



**Project-JBVNL
User Manual**

Document Management System-MM



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**User Manual for
Document Management System**

Document	Document Management System
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Brief Description

This document details the User Manual of Document Management System for JBVNL

Review History

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INTRODUCTION:

The purpose of this document is to provide help to the end user while execution of the transaction. This document is an end user training document which guides in step by step usage of SAP.

1. Create Document (DIR)

A document should be created to be able to store Original scanned copies or files for future Reference, attachment to Material Document

1.1 DIR Definition

DIR or Document info record is a term used in SAP DMS to refer to the master record in the R/3 System that stores all the information for a document.

1.2 Prerequisites

An Original file is available on End-user's workstation.

1.3 Procedure

To Create a Document:

Access the activity using one of the following navigation options.

Menu Path:

SAP Easy Access: Logistics _ Central Functions _ Document Management System _ Document

–

CV01N – Create

Transaction Code:

CV01N – Create Document



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1.4 Create Document

Tcode: CV01N

The 'Create Document: Initial' screen is displayed as shown below.

Create Document: Initial Screen

Select Document via ...

Document Type Document part Document version

Document part Document version

1.4.1 Select a specific document type. Ex: JPO. For a list of Dept. specific DMS –

Document Types configured, See below

S.No	Document Type	Description
1	JPO	Purchase Order Documents
2	JPR	Purchase Requisition documents
3	JRQ	Request for Quotation Documents
4	JMQ	Maintain Quotation
5	JCA	Contract Agreements
6	JVD	Vendor Master Documents
7	JMD	Material Master documents

