



**Project-JBVNL
User Manual**

Document Management System-PS



**User Manual for
Document Management System**

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Brief Description

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

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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

Document Type

Document part

Document version

Template

Document

Document part

Document version

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

Document Types configured, See below

S.No	Document Type	Description
1	LAY	Layout eg. Earthmesh,
2	SLD	Single Line Diagram of PSS
3	PSS	Electrical Layout of PSS
4	LND	Land related documents

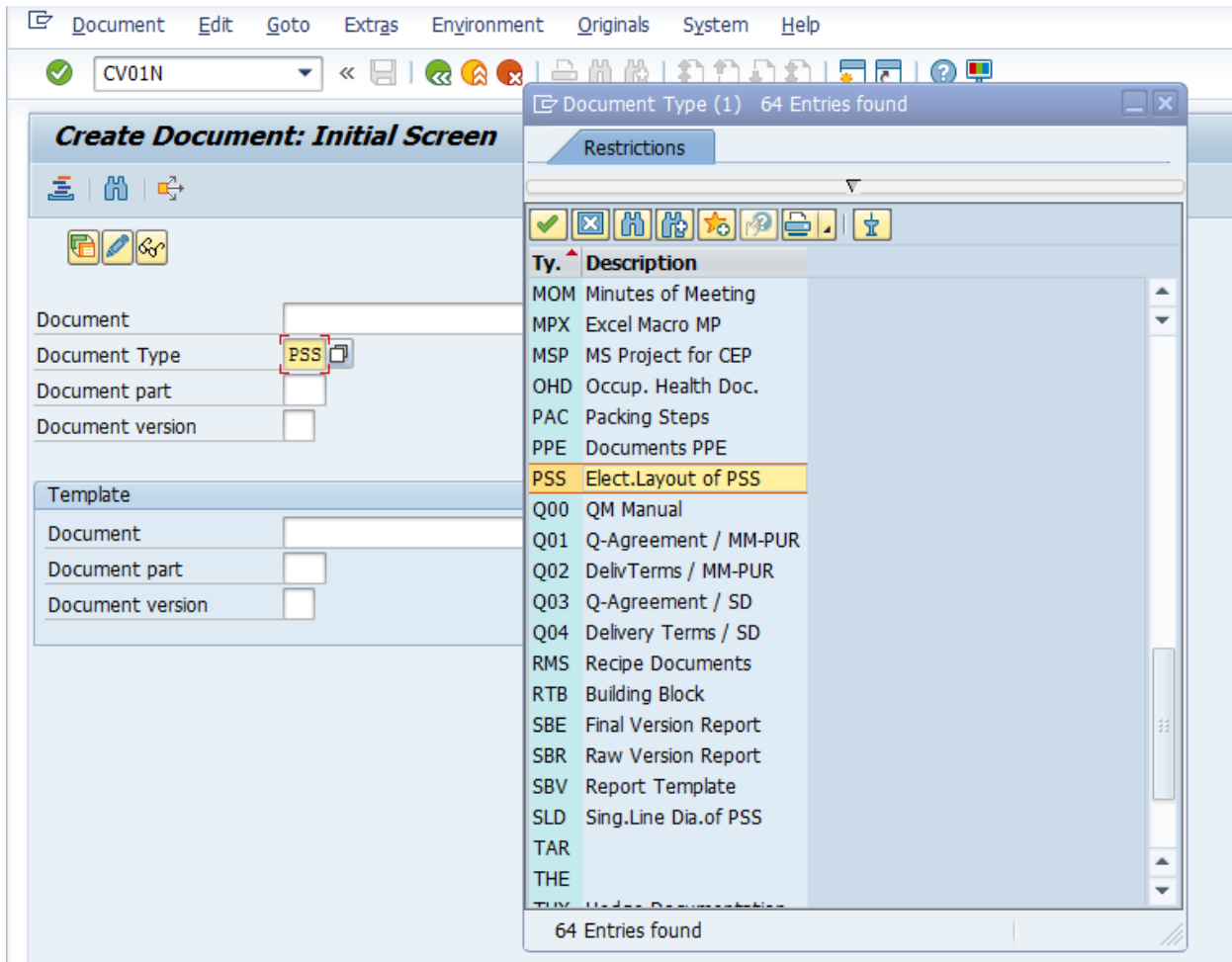


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Note: The User may use other Document types, to attach to other available standard SAP Objects under 'Object Link' tab while creating a DIR. In this scenario, DIR - SAP Object Link (SAP Object being used –WBS Element) is considered.

