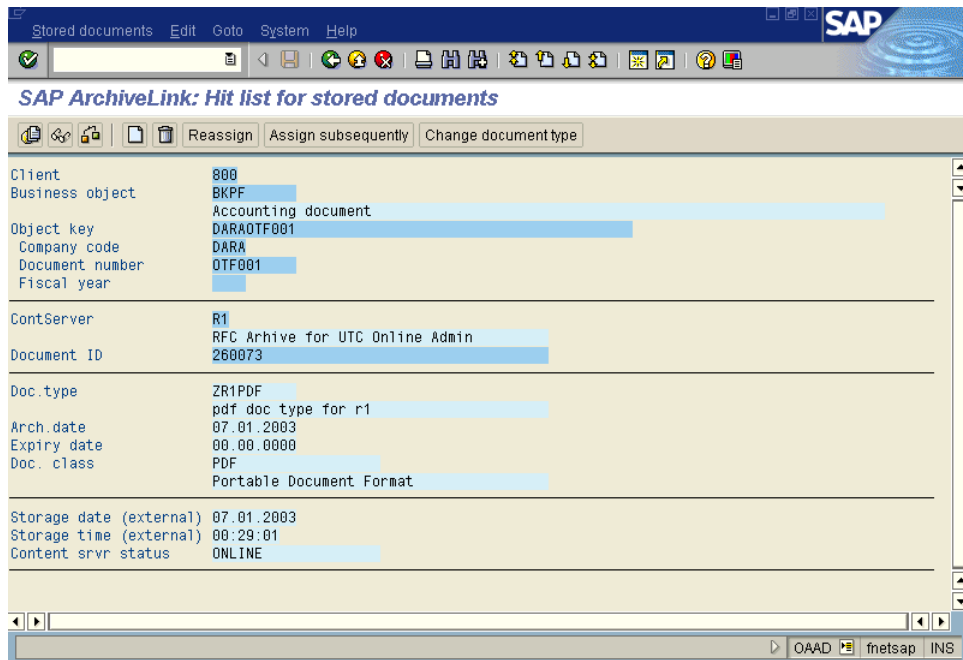
6. To display the document, click the **Display** button. The following scenarios exist when displaying the documents:

- Display in FileNet IDM Viewer: In this case, SAPGUI communicates with the FileNet IDM Desktop for R/3, which invokes the FileNet IDM viewer to display the linked document.

- Display in Internet explorer in Server add-on environment: In this case, SAPGUI communicates with IDM desktop for R/3, which displays the document in Internet Explorer.

- Display in Internet Explorer in Pure-thin environment: In this case, none of the FileNet component needs to be present on the client machine. SAP sends the display request to DWSAP server components and displays the document in Internet Explorer.

- Display in a custom viewer: Customers can also use their custom viewers to display the linked document. For details on how to achieve this, refer to DWSAP 5.1 Installation and Configuration manual-Client and Programmer's Handbook.

Note: Customers need to customize their SAP system differently for each of the above stated scenarios to work properly. For details on how to configure SAP R/3 for the above scenarios, refer to Installation and Configuration manual-Server and Installation and Configuration Manual-Client.

CAUTION: Documents having document types ALF and OTF, proprietary document types of SAP, cannot be displayed using the above viewers.

Displaying Print Lists

Print lists are the reports produced from SAP. These can be printed, archived to the IS library and stored on optical disk in a single operation. Print lists can be retrieved either directly in the SAP office module, or through the Archive Objects Administration module of the ArchiveLink Interface. Printlists can be displayed in the following viewers:

- SAPGUI.

- ArchiveLink Viewer.

To display the Find Archived Print Lists dialog box:

1. From the SAP R/3 main window, click **Office → Business Documents → Find Lists** menu. The following screen is displayed:
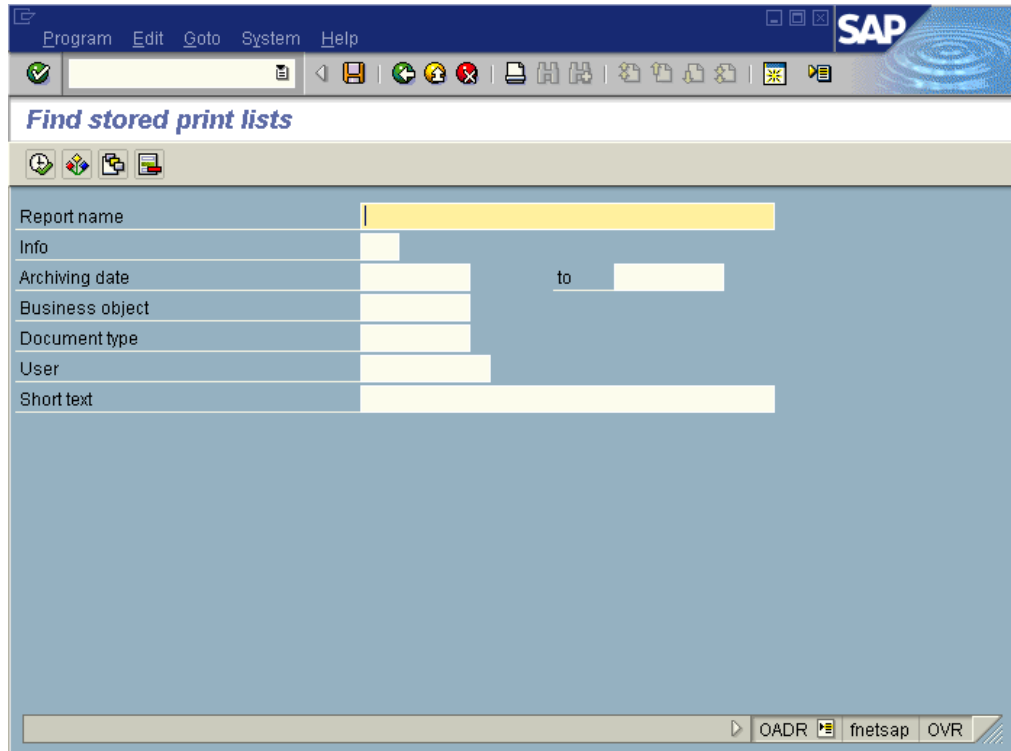
2. Enter the following search criteria in the respective fields:

Field	Description
Report Name	Denotes the type of print list.
Archiving Date (From/To)	Denotes the date range when the print list was archived. (nn/nn/nnnn)
Object Type	Denotes the type of object associated with the print list, such as Document.
Document Type	Denotes the document type, such as General Print List.

3. To display a list of matching print list reports, click the **Execute** button. The following screen is displayed:
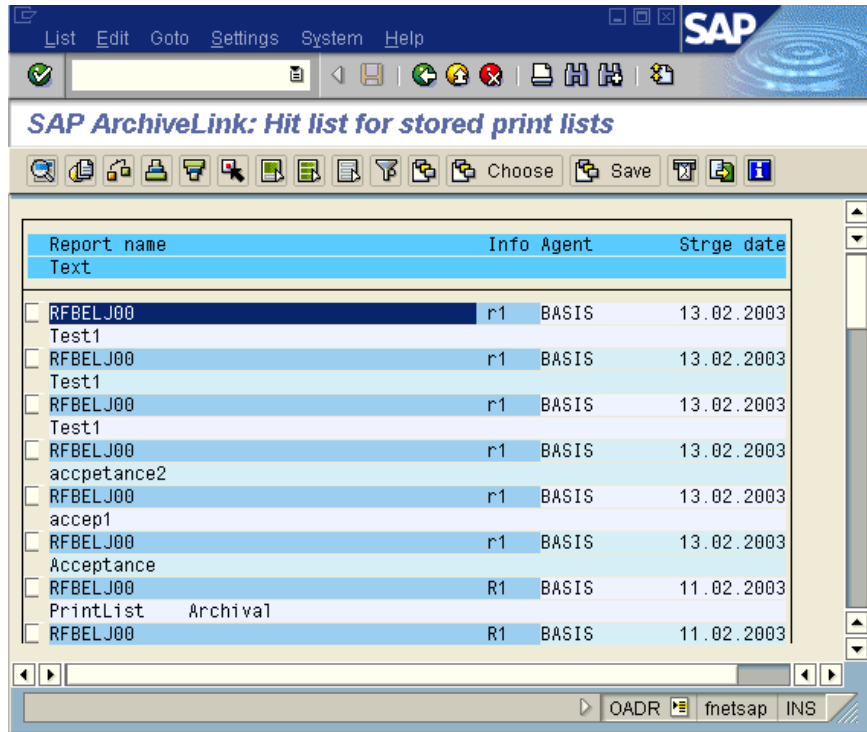
4. To retrieve the full index attributes for the archived Print list, choose
   any one of the report names, and click **Choose Details** button. If the
   print list is available for retrieval, then the status is displayed as
   ONLINE, otherwise the status is displayed as **OFFLINE**.
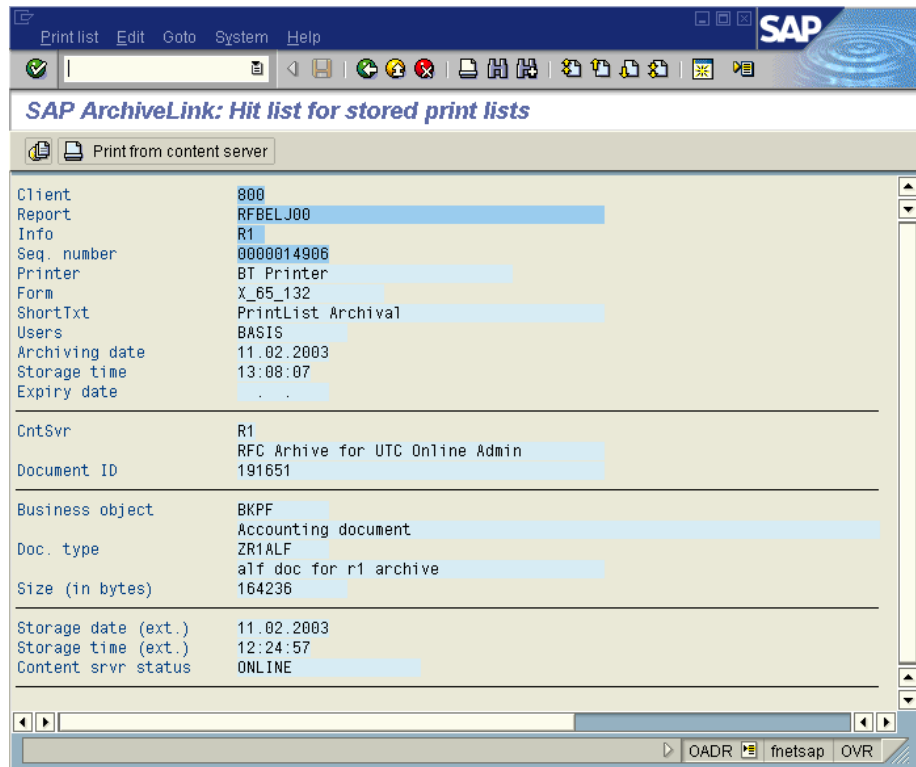
5. To retrieve the print list from the IS library and display it, select
   Printlist → Display from Content Server. Depending on the protocol

