

Documents



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Icons

| Icon | Meaning |
|---|----------------|
|  | Caution |
|  | Example |
|  | Note |
|  | Recommendation |
|  | Syntax |
|  | Tip |

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Documents

Purpose

Complex projects require comprehensive documentation and the provision of technical documents. The Project System uses, for example, the high-performance R/3 document management facility, so that you can access the various project-related documents that are not created in the R/3 System. Examples include CAD drawings and contracts.

In the Project System itself, you can enter extensive texts for the project (called "PS texts"), such as requirements definitions, work package definitions, or logs, directly into the Project System, when processing the relevant activities and WBS elements.

Document management using the intranet and Internet ensures a comprehensive and coherent flow of information over the various business areas involved in the project. For the purposes of decentralized project planning and control, you can access documents without having to access the SAP System directly.

Documents

Definition

Information carrier containing information intended either for a project worker or for exchange between systems. Documents can show any kind of storable information, such as technical drawings, graphics, programs, or text, which, taken together, describes an object.

Use

You can use document management make documents available throughout your business, and link them with SAP objects from different business areas. In the Project System, you can link documents with WBS elements, activities, and material components. So, for example, you can display technical drawings from a CAD system directly in your project.

For the purpose of decentralized project planning and control, you can also access documents using the Internet (see [Creating Project Documents in the Web \[Page 10\]](#) and [Searching for Documents in the Web \[Page 11\]](#)).

Integration

The functions for processing SAP documents are available in the Project System; choose *Project System* → *Documents* → *Document Management*. For more information, read [Document Management \[Ext.\]](#) .

You can also carry out many of these functions directly in the project - for example, when you edit a project in the Project Builder (see [Editing Documents in the Project Builder \[Page 7\]](#)).


Documents used and made available within projects are assigned to WBS elements, network activities, or material components. You can make such assignments either by means of the editing functions in document management or directly in the project (for example, in the Project Builder or project planning board. See [Assigning Documents in Document Management \[Page 9\]](#) and [Editing Documents in the Project Builder \[Page 7\]](#) for details.

Editing Documents in the Project Builder

Use








In the Project Builder, you can carry out document editing functions in the structure tree and in the document overview. The following surveys the various options.





To access the document overview, select a project object in the structure tree and choose  in the work area.

Procedure

The term "project object" is used in the following to refer only to those project objects to which you can assign documents, such as WBS elements and activities.

| Function | Procedure in the Structure Tree | Procedure in the Document Overview for a Project Object |
|-----------------------------|--|--|
| Create and assign documents | Select a project object and choose <i>Create</i> → <i>Document</i> . This takes you to document management. See also: Creating Documents [Ext.] | Prerequisites: You have defined an object link for the project object in document management customizing. In addition, you must stipulate <i>Simple Document Creation</i> for the object link. Choose  . The system automatically creates the document information record. Your only tasks are to select the original document in the File Manager and to specify where the document should be stored. |
| Display/edit basic data | Select a project object and choose  in the work area. In the basic data screen, choose  to switch between change and display modes. | Select the desired document and choose  . In the basic data screen, choose  to switch between change and display modes. |
| Display original file | Select the original file beneath the document and choose  in the work area. | Select the desired document and choose  . |

Editing Documents in the Project Builder

| | | |
|----------------------------|--|--|
| Assign document | | Prerequisite: The document already exists in document management. Enter the document type and document number. |
| Delete document assignment | Select an assigned document and choose  . | Select the desired document and choose  . |

Assigning Documents in Document Management

You can assign documents in document management either when you create them or later. The text that follows describes how you make the assignment in a document that has already been created in document management.


Prerequisites

To make assignments, you must first define them as object links in the *Define Document Types* step of the document management IMG.

Procedure

1. Choose *Logistics or Accounting* → *Project System* → *Documents* → *Document Management*.

2. Choose, for example, *Document* → *Change*.

3. Enter the data for the document and choose .

The basic data screen for the document is displayed.