Both Internal and External (Alphanumeric) number ranges are accepted for all.

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

Document Type **PSS**

Document part

Document version

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	O	Document number Example: Document number will be generated internally. Document number can also be entered manually
Document Type	R	Document type for a new document Example: PSS,LAY,SLD and LND.



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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 Elect.Layout of PSS (PSS)

Classification

Document

Document * Part Version

Deletion Flag Document Structure Hierarchy

Document Data | Descriptions | Object Links | Originals

Document Data

Description

Document Status In Work Not Released

User YASHDMS

Lab/Office

Change Number Valid From

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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[DIR - Object link](#)

Goto “Object Links” Enter WBS Element Number as shown in below screen shot

Create Document: Basic Data Elect.Layout of PSS (PSS)

Classification

Document

Document * Part 000 Version 00

Deletion Flag Document Structure Hierarchy

Document Data Descriptions **Object Links** Originals

WBS Element

WBS element	Version	Desc.
DDNW/17.57.01.01		Building construction

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

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





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Create Document: Basic Data Elect.Layout of PSS (PSS)

Classification

Document

Document * 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 WBS Element

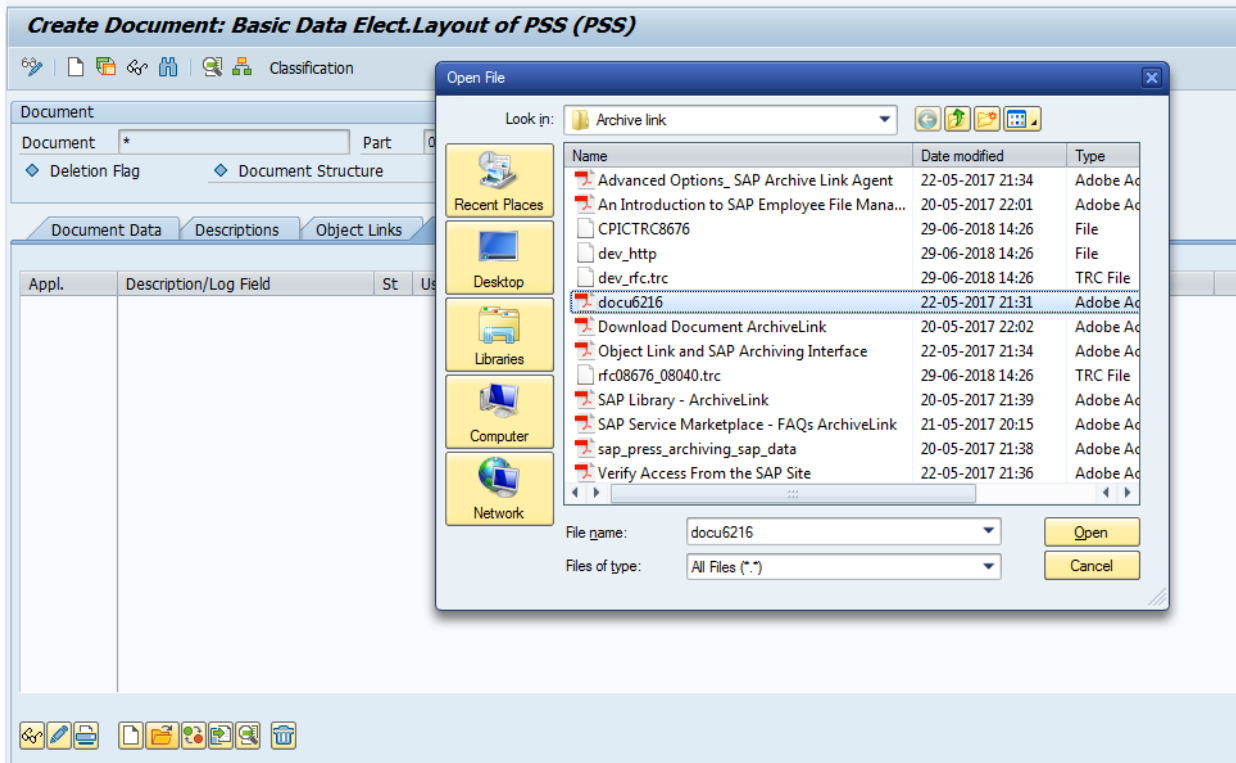


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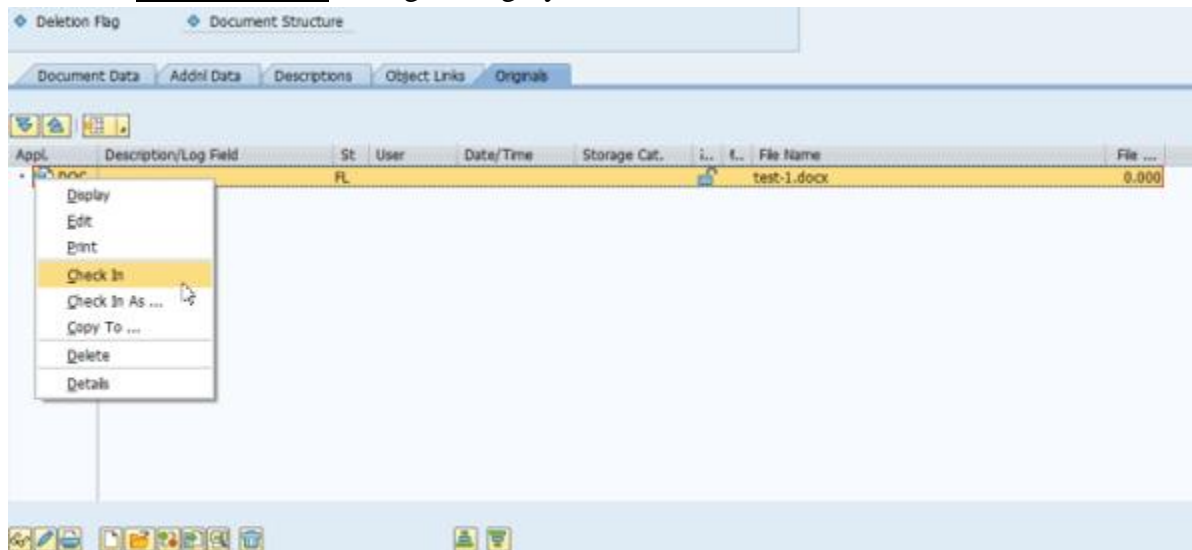
