

# 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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**Created On:** November 17, 2020

**Version:** 1.0

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## Introduction

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

## Prerequisites

Document Management System (DMS) is installed.

## Setup Document Management System

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



223\_BB\_ConfigGuid  
e\_EN\_IN.doc

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

## DMS Configuration for RFM

Use the following steps to configure DMS for RFM.

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

## Create Content Repository

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

**Display Content Repositories: Detail**

Content Rep.  Active 1 / 1  
 Description

Document Area   
 Storage type

Version no.  Content Server version 4.6  
 HTTP server   
 Port Number  SSL Port Number   
 HTTP Script   
 Phys. path

Time Created 26.11.17 21:55:15  
 Created By VABBOTT  
 Name VABBOTT

Last Changed At 26.11.17 21:55:15  
 Last Changed By VABBOTT  
 Name VABBOTT

[CS Admin](#)

## Maintain Category

Maintain Category using t-code OACT.

## Assign Content Repository to Category

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

**Display Content Repositories: Overview**

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

## Define Document Types

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

Table View Edit Goto Selection Utilities System Help

Change View "Define document types": Overview

New Entries

Dialog Structure

- Define document types
  - Define language-dep
  - Define document st
    - Display language
    - Define object links
    - Define transport of c
    - Maintain Lock Fields
    - Maintain Authorizatio
  - Maintain object link desc
  - Define document status

Ty.	Document type desc.	Status Change	Rev.asgmt	Vers.asgmt	Chg. doc.	Arch.auth
B2X	Col.Engin&ProjMan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BAM	Bank Account Doc	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BVO	Object Master CH	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BVV	Contract	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CPT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
D01	Print List	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DBE	Cover Sheet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DBV	Cover Sheet Template	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DMO	Demo Document	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DRF	PRT Eng/Des. Drawing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DRW	Engin/Des. Drawing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EBE	Acknowl. of Receipt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EBR	Batch record	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EBV	Acknow. template	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FOL	Folder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IBD	Inbound Document	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
KPR	Engin/Des. Drawing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
L01	Layout document	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
LFS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MPO	Maint. Prog. Object	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MSP	MS Project for CEP	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Position... Entry 1 of 46

**Note:** The configurations are available for all the objects.

## Define Object Links

Define Object Links as shown in the following screen:

Table View Edit Goto Selection Utilities System Help

Change View "Define object links": Overview

New Entries

Dialog Structure

- Define document types
  - Define language-dep
  - Define document st
    - Display language
    - Define object links
    - Define transport of c
    - Maintain Lock Fields
    - Maintain Authorizatio
  - Maintain object link desc
  - Define document status

T...	Object	Object Desc.	Scr. No.	Val. Obj.	1:n ratio
DRW	/CUM/CONMS	Constr. Measure	290		<input type="checkbox"/>
DRW	/CUM/CUDGN	Compat. Unit Design	291		<input type="checkbox"/>
DRW	/PLMB/ECR	Change record	500		<input type="checkbox"/>
DRW	CMQMEL	Claim	259		<input type="checkbox"/>
DRW	CRVS_B	Prod.Resource/Tool	214		<input type="checkbox"/>
DRW	DRAW	Document Info Record	202		<input type="checkbox"/>
DRW	EBAN	Purchase Req. Item	247		<input type="checkbox"/>
DRW	EKPO	Purchase Order Item	248		<input type="checkbox"/>
DRW	EQUI	Equipment Master	204		<input type="checkbox"/>
DRW	IFLOT	Functional Location	205		<input type="checkbox"/>
DRW	IMAV	Appropriation Req.	238		<input type="checkbox"/>
DRW	IMPTI	Measuring Points	227		<input type="checkbox"/>
DRW	INET	Object Link	212		<input type="checkbox"/>
DRW	IRLOT	Reference Location	206		<input type="checkbox"/>
DRW	KLAH	Class	243		<input type="checkbox"/>
DRW	KNA1	Customer	216		<input type="checkbox"/>