configuration, the Printlist can be displayed in either SAPGUI or ArchiveLink Viewer.

Displaying Printlist In SAPGUI

As of SAP R/3 release 4.5B, Print lists archived to FileNet can be displayed in SAPGUI. Searching for a text string and searching for attributes is also possible. But this functionality of searching for print lists is possible only for those print lists that are archived to HTTP content servers. In case the print list is archived to an RFC content server, free search and attribute are not available. In order to customize SAP R/3 to display print lists in SAPGUI, refer to Installation and Configuration manual-Server.

On selecting **Printlist → Display** from content server, the print list is retrieved from FileNet IS and displayed in SAPGUI as shown below:
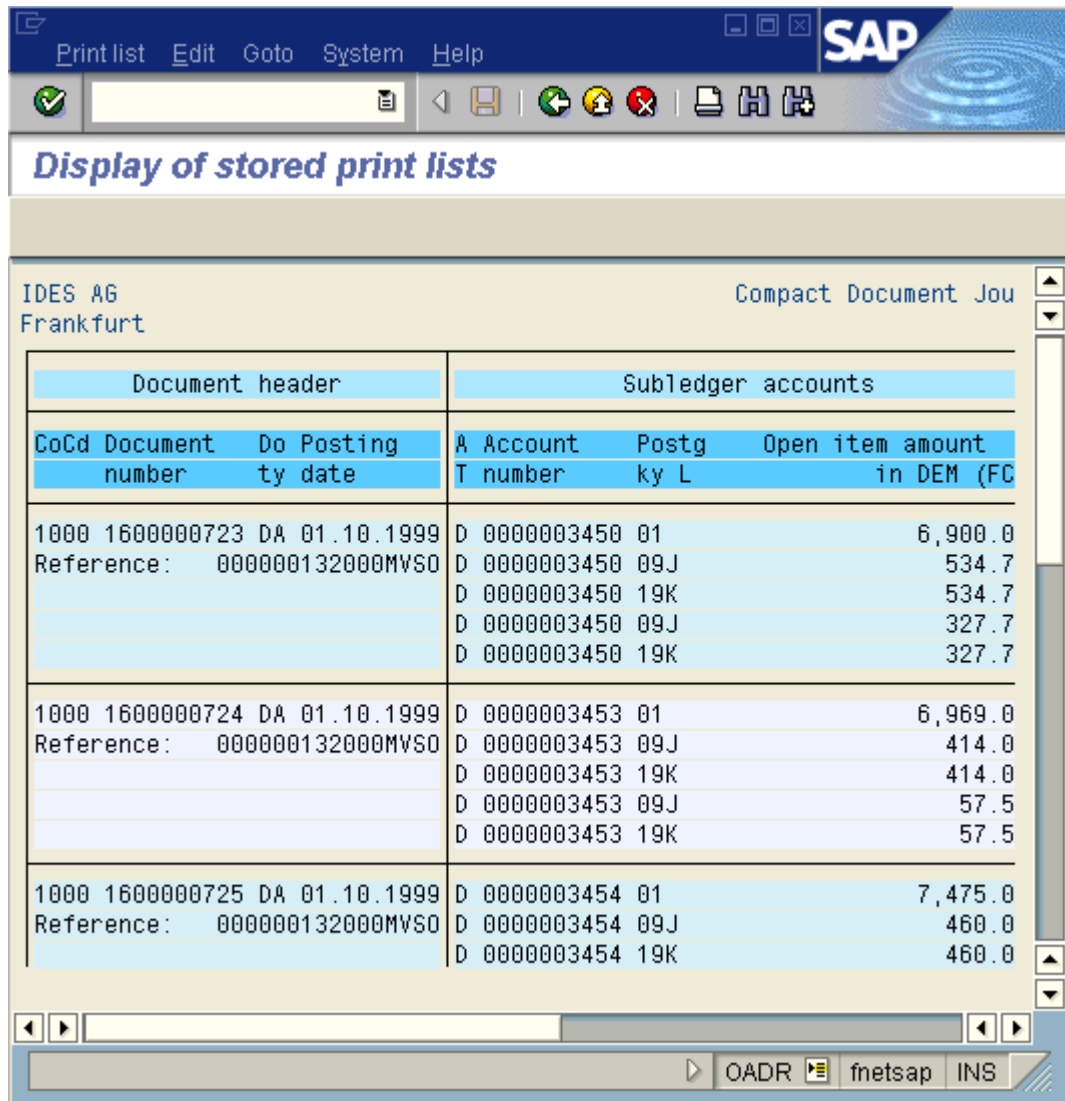
Searching for a Text String

The Free Search feature of SAPGUI is used to search a text string in a Print list document stored on the IS library. The search is conducted directly on the data file of the print list. To search a displayed print list for a specific text string:

1. Click **Edit → Free Search** menu. This displays the Find dialog box, as shown in the figure below:
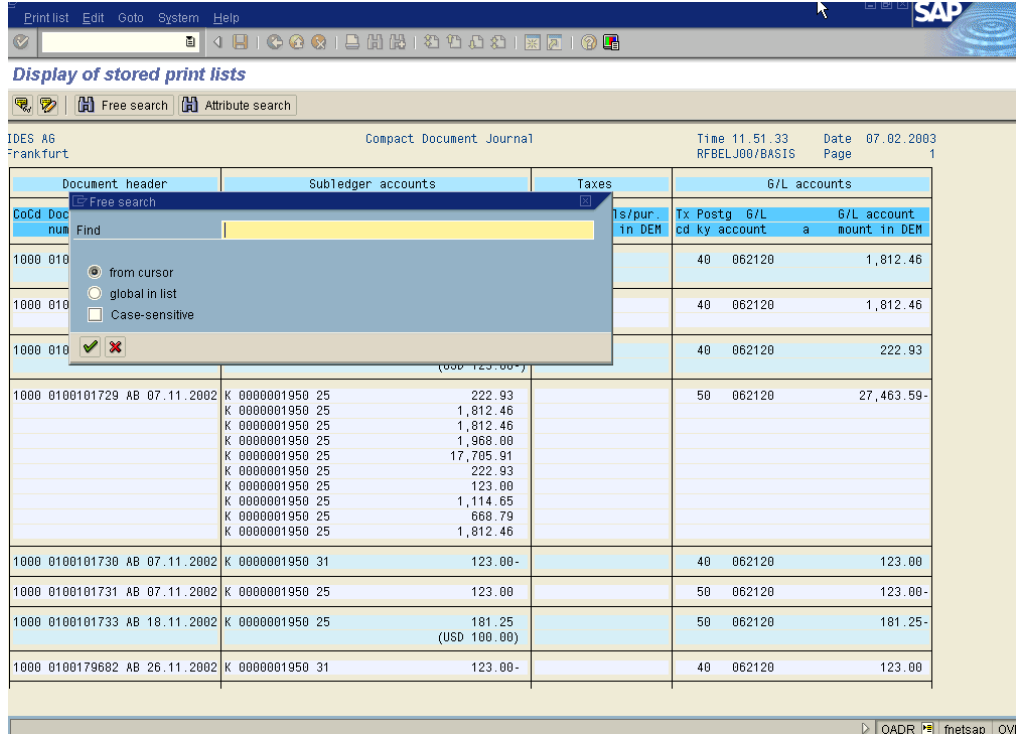
2. To find all the occurrences of the desired text string, enter the text string in the Find textbox, and click enter. The user can also choose to search from the current cursor position by selecting the **from cursor** radio button or in the entire Printlist by selecting the **global in list** radio button. Checking the case-sensitive check box carries out the case-sensitive search.

Searching for Attributes

The Attribute Search feature searches a SAP print list document stored on the IS library for a record that matches attributes as mentioned in the search criteria.