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To Check-In the Original file, select the file - Right click and Select 'Check-In'.
Select as **JBVNL_DMS** Storage Category and Hit Enter.



Note: JBVNL_DMS is Storage Category for DMS.



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Create Document: Basic Data Elect.Layout of PSS (PSS)

Classification

Document * Part Version

◆ Deletion Flag ◆ Document Structure ◆ Hierarchy

Document Data Descriptions Object Links Originals

Appl.	Description/Log Field	St	User
PDF	Acrobat Reader		

Check in Document: KPro

Storage cat.	Description
JBVNL_DMS	JBVNL Storage Category
TARO_DOC	
TRM_MSG	
VMW5137	



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Create Document: Basic Data Elect.Layout of PSS (PSS)

Classification

Document

Document * 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.	Lock	File Name
PDF	Acrobat Reader				JBVNL_DMS		docu6216.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="10000000014"/>
Document Type	<input type="text" value="PSS"/>
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 PSS 10000000014 000 00 created





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1.7 View DIR /File attachment to object link: WBS Element

To view Document attachment to –WBS element, go to WBS Element–CJ20N Screen and Select the - Line item, and click on 'Documents' icon. See below:

Project Builder: Subproject DDNW/17.57.01.01

Identification and view selection

WBS element: DDNW/17.57.01.01 Building construction

Detail: [Icon]

Overview(s): [Icons]

Linked Documents

Current Version

All versions

D..	Ty.	Document	DPT	Vs	Description
	BSS	10000000014		00	Electrical Layout of PSS

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



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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.

