

# FileNet Document Warehouse for SAP

## **Operations Manual**

### Release 5.1

### March 2003

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## **About This Manual**

This manual is designed to assist the users to archive, retrieve and display the documents through the Document Warehouse for SAP (DWSAP) 5.1 product suite. The first chapter contains conceptual information about DWSAP, and the subsequent chapters contain task-oriented activities that enable the users to archive, retrieve or display the documents. The following is an overview of the information that the manual contains:

Chapter 1–Introduction – Introduces the DWSAP product.

Chapter 2–Document Processing – Explains various data archiving methods and usage of FileNet IDM Desktop for R/3 Views.

Chapter 3–Document & Data Archiving – Explains various archiving modes and archiving print lists to FileNet system.

Chapter 4–Document Retrieval & Display – Explains how to retrieve the documents stored on the FileNet system and display them on a workstation using either ArchiveLink viewer, FileNet IDM viewer or a Java based viewer.

Chapter 5–Provides an overview of the DMS Sample Application.

Glossary–This is an alphabetically ordered list, which gives a quick explanation to various important terms in this document.

Index–This is an alphabetically ordered list, which helps to locate appropriate information easily.

## Target Audience

This manual is designed for the user of the DWSAP product suite. The user should be familiar with SAP.

## **New Features In This Release**

Release 5.1 of the DWSAP has the following new features:

- Multiple simultaneous RFC requests.
- On-Line Administration.
- Windows Event Logging.
- SAP Namespace.
- Enhanced SAP Document Management System (DMS) support.
- Pure Thin Document Viewing.

- FileNet Capture For R/3 support for Panagon Capture 4.0.
- DMS Viewing and Linking ASP Sample Application.

## Tips, Notes, Cautions, And Background Information

Throughout this manual, there are assorted brief messages designed to draw your attention to different kinds of information:

*Tip*: Indicates hints to improve efficiency of performing a task.

**Note:** Provides important information, such as situations that can affect the outcome of an operation or affect some other part of the system

**Background**: Explains the concepts behind specific features and provides helpful information for understanding the design of SAP Archive Link and DWSAP.

**CAUTION**: Signals, where possible loss of data or time may occur

#### Bold Type Indicates menu names, menu items, component names

<u>Blue text</u> Indicates a link to another topic, a link to another section in the same topic, or a link to an external topic.

## Education

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## **Comments And Suggestions**

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## 1 Introduction

This chapter provides an overview of Document Warehouse for SAP (DWSAP) 5.1 product suite. For a more detailed discussion of DWSAP, refer to the FileNet DWSAP Installation and Configuration –Server .

**Note:** This manual contains periodic references to the SAP system where it works in conjunction with DWSAP Server Components and the FileNet IDM Desktop for R/3. These references are included for your convenience, as examples only, and to provide a clear understanding of DWSAP Server Components and FileNet IDM Desktop for R/3 procedures.

## **FileNet Document Warehouse For SAP**

DWSAP integrates SAP and FileNet repositories like Image Serviices (IS) or Content Services (CS) using SAP ArchiveLink interface. It enables the business applications of SAP to process documents. It also allows archiving and retrieval of document as well as data.

The applications in DWSAP are:

- FileNet IDM Desktop for R/3: FileNet IDM Desktop for R/3 is installed on the client machine. It communicates with the SAPGUI client through SAP ArchiveLink interface, and with Image Services (IS) and Content Services (CS) using FileNet IDM objects.
- FileNet IDM Services for R/3: FileNet IDM Services for R/3 is installed on the server machine. It integrates the IS with SAP to provide automated document archiving and retrieval.

**Note:** FileNet IDM Services for R/3 will hereafter be called DWSAP Server Components.

Using DWSAP, you can:

- Process incoming documents before, during, and after archiving to the IS library. The archiving methods used are: early archiving, late archiving, and simultaneous archiving. For more information on these archiving methods, refer to section in Document Archiving Methods.
- Link the incoming documents to transactions in SAP system. To access the FileNet documents from SAP system, the documents should be indexed in SAP. This is called Document Indexing. This is

done by associating the document with SAP link table, which is performed automatically, when documents are linked to SAP transaction using FileNet IDM Desktop for R/3. Business attributes are not maintained for each archived document. Instead, the Link table in SAP database maintains relationships between SAP business objects and the documents associated with it.

- Link the incoming documents to work items that are routed and processed, using the SAP Business Workflow.
- Archive outgoing SAP generated documents such as order confirmations, print lists such as customer and vendor lists, and document images such as faxes received, directly from SAP system to IS library.
- Retrieve documents from IS that are linked to a transaction in SAP, and display these documents at the workstation.
- Store SAP generated data archive (REO) files on an optical library, instead of SAP application servers file system.

The following table contains examples of the types of documents in SAP that support ArchiveLink. Check the SAP documentation help files for a complete list for your release.

SAP Module	Original documents	SAP-generated Documents
Document Management System (DMS)	Any document	
Financial Accounting (FI)	Credit Memo	Line Item Journal
	Invoice	Full Audit Trail
	Payment	Classic Audit Trail
		Document Journal
Human Resources (HR)	Applications	
	Contracts and related	
	Correspondence	
	Photo of Employee	
	Regulatory documents	
	Certificates.	
Materials Management	Credit Memo	LIFO valuation report
(MM)	Invoice	Outline Agreement
		Purchase Order
		Schedule Line

		Master Material
Sales & Distribution (SD)	Complaint	Complaint
	Contract	Contract
	Delivery Note	Credit Memo
	Delivery Schedule	Delivery Note
	Order	Delivery Schedule
	Schedule	Order Confirmation
	Agreement Inquiry	Quotation
		Schedule Agreement
		Inquiry
		Invoice
Workflow (WF)	Any document	Any document

The list of ArchiveLink-enabled applications and individual transactions will increase over time. With ArchiveLink, the FileNet system will be able to process these new document types without modification.

## **2** Document Processing Using FileNet IDM Desktop For R/3

Document processing consists of entering, distributing, and incrementing data in appropriate modules on the SAP system. This data is taken from the documents located on the FileNet system.

This chapter describes the various procedures to process data on SAP system, using the FileNet IDM Desktop for R/3.

**Note:** SAP related screen shots are taken with SAP Application server 4.6B, so the actual screen in the users machine may differ from what is given in this Operations manual.

This section provides an overview of document archiving methods and then provides the procedure for document archiving using FileNet IDM Desktop for R/3.

## **Document Archiving Methods**

Document archiving in SAP refers to the action of classifying the committed documents. FileNet commits all the documents prior to processing them in the SAP system, regardless of the archiving method. The archiving methods used to process documents are:

- Early archiving
- Simultaneous archiving
- Late archiving.

#### Early Archiving

This archiving method involves committing incoming documents to FileNet libraries and routing the documents to another user for processing. New work items are not forwarded directly to other users for processing. Instead, new work items are placed in a central SAP Workflow queue. This queue is emptied by a predefined job, WF\_PROCESS Job, on the SAP system. This job runs periodically, and moves the new work items to specific Inboxes. This operation takes a few seconds.