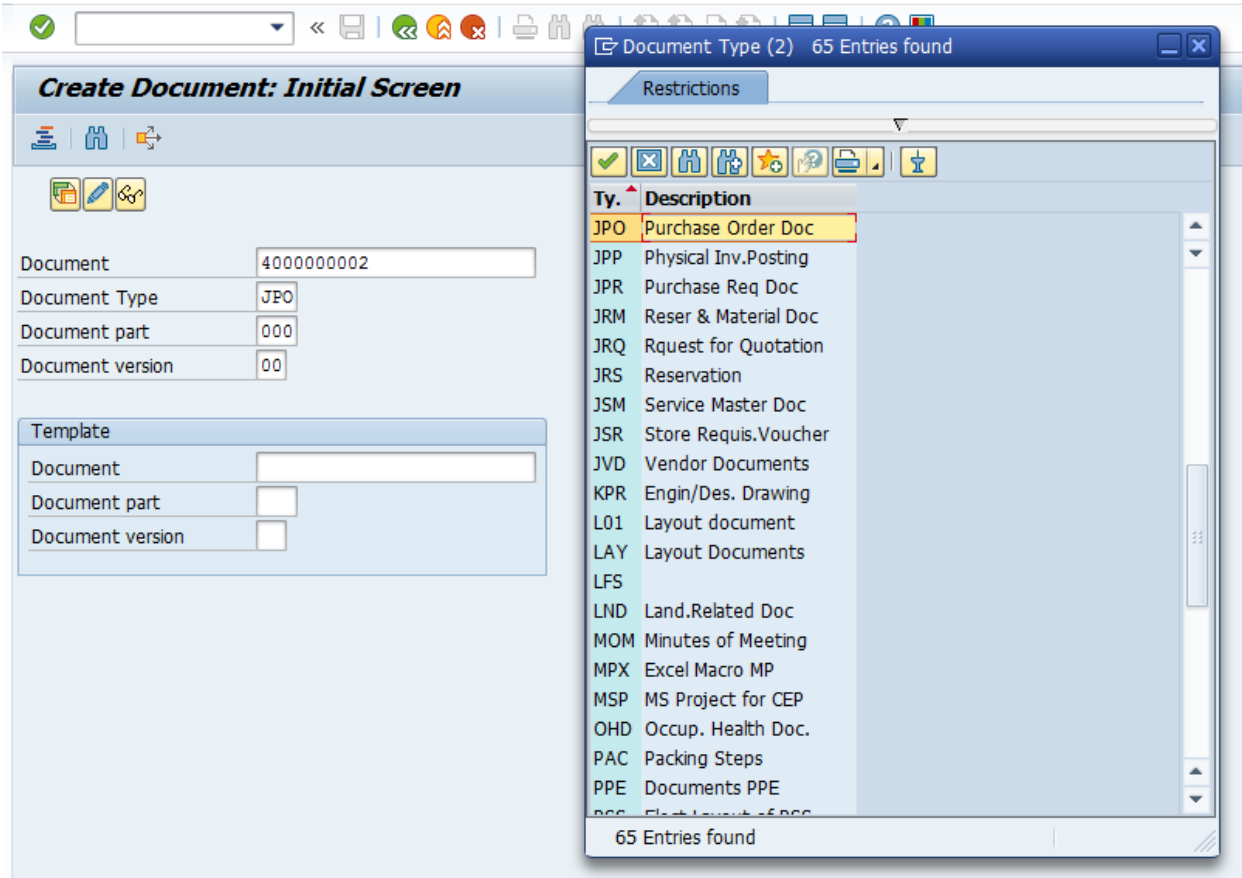


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Note: The User may use other Document types, to attach to other available standard SAP Objects under 'Object Link' tab while creating a DIR. In this scenario, DIR - SAP Object Link (SAP Object being used –Purchase Order) is considered.

External number should be same Purchase order number (Object link)

Document types. The User can enter alphanumeric characters up to 25 characters in Length for 'Document' field, Or, the system assigns a Document number if the 'Document' field is left blank at the time of DIR creation.



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1.4.2 Hit 'Enter' once a 'Document Type' is selected, to have system generate internal DIR number.

Create Document: Initial Screen

Document: 4000000002

Document Type: JPO

Document part: 000

Document version: 00

Template

Document: []

Document part: []

Document version: []

The User can also enter 'Alphanumeric' characteristic as External Number (if desired) and hit enter.

See below for Example.

Field Name	R/O(Required/Optional)	Description
Document	R	Document number Example: Document number can also be entered manually



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Document Type	R	Document type for a new document Example: JPO,JPR,JRQ,JMQ,JCA,JVD and JMD.
Document Part	O	Part of document Example: Part 000 is generated default by the system. Document Part can also be entered manually.
Document version	O	Example: Version 00 is generated by default. Version number can also be entered manually.

The 'Create Document: Basic Data' screen is displayed as shown below. Observe that the 'Document Type' selected is displayed in (Brackets) in DIR - 'Header' section. Also, Observe the Document Status Created - CR is set automatically by the system in 'Document Data' section of DIR.



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Create Document: Basic Data Purchase Order Doc (JPO)

Classification

Document

Document Part Version

Deletion Flag Document Structure Hierarchy

Document Data Descriptions Object Links Originals

Document Data

Description

Document Status Not Released

User YASHDMS

Lab/Office

Superior Document

Document Type Part Version

Originals

Appl.	Application	Storage Cat.	..	1..	File Name



The below Document Status sequence has been configured ONLY for Project document types.

1	FR	Released
2	IE	In Work
3	W6	Completed



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1.5 DIR - Object link

Goto “Object Links” Enter Purchase Order Number as shown in below screen shot

Create Document: Basic Data Purchase Order Doc (JPO)

Classification

Document

Document Part Version

◆ Deletion Flag ◆ Document Structure ◆ Hierarchy

Document Data Descriptions **Object Links** Originals

✓ Purchase Order Item

Purch.Doc.	Item	Desc.
4000000002	10	TRANSFORMER 100 KVA

Icons: [Print] [Refresh] [Delete] [Save] [Print] [Open]

Now go to “Originals Tab” and click on “Open Original button





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Create Document: Basic Data Purchase Order Doc (JPO)

Classification

Document

Document 40000000002 Part 000 Version 00

Deletion Flag Document Structure Hierarchy

Document Data Descriptions Object Links Originals

Appl.	Description/Log Field	St	User	Date/Time	Storage Cat.	..	1..	File Name

Click on Open Original



Choose related document to Purchase Order and click on Open



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Create Document: Basic Data Purchase Order Doc (JPO)

Document: 4000000002

Deletion Flag | Document Structure

Document Data | Descriptions | Object Links

Appl. | Description/Log Field

Open File dialog box showing the file selection process. The 'Look in' field is set to 'Archive link'. The file list includes:

Name	Date modified	Type
CPICTRC1572	02-07-2018 17:03	File
CPICTRC8676	29-06-2018 14:26	File
dev_http	02-07-2018 17:03	File
dev_rfc.trc	02-07-2018 17:03	TRC File
docu6216	22-05-2017 21:31	Adobe
Download Document ArchiveLink	20-05-2017 22:02	Adobe
Object Link and SAP Archiving Interface	22-05-2017 21:34	Adobe
rfc01572_09724.trc	02-07-2018 17:03	TRC File
rfc08676_08040.trc	29-06-2018 14:26	TRC File
SAP Library - ArchiveLink	03-07-2018 12:10	Adobe
SAP Service Marketplace - FAQs ArchiveLink	21-05-2017 20:15	Adobe
sap_press_archiving_sap_data	20-05-2017 21:38	Adobe
Verify Access From the SAP Site	22-05-2017 21:36	Adobe

File name: SAP Library - ArchiveLink
Files of type: All Files (*.*)

To Check-In the Original file, select the file - Right click and Select 'Check-In'.
Select as **JBVNL DMS** Storage Category and Hit Enter.

Deletion Flag | Document Structure

Document Data | Addn Data | Descriptions | Object Links | Originals

Appl. | Description/Log Field | St. | User | Date/Time | Storage Cat. | File Name | File ...

Appl.	Description/Log Field	St.	User	Date/Time	Storage Cat.	File Name	File ...
PL						test-1.docx	0.000

Context menu for the selected file:

- Deploy
- Edit
- Print
- Check In
- Check In As ...
- Copy To ...
- Delete
- Details



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Note: JBVNL_DMS is Storage Category for DMS.

Appl.	Description/Log Field	St	User	Date/Time
PDF	Acrobat Reader			

Storage cat.	Description
JBVNL_DMS	JBVNL Storage Category
TARO_DOC	
TRM_MSG	
VMW5137	

Appl.	Description/Log Field	St	User	Date/Time	Storage Cat.	File Name
PDF	Acrobat Reader				JBVNL_DMS	SAP Library - ArchiveLnk.pdf

Observe that the 'Lock' icon is in closed mode once the Original file is Checked-In.

Upon completion of the above steps, choose  or Ctrl+S to save the document. Observe that a Message is displayed at the bottom of screen saying – Document “ ” is Created.



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Create Document: Initial Screen



Document	<input type="text" value="4000000002"/>
Document Type	<input type="text" value="JPO"/>
Document part	<input type="text" value="000"/>
Document version	<input type="text" value="00"/>

Template	
Document	<input type="text"/>
Document part	<input type="text"/>
Document version	<input type="text"/>

Document JPO 4000000002 000 00 created



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1.6 View DIR /File attachment to object link: Purchase Order

To view Document attachment to –Purchase Order, go to Purchase Order–ME22N/ME23N Screen and Select the - Line item, and click on 'Documents' icon. See below:

Document Overview On | Print Preview | Messages | Personal Setting

ZHQP HQ Purchases | 4000000002 | Vendor: 100000 Shree Ganesh Ltd., | Doc. date: 31.10.2017

S. Itm	A	I	Material	Short Text	PO Quantity	O... C Deliv. Date	Net Price	Curr... Per	O... Matl Group	PInt	Stor. Location
10			1000000007	TRANSFORMER 100 KVA	10 NOS	D 31.10.2017	132,000.00	INR 1	NOS AB Cable ac...		JBVNL, Dhanbad Cl. Central Stores

Item: 1 [10] 1000000007, TRANSFORMER 100 KVA

Material Data | Quantities/Weights | Delivery Schedule | Delivery | Invoice | Conditions | India | Texts | Delivery Address | Confirmations | Condition Co...

Link Document open as shown in below screenshot

Document Overview On | Print Preview | Messages | Personal Setting

ZHQP HQ Purchases | 4000000002 | Vendor: 100000 Shree Ganesh Ltd., | Doc. date: 31.10.2017

S. Itm	A	I	Material	Short Text	PO Quantity	O... C Deliv. Date	Net Price	Curr... Per	O... Matl Group
10			1000000007	TRANSFORMER 100 KVA	10 NOS	D 31.10.2017	132,000.00	INR 1	NOS AB Cable ac...