Document	
Document Type	<input type="checkbox"/>
Document Part	<input type="checkbox"/>
Document version	<input type="checkbox"/>

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



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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: PSS
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:

Change Document: Initial Screen

Document: 10000000014

Document Type: PSS

Document part: 000

Document version: 00



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Change Document: Basic Data Elect. Layout of PSS (PSS)

Document: 100000000014 Part: 000 Version: 00

Deletion Flag Document Structure Hierarchy

Document Data Descriptions Object Links Originals

Document Data

Description: Electrical Layout of PSS (Long Text)

Document Status: IW In Work (Not Released)

User: YASHDMS

Lab/Office:

Change Number: Valid From:

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 Elect.Layout of PSS (PSS)

Status Log Classification

Document
Document: 10000000014 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.	File Name
PDF	Acrobat Reader	IA	YASHDMS	03.07.2018 11...	DMS_C1_ST	SAP Library - ArchiveLink.pdf

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.



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Add New Original file:

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.



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Change Document: Initial Screen



Document	<input type="text" value="10000000014"/>
Document Type	<input type="text" value="PSS"/>
Document part	<input type="text" value="000"/>
Document version	<input type="text" value="00"/>

Document info record PSS 10000000014 000 00 changed

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

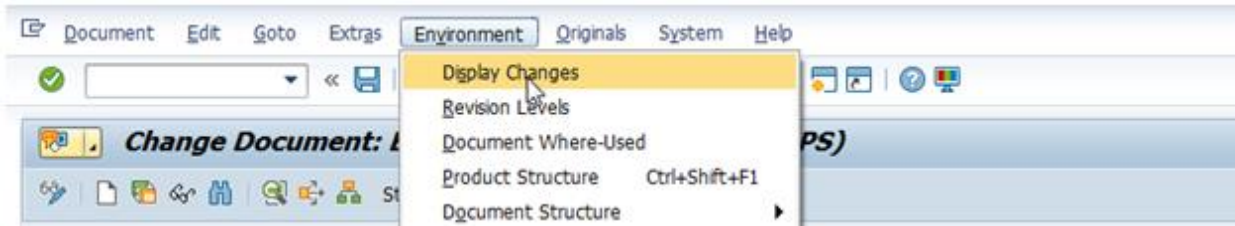


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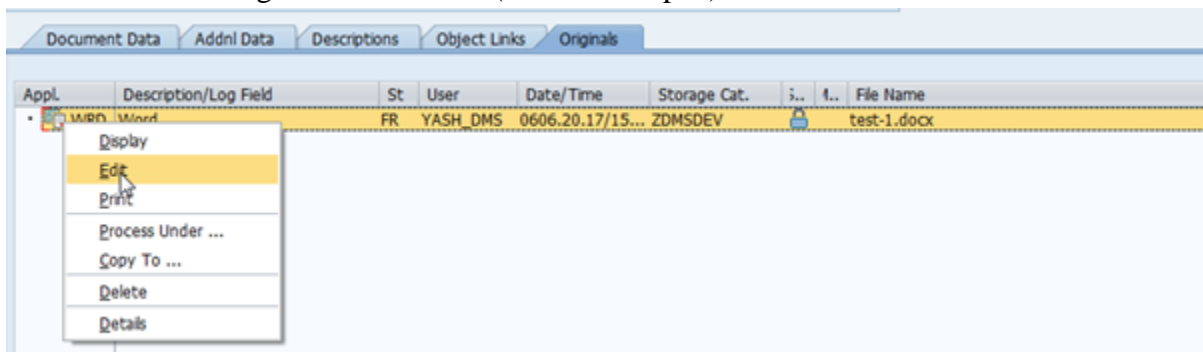
Display Change Documents for Documents



Changes to Document PSS / 10000000014 / 000 / 00

Category	Object	Field Name	Status	Old	New	User	Date	Time	TA Code
Changes to Object Links									
	WBS Element		Created	DDNW/17.57.01.01		YASHDMS	03.07.2018	11:15:58	CV01N
Changes to Originals									
	Original: PDF		Created			YASHDMS	03.07.2018	11:15:58	CV01N
Changes to Descriptions									
	Language: E		Created	Electrical Layout of PSS		YASHDMS	03.07.2018	11:15:58	CV01N
Changes to Fields									
			Created			YASHDMS	03.07.2018	11:15:58	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.



