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

Applies to:

Prometheus Group Solutions for MDG RFM

Summary

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

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PROMETHEUS GROUP

Table of Contents

Introduction

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

Prerequisites

Document Management System (DMS) is installed.

Setup Document Management System

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

223_BB_ConfigGuid
e_EN_IN.doc

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

DMS Configuration for RFM

Use the following steps to configure DMS for RFM.

- Create Content Repository
- Maintain Category
- Assign Content Repository to Category
- Define Document Types
- Define Object Links
- Define Profile

Create Content Repository

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

Maintain Category

Maintain Category using t-code OACT.

Assign Content Repository to Category

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

Define Document Types

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

Note: The configurations are available for all the objects.

Define Object Links

Define Object Links as shown in the following screen:

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

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

Define Profile

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

Define Profile as shown in the following screen:
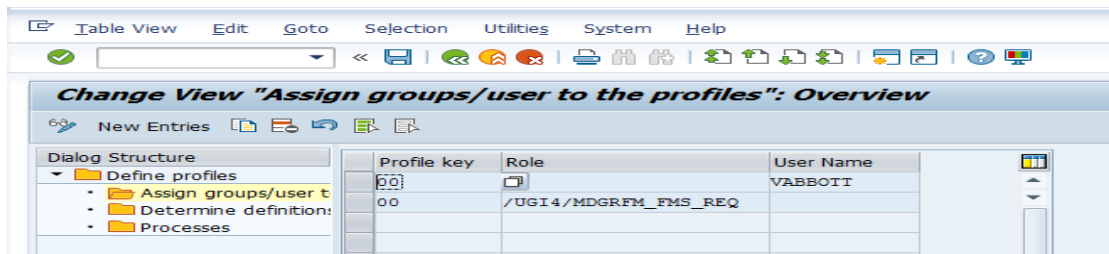
Note: The system displays the storage category based on the available role access.

Select Profile Key and Set Determination of Definitions of System.
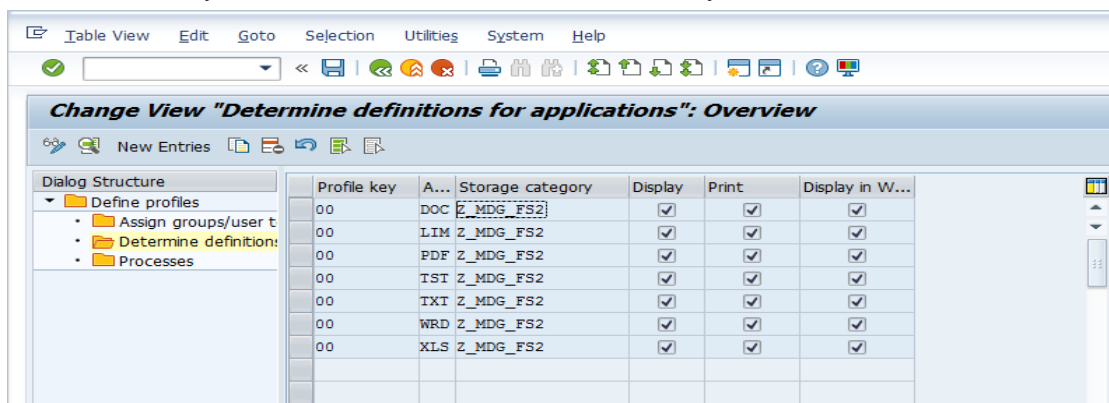
DMS Replication for RFM

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

Number Ranges for Documents

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

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

- Defining Number Ranges for Documents
- Assigning Number Ranges to Document Types
- Clear the Number Range Buffers

Defining Number Ranges for Documents

IMG Path:

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

Or,

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

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

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

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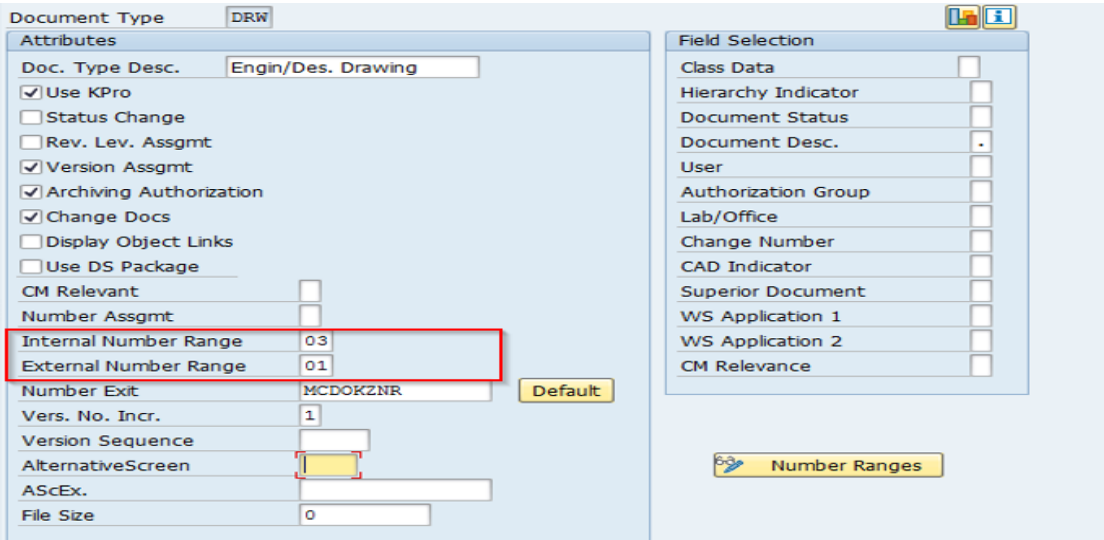 You need to adjust the external range to the internal range of the source system. Additional internal ranges are optional.
- Set internal number range to current NR status and have external number range start from next number: Set the "to number" to the current status. The external number range may start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

Assigning Number Ranges to Document Types

IMG Path

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

Double click on the document type. For example: DRW

Clear the Number Range Buffers

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

Steps to Replicate Document Info record for an Object

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

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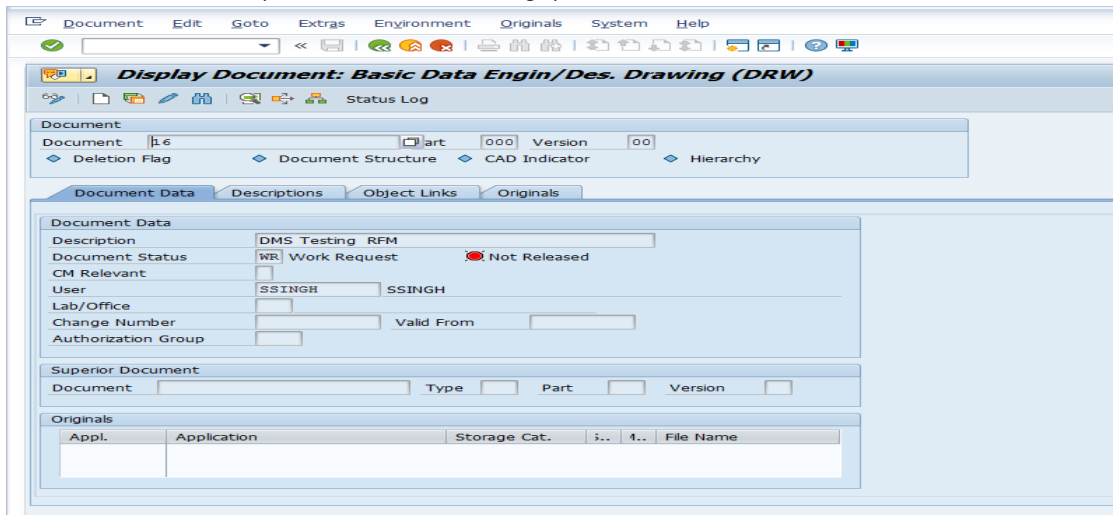
ALE Setup

Use the following steps for ALE Setup:

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

Create Document Info Record

Use the following steps to create Document Info Record:

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

Assigning Document Info Record to Article
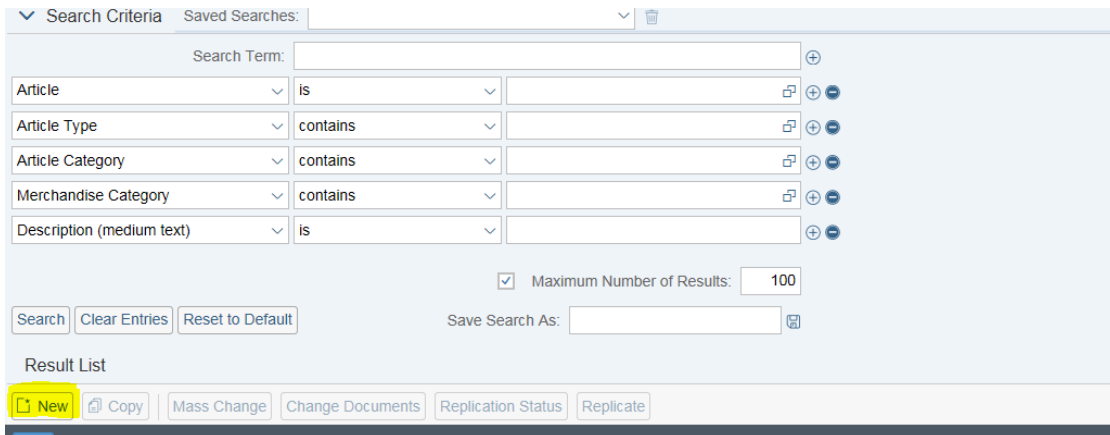
Use the following steps to assign document Info record to Article:

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

/UGI1/_MDGPROC_ALLUSR	/UGI1/_MDGPROC_ALLUSR	
/UGI1/_MDGPROC_REQ	/UGI1/_MDGPROC_REQ	
/UGI1/_MDGPROC_SPEC	/UGI1/_MDGPROC_SPEC	
/UGI1/_MDGPROC_STEW	/UGI1/_MDGPROC_STEW	
/UGI4/MDGRFM_DISP	*Master Data Governance for RFM: Display*	
/UGI4/MDGRFM_FMS_DISP	*Master Data Governance for FMS: Display*	
/UGI4/MDGRFM_FMS_MENU	*Master Data Governance for FMS: Menu*	
/UGI4/MDGRFM_FMS_REQ	*Master Data Governance for FMS: Requester*	
/UGI4/MDGRFM_FMS_SPEC	*Master Data Governance for FMS: Specialist*	
/UGI4/MDGRFM_FMS_STEW	*Master Data Governance for FMS: Steward*	
/UGI4/MDGRFM_MENU	*Master Data Governance for RFM: Menu*	
/UGI4/MDGRFM_REQ	*Master Data Governance for RFM: Requester*	
/UGI4/MDGRFM_SPEC	*Master Data Governance for RFM: Specialist*	
/UGI4/MDGRFM_STEW	*Master Data Governance for RFM: Steward*	
/UGI7/AIW_MENU	/UGI7/AIW_MENU	
/UGI7/AIW_REQ	/UGI7/AIW_REQ	
/UGI7/AIW_SPEC_EQUI	/UGI7/AIW_SPEC_EQUI	
/UGI7/AIW_SPEC_FUNCLOC	/UGI7/AIW_SPEC_FUNCLOC	
/UGI7/AIW_SPEC_MPLAN	/UGI7/AIW_SPEC_MPLAN	
/UGI7/AIW_SPEC_MSPOINT	/UGI7/AIW_SPEC_MSPOINT	
/UGI7/AIW_SPEC_PMBOMHDR	/UGI7/AIW_SPEC_PMBOMHDR	
/UGI7/AIW_SPEC_TLEQHDR	/UGI7/AIW_SPEC_TLEQHDR	
/UGI7/AIW_SPEC_TLFLHDR	/UGI7/AIW_SPEC_TLFLHDR	
/UGI7/AIW_SPEC_TLGNHDR	/UGI7/AIW_SPEC_TLGNHDR	
/UGI7/AIW_SPEC_WORKCNTR	/UGI7/AIW_SPEC_WORKCNTR	
/UGI7/AIW_STEW	/UGI7/AIW_STEW	