Item: 1 [10] 1000000007, TRANSFORMER 100 KVA

Material Data | Material group

Purchase Order Item - Link to Documents

Purchasing Doc.: 4000000002

Item: 10 TRANSFORMER 100 KVA

Linked documents

All versions:

Ty.	Document	DPt	Vs	Status	Hr	Description
JPO	4000000002	000	00	In Work		Purchase order-4000000002



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2. CHANGE / DISPLAY DOCUMENT (DIR)

To make changes to a DIR or View document content

2.1 DIR: Definition

DIR or Document info record is a term used in SAP DMS to refer to the master record in the System that stores all the business information for a document.

2.2 Prerequisites

DIR Exists in the system

2.3 Procedure

Access the activity using one of the following navigation options.

Menu Path:

SAP Easy Access: Logistics _ Central Functions _ Document Management System _
Document _ CV02N – Change

SAP Easy Access: Logistics _ Central Functions _ Document Management System _
Document _ CV03N – Display

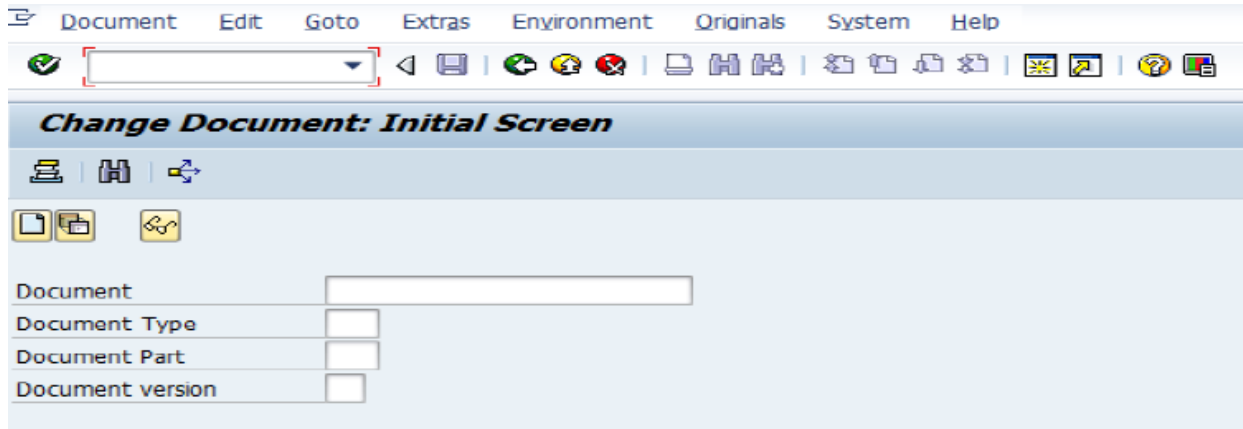
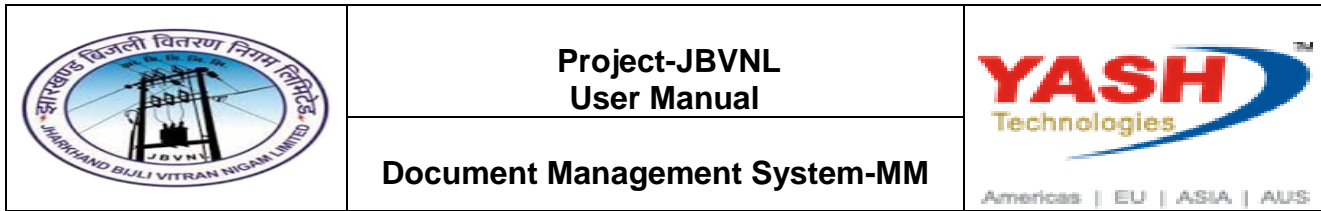
Transaction Code:

CV02N – Change Document

CV03N – Display Document

2.4 CV02N – Change Document:

Change Document: Initial screen is displayed as shown below.



Make the entries as required, Complete/Review following fields and then Press the Enter Key:

Field Name	R/O(Required/Optional)	Description
Document	R	Document number Example: Document number which was generated in Create Document transaction
Document Type	R	Example: JPO
Document Part	R	Example: Part 000, 001
Document version	R	Example: Version 00, 01 etc.