To perform attribute search in a Printlist:

1. Click **Edit → Attribute Search**.

2. Enter the search criteria and then press search. The SAP ArchiveLink viewer searches the description file of the print list for the above attributes.

Creating Notes

The DWSAP supports the creation of Notes on print lists from SAPGUI. To create a Note associated with the Printlist:

1. Click **Print list → Create note** menu in the displayed print list. The following screen is displayed:
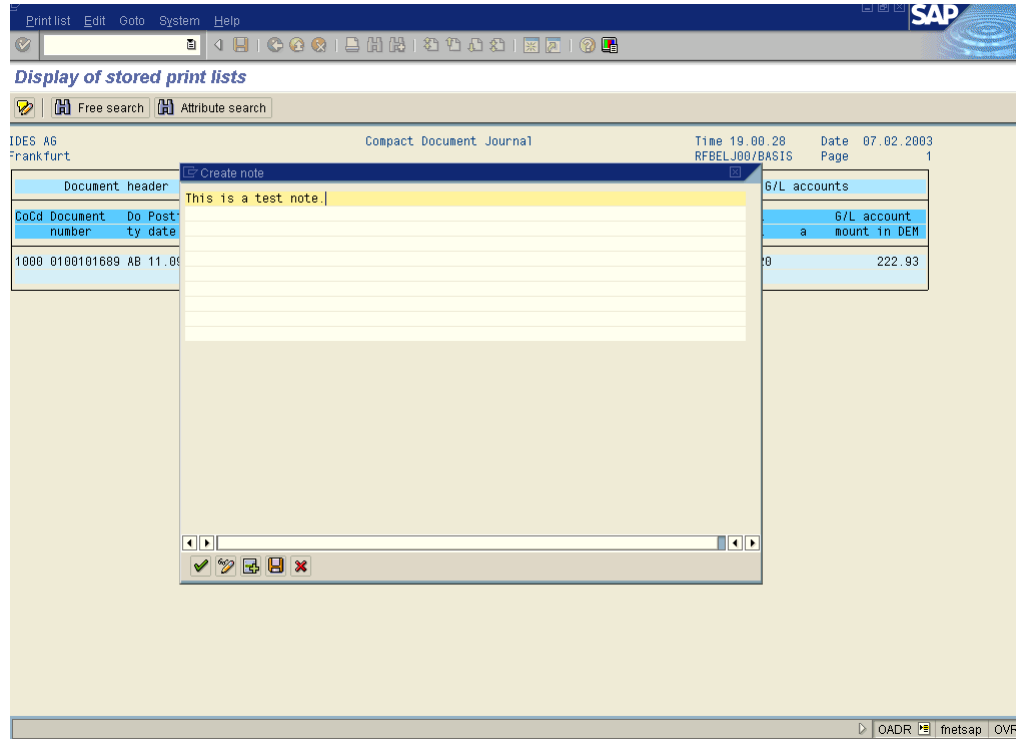
2. Enter the text for the note in the above screen and press **Save**.

3. This sends a request to DWSAP and the note is stored.

4. In order to display the note added, click on the menu item **Print list → Display note**. The notes added on a print list are displayed in a new screen as shown below:
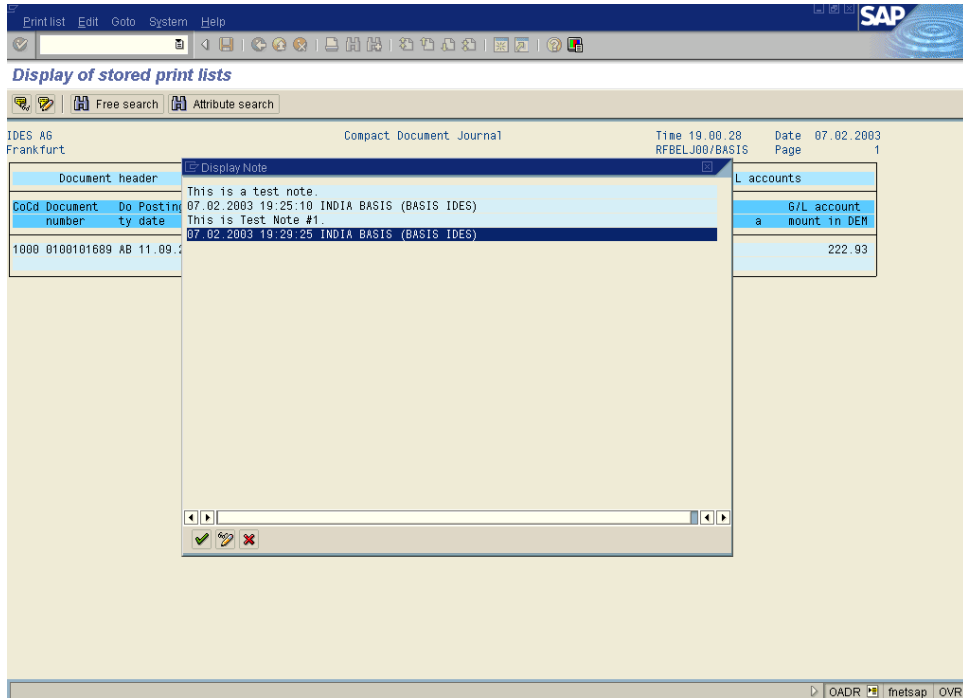
5. Users can also add more than one note on a print list. This can be done through menu item **Print list → Expand on note**. The following screen is displayed which has the note previously added in display mode. The additional notes can be added in the extra text boxes provided and pressing **Save**.
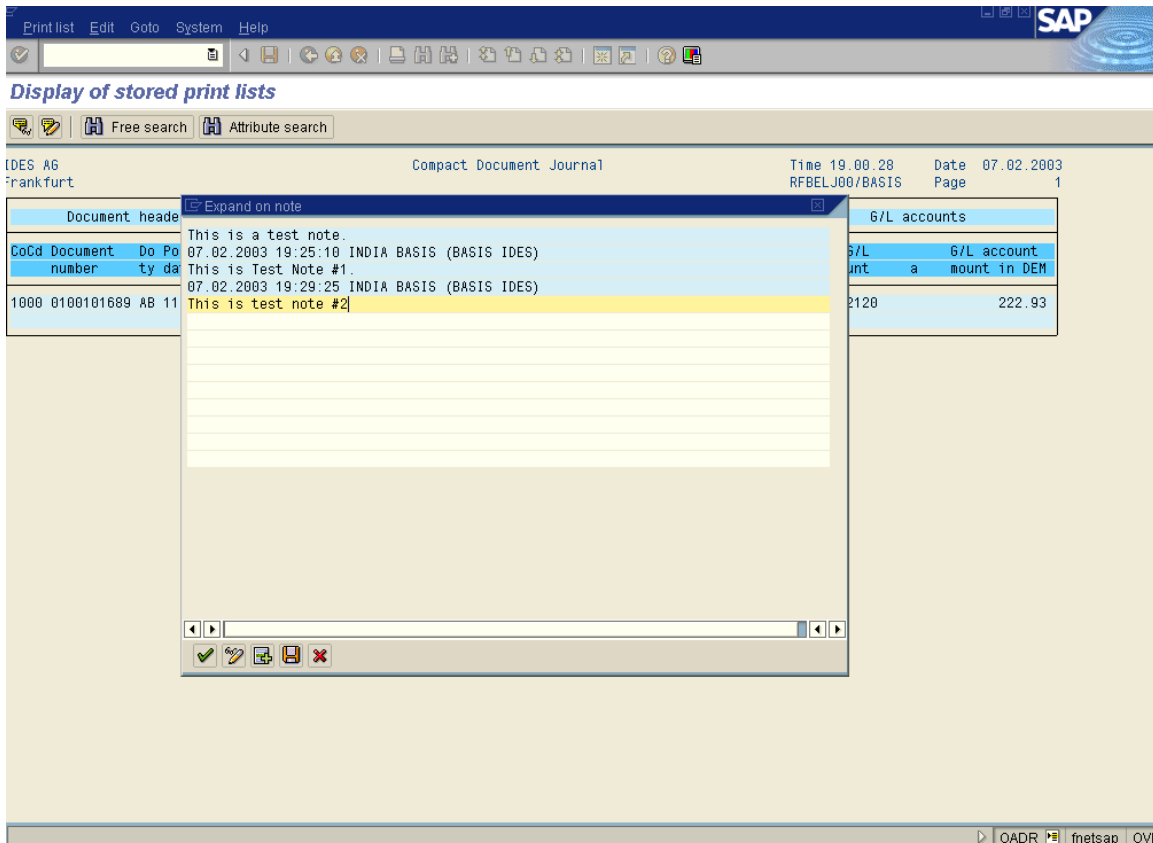
Displaying Print Lists In ArchiveLink Viewer

SAP ArchiveLink Viewer can be used to display archived documents. Print lists, outgoing documents in OTF format and incoming documents in FAX format can be displayed using ArchiveLink Viewer. This viewer uses the functions provided in the IDMForR3.DLL to retrieve documents stored on the FileNet system. For displaying Print list in ArchiveLink Viewer, SAP should be customized accordingly. For details on configuring SAP system for display in ArchiveLink Viewer, refer to Installation and Configuration manual -Client.

Using SAP ArchiveLink Viewer you can:

- Print to a UNIX server using a spool independent of SAP SAPspool.

- Print locally through Microsoft Windows.

- Display and edit a note already displayed with the associated displayed document.