Using the Early Archiving processing method, you can:

- Create a work item in the SAP Workflow program, representing the document to be processed. This workflow item can also be routed it to the Inbox of another user.
- Link the incoming document to the work item automatically.
- Retrieve the work item from SAP Workflow and display the image of the associated document.
- Process the Document Type associated with the work item, and book or post the document in an SAP application.
- Create a permanent link between the document and the new SAP transaction.

#### Simultaneous Archiving

The process of simultaneous archiving is similar to early archiving. In simultaneous archiving, incoming documents are classified for processing on the SAP system, and document's data is entered into the corresponding SAP R/3 transaction. The difference between the two methods of archiving is that the work item is not routed to another user for processing in simultaneous archiving.

#### Late Archiving

The process of late archiving commits documents to FileNet, and classifies the documents after processing them on SAP. Late Archiving can be done with or without using bar codes on the incoming documents.

#### Late Archiving Without Using Bar Codes

While processing incoming documents without bar codes, you can:

- Book the paper document into SAP system to create a new transaction.
- Note the transaction key on the SAP document for later reference.
- Retrieve and display the document in the FileNet viewer.
- Match an object in SAP application, using the SAP Object ID and other key data from the displayed document.
- Create an entry in the Link table, to link the object and the displayed document.

#### Late Archiving Using Bar Codes

While processing incoming original documents using bar codes, you can:

• Attach a unique bar code to each incoming document before it is distributed for processing.

- Book the paper document into SAP application and create a new SAP transaction.
- Create a temporary link between the document and the SAP object. This link is stored in SAP database.
- Retrieve the scanned document from a FileNet Workflow queue, and send a message to SAP system containing the FileNet document id and bar code value.
- Create a permanent link between the SAP transaction and the document, using SAP Object ID and FileNet document id. To create this link, match the message containing the FileNet document id and bar code value with the temporary record. This action is automatically performed by the cBarcode, which is a part of the DWSAP Server Components.

## Using FileNet IDM Desktop For R/3 For Incoming Documents

FileNet IDM Desktop for R/3 main window represents the interface between DWSAP application and the FileNet Image Services (IS) or Content Services(CS).

The FileNet IDM Desktop for R/3 uses views to obtain a document from either IS or CS library for processing. The following standard views are provided with FileNet IDM Desktop for R/3:

- FileNet Browse for R/3.
- FileNet Capture for R/3.
- FileNet Queue for R/3.

Each of the above views is described in the later sections. Customers can also develop their own views that can be plugged into the FileNet IDM Desktop for R/3.

#### Accessing FileNet IDM Desktop For R/3

In order to access IDM Desktop for R/3, click **Start**  $\rightarrow$  **Programs**  $\rightarrow$  **IDM Desktop for R/3**. To view the three standard views, click File  $\rightarrow$  Open iView menu; the following screen appears:

🥦 FileNet IDM Desktop For R/3 - Op	oen iView _□×
Select a Niew to open: FileNet Browse For R/3 FileNet Capture for R/3 FileNet Queue For R/3	<u>Q</u> k Cancel

FileNet IDM Desktop for R/3 can be used to perform following operations:

- Open a view to link documents to SAP business transactions. To open any view, select it in the Open iView dialog box, and click **Ok**. The Open iView dialog box closes, and the chosen view appears as a child window inside the main window.
- Access already opened views. In order to find out which views are currently open, click the Window menu; below the horizontal separator line, all open views are displayed. Select any one of them to activate the corresponding view.
- Access Help and display the version for FileNet IDM Desktop for R/3.
- Exit FileNet IDM Desktop for R/3 Application.To terminate an application of FileNet IDM Desktop for R/3, click **File → Exit** menu.

**Note:** You can also double-click a view in the Open iView dialog box, to open it. There can be none, one, or more views opened simultaneously.

#### Menu And Command Summary

The following tables summarize the menus and commands available in the IDM Desktop for R/3 main window.

#### File Menu

Option	Function
Open iView	Opens a dialog that lets you choose a view and open it.
Close	Closes the currently active view.
Close All	Closes all open views
Save Settings On Exit	A check marked menu to enable or disable the saving of current settings automatically when FileNet IDM for R/3 is closed. A checkmark before this menu item will mean

Option	Function
	that this option is switched on.
Save Settings Now	Immediately saves the current settings.
Exit	Exits the FileNet IDM Desktop for R/3.

#### Window Menu

The options on the Window menu are:

Option	Function
Tile Horizontally	Tiles all open windows horizontally.
Tile Vertically	Tiles all open windows vertically.
Cascade	Cascade all open windows.
Arrange Icons	Arranges the icons of all minimized windows.
<open view=""></open>	Activates the view. There will be a Menu item for each open view

#### Help Menu

The options on the **Help** menu are:

Option	Function
Contents	Displays FileNet IDM Desktop for R/3 help topics.
Search	Displays the Search Tab of the online help file.
About	Displays product and version information for FileNet IDM Desktop for R/3.

#### **Archiving Incoming Documents**

The following steps need to be performed to archive incoming documents using FileNet IDM Desktop for R/3:

**Note:** Before carrying out the Archiving of Incoming Documents, Customizing for archiving Incoming documents should be carried out as mentioned in the Installation and Configuration Manual-Client.

- 1. Launch FileNet IDM Desktop for R/3. If there is no open child window, open one of the views using the Open iView menu.
- 2. Logon to the desired IS library displayed in the tree view. The FileNet IDM Desktop for R/3 shows all the FileNet Workflo workspaces and queues in the selected IS.

FileNet IDM Desktop For R/3 - [FileNe	t Queue For R/3]
▶ Eile Queue Window Help	_ B ×
FileNet Neighborhood	Contents of 'WorkSpace1/Queue1' (Entries:2)
FileNET Neighborhood	169699
Ready.	

**Note:** SAP will subsequently request that FileNet IDM Desktop for R/3 to send the selected document number to be linked with SAP objects.

- The first document of this Workflo Queue will be selected automatically. The FileNet IDM Desktop for R/3 opens the FileNet IDM Viewer to display the document.
- Double-click the SAP icon from the Windows desktop or choose SAPLogon from SAP R/3 program group to open the main window of SAP R/3.
- 5. Logon to SAP System.
- Click Office → Business Document → Documents → Move menu, or transaction oawd to get the default settings for stored documents, The following screen is displayed:

<i>空</i> 	Help	
		le l
Store documents		
9) P. F. 9) # E I		
Default settings		
lenaure secongs		
🔤 🗠 All Applications - NOT a summary		
Asset Accounting		
🖵 🖽 Engineering Change Management		
🖵 🕀 Financial Accounting		
🖵 🖽 Human Resources - Applicant Management		
🖵 🖽 Human Resources - Employee Management		
🖵 🖽 Human Resources - Travel Expenses		
💳 🖽 Materials Management		
🖵 🖽 Plants Maintenance		
😐 Quality Management		
🖃 🕮 Sales & Distribution		
🕀 All Applications		
- 🕀 Asset Accounting		
E Financial Accounting		
- CE Human Resources - Applicant Management - CE Human Resources - Employee Management		
- CE Materials Management		
- B Plants Maintenance		
- CE Quality Management		
□ Gales & Distribution		
- D All Applications		
		• •
		👂 OAWD 🔚 fnetsap INS
		e entre di motoup me

The default setting contains a list of work modules, where each work module contains groups of related document types. These document types classify the incoming original document to be processed. For example, incoming invoices and credit memos are grouped under a work module named Financial Accounting.