4. Choose the *Object Links* tab page.

The resulting tab pages show the SAP objects to which documents can be linked. The selection of objects shown is stipulated in customizing (see *Prerequisite* above).

5. Choose the appropriate tab page, such as *WBS element* or *Network*.

6. Enter the necessary data.

7. Save your data.

Creating Project Documents in the Web

Creating Project Documents in the Web

Use

You can use this Internet scenario to create documents for WBS elements and network activities without having to access the SAPGUI of the SAP System. The documents appear as a hierarchical project.

Prerequisites

You have defined an object link for WBS elements and networks in document management customizing. In addition, you must stipulate *Simple Document Creation* for both object links.

The original document in question must be on a PC, or you must be able to choose if using the File Manager.

Service

CNW4

Activities

You reach the hierarchical project display via the project definition and/or the WBS element or network. You navigate in the project to the desired WBS element or network activity and create a new document. The procedure is otherwise the same as when you create a document in the Project Builder (see [Processing Documents in the Project Builder \[Page 7\]](#)).

In the same way, you can view and edit documents already assigned. You recognize such documents by the assignment symbol. Click on the relevant document to proceed to the basic data for the document. From there, you can access the original file.

Finding Documents in the World Wide Web

Use

You can now search for document in the Document Management System even when you do not have access to a SAPGUI of the SAP System by using the Internet scenarios *Find documents*. Starts the document search in your own Workplace.

In order to keep the document search as effective as possible you can enter the following known data before you start the search:

- Document data (attribute) that either comes directly for them document info record or from the environment of the document
- Data from the contents of the original application file

Integration

Finding Attributes

There are two methods for finding attributes:

1. You can use the standard function of the SAP System (data base selection).
 2. You use an external search engine. It is advantageous to be able to use simple spoken-language-style search queries.
The connection to external search engines is done using the [Index Management Service \[Ext.\]](#), a component of the [SAP Knowledge Provider \[Ext.\]](#).
- IMS is a service with an open programming interface for the selected search engines. The search engines can be chosen to match your needs in your enterprise and be installed on a computer or machine that is accessible over your network or the Internet.
 - The R/3 Gateway connects IMS with the SAP System using RFC. You must therefore first enter an RFC destination Customizing and maintain the settings for the R/3 Gateway.
 - The original application files are stored in the Knowledge Provider Content Server. The server uses the HTTP interface.

Full Text Search

The full text search can only be done using an external search engine that is connected to the Index Management Service.

Prerequisites

Index Management Service

You must make the required settings in Customizing for the *Document Management System*. Under the node *Document search in the World Wide Web* execute the following activities:

- *Maintain Search Sever Relation*
- *Set up search engine index*

Finding Documents in the World Wide Web

Enterprise-Specific Processes

You can start various enterprise-specific processes from the results screen of the document search (*Document list*).

- Create a function module for each enterprise-specific process. The function module contains special checks and processes.
- Under the node *Document search in the World Wide Web* execute the following activity: *Create processing procedure for document*
Detailed information can be found in the IMG for *Document Management*.

Selection criteria

Before you start the document search enter the known data from the document info record (metadata):

The connection of the external search engine using *Index Management Service* allows the following entries:

- Data from projects that is assigned to the document
- Characteristics values after classification
- [Search Text from the Original Application File \[Page 15\]](#) (full text search)

Services

Various services are available for the document search. The differences relate to:

- Use of the search engine
- The scope of function for further processing of the documents in the document list

Services that require an External Search Engine

The following services require that an external search engine be connected:

- CVSE_SEARCH
- CVSE_MAINTAIN

The following overview shows a comparison of the two services.

| Similarities | Differences |
|---------------------------------|---|
| Scope of the selection criteria | <p>Selection of activities that can be executed from the results list (<i>Document list</i>):</p> <ul style="list-style-type: none"> • CVSE_SEARCH You can display documents and transfer into a worklist in your Workplace. • CVSE_MAINTAIN You can display documents and transfer into a worklist in your Workplace. You can change the content of the original application file and storage data (check in / out). |