- Create a note if one does not exist with the document.

- Select and de-select a displayed document.

- Copy a selected area of a document image to the Windows clipboard.

- Select an entire page prior to copying to Windows clipboard.

- Search a displayed print list for a text string.

- Search an indexed print list for record matching attributes.

- Navigate through a document using the first page, next page, and previous page commands.

- Navigate between the documents using the first document, next document, previous document, and last document commands.

- Manipulate Windows using the tile and cascade commands.

The following figure shows a print list in ALF displayed in the SAP ArchiveLink viewer:

Searching for a Text String

The Free Search feature of SAP ArchiveLink viewer is used to search a text string in a Print list document stored on the IS library. The search is conducted directly on the data file of the print list. To search a displayed print list for a specific text string:

1. Click **Edit → Free Search** menu. This displays the Find dialog box, as shown in the figure below:
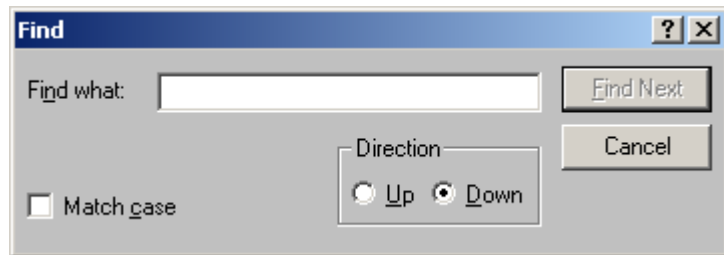
2. To find all the occurrences of the desired text string, enter the text string in the **Find** textbox, and click the **Find Next** button.

When a search is executed, the displayed page of the print list is searched first. The first occurrence of the text string is highlighted. If the text string is not found on the displayed page, the text string is passed to DWSAP client components, and the search continues on the remaining print list in cache. If the text string is located, the relevant page is retrieved to the workstation, displayed, and the matching text string is highlighted.
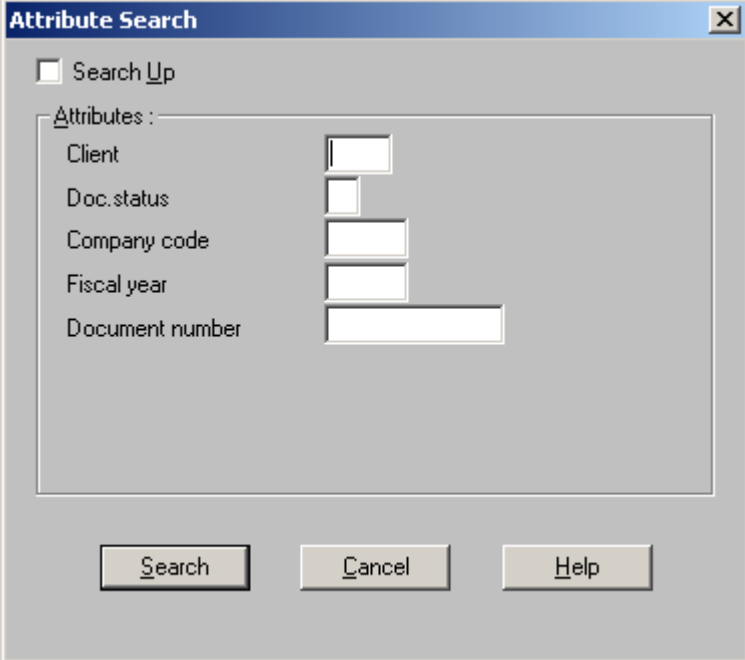
Searching for Attributes

The Attribute Search feature searches a SAP print list document stored on the IS library for a record that matches attributes as mentioned in the search criteria.

Note: Attribute search is supported for only those print lists that are generated in background and store a description file along with the data file.

To perform attribute search in a Printlist:

1. Click **Edit → Attribute Search**. The following dialog box is displayed:

2. Enter the search criteria in the above dialog and then press search. The SAP ArchiveLink viewer searches the description file of the print list for the above attributes. This description file is generated and archived together with the print list in the current language of the user, for example English. The resulting pointer navigates to the correct location in the data file.

Creating Notes

The DWSAP supports the creation of Notes from SAP applications and from SAP ArchiveLink viewer. To display a Note associated with the Printlist, click **Edit → Note** menu, from the display window of SAP ArchiveLink viewer.

The Note Editor dialog box displays a note associated with the displayed document, as shown in the figure below:
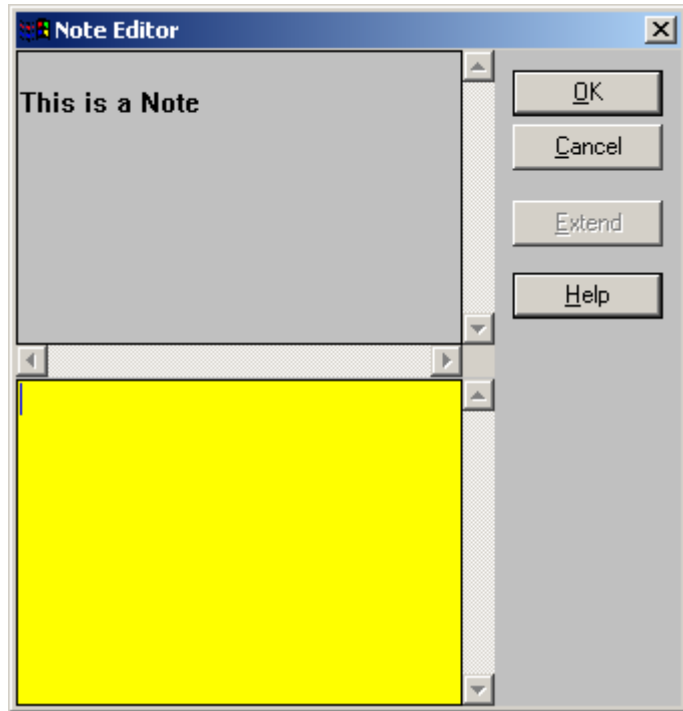
To add new text to the existing Note or to create a Note, click the **Extend** button in the Note Editor window. The Note is sent to the IS library, where a FileNet annotation is created and stored with the document.

5

DMS Sample Web Application

A DMS sample web application is packaged along with DWSAP 5.1 Server add-on. This sample application exposes the DMS functionality over the web. Using this application, multiple users can simultaneously link the FileNet objects to SAP Document Info Records (DIRs).

Using the sample application, the user can:

- Browse the contents of FileNet Libraries and select the FileNet objects that need to be linked to DIRs.

- Link FileNet objects to DIRs.

- Create new versions of DIRs.

- Unlink DIRs from the FileNet objects.

- Link FileNet objects to Material Master.

- Display Material Master Records linked to FileNet object.

Accessing The DMS Sample Web Application

The DMS sample web application can be accessed through a URL. The URL is of the form

http://ServerName/idmws/dwhome.asp

Where,

ServerName is the name of the server on which DWSAP 5.1 server add-on is installed.

Dwhome.asp page is the home page of DMS sample web application. This page loads all the FileNet libraries configured on the server as shown below.
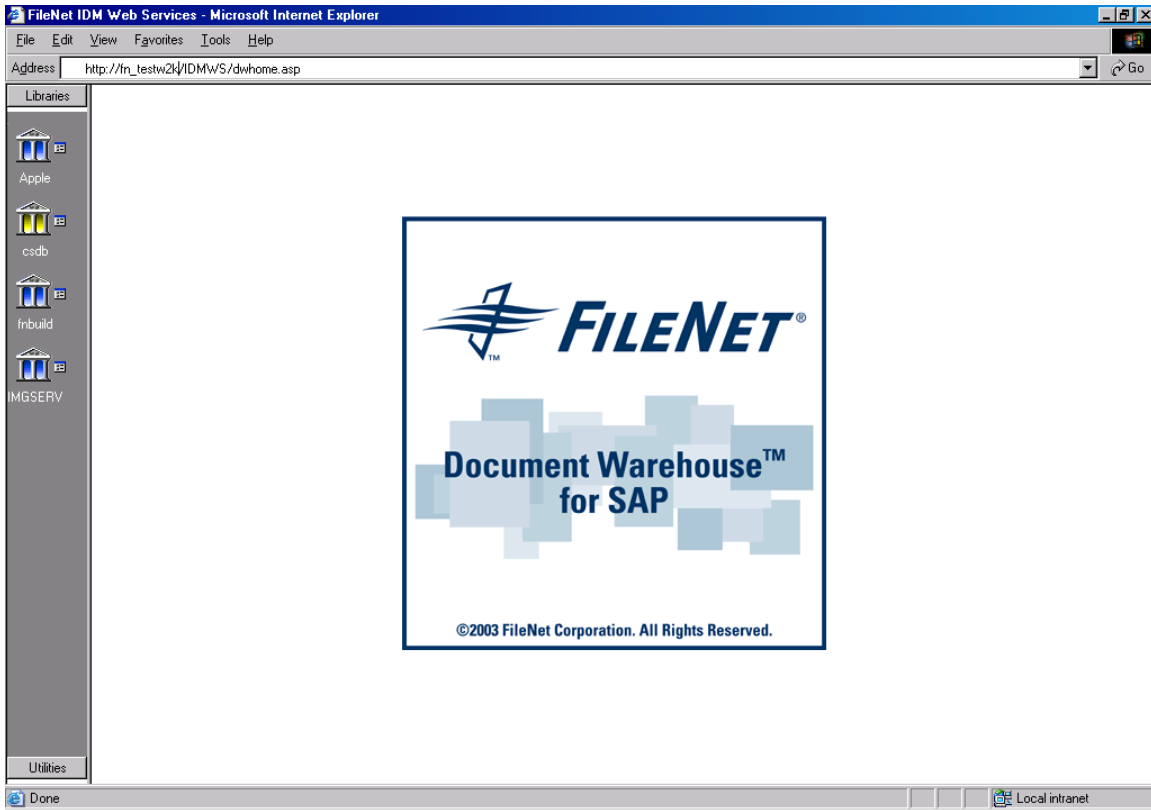
Browsing The Configured Libraries

