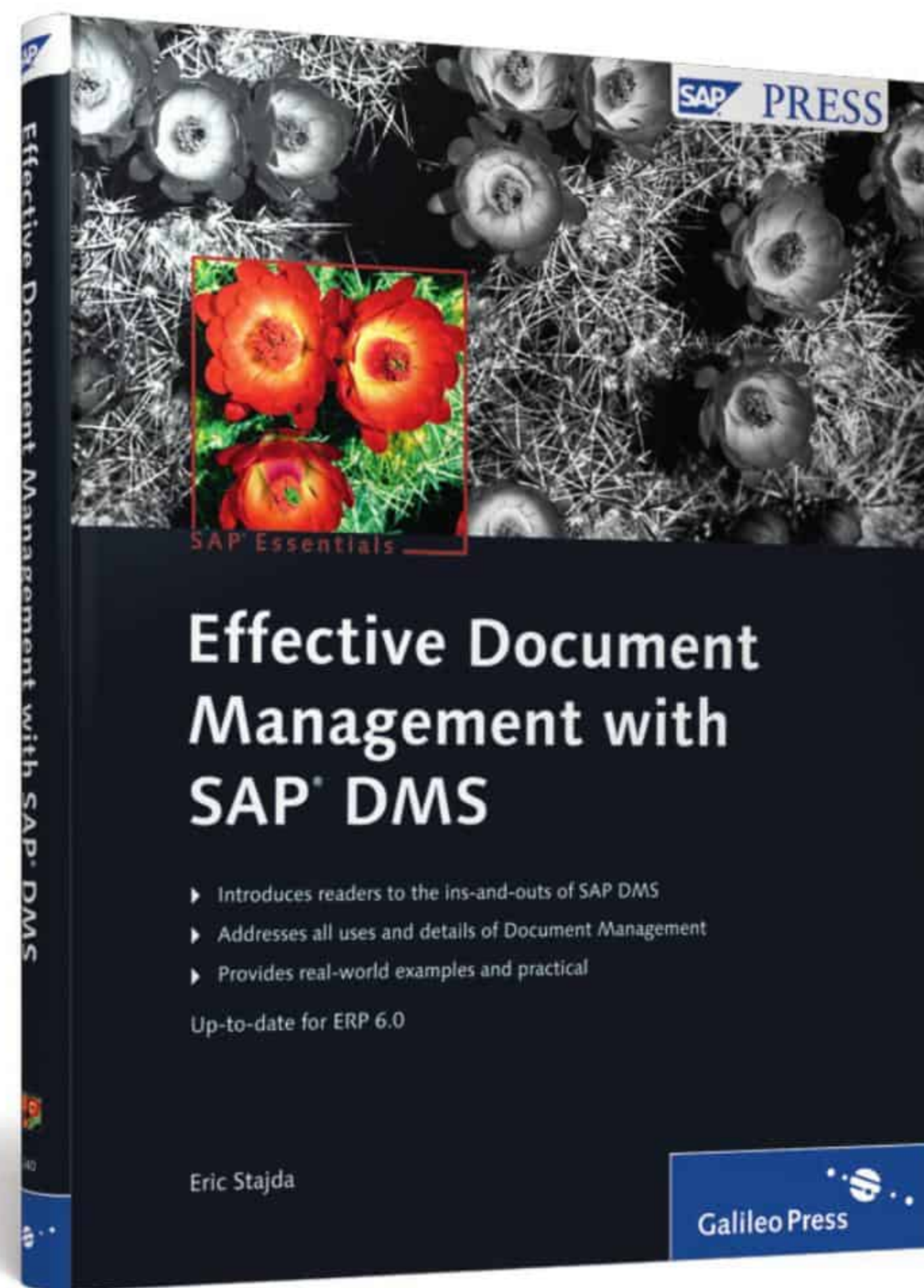


Eric Stajda

Effective Document Management with SAP® DMS



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This chapter introduces you to SAP Document Management System (SAP DMS). It includes topics such as the benefits of SAP DMS, and how to use this book.

1 Introduction

In this chapter, you will learn about SAP DMS – what is it and what benefit can you expect to derive from an SAP DMS implementation? You will also learn about project complexity, and types of resources you should plan to have on your project. This chapter will also review how this book should be used, and is structured to progress from simple to complex topics. Finally, in this chapter, you will learn about the availability of SAP DMS in different releases of SAP software.

1.1 What Is SAP DMS?

SAP provides you with an enterprise document management system, SAP DMS, which you can use to manage documents for your business. Surprisingly, many companies are not aware this. This functionality is not part of an add-on or an additional piece of software you must purchase from SAP. Rather, it is part of your base SAP system. With a little basic knowledge on SAP DMS and its configuration, you can begin to take advantage of SAP DMS functionality in your system, such as the following:

- ▶ Secure storage for documents
- ▶ Check-in/check-out functionality
- ▶ Ability to classify documents for searching
- ▶ Linking of documents to other objects for visibility across the system
- ▶ Integration of Microsoft® Office applications for updating documents
- ▶ Elaborate security profiles to protect access to documents
- ▶ Controlling of documents through change management process

- ▶ Use of versions and revisions
- ▶ Full text search across stored documents
- ▶ Automatic conversion of documents to neutral format for viewing and long-term storage
- ▶ Integration of your CAD system into SAP DMS for management of drawings and models

This is a brief list of functionalities offered by SAP DMS. In this book, you will learn about all of these and much more.