The User can now make the necessary changes – Ex: Document Description, Change / Delete Original File, Change the Original File Content, Object links, Maintain Hierarchy (Superior Document) etc. as shown below:

Change Document Description, DIR Status:



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Change Document: Initial Screen



Document	<input type="text" value="4000000002"/>	
Document Type	<input type="text" value="JPO"/>	
Document part	<input type="text" value="000"/>	
Document version	<input type="text" value="00"/>	



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Change Document: Basic Data Purchase Order Doc (JPO)

Document 4000000002 Part 000 Version 00

Deletion Flag Document Structure Hierarchy

Document Data Descriptions Object Links Originals

Document Data

Description Purchase order-4000000002

Document Status IW In Work Not Released

User YASHDMS YASHDMS

Lab/Office

Superior Document

Document Type Part Version

Once changes are made to 'Long text', hit Save or 'Back - F3' button to go back to the DIR - Basic data screen.

To make changes to Originals:

Add / Delete Original file:

To Delete an Original file, Select the file and Click on the Delete (Trash Bin) icon.



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Change Document: Basic Data Purchase Order Doc (JPO)

Document: 4000000002 Part: 000 Version: 00

Deletion Flag Document Structure Hierarchy

Document Data Descriptions Object Links Originals

Appl.	Description/Log Field	Status
PDF	Acrobat Reader	IA

Select attached document and click on "Delete original"

Delete Original

Change Document: Basic Data Pur.Order Doc ...

Delete Original

Yes No Cancel

Click 'Yes' to Delete the existing original from DIR.

Note: Deleting the Original file from DIR will not delete the file from the Original upload path itself.

Add New Original file:



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Click on 'Open Original' icon and select the file. Check-In the file as mentioned in Create DIR User manual.

After making the desired changes in DIR, Click on 'Save' button or Ctrl+S. Observe that a message is displayed at the bottom of screen saying – DIR “ “ is Changed.

Change Document: Initial Screen

Icons:

Icons:

Document	<input type="text" value="4000000002"/>	
Document Type	<input type="text" value="JPO"/>	
Document part	<input type="text" value="000"/>	
Document version	<input type="text" value="01"/>	

Document info record JPO 4000000002 000 01 changed



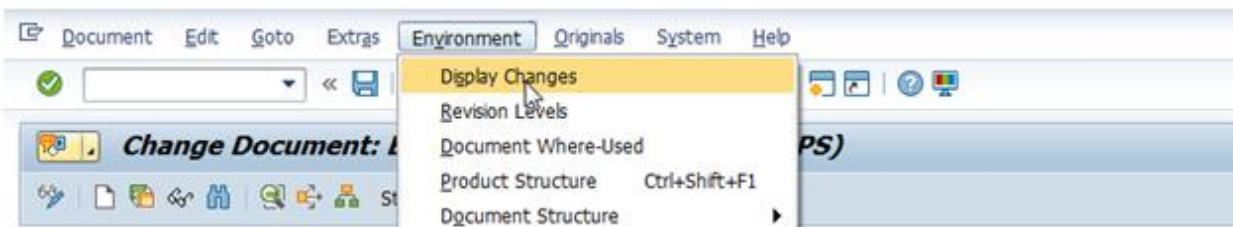
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To view the changes in DIR, Select the DIR in consideration and Hit Enter. Now, Click 'Environment → Display Changes' (Tab Displayed on Top)



Display Change Documents for Documents



Changes to Document JPC / 4000000002 / 000 / 00

Category								
Object	Field Name	Status	Old	New	User	Date	Time	TA Code
Changes to Object Links								
Purchase Order Item		Created		400000000200010	YASHDMS	03.07.2018	14:55:51	CV01N
Changes to Originals								
Original: PDF		Created			YASHDMS	03.07.2018	14:55:51	CV01N
Changes to Descriptions								
Language: E		Created		Purchase order-4000000002	YASHDMS	03.07.2018	14:55:51	CV01N
Changes to Fields								
		Created			YASHDMS	03.07.2018	14:55:51	CV01N

For Document Check-Out or to View the Original file content, the User can Double click the Original file which is in 'Check-In/Check-Out' mode. To Change the Original file Content itself, Select the file -> Right Click -> 'Edit' (Lock icon Open) mode.