**Note:** Access to the default setting and associated document types can be controlled through the security features in SAP System. For information on security Features, see the appropriate SAP documentation.

7. From the default settings window, double-click the desired work module, such as Financial Accounting. The following screen is displayed:

r <u>D</u> ocument <u>E</u> dit Goto	<u>S</u> ettings Uti <u>l</u> ities System <u>H</u> elp		
Ø	i 🕂 🗳 I 😫 🔞 🚱 🚱 I 😓 II 🕼 😫 🔁 I	1 21   🕱 🖉   😗 📭	
Store documents	;		
V 🗉 🖻 V 🖁 🗄			
Financial Acco	punting		
	🕼 Incoming credit memo w/o verification	BASIS IDES	
	🖉 Incoming invoice w/o verification	BASIS IDES	
	Incoming invoice w/o verification	BASIS IDES	
	Incoming payment fast entry Incoming payment FAX Doc Type FAX for M1	BASIS IDES	
	🕼 Incoming payment	BASIS IDES	
	€ FAX	BASIS IDES	
		BASIS IDES	
	🕼 PDF Documen for archive p1	BASIS IDES	
	PDF Documen for archive p1 Inconing document Aaa Wew Doc Type for Incoming Documents	BASIS IDES	
	🖉 Aaa	BASIS IDES	
	🕼 New Doc Type for Incoming Documents	BASIS IDES	
	🕼 Doc Type for S2 for incoming Documents	BASIS IDES	
	🕼 Incominmg Doc type for T1	BASIS IDES	
	졅 Doc Type PDF for Archive T1	BASIS IDES	
	🕼 Doc Type For HTTP	BASIS IDES	
	🕼 PDF Doc type	BASIS IDES	
	🕼 Incoming Doc Type For X2	BASIS IDES	
	VE PDF	BASIS IDES	
	New Doc Type for Throwing Documents     Doc Type for S2 for incoming Documents     Incoming Doc type for T1     Doc Type PDF for Archive T1     Doc Type For HTTP     PDF Doc type     Incoming Doc Type For X2     PDF     test Doc type	BASIS IDES	
	VE Incoming involce w/o verification	BASIS IDES	
	🕼 Incoming Invoice	BASIS IDES	
	🕼 Incoming Doc Type for Archive Y2	BASIS IDES	
	-		
•			• •
🐼 Cancelled by user			🕑 OAWD 🔚 fnetsap IN

8. Select the document type and click the **Document** menu. The following drop down list is displayed.

Storing for subseque	ententry F5 📘 🖓 🖧 🖏 🖺 1	0 20   🐺 🗖   🖓 🖪	
Storing for subs <u>e</u> que			
Store and enter	F7		
Store and assign	F8		
Assign then store	F9		
Exit	Shift+F3		
	hemo w/o verification	BASIS IDES	
	Incoming invoice w/o verification	BASIS IDES	
	🕼 Incoming invoice preliminary posting	BASIS IDES	
	<ul> <li>Incoming payment fast entry</li> <li>Incoming payment</li> <li>FAX</li> <li>Doc Type FAX for M1</li> <li>PDF Documen for archive p1</li> <li>Inconing document</li> <li>Aaa</li> <li>New Doc Type for Incoming Documents</li> </ul>	BASIS IDES	
	🕼 Incoming payment	BASIS IDES	
	E FAX	BASIS IDES	
	🕼 Doc Type FAX for M1	BASIS IDES	
	🕼 PDF Documen for archive p1	BASIS IDES	
	🖉 Inconing document	BASIS IDES	
	Aaa	BASIS IDES	
	🖉 New Doc Type for Incoming Documents	BASIS IDES	
	🕼 Incominmo Doc type for T1	BASIS IDES	
	Doc Type PDF for Archive T1	BASIS IDES	
	🕼 Doc Type For HTTP	BASIS IDES	
	C Doc Type for S2 for incoming Documents Licominmg Doc type for T1 Doc Type PDF for Archive T1 Doc Type For HTTP PDF Doc type	BASIS IDES	
	Incoming Doc Type For X2	BASIS IDES	
	For X2	BASIS IDES	
	VE test Doc type	BASIS IDES	
		BASIS IDES	
	Incoming invoice w/o verification Incoming Invoice	BASIS IDES	
	Incoming Doc Type for Archive Y2	BASIS IDES	
	VE Incoming boc Type for Archive 12	DAGIG IDEG	
•			•

Select the following menu entries for different archiving methods:

a. **Storing for subsequent entry** option for early archiving. The following dialog box is displayed.

🖙 Storing for s	ubsequent entry 🗵	
Doc. type	Doc Type FAX for M1	
Recipient	BASIS IDES	
Note	Doc Type FAX for M1	
✓ 월 Mass archiving ¥		

Fill in the text description of the work item in the Note field. Click ( $\sqrt{}$  ) button.

Click **Mass archiving** button to process a batch of similar documents.

b. Storing and enter option for simultaneous archiving.

🖙 Store and enter 🛛 🗵		
Doc. type	Doc Type FAX for M1	
Recipient	BASIS IDES	
Note	Doc Type FAX for M1	
🖌 🛃 Mass archiving 🔀		

Fill in the text description of the work item in the Note field. Click ( $\sqrt{}$  ) button.

Click **Mass archiving** button to process a batch of similar documents.

c. Assign then store option for late archiving without using barcodes.

🖻 Accounting document 👘	
Company code	ð
Document number	
Fiscal year	
🖌 🗞 Object 🖉 Object 🕱	

Enter the necessary information according to the selected System Setting and document type. To continue, click the ( $\sqrt{}$ ) button.

SAP sends an OLE request to FileNet IDM Desktop for R/3, to obtain the document number of the top most selected item. After the document number is sent to SAP, FileNet IDM Desktop for R/3 deselects the item, or removes the document from the queue, and automatically selects the next document in the queue.

If Mass Archiving has been chosen, an identical work item is created for each document, and all selected documents, or remaining items in the selected FileNet Workflo queue are processed automatically. When the queue is empty, processing stops and FileNet IDM Desktop for R/3 enters Advanced Interaction. For more information on advanced interaction, refer to section <u>Advanced Interaction FileNet Queue for R/3</u>.