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

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

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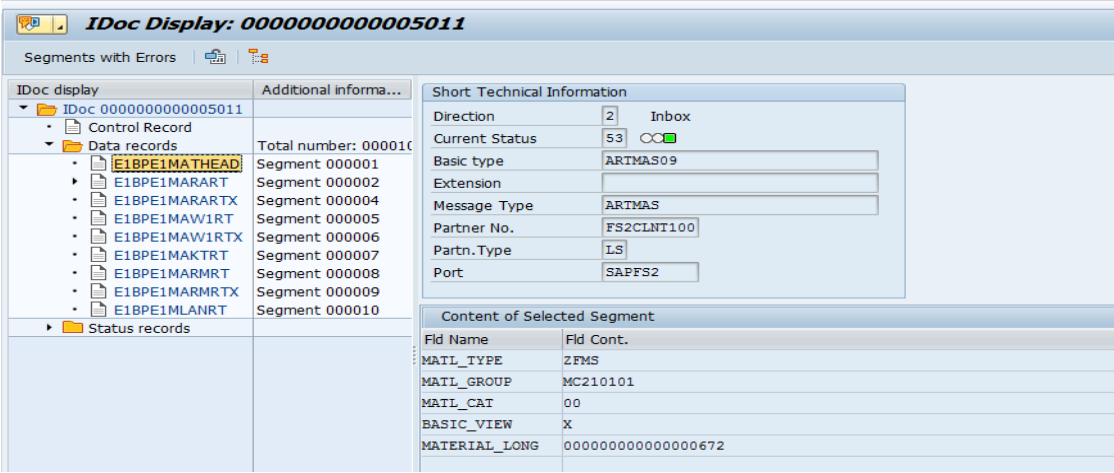
6. Process the CR and Approve it.

The Article is created with DIR.
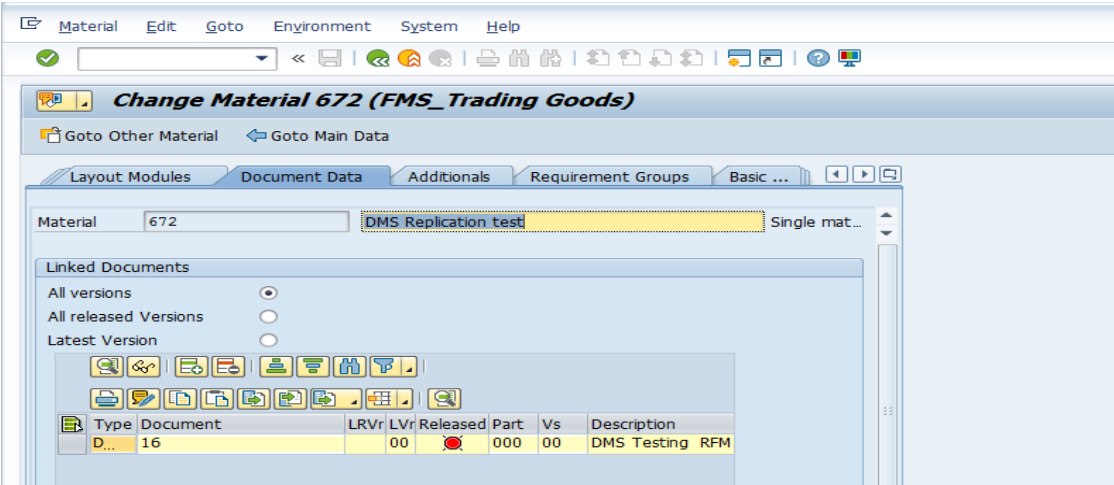
The Article is replicated to target system through an IDoc.

Replication of Document Info Records with Document Links

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

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

3. Click F8 to replicate the DIR.
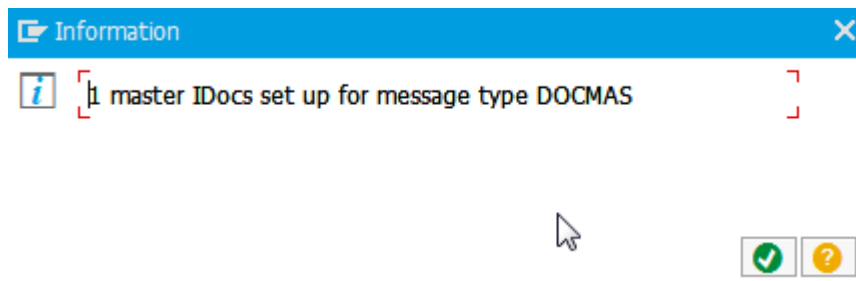
Document is replicated along with the link.

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