Finding Documents in the World Wide Web

Services that do not require an External Search Engine

The following services do not require that an external search engine be connected:

- CVW3
- CVW4

The following overview shows a comparison of the two services.

| Similarities | Differences |
|---------------------------------|---|
| Scope of the selection criteria | Selection of activities that can be executed from the results list (<i>Document list</i>): <ul style="list-style-type: none"> • CVW3 You can display documents and transfer into a worklist in your Workplace. • CVW4 You can display documents and transfer into a worklist in your Workplace. You can change the content of the original application file and storage data(Check in / out). |

Search Results

The search results are presented as a document list where the data for each document is displayed such as:

- Key data for identification (document, document type, document part, document number)
- Status
- Person responsible
- Workstation application for processing the original application file and the size of the file

Further processing possibilities depend on the service selected. The following overview contains the function selection.

| Service | Supported Activities |
|---------------------|---|
| CVSE_SEARCH CVW3 | Display document data such as: <ul style="list-style-type: none"> • Document data from the document info record • Object links • Status log • Class data • Display original application file Files must be accessible in the file system or be stored in the Knowledge Provider. They transfer documents into a worklist in your Workplace.. |

Finding Documents in the World Wide Web

| | |
|-----------------------|--|
| CVSE_MAINTAIN CVW4 | <p>Display document data (see Service CVW3, CVSE_SEARCH).</p> <p>They change document data such as:</p> <ul style="list-style-type: none">• Document status• Document data of the document info record (such as person responsible)• Storage data (such as storing in a storage system) <p>You can execute an enterprise-specific process (such as release for production).</p> <p>They transfer documents into a worklist in your Workplace..</p> <p>You are processing an original application file.</p> <ul style="list-style-type: none">• Change content• Change storage data (Check in / out) |
|-----------------------|--|

Activities

See: [Document Search in the World Wide Web \[Page 17\]](#)

Full Text Search for Original Application Files

Use

You can use the full text search to find document according to known data in the original application file.

Integration

The full text search is done using [Content Management Service \[Ext.\]](#) (component of the [SAP Knowledge Provider \[Ext.\]](#)). **See:** [Document Search in the World Wide Web \[Page 11\]](#)

Prerequisites

Storage Data of Original Application Files

The full text search only reads original application files that are stored in the Knowledge Provider.

Settings in the SAP System

1. The Content Server is installed
2. Set the Content Server for indexing preparation:
 - Start the function *Monitoring* for Knowledge Provider (transaction code SKPR07).
 - Enter the document class DMS_PCD1.
 - Select *Edit* → *Administration*.

A dialog box appears where the following data is preset:

| | |
|----------------------|------------|
| Document Area | DMS |
| Administration table | DMS1DIDSTA |
| Class can be indexed | X |

- Set the indicator: *Setup indexing*.
3. Select in Customizing of *Document Management* the MIME types that you want to be read for the full text search; under *General Data* → *Settings for storage systems* → *Create MIME types for full text search*.
 4. Schedule the full text search for cyclical background preparation.
 - Execute transaction *Start job* (transaction code SM36).
 - Schedule the job for the following ABAP program: RSTIRIDX (Report for indexing stored documents).

Features

The IMS full text search allows you to use a known character string from the content of the original application file in a search.

You can start a full text search in the following processing situations:

- Standard SAP System: Function *Document* → *Find*

Full Text Search for Original Application Files

- Internet scenario [Finding Documents in the World Wide Web \[Page 11\]](#), for example from the Workplace

Activities

On the initial screen of the document search enter known data from the document info record such as *Person responsible*.

In the lower section of the screen you can enter the search text with the known character string from the original application file.

The result is a list of documents that you can process.

See:

[Evaluation and Processing of the Document List \[Ext.\]](#) (for processing in the SAP System)

[Document Search in the World Wide Web \[Page 11\]](#)

Searching for Documents in the Web

Use

You can use the document search form to search for documents from the Document Management System (DMS), using the Internet and without access to the SAP-GUI of the SAP system.