#### Late Archiving Using Bar Codes

While processing incoming documents using bar codes, you can:

- Attach a unique bar code to each incoming document before it is distributed for processing.
- Book the paper document into SAP application and create a new SAP transaction.
- Create a temporary link between the document and the SAP object. To create this link, and the bar code into the SAP system. This link is stored in SAP database.
- Retrieve the scanned document from a FileNet Workflow queue, and send a message to SAP system containing the FileNet document ID and bar code value.
- Create a permanent link between the SAP transaction and the document, using SAP Object ID and FileNet document ID. To create this link, match the message containing the FileNet document ID and bar code value with the temporary record. This action is automatically performed by cBarcode component, which is a part of the DWSAP Server Components.

### **Using FileNet Queue For R/3**

FileNet Queue for R/3 is one of the views shipped with FileNet IDM Desktop for R/3. It allows the user to access the contents of a FileNet Workflo queue that holds documents that are ready for processing in SAP system.

#### Accessing FileNet Queue For R/3

In order to access FileNet Queue for R/3, open FileNet IDM Desktop for R/3. Access the menu File  $\rightarrow$  Open iview  $\rightarrow$  FileNet Queue For R/3.

#### Menu And Command Summary

The following table briefly describes the menus and commands that FileNet Queue For R/3 adds to the standard menus of the FileNet IDM Desktop for R/3.

#### Queue Menu

The options on the Queue menu are:

Option	Function	
Fetch Next Document	If 'Auto Fetch' is off and all documents in the list-view have been processed, the user can choose this option to display the next document(s) in the list-view. See <u>Fetching Documents from a Queue</u> .	
Auto Fetch	When ' <b>Auto-Fetch</b> ' option is turned on FileNet Queue For R/3 to automatically fetch the next document when the document in the list-view has been processed. See <u>Auto-Fetch</u>	
Pend Queue Entry	Using this option the user can pend the selected document for a certain number of hours or days. See <u>Pending Documents</u> .	
Skip Queue Entry	Using this option the user can skip a document and make that document to go to the end of the Workflo Queue. See <u>Skipping Documents</u>	
Reroute Queue Entry	Using this option the user can Reroute a document, this means to remove it from the current Queue and insert it at the end of another Queue. For more information refer to <u>Rerouting Documents</u>	
Search	This menu item invokes the 'Queue Search' dialog, which allows you to execute a search on the contents of a queue. See <u>Searching a Queue</u>	
Configure Queues	This command invokes the ' <b>Configure</b> <b>Queues</b> ' dialog that allows configuring Queues that is the user can add or remove to the FileNet Queue For R/3 from different Workspaces.	
Continue Assignment	Lets the user to continue with the current selection after starting advanced interaction. For more information refer to Advanced Interaction FileNet Queue for R/3.	
Cancel Assignment	Lets the user to cancel advanced interaction. For more information refer to Advanced Interaction FileNet Queue for R/3.	

#### **Graphical User Interface**

The FileNet queue for R/3 has a GUI similar to Microsoft Windows Explorer. In the tree-view, the configured IS libraries are displayed. To see the workspaces for a library, double-click that library, or click the

expand symbol (+) next to the library. If you are not logged on to the selected library, a logon dialog appears depending on the FileNet IDM Desktop settings. Click the expand symbol (+) next to the workspace, to see the Workflo Queues for the selected workspace.

**Note:** All Queues for the selected workspace will be displayed in FileNet Queue for R/3's tree view, even the queues without a DocumentNumber field. However, while selecting such a queue, the user will be notified with a message and the queue will be deleted from the tree view.

The right pane shows the contents of the selected queue in the tree view. A queue can contain several documents simultaneously; but only one queue entry will be displayed in the list view. The selected document will automatically be displayed in the FileNet IDM Viewer.

The list view supports four different views that can be selected using the list view's context menu.

- Large icons.
- Small icons.
- List.
- Details.

To display index values of the documents listed, select the option **View Details** from the context menu of the list view. FileNet IDM Desktop for R/3 uses the columns specified in Microsoft<sup>™</sup> Windows Explorer for each library.

**Tip**: To configure different columns to be displayed for a specific library, open a FileNet library in Microsoft<sup>™</sup> Windows Explorer and click **Options** in the context menu of the list view pane.

#### Configuring Queues For Display In FileNet Queue For R/3

In order to configure queues for display in FileNet Queue for R/3, perform the following steps.

1. Open FileNet Queue for R/3. The following screen is displayed:

📴 FileNet IDM Desktop For R/3 - [FileNet Queue For R/3]		
▶ File Queue <u>W</u> indow <u>H</u> elp		
FileNet Neighborhood	Contents	
FileNET Neighborhood		
Ready.		

2. Access the menu **Queue** → **Configure Queues**. The following screen is displayed.

🐃 Configure Queues	
List of selected queues	<u>O</u> k Ca <u>n</u> cel
<u>A</u> dd <u>B</u> emove	

To reflect the changes made in the queue configuration, the Queue CIM will be reset after clicking the Okbutton.

3. Click Add .The following screen is displayed:

🗃 Configure Queues		×
- Select the queue to add		Ok
Library:		Cancel
Workspace:	<b>T</b>	
<u>Q</u> ueue:	<b></b>	

4. Select the Library, Workspace and Queue and click **Ok**. The following screen is displayed:

🗃, Configure Queues	
List of selected queues DefaultIMS:IMGSERV:FileNET - WorkSpace1/Queue1 DefaultIMS:IMGSERV:FileNET - WorkSpace2/Queue1	<u>O</u> k Ca <u>n</u> cel
<u>A</u> dd <u>R</u> emove	
To reflect the changes made in the queue configuration, the Queue CIM will be re button.	eset after clicking the Ok

5. Click **Ok**. The following screen is displayed:

📴 FileNet IDM Desktop For R/3 - [File	Net Queue For R/3]	
🧏 Eile Queue <u>W</u> indow <u>H</u> elp	_ 8 ×	
FileNet Neighborhood	Contents	
Kan FileNET Neighborhood		
🖻 🏦 IMGSERV		
WorkSpace1		
Queue1		
WorkSpace2		
Queue1		
Ready.		

#### **Fetching Documents From A Queue**

When a Workflo Queue is selected from the tree-view of FileNet Queue for R/3, the right pane displays a document. In order to fetch the next available document the **Fetch Next Document** command on the **Queue** menu can be used.

FileNet Queue for R/3 fetches the next available document from the Workflow Queue, when:

Queue entry is not busy, which means it is not in use by a different user.

- Queue entry is not delayed.
- Queue entry is complete.
- Priority of the queue entry is in the range of 1 to 9.
- Oldest queue entry with the highest priority is fetched.

When a document is fetched from the queue, the queue entry is locked until it is linked to an SAP object. After SAP has processed the document, FileNet IDM Desktop for R/3 fetches the next document in the queue if **Auto-Fetch** option is checked. Otherwise, Fetch **Next Document** command from the **Queue** menu can be used to retrieve the next document for processing.

#### Auto-Fetch

When **Auto-Fetch** option is checked, FileNet IDM Desktop for R/3 deletes the linked document, and fetches the next document from the Workflo Queue.

When **Auto-Fetch** option is turned off, FileNet IDM Desktop for R/3 does not fetch the next document automatically from the Workflo Queue after linking with SAP. To retrieve the next document, select **Fetch Next Document** option from the **Queue** menu.