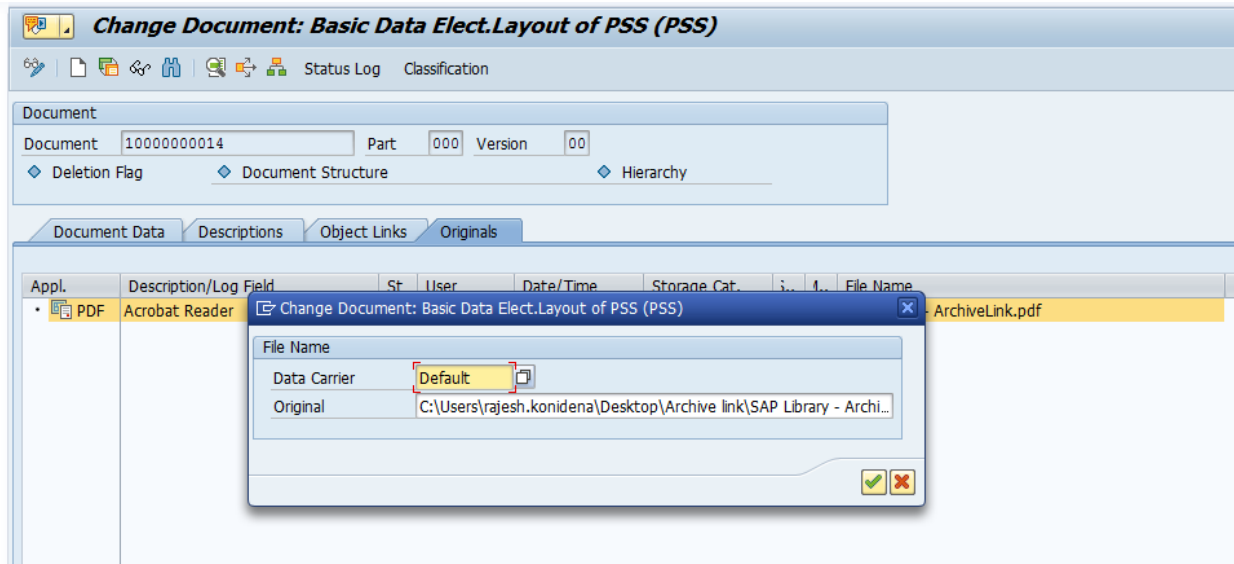


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After making the necessary changes to the file, Click – Close -> Yes to save changes to the file.

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: PSS
Document Part	R	Example: Part 000, 001
Document version	R	Example: Version 00, 01 etc.



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Display Document: Initial Screen



Document	10000000014	
Document Type	PSS	
Document part	000	
Document version	00	

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 Elect.Layout of PSS (PSS)

Status Log

Document

Document Part Version

Deletion Flag Document Structure Hierarchy

Document Data | Descriptions | Object Links | Originals

Document Data

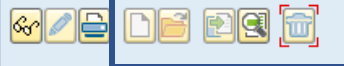
Description
Document Status In Work Not Released
User YASHDMS
Lab/Office
Change Number Valid From

Superior Document

Document Type Part Version

Originals

Appl.	Application	Storage Cat.	...	1..	File Name
PDF	Acrobat Reader	DMS_C1_ST	🔒		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: PSS.
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="10000000014"/>
Document Type	<input type="text" value="PSS"/>
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="10000000014"/>
Document Type	<input type="text" value="PSS"/>
Document part	<input type="text" value="000"/>
Document version	<input type="text" value="00"/>

Temp New Version

Docu

Docu

Docu

 New version copied from PSS 10000000014 000 00

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



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Create Document: Initial Screen



Document	<input type="text" value="10000000014"/>
Document Type	<input type="text" value="PSS"/>
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
WBS Element

✓ | 📄 | 🗑️



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Create Document: Basic Data Elect.Layout of PSS (PSS)