We supply a predefined form for the document search. It is divided into the following areas:

The diagram shows a search form layout on a light blue background. It consists of three stacked yellow rectangular input fields and a 'Find' button at the bottom. The first field is labeled 'Input field for object type for which a document is sought'. The second field is labeled 'Input field for free text search: Find'. The third field is labeled 'Search constraints: Additional Search Criteria'. The 'Find' button is located below the third field.

Prerequisites

You have defined the form layout using [SAP@Web Studios \[Ext.\]](#).

If you access the form using *Create Internal Service Request* from the launchpad in the Employee Workplace, you must first choose the appropriate form.

Procedure

1. Enter the object to which the document you are looking for is linked.
This is optional.
2. Enter the search term in the *Search for* field
The system searches for all documents indexed using this search term. This is also optional. You can only control your search by means of the specifications you enter under *Additional Search Criteria*.
3. Enter one or more constraints under *Additional Search Criteria*.

Searching for Documents in the Web

4. Choose *Find*.

Result

The system determines the appropriate documents.

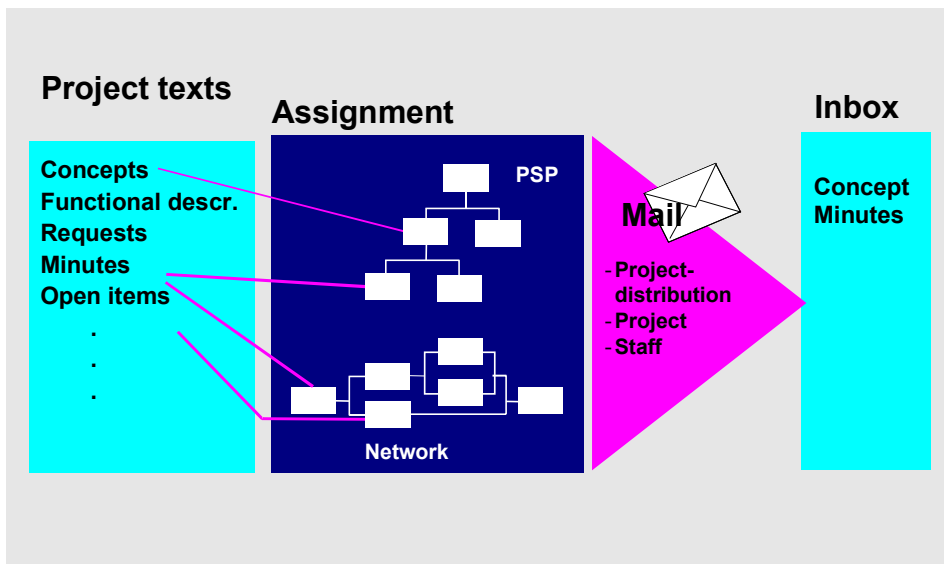
PS Texts

Definition

Texts created and managed in the Project System.

Use

During project processing, you can enter information, such as requirements definitions, work package definitions, or logs, directly into the Project System, in the form of PS texts.



You can send PS texts to persons involved in the project at any time.

Structure

PS texts are managed in the SAP System by means of their descriptions.



Before entering the texts, consider the naming convention you want to use for the text descriptions. Use of naming conventions ensures that the same description is not used more than once.

Integration

You can edit PS texts either in the PS text catalog or in the project - for example, in the Project Builder or the project planning board. You enter PS texts using the SAP System's own text processing (as SAPScript files) or with MS Word (as RTF or DOC files).

Editing PS Texts in the PS Text Catalog

Editing PS Texts in the PS Text Catalog

Use

You use the PS text catalog to manage and edit all the PS texts in your system. You can use particular selection criteria to display the PS texts in an overview, along with the relevant management data. From this overview, you can branch to the text overview that shows the first lines of the PS texts selected.

All the usual processing functions are available in the overviews.

Procedure






1. Choose *Logistics* or *Accounting* → *Project System* → *Documents* → *Project Texts* → *Edit*.

The screen *PS Text Catalog: Change* appears.