#### **Pending Documents**

A document in a queue can be marked for processing later. The FileNet queue for R/3 returns the document to the queue, where it remains until the specified period elapses.

**Note:** A pend document is unavailable for processing and does not display as part of the queue contents. When the specified period elapses, the document automatically becomes available for processing.

To pend a queue entry:

 Click Queue → Pend Queue Entry menu. The Pend Queue Entry dialog box appears, as shown in the figure below:

🐃 FileNet IDM Desktop For R/3 - Pend Queue Entry	
Pend Queue Entry Pend Queue Entry for	<u>D</u> k
O Days	Ca <u>n</u> cel

- 2. Select the respective radio buttons to specify whether the document be put on hold for **Hours** or **Days**.
- 3. In the **Pend Queue Entry for** text box, enter the number of days or hours you want to pend the document.
- 4. Click **Ok** button to place the document on hold and return to the FileNet IDM Desktop for R/3 window.
- 5. If **Auto Fetch** option is checked, the next document is fetched from the Workflo Queue; otherwise, list view will be empty.

#### **Skipping Documents**

Skipping documents option can be used in case it is not required to process the document in the queue immediately and make that document go at the end of the Workflo Queue. The FileNet Queue For R/3 deletes the document from the queue, and reinserts the document at the end of the Workflo Queue.

To skip a document:

- 1. Click Queue → Skip Queue Entry menu.
- 2. If **Auto Fetch** option is checked, the next document is fetched from the Workflo Queue; otherwise, list view will be empty.

#### **Rerouting Documents**

The user can also send a document to a different queue. The FileNet Queue For R/3 deletes the document from its current queue, and inserts it in the specified queue.

To re-route a document:

 Click Queue → Reroute Queue Entry menu. The Reroute queue entry dialog box appears, as shown in the figure below:

💐 FileNet IDM Desktop For R/3 - Reroute Queue Entry		
Filter Queue I	On Document Number	
Select target queue		Ok
Library:	IMGSERV	
Workspace	WorkSpace2	Ca <u>n</u> cel
Queue:		

- 2. Enable or Disable the **Filter Queue On Document Number** check box.
- 3. If **Filter Queue On Document Number** check box is checked, only those queues of the workspace are visible that have the **DocumentNumber** field defined.
- 4. If **Filter Queue On Document Number** check box is not checked, all queues that belong to the selected Workspace are visible.
- 5. Select the destination queue to which the document is to be re-routed. The user can select a Queue from different Workspace, but not from another Library.
- 6. Click **Ok** button to reroute the document.

#### **Searching A Queue**

The Queue Search dialog box lets the user specify and execute a search on the selected Queue. Click **Queue**  $\rightarrow$  **Search** menu, to invoke the Queue Search dialog box.

🐂 FileNet IDM Desktop For R/3 - Queue Search		
FileNet IDM Desktop For R/3 - Queue Search Fetch incomplete queue entries? O Only incomplete entries No incomplete entries All entries, even if incomplete Fetch busy queue entries? Only busy entries No busy entries No busy entries	Other restrictions       Retrieve max. entries at a time       50       Maximum priority       5       Minimum priority       0	X k Cancel
C All entries, even if busy Fetch delayed queue entries? All entries, even if delayed		

The various search options in the **Queue Search** dialog box are:

• Fetch incomplete queue entries.

- Fetch busy queue entries.
- Fetch delayed queue entries.
- Retrieve max entries at a time; the default value being 50.
- Minimum and Maximum priority.
- DocumentId.

#### Linking A Document To SAP R/3 Transaction

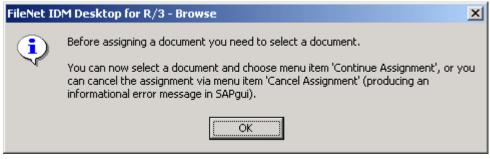
Prior to linking a document or folder to SAP R/3 transaction, a document should be selected from the list view of FileNet Queue for R/3. The selected document will be linked with SAP R/3 objects when SAPGUI sends a request. If the linking finishes without an error, the document is deleted from the Workflo Queue, and also, is removed from the list view of FileNet Queue for R/3. If an error occurs, a message is shown and the document is not deleted from the queue.

#### Advanced Interaction FileNet Queue For R/3

In some cases, a request from SAPGUI for a FileNet document id cannot be immediately satisfied. Instead of directly returning an error indication to SAP, the user is informed of the error and is given another chance to come up with a valid selection. This process is called Advanced Interaction.

Following are the examples of such cases.

**Case 1**: When a user tries to assign a document to an SAP object and the currently active View cannot provide a document id (e.g. because no document has been selected), SAPGUI displays an informational message that no documents were scanned in.



**Case 2**: If the user selects an object, but SAPGUI requests a document id from a different library. In this case, the user is informed about it, and the user is asked to make a new selection. The document id of the newly selected document is returned to SAPGUI.



## **Using FileNet Browse For R/3**

FileNet Browse for R/3 is one of the views shipped with FileNet IDM Desktop for R/3. It allows browsing through Image Services (IS) and Content Services (CS) Libraries. It also allows selecting documents and folders to link to SAP R/3 transaction. The following figure shows the user interface for FileNet Browse for R/3:



#### Menu And Command Summary

The following table briefly describes the menus and commands the FileNet Browse For R/3 adds to the standard menus of the FileNet IDM Desktop for R/3.

#### Browse Menu

The options on the Browse menu are:

Option	Function
Search	Lets you specify a search by opening the search dialog. See <u>Searching Documents</u>
Switch to View	Lets you choose whether Documents or Versions are displayed in the List View.
	See Working with document versions
Continue Assignment	Lets you continue with the current selection

Option	Function	
	after starting advanced interaction.	
	See <u>Advanced Interaction FileNet Browse</u> For R/3.	
Cancel Assignment	Lets you cancel current assignment.	
	See <u>Advanced Interaction FileNet Browse</u> For R/3.	

#### **Graphical User Interface**

The FileNet Browse for R/3 has a Graphic User Interface (GUI) similar to Microsoft Windows Explorer. In the tree-view, all the configured IS libraries are displayed. If smartIds are enabled, then all the CS libraries are also displayed.

To see the top-level folders, double- click a library or click on the expand symbol (+) next to the library. A logon dialog will appear. After the user has logged on, the right pane, which is the list view, shows the contents of the currently selected library or a folder from the tree view. After selecting a document, the document will be displayed in the FileNet IDM viewer.

The list view supports four different views, each of which can be accessed via the list view's context menu. To display index values of the documents listed change to 'View Details'. The list view will then display several columns, each column representing a document index.

FileNet IDM Desktop for R/3 uses the columns specified in Microsoft<sup>™</sup> Windows Explorer for each library.

*Tip*: To configure different columns to be displayed for a specific library, open a FileNet library in Microsoft<sup>™</sup> Windows Explorer and click *Options* in the context menu of the list view pane.