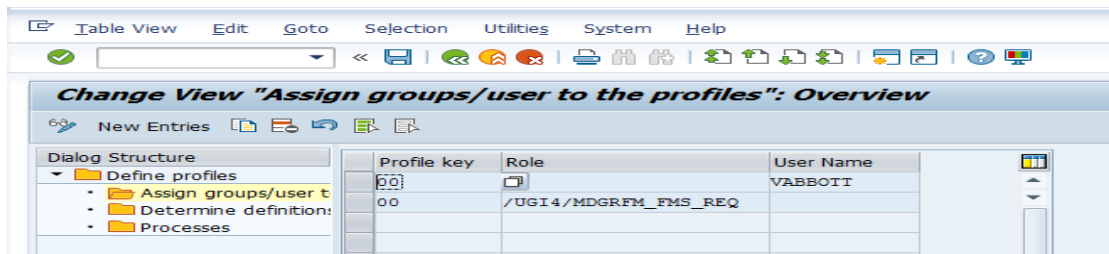
**Note:** The above configuration is displayed by default and works for all Objects.

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

## Define Profile

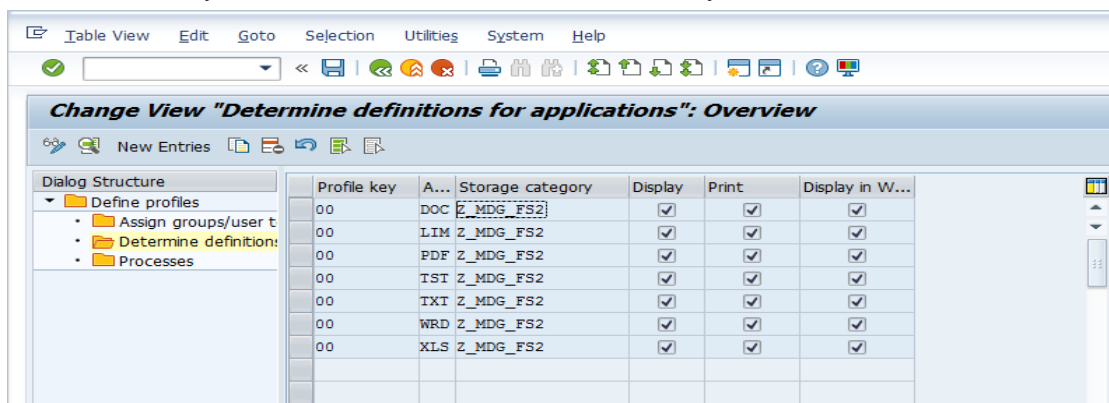
The profile helps user to determine application and default storage category automatically to make sure that the document is stored in the secured predetermined storage space.

Define Profile as shown in the following screen:



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

Select Profile Key and Set Determination of Definitions of System.



## DMS Replication for RFM

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

## Number Ranges for Documents

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

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

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

## Defining Number Ranges for Documents

IMG Path:

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

Or,

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

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

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

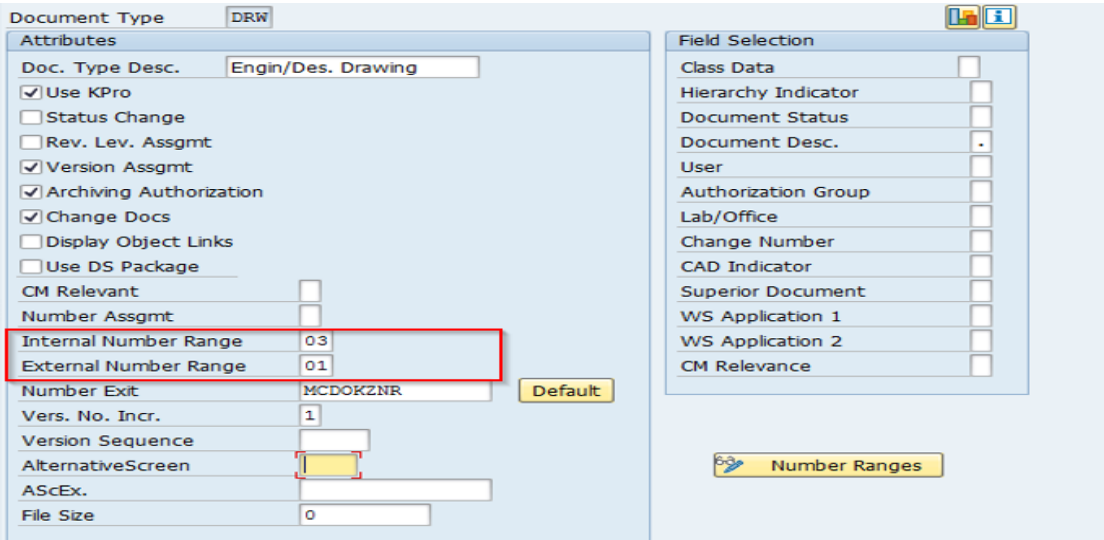
- With existing internal number: In Operational ECC, if an existing internal number needs to be changed to external number, first set the NR status to '0' and then set the flag for external number.  
You need to adjust the external range to the internal range of the source system. Additional internal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