Classification

Document

Document Part Version

Deletion Flag Document Structure Hierarchy

Version "00"
changed to "01"

Document Data | Descriptions | Object Links | Originals

Document Data

Description

Document Status In Work Not Released

User YASHDMS

Lab/Office

Change Number Valid From

Superior Document

Document Type Part Version

Originals

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





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Create Document: Basic Data Elect.Layout of PSS (PSS)

Classification

Document
Document: 10000000014 Part: 000 Version: 01
Deletion Flag Document Structure Hierarchy

Document Data Descriptions Object Links Originals

Appl.	Description/Log Field	St	User
PDF	Acrobat Reader		

Check in Document: KPro

Storage cat.	Description
DMSLFH	
DMS_C1_ST	Default storage DMS (main files)
DVS1CONT	Category for DVS content objects
DVS1STRUCT	Structures for DVS
HME_CONT	TEST
JBVNL_DEV	JBVNL Storage Category
JBVNL_DMS	JBVNL Storage Category
TARO_DOC	
TRM_MSG	
VMW5137	

Attach new version document

Save the document.



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Create Document: Initial Screen



Document	<input type="text" value="10000000014"/>
Document Type	<input type="text" value="PSS"/>
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 PSS 10000000014 000 01 created

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

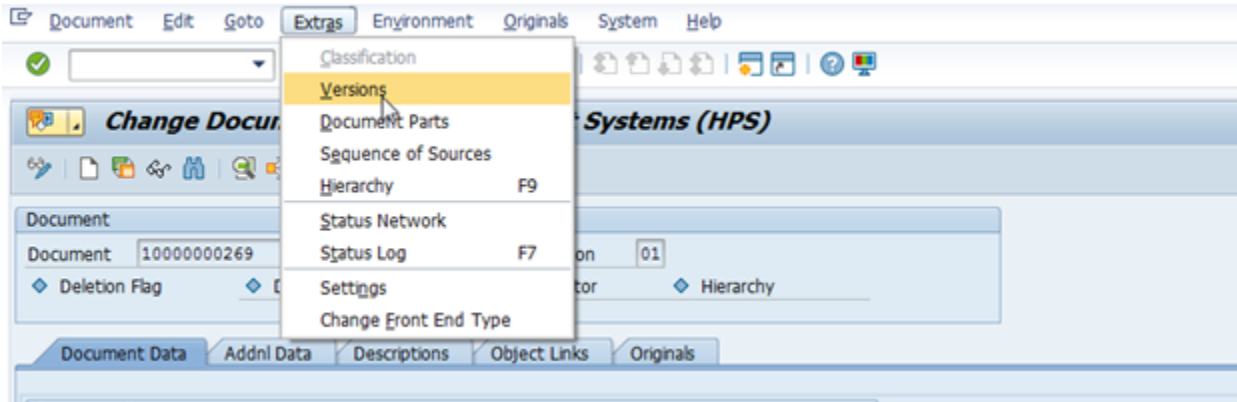


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Document Versions

Choose

Documents PSS/10000000014/000/xx
Latest Version On 03.07.2018 PSS/10000000014/000/01

Exception	Version	Status	Change Number	Description	Valid From	Valid To
○○○	00	IW		Electrical Layout of PSS
○○■	01	IW		Electrical Layout of PSS 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

Execute Choose Save Reset Display Document As ...

Document Data (*) Classification Object Links Texts

Key Fields

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

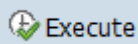
Maximum Number of Hits

Other Selection Criteria

Language	EN	
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="checkbox"/> *	
CAD Indicator	<input type="checkbox"/> *	
All Documents with Application	<input type="checkbox"/>	

Document Status Date From: Date To:

Click on execute



List Edit Goto Settings Extras System Help

Document List After Selection **3 Hits**

Choose Save Thumbnails (Images)

R...	Ty.	Document	Vs	Part	User	Description	Status text	Change Number
	PSS	10000000010	00	000	YASHPS2	PSS Document type - SIT Testing	In Work	
	PSS	10000000014	00	000	YASHDMS	Electrical Layout of PSS	In Work	
	PSS	10000000014	01	000	YASHDMS	Electrical Layout of PSS Updated doc	In Work	