On the above page, select the library to logon to a library. The logon dialog is displayed as shown below:
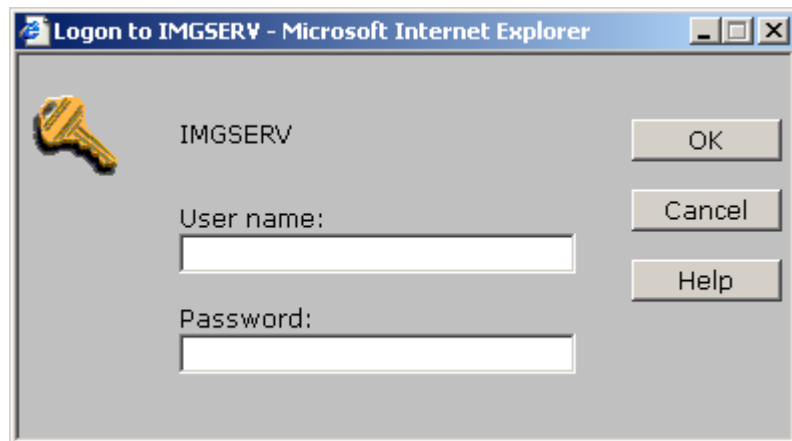
After logging on to a library DMS toolbar is loaded which exposes the DMS functionality. All the configured SAP systems are also loaded. The SAP system to which the FileNet objects can be linked can be selected via this list.

Note: DMS toolbar is disabled unless a document or a folder is selected
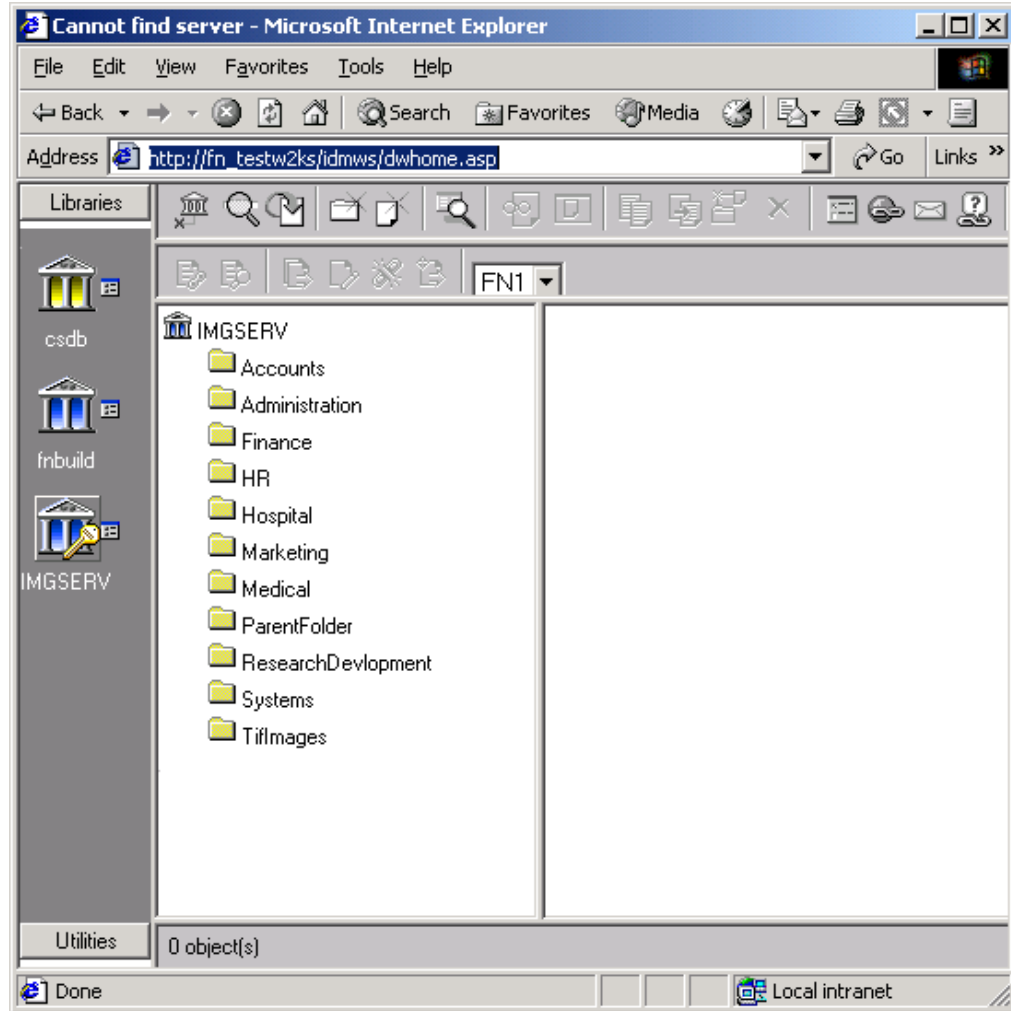
Select a folder to display the contents of the folder as shown below.
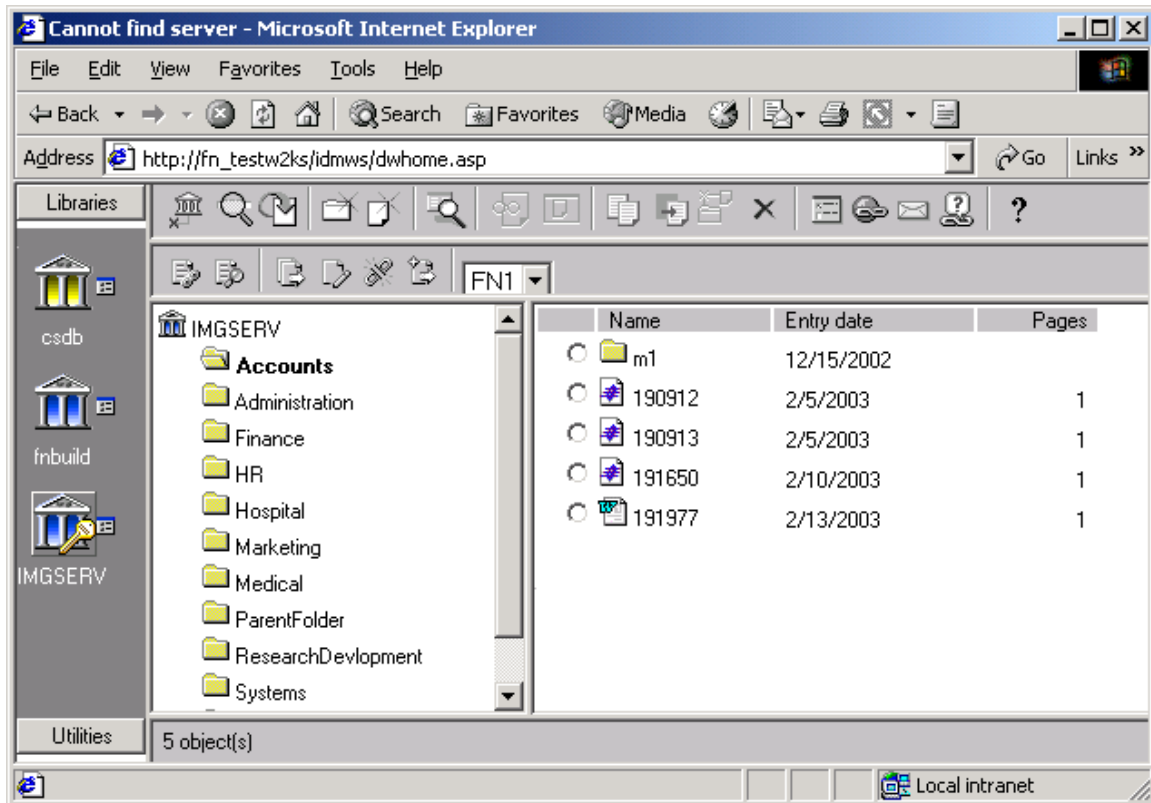
DMS toolbar exposes the following functions which are explained in the subsequent sections:

- Link FileNet objects to Material Master.

- Display linked material master records.

- Publish document to SAP R/3.

- Change document status.

- Unlink R/3 objects.