## Assigning Number Ranges to Document Types

IMG Path

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

Double click on the document type. For example: DRW



Document Type: DRW

Attributes

Doc. Type Desc.: Engin/Des. Drawing

☒ Use KPro

☐ Status Change

☐ Rev. Lev. Assgmt

☒ Version Assgmt

☒ Archiving Authorization

☒ Change Docs

☐ Display Object Links

☐ Use DS Package

CM Relevant: ☐

Number Assgmt: ☐

Internal Number Range: 03

External Number Range: 01

Number Exit: MCDOKZNR

Vers. No. Incr.: 1

Version Sequence:

AlternativeScreen:

AScEx.:

File Size: 0

Field Selection

☐ Class Data

☐ Hierarchy Indicator

☐ Document Status

☐ Document Desc.

☐ User

☐ Authorization Group

☐ Lab/Office

☐ Change Number

☐ CAD Indicator

☐ Superior Document

☐ WS Application 1

☐ WS Application 2

☐ CM Relevance

Number Ranges

## Clear the Number Range Buffers

To clear the number range buffers in the target system, you can use the report NK\_REORGANIZE.

## Steps to Replicate Document Info record for an Object

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

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

## ALE Setup

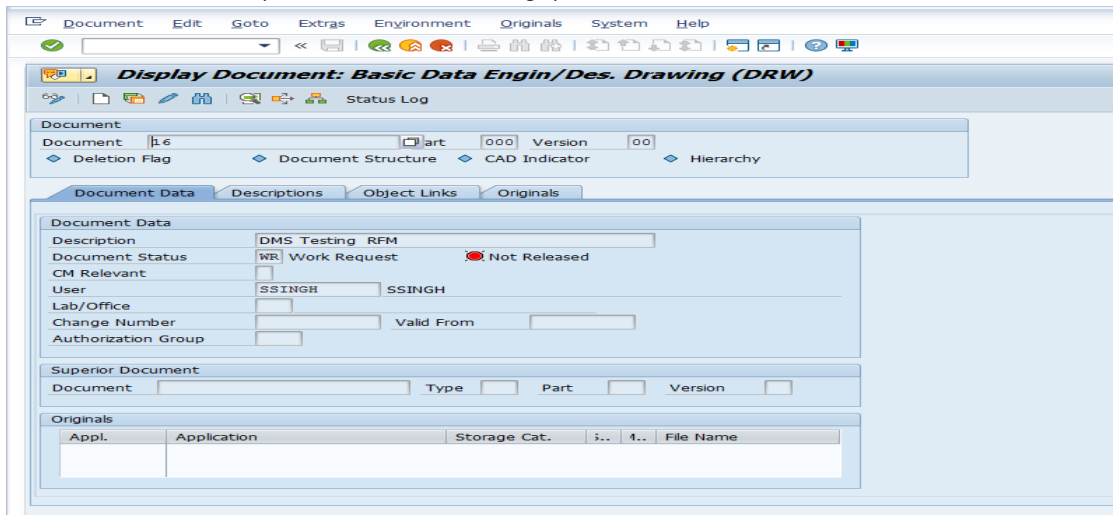
Use the following steps for ALE Setup:

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

## Create Document Info Record

Use the following steps to create Document Info Record:

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



The screenshot shows the 'Display Document: Basic Data' dialog box in SAP. The 'Document' tab is active, showing fields for Document (16), Version (00), and Deletion Flag. Below this, the 'Document Data' tab is selected, displaying fields for Description (DMS Testing RFM), Document Status (WR Work Request), CM Relevant (Not Released), User (SSINGH), Lab/Office (SSINGH), Change Number, and Authorization Group. The 'Superior Document' section shows fields for Document, Type, Part, and Version. The 'Originals' section shows a table with columns for Appl., Application, Storage Cat., and File Name.