1.2 Benefits of SAP DMS

There are many benefits to using SAP DMS, and a document management system in general. If you think about it, companies and individuals generate large numbers of documents each day. These documents are the lifeblood of a company. Without them, a company can't exist.

The documents could be stored on a person's laptop, or on a shared drive, or they could be hidden in someone's desktop drawer. People need access to these documents to make business decisions. Access to documents needs to be fast; people can't spend hours or days searching for the right information. This is where SAP DMS comes into play. Using it, you can take all of the key business documents your company is generating and store them in one place that everyone can use as the source. This is a major business benefit.

When implementing SAP DMS, you can expect to gain the following benefits to your business.

- ▶ Secure storage of documents
- ▶ Easy retrieval of documents
- ▶ Excellent search capabilities to cut down on time searching for documents
- ▶ A controlled environment for updates to documents
- ▶ Complex security rules to control access
- ▶ Increased visibility of key documents
- ▶ One source and one set of rules for managing documents

- ▶ Reduced time and effort spent on document management
- ▶ Ability to maintain document history to meet legal requirements

These are just a few of the possible business benefits of SAP DMS, and depending on your environment, you may have a completely different set of business challenges to solve and benefits to achieve. SAP DMS offers many benefits to all companies that own SAP software and generate documents. Implementing and using SAP DMS is therefore something every company should look into.

1.3 SAP DMS Project Complexity

In general, SAP DMS projects are not the most complex projects in the SAP world. They are not as complex as setting up finance or manufacturing, for example. In fact, they are typically light in terms of configuration and transactions. The complexity of an SAP DMS project will be driven by the number of different types of documents you want to manage, and by the rules for each document. As an example, in a complex project, you might want to manage all documents generated by your engineering, finance, and purchasing departments. Let's image that this means over 300 unique types of documents. For each unique document, you have to think about rules, such as: How do I want to search for the document? What is its lifecycle? What are the security rules? These are just a few rules that need to be defined.

In a simpler project, you might only want to manage documents coming from a customer and have them attached to the appropriate customer record in the SAP system. This is a simple and straightforward project because you are working on developing rules for only one type of document.

As mentioned previously, project complexity increases with the number of different types of documents to be managed.

1.4 Resources Required for a Project

An SAP DMS implementation project will require a varied set of resources, including the following:

- ▶ **Business users:** Business personnel who know about the rules for the documents that are being stored, such as who needs to approve a document before it

becomes official. Business users will work with the SAP application consultant to map out a process for the documents being stored.

- ▶ **SAP application consultant:** The SAP application consultant works with business users to define a process for each document being stored. Once this process is defined, SAP application consultants map it to the SAP system and complete the SAP configuration.
- ▶ **SAP Basis/IT infrastructure resources:** The SAP Basis/IT infrastructure resources set up the infrastructure components required to support SAP DMS. This includes items such as content servers, cache servers, TREX, and conversion servers. Setting up the infrastructure components is usually one of the first activities accomplished in a project.

You may have one or several of each of these resource types, depending again on the number of documents you plan to store in the system.

1.5 How to Use This Book

As mentioned earlier, this book proceeds from simple to complex topics. In Chapter 2, you will start by answering some basic business questions, such as what types of documents you want to manage, and what attributes are associated with these documents. Answering these questions is important because it sets you up to start thinking about how your SAP DMS implementation will function. Chapter 3 reviews how to execute basic SAP DMS transactions, and step-by-step instructions are provided. Next, in Chapter 4, you will tackle how to configure the system. This means that you will learn how to set up items such as document types, additional attributes, and status networks. After you have completed the configuration, you can begin to use the system to store your documents.

The chapters that follow take you through more advanced topics such as defining and setting up security, infrastructure requirements, and the use of BAdIs or user exits to enhance the basic functionality provided by SAP.

The overall goal of the book is to prepare you for the implementation and use of SAP DMS in your environment. After reading this book and learning the material, you will not only have a thorough understanding of what SAP DMS is, but you will also be able to configure and use it effectively.

If you are a beginner with SAP DMS, it is best to proceed through the chapters as they are ordered. As mentioned previously, you will start with the simple and move to the complex, and each chapter will build on the knowledge you gained in the one before it. Advanced chapters assume that you have understood the content in the previous chapters. More advanced readers can start with the chapters they are interested in learning about. As an example, if you understand the SAP DMS transactions and configuration activities, but need information on how to set up SAP DMS security, you can go directly to the chapter that covers the topic of security.