#### Linking A Document, A Version Or A Folder

Prior to linking a document, a specific version or a folder to SAP R/3 transaction, a document, version or folder should be selected. The selected object is linked to SAP. If the linking finishes without an error, the object is deselected.

If more than one document, version, or folder is selected, the top-most selected object is linked. Subsequent to successful linking, the next top-most selected object is displayed in the FileNet IDM Viewer and this object is the next object to be linked.

#### Using SmartIDs

Using FileNet IDM for R/3 configuration tool, the user can enable or disable the use of SmartID. In Configuration Tool, go To Client  $\rightarrow$ 

General section, enable or disable SmartIDs option in the Type of document ids frame as shown below.

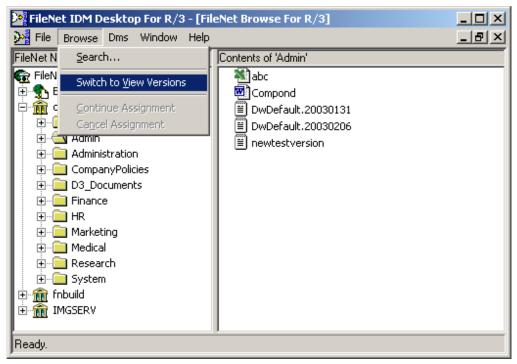
Document Warehouse for SAP	Configuration	
File Edit Help		
🖉 🗋 🔤 🗠 🖬 🔌		
Configuration	General	
<ul> <li>Common</li> <li>Client</li> <li>Miews</li> <li>Dms</li> </ul>	Active Sap System Active Sap System FN1  Type of document ids created C Conventional document ids G SmartIDs AutoLogon Enable automatic logon Automatic Logoff after Minutes Default Display Connector IDM Viewer Internet Explorer C Custom IDM Viewer Maximum Documents 10  Filter Queue Setting Filter Queue On Document Number	

**Note:** If **SmartIDs** option is not enabled, user will not be able to link to a folder. The Content Service libraries will not be displayed in FileNet Browse For R/3.

#### **Working With Document Versions**

Content Services (CS) keeps track of the versions of its documents. User can access a document, which refers to the latest version of the document, or can specify a version of the document to be accessed. DWSAP allows linking a document or a specific version of a document to an SAP R/3 transaction.

To enable version linking, switch the list view to view the versions of the documents via menu item **Browse**  $\rightarrow$  **Switch to View Versions**, as shown in the figure below:



The list view will then display one item for each version. If a version of a document is selected, the status bar indicates this by adding the version number to the document id, such as **003682577:3**.

FileNet IDM Desktop For R/3 - [FileNet Browse For R/3]				
∑∰ Eile Browse Dms Window Help			_ 8 ×	
FileNet Neighborhood	Contents of 'Admin'			
<ul> <li>FileNET Neighborhood</li> <li>Entire FileNET Network</li> <li>csdb</li> <li>Accounts</li> <li>Admin</li> <li>Administration</li> <li>CompanyPolicies</li> <li>D3_Documents</li> <li>Finance</li> <li>HR</li> <li>Marketing</li> <li>Medical</li> <li>System</li> <li>System</li> <li>finbuild</li> <li>MGSERV</li> </ul>	Item	Version ID 1 2 1 1 2 3 4		
Ready.				

To switch back to document view, click **Browse**  $\rightarrow$  **Switch to View Documents** menu. The list view will then display one item for each document.

#### Advanced Interaction FileNet Browse For R/3

Advanced Interaction as implemented in FileNet Browse For R/3. is similar to FileNet Queue For R/3.

If no document is selected when SAPGUI sends a link request, for an assignment, a message is displayed, as shown in the figure below:

FileNet ID	OM Desktop for R/3 - Browse	×
<b>i</b> )	Before assigning a document you need to select a document.	
<i>۲</i> ۳	You can now select a document and choose menu item 'Continue Assignment', or yo can cancel the assignment via menu item 'Cancel Assignment' (producing an informational error message in SAPgui).	ou
	(CK)	

FileNet IDM Desktop for R/3 waits for the user to select either of the following two options:

- Cancel Assignment: User chooses not to select anything and cancel the current assignment by selecting menu item Browse → Cancel Assignment.
- Continue Assignment: User can select a document or folder and then proceed with the current assignment by selecting the menu item **Browse** → **Continue Assignment.**

#### **Searching Documents**

A search can be performed on a library on the basis of some characteristics of the documents. To search the documents within the FileNet library:

User can perform search by selecting the search menu item through **Browse**  $\rightarrow$  **Search**. This opens the search dialog. The search dialog has the following two views:

- Advanced Query .
- Simple Query.

By default, the Advanced Query view is shown. The following screen shows the Advanced Query view:

🖹, FileNet IDM Desktop For R/3 - Search						
Criteria Results Options						
	Lool			<b>•</b>		Ne <u>w</u> Search
		,	# <u>mp</u> <b>#</b> × 1			Search Now
		Key Condition	Operator	Value		Cou <u>n</u> t Only
						Simple Query
		Property	Operator	Value	<b>_</b>	
						Close
	$\vdash$					
	$\vdash$					
	$\vdash$					
					•	
			1			Last Count:

The following screen shows the Simple Query view:

🐂 FileNet IDM Desktop For R/3 - Search		×
Document ID:	Maximum returned:	Ne <u>w</u> Search
Document Class:		Search Now
Added between:	Look in:	Count Only
	Browse	Close
		Last Count:

#### Specify A Search

In both the search views, choose the appropriate library from the drop down field. After logging on to the library further search criteria should be entered.

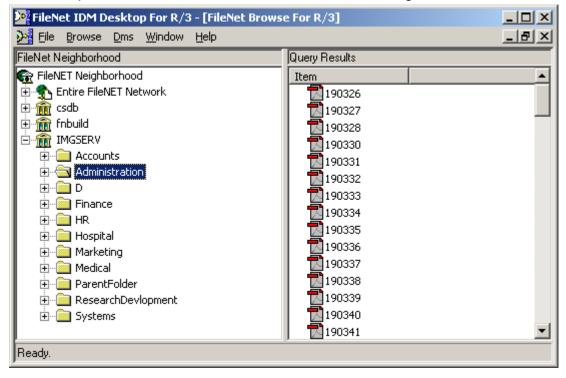
#### **Count The Number Of Documents Matching Search Criteria**

To count the number of documents that match the search criteria, click **Count Only** button after specifying the search criteria. The number of documents that match the search criteria are counted and the result is displayed in the **Last Count** box in lower right corner.

🐂 FileNet IDM Desktop For R/3 - Search		×
D <u>o</u> cument ID:	Maximum returned:	
	100	Ne <u>w</u> Search
Document Class:		
SAPALFDC		Search Now
Added between:	Look in:	Cou <u>n</u> t Only
	m IMGSERV	Advanced Query
and		Advanced Query
	Browse  Include subfolders	<u>C</u> lose
		Last Count:

#### **Display A List Of Documents Matching The Search Criteria**

To list all documents matching search criteria, click the **Search Now** button. The search dialog closes and the result is listed in the list-view pane of FileNet Browse For R/3, as shown in the figure below:



#### Specify A New Search

To clear the existing search criteria and specify a new search, click the **New Search** button. The search dialog is cleared of the search criteria and new criteria can be specified.