- Publish current document version.
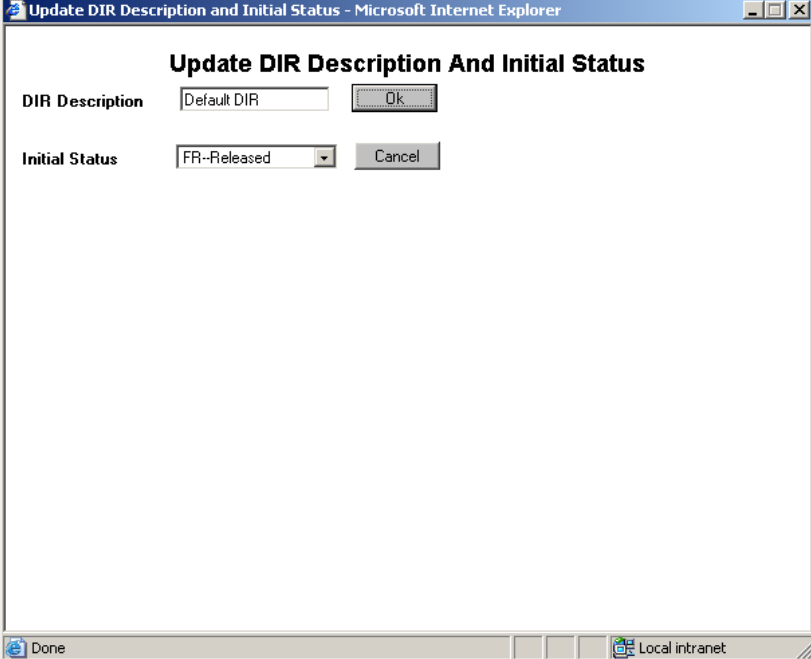
Link To Material Master

This function allows searching for material master records in SAP R/3 and linking the selected material master record to the selected FileNet object.

The following procedure needs to be followed in order to link material master records to FileNet objects:
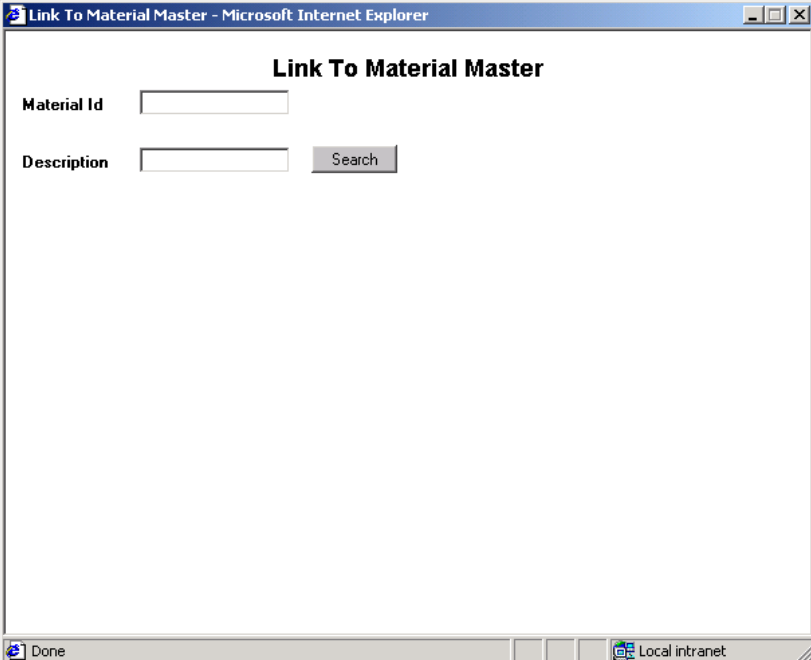
1. Select the library and the object that needs to be linked to the material master record. Also, select the SAP system for which the link is to be established.

2. Click on icon ⬚ . In case in the configuration tool the option **Prompt for DIR Status and Description** is enabled in Client → DMS , a dialog box is popped. If the option is disabled in Configuration tool, then skip to step 4.

3. Enter the value of the DIR description and select the status of DIR to be created and click **Ok**. The following screen is displayed:

4. Enter the search criteria for searching material master records in the above window by entering the values for Material Id and Material Description. After entering the search criteria, click on the **Search** button to execute the search.

5. This searches for the material master records in the selected SAP R/3 system. The following screen is displayed:

6. Select the material master record that needs to be linked to selected FileNet object. The **Link** button is enabled.

7. Click on the **Link** button to link the selected material Id to the FileNet object through a DIR. A DIR is created in SAP R/3 and the DIR Id is popped up as shown below. Click on the **Ok** button to acknowledge the message and the window closes.

Display Material Master

This function displays material master records linked to the selected FileNet object.

The following procedure needs to be followed in order to link material master records to FileNet objects:

1. Select the library and the object for which material master records need to be displayed. Also, select the SAP system for which the link is to be established.

2. Click on the icon ⬚. This launches a new window and all the material master records linked to the selected FileNet object are displayed.

Publish Document To SAP R/3

This function creates a DIR in SAP R/3 and a link is established with the selected FileNet object.

The following procedure needs to be followed in order to link material master records to FileNet objects:

1. Select the library and the object for which a DIR needs to be created. Also, select the SAP system for which the link is to be established.

2. Click on the icon [icon] . In case in the configuration tool the option **Prompt for DIR Status and Description** is enabled in **Client → DMS** a dialog box is popped. If the option is disabled in Configuration tool, then skip to step 3.
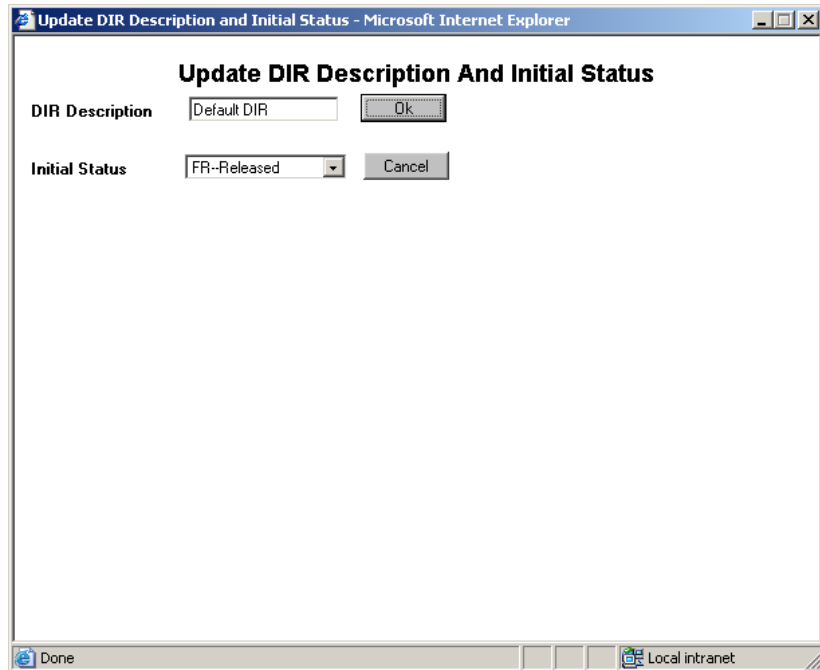
3. Enter the value of the DIR description and select the status of DIR to be created and click **Ok.** Clicking **Cancel** will create DIR with the default values.
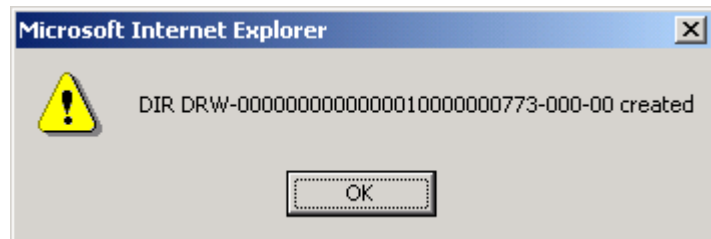
4. Click **OK** to acknowledge the message and the window closes.

Change Document Status

This function allows changing the status of DIRs linked to selected FileNet object in SAP R/3.

1. Select the object in the library and the SAP system.

2. Click on the icon . A dialog box is displayed which shows all the DIRs linked to selected FileNet object along with its current status and list of new statuses as shown below:
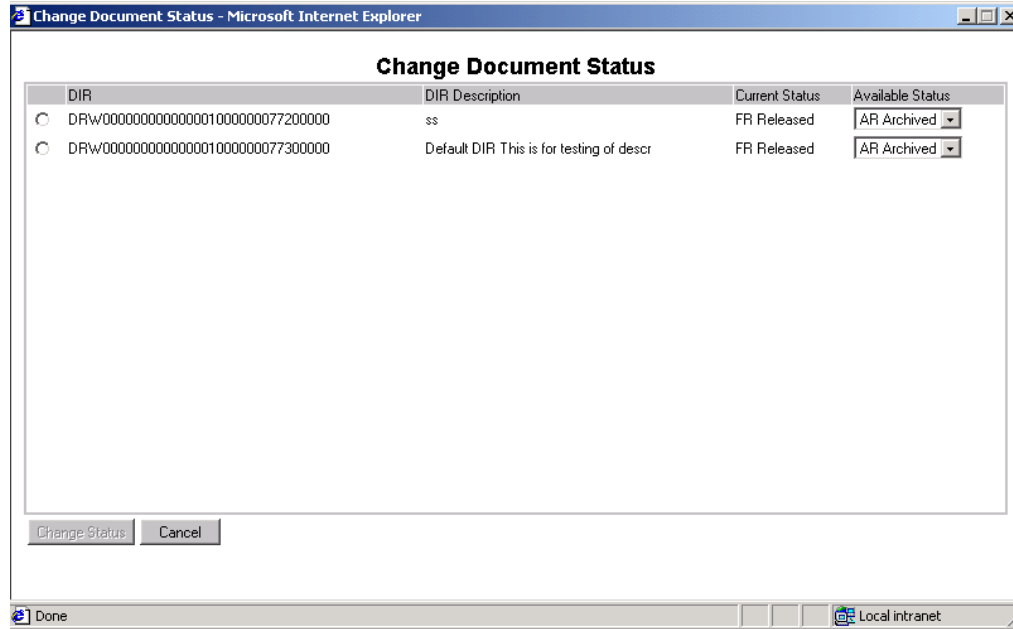
3. Select a DIR whose status needs to be changed. This enables the button **Change Status**.