## Assigning Document Info Record to Article

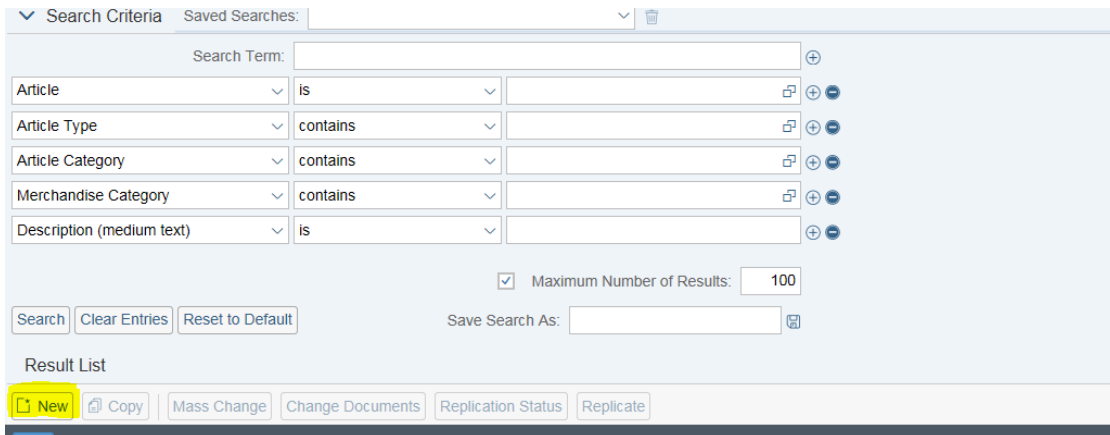
Use the following steps to assign document Info record to Article:

1. Launch NWBC
2. Select the role /UGI4/\_MDGRFM\_FMS\_REQ



<a href="#">/UG1/MDGPROC_FORDR</a>	<a href="#">/UG1/MDGPROC_FORDR</a>
<a href="#">/UG1/MDGPROC_ALLUSR</a>	<a href="#">/UG1/MDGPROC_ALLUSR</a>
<a href="#">/UG1/MDGPROC_REQ</a>	<a href="#">/UG1/MDGPROC_REQ</a>
<a href="#">/UG1/MDGPROC_SPEC</a>	<a href="#">/UG1/MDGPROC_SPEC</a>
<a href="#">/UG1/MDGPROC_STEW</a>	<a href="#">/UG1/MDGPROC_STEW</a>
<a href="#">/UG1/MDGRFM_DISP</a>	Master Data Governance for RFM: Display
<a href="#">/UG1/MDGRFM_FMS_DISP</a>	Master Data Governance for FMS: Display
<a href="#">/UG1/MDGRFM_FMS_MENU</a>	Master Data Governance for FMS: Menu
<a href="#">/UG1/MDGRFM_FMS_REQ</a>	Master Data Governance for FMS: Requester
<a href="#">/UG1/MDGRFM_FMS_SPEC</a>	Master Data Governance for FMS: Specialist
<a href="#">/UG1/MDGRFM_FMS_STEW</a>	Master Data Governance for FMS: Steward
<a href="#">/UG1/MDGRFM_MENU</a>	Master Data Governance for RFM: Menu
<a href="#">/UG1/MDGRFM_REQ</a>	Master Data Governance for RFM: Requester
<a href="#">/UG1/MDGRFM_SPEC</a>	Master Data Governance for RFM: Specialist
<a href="#">/UG1/MDGRFM_STEW</a>	Master Data Governance for RFM: Steward
<a href="#">/UG1/AIW_MENU</a>	<a href="#">/UG1/AIW_MENU</a>
<a href="#">/UG1/AIW_REQ</a>	<a href="#">/UG1/AIW_REQ</a>
<a href="#">/UG1/AIW_SPEC_EQUI</a>	<a href="#">/UG1/AIW_SPEC_EQUI</a>
<a href="#">/UG1/AIW_SPEC_FUNCLOC</a>	<a href="#">/UG1/AIW_SPEC_FUNCLOC</a>
<a href="#">/UG1/AIW_SPEC_MPLAN</a>	<a href="#">/UG1/AIW_SPEC_MPLAN</a>
<a href="#">/UG1/AIW_SPEC_MSPOINT</a>	<a href="#">/UG1/AIW_SPEC_MSPOINT</a>
<a href="#">/UG1/AIW_SPEC_PMBOMHDR</a>	<a href="#">/UG1/AIW_SPEC_PMBOMHDR</a>
<a href="#">/UG1/AIW_SPEC_TLEQHDR</a>	<a href="#">/UG1/AIW_SPEC_TLEQHDR</a>
<a href="#">/UG1/AIW_SPEC_TLFLHDR</a>	<a href="#">/UG1/AIW_SPEC_TLFLHDR</a>
<a href="#">/UG1/AIW_SPEC_TLGNHDR</a>	<a href="#">/UG1/AIW_SPEC_TLGNHDR</a>
<a href="#">/UG1/AIW_SPEC_WORKCNTR</a>	<a href="#">/UG1/AIW_SPEC_WORKCNTR</a>
<a href="#">/UG1/AIW_STEW</a>	<a href="#">/UG1/AIW_STEW</a>
<a href="#">/UG1/MDGPROC_FORDR</a>	<a href="#">/UG1/MDGPROC_FORDR</a>