## DMS Enhancements To FileNet Browse for R/3.

DWSAP provides DMS components for the following DMS functionality:

- Creating and modifying DIRs in SAP R/3.
- Linking objects from FileNet repositories such as document, specific version of a document, folder, and stored search to DIRs.
- Accessing information of SAP R/3 master records.
- Functions for to searching and selecting SAP R/3 master records.

#### **DMS Menu**

Option	Function	
Publish document to SAP R/3	Lets you create new DIR in SAP and link it to the selected FileNet object.	
	See Publish Document to SAP R/3.	
Publish current document version to SAP R/3	Lets you create a new version of a DIR in SAP R/3 if <b>View versions</b> is enabled. In case, <b>View documents</b> is enabled, then this performs the same function as publish document to SAP R/3.	
	See <u>Publish current document version to</u> <u>SAP R/3</u> .	
Change Document status in SAP R/3	Lets you change the status of the DIR linked to selected FileNet object.	
	See Change document status in SAP R/3	
Link to Material Master	Lets you search for material master records in SAP R/3 and link the selected material master to the selected FileNet object.	
	See Link to Material Master.	
Display Material Master	Displays the material master records linked to the selected FileNet object.	
	See Display Material Master	
Unlink from SAP R/3 objects	Checks for all the DIRs linked to the selected FileNet object and delete all the links. See Unlink from SAP R/3 objects	
Switch SAP R/3 system	Allows the user to logon to a different SAP system. See <u>Switch SAP R/3 System</u>	

#### **Using The DMS Components**

FileNet Browse for R/3 has been enhanced, with a new DMS menu that allows the users to access the DMS functionality. This module allows

selecting a FileNet object and linking it to a DIR and a material master record in SAP. The following screen shows the DMS menu:

FileNet IDM De	esktop For R/3 - [FileNet Browse For R/3]	
🥦 File Browse	Dms Window Help	_ <u>-</u> 2 ×
FileNet Neighborho	Publish document to SAP R/3	
🖻 🏦 IMGSERV	Publish current document version to SAP R/3	
🗄 💼 Accour	Change document status in SAP R/3	
	Link to Material Master	
Ready.		

The DMS menu offers the following functions:

- Publish document to SAP R/3.
- Publish current document version to SAP R/3.
- Change document status in SAP R/3.
- Link to Material Master.
- Display Material Master.
- Unlink from SAP R/3 objects.
- Switch SAP R/3 System.

#### Publish Document To SAP R/3

The publish document to SAP R/3 object links the selected FileNet object to a SAP DIR object. In order to execute this function, follow the steps below:

Click on the menu item DMS → Publish document to SAP R/3. In case in the configuration tool the option Prompt for DIR Status and Description is enabled in Client → DMS, a dialog box is popped. If the option is disabled in Configuration tool, then skip to step4.

💐 Update DIR Descrip	×	
DIR Description	Default DIR	Ok
Initial Status	FR Released	Cancel

2. The dialog box has the default values same as that configured using the configuration tool. Enter the value for DIR description and select the status of DIR to be created.

- 3. If DIR with the default status and description is to be created, then press **Cancel**. Otherwise, if the DIR is to be created with the new parameters, then press **Ok**.
- 4. A new DIR is created and is displayed in the status bar as shown below.

ጅ FileNet IDM Desktop For R/3 -	[FileNet Browse For R/3]
<mark>≫</mark> Eile Browse <u>D</u> ms <u>W</u> indow <u>H</u>	elp _ 🗗 🗙
FileNet Neighborhood	Contents of 'Accounts'
	190912
🗄 🔄 Accounts	<b>**</b> 190913
庄 📄 Administration	<b>**</b> 191650
🗄 💼 Finance	
📄 🕀 🛄 HR	
🗄 🖻 Hospital	
🗄 💼 Marketing	
🗄 🖷 🧰 Medical	
🗄 🖳 📄 ParentFolder	
🗄 💼 ResearchDevlopment	
🗄 💼 Systems	
DIR DRW-0000000000000010000002	113-000-00 created.

### Publish Current Document Version To SAP R/3

The behavior of this function depends on whether display of versions is enabled or not. The display of versions can be enabled through the menu item **Browse**  $\rightarrow$  **Display versions**. To disable display of versions for a document, this option should be set to display documents. This can be achieved through the menu item **Browse**  $\rightarrow$  **Display Documents**. In case version display is disabled and view is set to display documents, then publish current document version works in the same fashion as Publish document to SAP R/3. In case, versions are displayed, then the system checks whether any former version of the selected document was linked to a DIR. If a DIR linked with a former version is found, then the version of the DIR is incremented by one and linked to the selected version object.

In order to publish current document version to SAP R/3, follow the steps below:

 Click on the menu item DMS → Publish current document version to SAP R/3. In case in the configuration tool the option Prompt for DIR Status and Description is enabled in Client → DMS, a dialog box is popped. If the option is disabled in Configuration tool, then skip to step4.

🖷. Update DIR Descrij	ption and Initial Status	×
DIR Description	Default DIR	Ok
Initial Status	FR Released	Cancel

- 2. The dialog box has the default values same as that configured. Enter the value for DIR description and select the status of DIR to be created.
- 3. If DIR with the default status and description is to be created, then press cancel. Otherwise, if the DIR is to be created with the new parameters, then press **Ok**.
- 4. A new version for a DIR is created and is displayed in the status bar as shown below.

ጅ FileNet IDM Desktop For R/3 - [FileNet Browse For R/3]				
🔀 Eile Browse Dms Window Help			_ 8 ×	
FileNet Neighborhood  FileNET Neighborhood  FileNET Neighborhood  Accounts  Accounts  Admin  Administration  CompanyPolicies  Admin  Administration  Administr	Contents of 'Admin' Item ▲ abc ▲ abc ▲ D3Document ■ D3Document ■ D3Document ■ D3Document ■ D3Document ■ Test ■ Test ■ Test ■ Test ■ Test	Version ID 2 1 1 3 2 1 3 2 1		

#### Change Document Status In SAP R/3

This function allows changing the status of DIRs linked to the selected FileNet object. To execute this function, follow the steps below:

 Click on the menu item DMS → Change document status in SAP R/3. A dialog box is displayed which shows all the DIRs linked to selected FileNet object along with its current status and list of new statuses as shown below:

📚 Change Document Status		×
Select SAP R/3 Document	Current Status	
DRW-000000000000010000001927-000-00	FR Released	
DRW-000000000000000000000000000000000000	, New Status	
	AR Archived IA In work PR Checked SP Locked	▲ ▼
	<u>O</u> K Cancel	]

- 2. In the above dialog, select the DIR for which status is to be changed.
- 3. On selecting a DIR, the current status and new status are displayed for the selected DIR.
- 4. Select the new status for the selected DIR and press **Ok**. This changes the status of the DIR to the selected status.