2. Stipulate the texts to be displayed - for example, all the texts created by a particular person or all those of a particular text type.

3. Choose .

The management data screen appears. Here you can execute the following functions:

| Function | Procedure | What You Should Know |
|--------------------------------|---|--|
| Create PS text | Choose  . | If there is already a PS text with this description and text type, you can choose from the following: <ul style="list-style-type: none"> • Replace the old PS text and adopt its text • Create a PS text with the same name, copying the source text • Create a PS text with the same name and a new text |
| Copy PS text | Select a PS text and choose  . | You create a copy of the selected PS text, but with a new description. |
| Display text of a PS text | Select a PS text and choose  . | You branch to the text editor and change your text there. |
| Delete PS text | Select a PS text and choose  . | If the PS text is assigned to a WBS element or an activity, you must delete the assignment before deleting the text. |
| Send PS text to user in system | Select a PS text and choose  . | |

Editing PS Texts in the PS Text Catalog

| | | |
|--------------------------|---|--|
| <p>Assign PS text</p> | <p>Select a PS text and choose  <i>Assignment</i>.</p> | <p>You assign the PS text to a WBS element or an activity to a network or standard network.</p> <p>Having assigned the text, choose  in the overview.</p> |
| <p>Delete assignment</p> | <p>Select a PS text and choose  <i>Assignment</i>.</p> | <p>The assignment is deleted, but the PS text remains in place.</p> <p>Having deleted the assignment, choose  in the overview.</p> |


Editing PS Texts in the Project Builder

Editing PS Texts in the Project Builder

Use









In the Project Builder, you can carry out PS text editing functions in the structure tree and in the PS text overview. The following surveys the various options.



To access the PS text overview, select a project object in the structure tree and choose  in the work area.

Procedure

The term "project object" is used in the following to refer only to those project objects to which you can assign PS texts, such as WBS elements and activities.

| Function | Procedure in the Structure Tree | Procedure in the PS Text Overview for a Project Object |
|-----------------------------|---|---|
| Create and assign PS text | <ol style="list-style-type: none"> 1. Select a project object and choose <i>Create</i> → <i>PS Text</i>. 2. Enter the required administration information and choose . 3. Enter your text. <p>Choose  to return to the administration information.</p> | <ol style="list-style-type: none"> 1. Enter the key for the text type and a description. 2. Choose  and enter the text. <p>Choose  to return to the PS text overview.</p> |
| Edit PS text | <p>Select an assigned PS text.</p> <p>The work area shows the administration information for the PS text. Choose  to proceed to the text, which you can then change as you want.</p> | <p>Select the required PS text.</p> <p>Choose  to proceed to the text, which you can then change as you want.</p> |
| Delete a PS text assignment | <p>Select an assigned PS text and choose .</p> | <p>Select the desired PS text and choose .</p> |

Standard Texts

Definition

Standard texts are texts used frequently, but only in internally processed activities - for example, for work center-specific descriptions.

Use

Use standard texts to:

- Save time and effort when creating activity or instruction descriptions
- Ensure that activity descriptions are consistent across the whole of your company
- Document standard instructions

To create and edit standard texts, choose *Accounting* or *Logistics* → *Project System* → *Documents* → *Standard Texts*.

Integration



You can also edit standard texts in work centers and copy them from there to activities. To this end, you need to set the appropriate reference indicator in the work center.

Having copied a standard text to an activity, you can change or add to the text there.


Standard Texts

Assigning Standard Texts to Activities

Prerequisites

You are in the detail screen for an internally processed activity. The required standard text has already been created and stored under a key.

Procedure

1. Enter the appropriate standard text key on the *User-Defined* tab page.
2. Choose .
3. To branch to the standard text, choose the *Long Text* tab page.

A dialog box appears, where you stipulate how the standard text is to be displayed.

- Along with the long text for the activity
- Standard text only, without activity long text

You can edit the standard text in the *Long Text* tab page. The changes are only stored with the activity. They have no effect on the original standard text.