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



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

Create Article ✕

---

**Article Basic Data**

Article:

\* Article Type:

\* Merchandise Category:

\* Article Category:

\* Base Unit of Measure:

**Reference Article**

Reference Article:

[Continue](#)

Article: @@1366, DMS Testing - (FMS\_Trading Goods / Mens Jeans / Single material)

Expand All Collapse All Refresh Check Assignment Block:  Side Panel

---

**Basic Data** Edit

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

**Groupings**

\* Merchandise Category: MC210101 Mens Jeans \* Article Type: ZFMS FMS\_Trading Goods

\* Industry Sector: 1 Retail Division:

Product hierarchy:  Ext. Mdse Catgry:

Authorization Group:  ABC Indicator:

Pricing Ref. Article:  Fashion Grade:

Price Band Category:

**General Data**

\* Valuation Class: 3100 Trading goods With empties BOM: ☐

Country of origin:  Region of origin:

Commodity Code:  Haz. Article number:

Storage conditions:  Temp. conditions:

Save [Submit](#) Edit

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

Expand All Collapse All Assignment Block:  Side Panel

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**Additional Data**

**Actions**  Textile Fiber Code  Fiber Share Percentage

No data available

**Image** Edit

Image

Image URL:

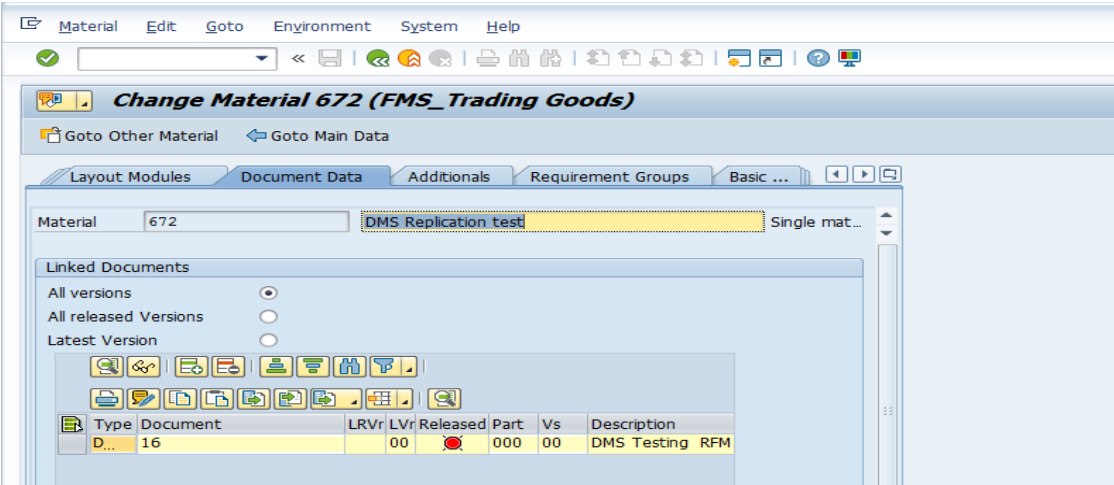
**Document Assignment** Edit

	Actions	Document Type	Document	Document part	Document version	Document Type Descript...	Newest version
		DRW	16	000	00	Engin/Des. Drawing	<input type="checkbox"/>

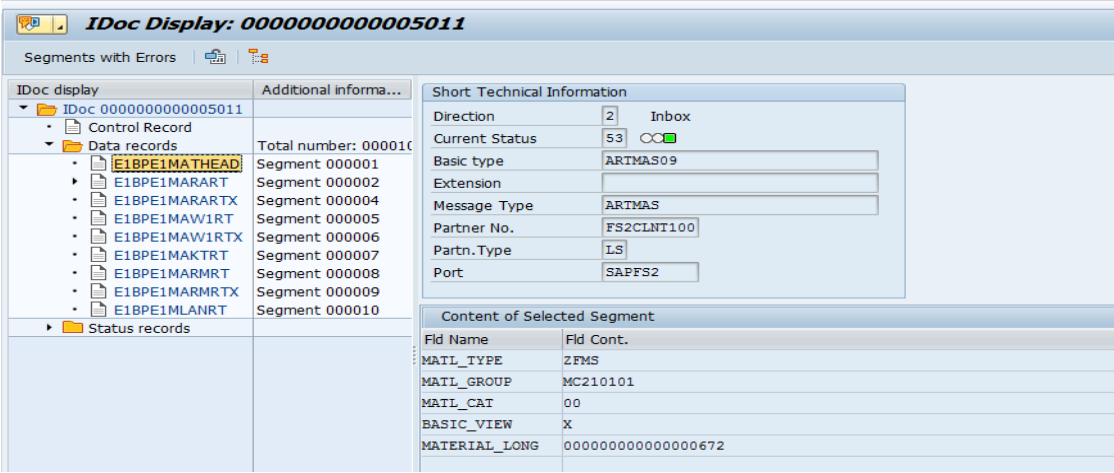
[Document Assignment: Text](#)

[Done](#)

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



The Article is replicated to target system through an IDoc.



## Replication of Document Info Records with Document Links

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

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

**Send Documents Directly**

Document Data

Document: 16

Document Type: DRW

Document part: 000

Document version: 00

☐ Ignore Distribution Lock

Target Sys

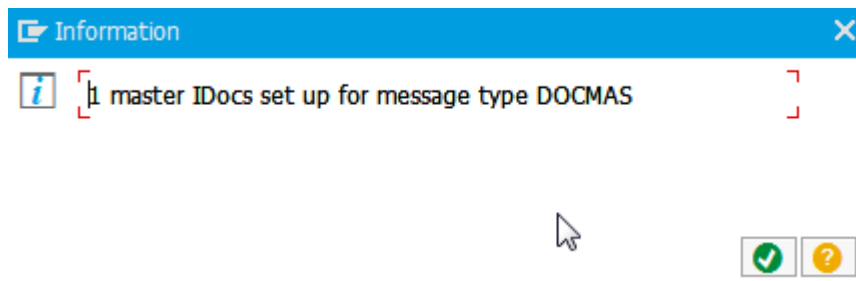
Logical system: FS2CLNT200

Parallel Processing

Server Group:

No. of Documents per Process: 20

- Click F8 to replicate the DIR.



Document is replicated along with the link.

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

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

Document: 16 Part: 000 Version: 00

Deletion Flag Document Structure CAD Indicator Hierarchy

Document Data Descriptions Object Links Originals

**Material Master**

Material	Desc.
672	DMS Replication test