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The screenshot displays the Document Management System-MM interface. At the top, there are tabs for Document Data, Addnl Data, Descriptions, Object Links, and Originals. Below these is a table with columns: Appl., Description/Log Field, St, User, Date/Time, Storage Cat., i.., f.., and File Name. A row is highlighted with a yellow background, showing 'test-1.docx' as the file name. A context menu is open over this row, with options: Display, Edit (highlighted), Print, Process Under..., Copy To..., Delete, and Details.

Below the table, there is a section titled 'Change Document: Basic Data Purchase Order Doc (JPO)'. It contains a toolbar with icons for document operations and labels for 'Status Log' and 'Classification'. Underneath, there are input fields for 'Document' (4000000002), 'Part' (000), and 'Version' (00). There are also expandable sections for 'Deletion Flag', 'Document Structure', and 'Hierarchy'.

At the bottom, another instance of the 'Change Document: Basic Data Purchase Order Doc (JPO)' dialog box is shown. It has a 'File Name' section with two input fields: 'Data Carrier' (Default) and 'Original' (C:\Users\rajesh.konidena\Desktop\Archive link\SAP Library - Archi...). There are 'Yes' and 'No' buttons at the bottom right of the dialog.

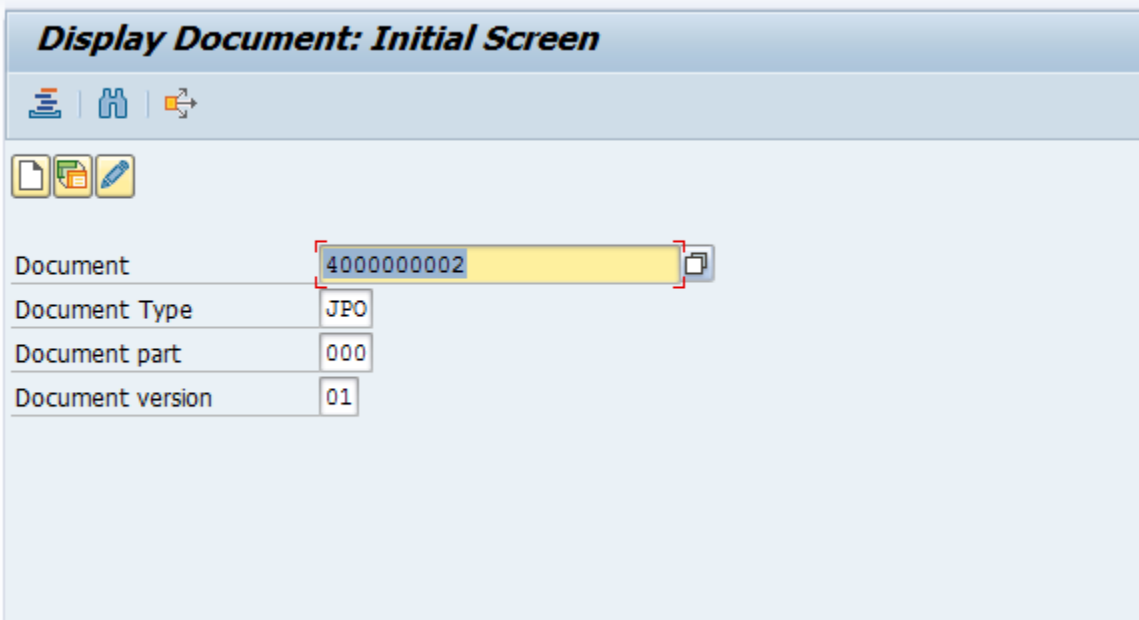
After making the necessary changes to the file, Click – Close -> Yes to save changes to the file.

3. Display Document

CV03N – Display Document:

Make the entries as required, Complete/Review following fields and then Press the Enter Key:

Field Name	R/O(Required/Optional)	Description
Document	R	Document number Example: Document number which was generated in Create Document transaction
Document Type	R	Example: JPO
Document Part	R	Example: Part 000, 001
Document version	R	Example: Version 00, 01 etc.



Note: Changes to a DIR can only be done using CV02N transaction. Observe that the Changeable fields are grayed out in CV03N - Display Document transaction.

To View the Original file content, the User can Double click the Original file which is in 'Check-In' mode.