1.6 A Note on the Availability of SAP DMS

SAP DMS is available in SAP R/3 3.1 and up. This book is written based on the SAP DMS functionality available in SAP ERP 6.0. This is a modern release; however, you will find most of the SAP DMS functionality described in this book available in much earlier releases of SAP R/3, such as 4.6 and 4.7. Therefore, you do not need to upgrade your system to the latest SAP release to take advantage of SAP DMS functionality. Most likely you can start working immediately using the release you have today.

1.7 Summary

In this chapter, we have provided a brief introduction to SAP DMS. You learned that through SAP DMS, SAP provides you with an enterprise document management system you can use without purchasing additional software. You then took a look at some of the benefits of implementing SAP DMS, including easy retrieval, secure storage, and the ability to apply complex security rules for document access. You were then given an idea of how to judge project complexity based on the number of different documents you plan to manage. You also learned about the three different types of resources required for an SAP DMS project: business users, SAP application consultants, and SAP Basis/IT infrastructure resources. Finally, you learned how to use this book, and about the general availability of SAP DMS across SAP software releases.

In the next chapter, Chapter 2, you will identify questions you need to answer before starting your SAP DMS project.

This chapter reviews information you need to address before starting your SAP DMS project. This is the foundation to making sure your project will be successful.

2 Questions to Answer before Starting Your SAP DMS Project

Before starting your SAP DMS project, there are a number of questions you need to answer, and considerations that you should take into account. At this point in the process, you should be focused on defining your requirements and goals, and not so much on what the SAP DMS system can do. After you prepare a solid foundation and plan, the information can be used effectively when you begin configuring and using the SAP DMS system.

Defining your requirements and goals is critical to project success. It's much easier to reach a goal efficiently with planning and insight. This chapter discusses the basic considerations you need to address before starting your SAP DMS project.

2.1 Defining which Documents to Manage with SAP DMS

The first step in your SAP DMS project is defining the documents you want to manage. On a daily basis, a business can generate thousands of documents, which make up the intellectual capital and value of that business. Some generated documents are trivial, whereas others are critical to the production and sale of products. Critical documents include CAD drawings, test reports, product specifications, product literature, and financial documents. Without these critical documents, a company can't create, purchase, or sell goods. These are the types of documents that should be managed within SAP DMS.

If a company is using SAP software, it is most likely that business processes such as manufacturing, sales, purchasing, engineering, and finance are being executed and managed within the SAP system. When selecting which documents to man-

age within SAP DMS, you should select documents that support such business processes. Key documents are then gathered into one location where the business process is being executed. This makes the data more widely available, less difficult to find, and updates can be managed in a controlled manner.

Example

You want to manage all documents associated with the engineering change process you execute within the SAP system. Multiple documents are generated and controlled through this process, and these documents should be stored within SAP DMS.

2.2 How Documents Fit Into the Overall Business Process

The next important step is defining how the documents you want to manage fit into the overall business process with which they are associated. Are documents created or required at certain steps in the process? Which business objects are documents associated with? Map out your business in a process flow. For each step in the flow, you can identify which documents are required. You should look at what is significant about each document and what it feeds downstream or what it triggers.

As an example, it is a best practice that each company has a process for the development and introduction of new products. During this process, certain documents are required to move to the next phase or maturity level of the product design. If you are in the "prototype" phase of your product design, you will need drawings released at a certain status, signifying that they can be used to build prototypes but not production parts. Along with the drawings, you may need documents such as specifications and finite elements analysis reports.

Example

Imagine that you work for a company that produces bicycles. Before a bicycle can be shipped from the factory, a document describing how the bicycle should be assembled by the consumer must be stored in the system, printed, and included as part of the overall package.

The assembly instructions are related to the finished good item material master for the bicycle in the SAP system, and may be included as an item in the bill of materials (BOM). You might also have a business process or system check in place to make sure that the assembly instructions are stored in the SAP system before manufacturing and shipping of the bicycle can happen.

2.3 How to Search for Stored Documents

With SAP DMS you are not just storing files or attachments. Along with the files, you are also storing attributes. Examples of standard attributes stored with each file include the following:

- ▶ Description
- ▶ Owner
- ▶ Responsible lab office

Along with standard attributes you can store additional attributes, which can be used to search for stored documents.

For example, if you are storing CAD drawings you might want to know in which CAD application and release of the application the drawings were created. You might also want to know the size of the drawing, and which customers are using it. These are a few examples of additional attributes you might want to maintain.

This is an important topic, and you should make the necessary effort to define and add document attributes that are required to fulfill your search requirements. This will prevent you from creating an unstructured and unsearchable system.

Example

You plan on storing the resumes of all of your employees. When new positions or opportunities become available, you want to be able to search across the resumes to find qualified internal candidates, using the following attributes:

- ▶ Employee location
- ▶ Salary category (hourly, salaried)
- ▶ Willing to relocate
- ▶ Skill set
- ▶ Languages spoken
- ▶ Education level

Searching on the above attributes will return a list of resumes that match the selection criteria.

Beyond searching on attributes, SAP DMS also offers you the capability to perform full text searches on stored documents. This functionality is provided via the Index Server, which is a component of the SAP Knowledge Provider.

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