4. From the list of available status, select the new status of the DIR and click **Change Status**.

5. This changes the status of the DIR to the one selected in the available status. After the status has been changed, the web page is refreshed with the updated value of status.
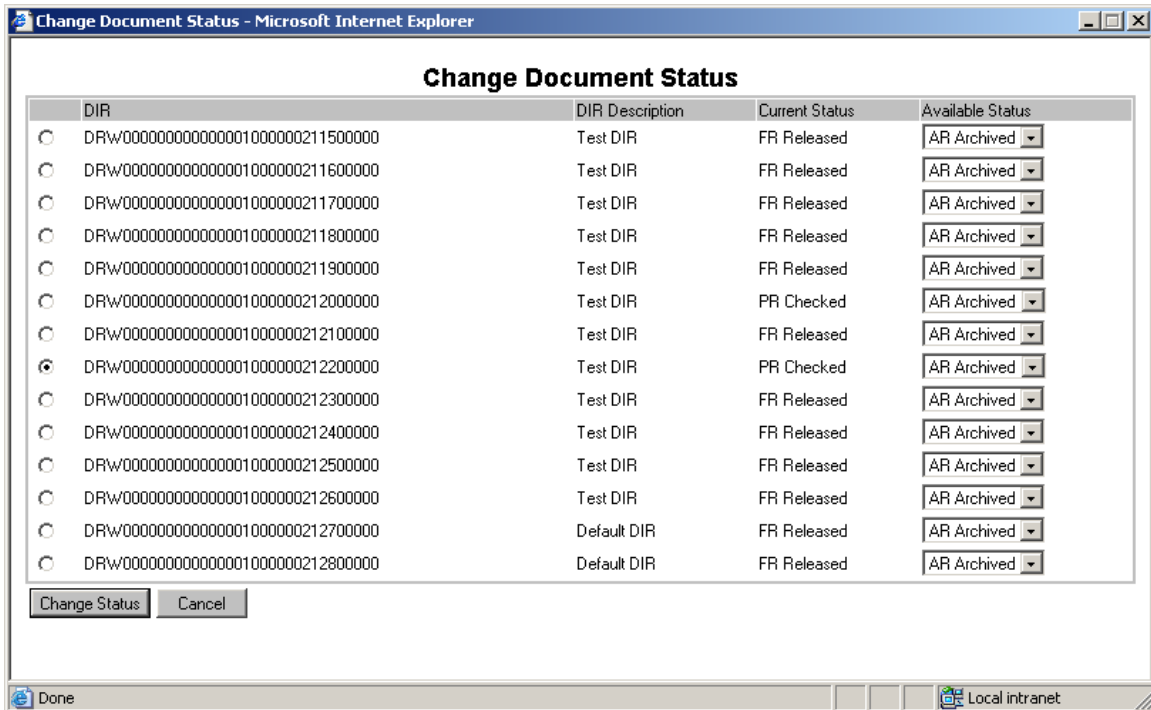
Note: The status of only one DIR can be changed at one time. The application does not allow selecting multiple DIRs at a time.

Unlink R/3 Objects

This function unlinks the DIRs linked to selected FileNet object in SAP R/3.

1. Select the library and the object for which DIRs needs to be deleted. Also, select the SAP system for which the links are to be deleted.

2. Click on the icon ⬚ The following screen is displayed:

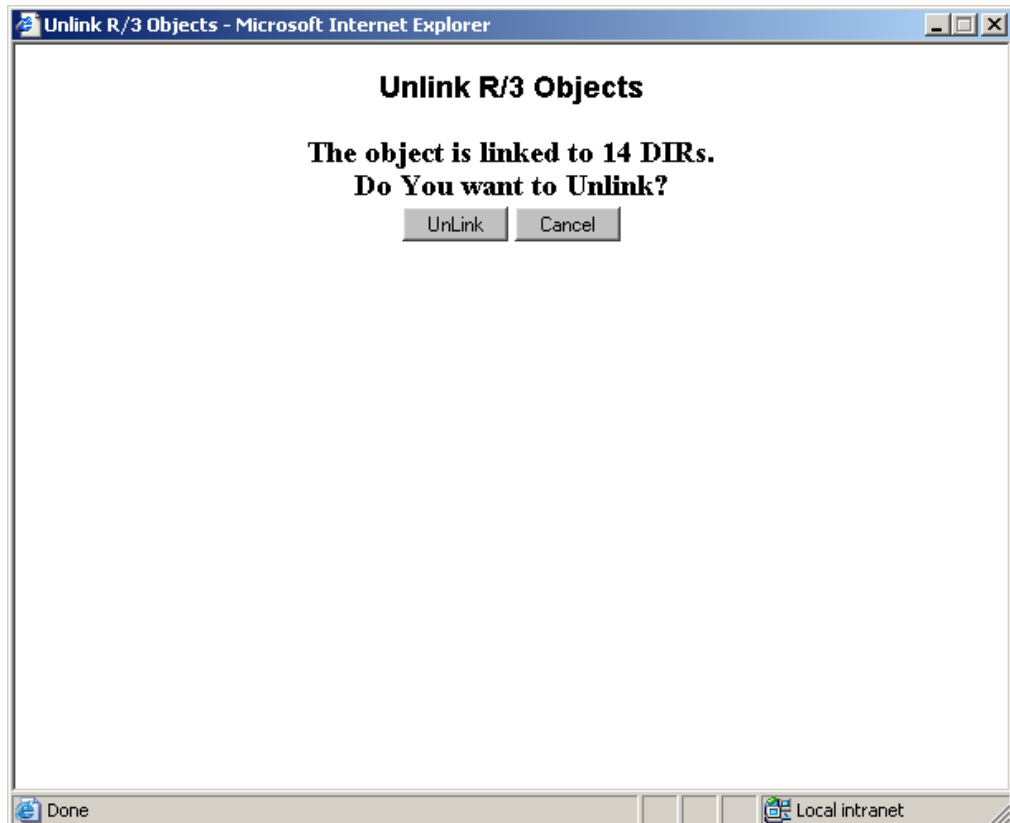3. Click **Unlink** to confirm unlinking all the DIRs linked to the selected FileNet object:

4. All the DIRs are deleted in SAP R/3 and message box is displayed for the confirmation of deletion.

Publish Current Document Version

This function is used to link a new version of a FileNet Object to a DIR, which is already linked to the earlier version of the document. The display of versions is enabled by default for a CS library while for an IS library the version display is disabled in the Web Application. In case version display is disabled, publish current document version works in the same fashion as Publish document to SAP R/3. In case, versions are displayed, then the system checks whether any former version of the selected document was linked to a DIR. If a DIR linked with a former version is found, then

the version of the DIR is incremented by one and linked to the selected version object.

In order to publish current document version to SAP R/3, follow the steps below:

1. Select the library and the object for which the version is to be linked. Also, select the SAP system for which the link is to be made.

2. Click on the icon ⬚ . This will launch a new window that will show all the versions of the document as shown below.
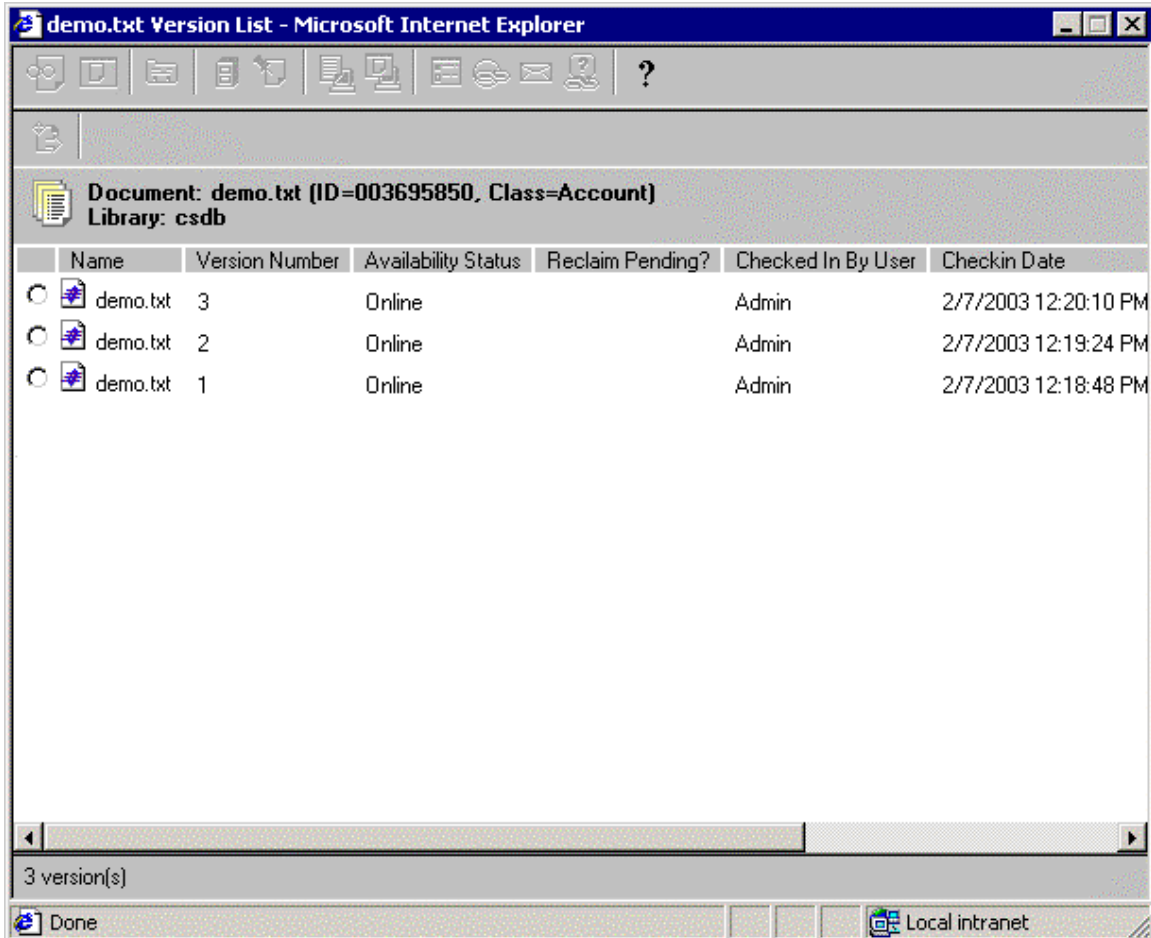
3. Select the version of the document that you want to link with SAP and