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Display Document: Basic Data Purchase Order Doc (JPO)

Document Management System-MM

Document: Part: Version:

◆ Deletion Flag ◆ Document Structure ◆ Hierarchy

Document Data Descriptions Object Links Originals

Document Data

Description	Purchase order-4000000002		
Document Status	IW In Work	<input checked="" type="radio"/> Not Released	
User	YASHDMS	YASHDMS	
Lab/Office	<input type="text"/>		

Superior Document

Document	<input type="text"/>	Type	<input type="text"/>	Part	<input type="text"/>	Version	<input type="text"/>
----------	----------------------	------	----------------------	------	----------------------	---------	----------------------

Originals

Appl.	Application	Storage Cat.	...	1..	File Name
PDF	Acrobat Reader	DMS_C1_ST	<input checked="" type="checkbox"/>		SAP Library - ArchiveLin

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4. Create Document Version

1. Create Document Version

To add a new/revised Version to an already existing Document.

4.1 DIR: Definition

DIR or Document info record is a term used in SAP DMS to refer to the master record in the System that stores all the business information for a document.

4.2 Prerequisites

DIR with Version 00 Exists in the system

4.3 Procedure

Access the activity using one of the following navigation options.

Access the activity using one of the following navigation options.

Menu Path:

SAP Easy Access: Logistics _ Central Functions _ Document Management System _

Document _ CV01N Create

Transaction Code:

CV01N – Create Document

4.4 CV01N – Create Document:

Create Document: Initial screen is displayed as shown below



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Create Document: Initial Screen

Select Document via ...



Document	<input type="text"/>
Document Type	<input type="text"/>
Document part	<input type="text"/>
Document version	<input type="text"/>

Template

Document	<input type="text"/>
Document part	<input type="text"/>
Document version	<input type="text"/>

For Creation of DIR - New Version, Complete/Review following fields and then Press the Enter Key:

Field Name	R/O(Required/Optional)	Description
Document	R	Document number Example: DIR number for which a new Version shall be created
Document Type	R	Document type for new document Example: JPO.
Document Part	O	Part of document Example: Part 000 is generated default by the system. Document Part can also be entered manually.
Document version	R	Example: Version 01, 02 etc.



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Create Document: Initial Screen



Document	<input type="text" value="4000000002"/>
Document Type	<input type="text" value="JPO"/>
Document part	<input type="text" value="000"/>
Document version	<input type="text" value="00"/>

Template	
Document	<input type="text"/>
Document part	<input type="text"/>
Document version	<input type="text"/>

Click 'Continue' button in the pop-up message. By doing so, the system automatically copies the Original files, Object links maintained in DIR - Version 00.



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Create Document: Initial Screen



Document	<input type="text" value="4000000002"/>
Document Type	<input type="text" value="JPO"/>
Document part	<input type="text" value="000"/>
Document version	<input type="text" value="00"/>

Template

Document

Document

Document

New Version

New version copied from JPO 4000000002 000 00

Hit 'Enter' for below pop-up (if applicable)



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Create Document: Initial Screen



Document	<input type="text" value="4000000002"/>
Document Type	<input type="text" value="JPO"/>
Document part	<input type="text" value="000"/>
Document version	<input type="text" value="00"/>

Template

Document	<input type="checkbox"/>
Document part	<input type="checkbox"/>
Document version	<input type="checkbox"/>

Object Selection

Select objects whose links you want to copy:

Object
Purchase Order Item



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Create Document: Basic Data Purchase Order Doc (JPO)

Classification

Document

Document 4000000002 Part 000 Version 01

Deletion Flag Document Structure Hierarchy

Version "00"
changed to "01"

Document Data Descriptions Object Links Originals

Document Data

Description Purchase order-4000000002 Updated doc
Document Status IW In Work Not Released
User YASHDMS YASHDMS
Lab/Office

Superior Document

Document Type Part Version

Originals

Appl.	Application	Storage Cat.	...	1..	File Name
PDF	Acrobat Reader	DMS_C1_ST	SAP Library - ArchiveLinl





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Create Document: Basic Data Purchase Order Doc (JPO)

Classification

Document: 4000000002 Part: 000 Version: 01

Deletion Flag Document Structure Hierarchy

Document Data Descriptions Object Links

Appl.	Description/Log Field	St
PDF	Acrobat Reader	

Check in Document: KPro

Storage cat.	Description
JBVNL_DMS	JBVNL...
TARO_DOC	
TRM_MSG	
VMW5137	

SAP Library - ArchiveLi

Attach new version document

Save the document.



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Create Document: Initial Screen



Document	<input type="text" value="4000000002"/>
Document Type	<input type="text" value="JPO"/>
Document part	<input type="text" value="000"/>
Document version	<input type="text" value="01"/>

Template	
Document	<input type="text"/>
Document part	<input type="text"/>
Document version	<input type="text"/>

Document JPO 4000000002 000 01 created

Again come to change of document info record (CV02N) to find version of the document, Find below screenshot



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The screenshot shows the 'Extras' menu with the following options: Classification, Versions (highlighted), Document Parts, and Sequence of Sources. Below the menu, the 'Document Versions' section is visible, including a 'Choose' button and document details for 'JPO/4000000002/000/xx'.

Document Versions

Choose

Documents JPO/4000000002/000/xx
Latest Version On 03.07.2018 JPO/4000000002/000/01

Exception	Version	Status	Change Number	Description	Valid From	Valid To
00	00	IW		Purchase order-4000000002
00	01	IW		Purchase order-4000000002 Updated doc



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5. Find Document

To retrieve or search a document that is created in the system

5.1 Definition

DIR or Document info record is a term used in SAP DMS to refer to the master record in the System that stores all the business information for a document.

5.2 Prerequisites

DIR data exists in the system

5.3 Procedure

Access the activity using one of the following navigation options. Menu Path: SAP Easy

Access: Logistics ► Central Functions ► Document Management System ► Document ► CV04N ►

Find Transaction Code: CV04N – Find Document

5.4 Find Document ‘Find Document’ Initial screen is displayed as shown below. Enter specific search criteria based on which the system retrieves the documents stored in the system.



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Find Document: Selection Criteria

Execute Choose Save Reset Display Document As ... Additional Selections i

Document Data Classification Object Links Texts

Key Fields

Document	<input type="text"/>	
Document Type	<input type="text"/>	
Document part	<input type="text"/>	
Document version	<input type="text"/>	
Maximum Number of Hits	<input type="text" value="100"/>	

Other Selection Criteria

Document Version

Valid Version for Date

All Versions Latest Versions All released Versions

Language

Description	<input type="text"/>	
User	<input type="text"/>	
Lab/Office	<input type="text"/>	
Change Number	<input type="text"/>	
Authorization Group	<input type="text"/>	
Deletion indicator	<input type="text" value="="/> *	
CAD Indicator	<input *<="" td="" type="text" value="="/> <td></td>	
Application	<input type="text"/>	

Layout:

- a.) To search the DIR, enter the selection parameters (Ex: Document Type, Part, Version, User name etc.) and Execute the report. Observe the #Hits returned based on the Selection criteria entered by the user.



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Find Document: Selection Criteria

Display Document As ...

Document Data (*) Classification Object Links Texts

Key Fields

Document		<input type="button" value="i"/>
Document Type	JPO	<input type="button" value="i"/>
Document part		<input type="button" value="i"/>
Document version		<input type="button" value="i"/>
Maximum Number of Hits	100	

Other Selection Criteria

Language	EN	
Description		<input type="button" value="i"/>
User		<input type="button" value="i"/>
Lab/Office		<input type="button" value="i"/>
Change Number		<input type="button" value="i"/>
Authorization Group		<input type="button" value="i"/>
Deletion indicator	= *	<input type="button" value="i"/>
CAD Indicator	= *	<input type="button" value="i"/>
All Documents with Application		
Document Status	<input type="checkbox"/>	
Date From:		<input type="button" value="i"/>
Date To:		<input type="button" value="i"/>

Click on execute

Document List After Selection **5 Hits**

Thumbnails (Images)

R..	Type	Document	Vs	Part	User	Description	Status text	Change Number
	JPO	4000000000	00	000	YASHDMS	Purchase order-4000000000	In Work	
	JPO	4000000002	00	000	YASHDMS	Purchase order-4000000002	In Work	
	JPO	4000000002	01	000	YASHDMS	Purchase order-4000000002 Updated doc	In Work	
	JPO	4100000025	00	000	YASHMM2	4100000025	In Work	
	JPO	10000000006	00	000	YASHDMS	Purchase order-4000000000	In Work	