again Click the icon ⬚. In case in the configuration tool the option **Prompt for DIR Status and Description** is enabled in **Client →
DMS**, a dialog box is popped. If the option is disabled in Configuration tool, then skip to step4.
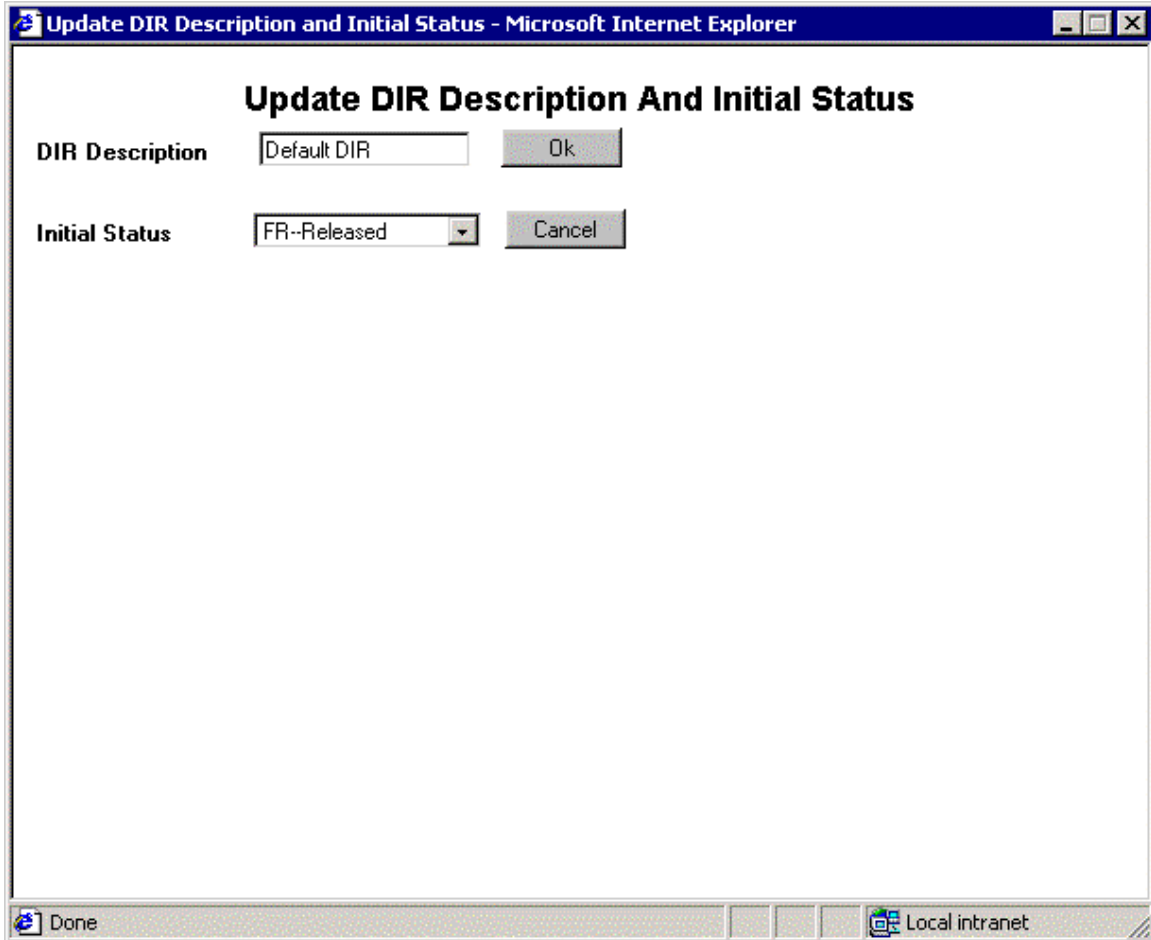
4. The dialog box has the same default values as that configured. Enter the value for DIR description and select the status of DIR to be created.

5. If DIR with the default status and description is to be created, then press **Cancel**, else press **OK**. The following screen is displayed:

6. A new version for a DIR is created and is displayed in the alert box. Press **Ok** to exit.

Logging On To SAP System

Before carrying out any of the DMS functionality mentioned above a connection has to be established with the SAP system. The application automatically establishes a connection with SAP when the configuration

option **RFC Auto Logon enabled** is checked. If the configuration option is unchecked the user needs to provide logon credentials for the SAP system and based on them a connection is established with the SAP system.

 In order to logon to the SAP system follow the following steps:
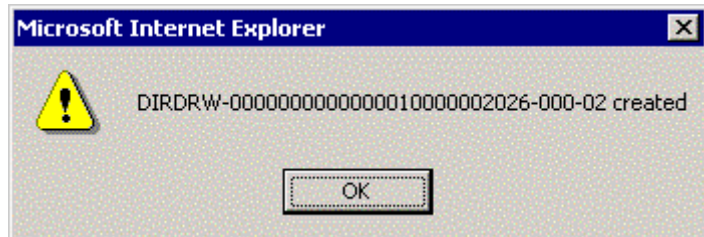
1. Select the library and the object for which the link is to be made. Also, select the SAP system for which the link is to be made.

2. Press the corresponding button as per the desired functionality. Following screen is displayed:

3. Specify the different parameters and press **OK**. If the connection is established the user is presented with the next screen depending on the DMS functionality requested. If the connection cannot be established the above screen is again presented to the user to reenter the logon credentials.

Glossary

ABAP

Advanced Business Application Programming. The programming language used for creating SAP applications.

ALF

Advanced List Format. This is SAP's proprietary format for outputting summaries of reports such as print lists.

ARCH Output Device

A dummy printer where SAP-generated documents are placed in readiness for archiving and/or printing.

ArchiveLink

The SAP system's interface between the SAP system and DWSAP.

Asynchronous Archiving

When queues are used to buffer both the SAP system's outgoing archive requests and the incoming acknowledgment and confirmation messages.

Booking

Creating new transactions such as orders and invoices in the SAP system.

Catalog Interface Module

A module that allows the user to choose one or more documents and/or folders for linking to a SAP transaction. Desktop for R/3 comes with three standard Views, FileNet Browse For R/3, FileNet Queue For R/3, and Filenet Capture For R/3,. In addition an integrator can develop a special view for a customer that can be plugged into the Desktop for R/3.

CIM

Acronym for Catalog Interface Module.

Document Type

A document type specifies the possible usages of a document within the SAP R/3 system.

Early Archiving

A SAP process where you retrieve committed documents from the archive system and route the documents to another person who completes the processing.

FAX

Short for facsimile. A SAP document type that conforms to CCITT Group 4 TIFF format.

Hit List

A displayed list of items returned from a query to the SAP database.

Incoming Document

A scanned or archived document that can be processed in the SAP system. Also, see NCI.

Late Archiving

A SAP process where you process work items and then retrieve and link committed documents from the archive system.

Link table

A table in the SAP system that defines the relationships between SAP objects and documents stored in the FileNet system.

NCI

Non-Coded Information. A document that has been scanned or faxed.

OTF

Short for SAP's proprietary Outgoing Text Format. This is the format that SAP uses for outputting detailed reports.

Outgoing Document

A document created in the SAP system.

Print List

Print lists are reports produced from SAP applications such as customer and vendor lists.

Process

The operation to be performed on a work item, as defined by the document type.

SAP

Systems, Applications and Products in Data Processing.

SAPGUI

The SAP R/3 system's Graphical User Interface: windows, buttons, menus, etc.

Simultaneous Archiving

A SAP process where you retrieve committed documents from the archive system, link them to work items, and complete the processing.

System Setting

A customizable screen in the SAP R/3 system that groups specific document types together.

Viewer

The SAP ArchiveLink Viewer as well as FileNet's IDM Viewer can display document images, outgoing documents and print lists.

Work Item

A work item is the processing of a document or a message.

Work Queue

A FileNet Workflo queue in the selected Workflo workspace containing documents for processing in the SAP system.

Workspace

Where the FileNet Queue For R/3 searches for the FileNet Workflo queue containing documents for processing in the SAP system.

Appendix A – Software License Agreement

FileNet End User Software License Agreement

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