### Link To Material Master

This function allows searching for material master records and linking the selected material master to the selected FileNet object. To execute this function, follow the steps below:

 Click on the menu item DMS → Link to Material Master In case in the configuration tool the option Prompt for DIR Status and Description is enabled in Client → DMS, a dialog box is popped. If the option is disabled in Configuration tool, then skip to step 3.

💐 Update DIR Descr	×	
DIR Description	Default DIR	Ok
Initial Status	FR Released	Cancel

2. If DIR with the default status and description is to be created, then press **Cancel**. Otherwise, if the DIR is to be created with the new parameters, then press **Ok**. The following screen is displayed:

Search criteria	
Material ID I Material description	Search
Material ID Material Description	
	OK Cancel

3. In the above dialog, enter the material Id or material description as search criteria and press **search** button. A list of available material master records is displayed as shown:

D Search for Material Ma	ster	×
Search criteria Material ID Material description	m-0*	Search
Material ID M-01 M-02 M-03 M-04 M-05 M-05 M-06 M-07 M-08 M-09	Material Description           Sunny Sunny 01 - Test           Sunny Xa1           Sunny Tetral3           Sunny Extreme Test           Flatscreen LE 50 P           Flatscreen MS 1460 P           Flatscreen LE 64P           Flatscreen MS 1575P           Flatscreen MS 1585	OK Cancel

4. Select a material master record that is to be linked and click **Ok** to link this master record to the selected FileNet Object.

5. A new DIR is created and is displayed in the status bar as shown below.

🎦 FileNet IDM Desktop For R/3 - [FileNet Browse For R/3]			
🧏 Eile Browse Dms Window Help		_ 8 ×	
FileNet Neighborhood	Contents of 'ResearchDevlopment'		
🖻 🏦 csdb 📃 🔺	190916		
🗄 🕀 🏦 fnbuild	190918		
	190920		
E Accounts			
· → Administration			
I III III III III III III III III III			
· Hospital			
⊕ Marketing     ⊕ Medical			
DIR DRW-000000000000000000000000000000000000			

### **Display Material Master**

This function searches for all the material masters linked to the selected FileNet object. In order to execute this function, follow the steps below:

 Click on the menu item DMS → Display Material Master. This searches for all the material masters linked to the selected FileNet object. If the selected FileNet object is linked to more than one material master, a dialog is displayed showing all the linked material master.

🔑 Select Material Master	×
<mark>M-01</mark> M-05 M-09 MSA-1003	
<u>O</u> K Cancel	

 In the above dialog, select the material Id for which details are to be displayed and press Ok. This displays the detailed information for Material Id in a new dialog box as shown below:

M	laterial Master				×
	aterial faterial MSA-1003	Slid	le film XL 100 ASA 24 exposure	is b/w	Close
_ Ge	eneral Data				
M	ldse Category	050	Division	16	
0	Id Material No.		Product Hierachy	001500010000000100	
U	Init of measure	ST	-		
L	ab./Office		-		

### Unlink From SAP R/3 Object

This function checks whether the selected FileNet object is linked to any DIRs and removes all links. To execute this function, follow the steps below:

 Click on the menu item DMS → Unlink from SAP R/3 objects. The following message box is displayed which asks for user confirmation for deleting all links.

IdmForR3	Browse 🔀
?	The FileNet Object '190918' is linked to '27' SAP R/3 Object(s).Do you want to Delete all links?
	<u>Y</u> es <u>N</u> o
0	Duran Man to provide all the DIDs lighted to the socie start Citablet

2. Press **Yes** to remove all the DIRs linked to the selected FileNet object. The status of the links being removed is displayed in the status bar.

### Switch SAP R/3 System

If this function is invoked, the following logon screen is displayed and the user is able to logon to a different SAP system. All used SAP systems need to be configured using the configuration tool.

si	AP Logon at	Fn1	×
	-User Data-		ОК
	Clien <u>t</u>	800	<u>C</u> ancel
	<u>U</u> ser	BASIS	
	<u>P</u> assword		<u>S</u> ystem
	<u>L</u> anguage	EN	
			Pass <u>w</u> ord

## **Using FileNet Capture For R/3**

FileNet Capture for R/3 is one of the views shipped with FileNet IDM Desktop for R/3. It allows scanning and committing of paper documents and linking these paper documents to transactions in SAP R/3.

Using FileNet Capture for R/3, paper sheets are scanned and the scanned pages are assembled to documents. These documents can be committed to Image Services (IS) libraries. The committed document can then be linked to an SAP transaction. It is not possible to commit or assign more than one document in one step. The following figure shows the user interface for FileNet Capture for R/3:

🍱 FileNet IDM Desktop For R/3 - [File	Net Capture for R/3]	<u>- 🗆 ×</u>
🧏 Eile ⊆apture <u>W</u> indow <u>H</u> elp		<u>- 8 ×</u>
FileNET Neighborhood	Scanned images	
Image: FileNET Neighborhood         Image: FileNET Network         Image: FileNetwork         Image: FileNetwork	1- Page 184051	
Selected item: 'Page 184051'		

## Menu And Command Summary

The following table briefly describes the menus and commands the FileNet Capture for R/3 adds to the standard menus of the FileNet IDM Desktop for R/3.

### **Capture Menu**

Option	Function	
Scan	Lets you scan in pages. See <u>Scanning a</u> <u>document</u> .	
Cancel session	Deletes the scanned in pages and starts a new session.	
Continue Assignment	Lets you continue with the current selection after starting advanced interaction. See <u>Advanced Interaction</u> <u>FileNet Capture For R/3</u> .	
Cancel Assignment	Lets you cancel advanced interaction. See <u>Advanced Interaction FileNet</u> <u>Capture For R/3</u> .	
Options	Opens the options dialog. See <u>Configuring FileNet Capture for R/3</u> .	

The options on the Capture menu are:

## Selecting A Library And Logging On

The Graphic User Interface (GUI) of FileNet Capture For R/3 allows to select the IS Library to which a document has to be scanned and committed. Before scanning any paper documents, the user should select and logon to a library by selecting a library from the tree view. If the user has not logged in then, a logon dialog appears for login credentials.

## **Configuring FileNet Capture for R/3**

FileNet Capture for R/3 needs to be configured before it can be used. To configure FileNet Capture for R/3, click **Capture**  $\rightarrow$  **Options** menu as shown.

PileNe	et IDM Desktop For R/3 -	- [FileNet Capture for R/3]
🛃 Eile	<u>Capture</u> <u>Window</u> <u>H</u> elp	_ 8 >
FileNET	<u>S</u> can	
🗄 🚯 E	Cancel session	
📄 🛱 I	Continue assignment	
	Cancel assignment	
+… ÷	Options	
	Finance	
÷[	HR	
÷	Hospital	
	Marketing	
. <u>+</u> …	Medical	
÷	ParentFolder	
÷…[	📄 ResearchDevlopment	
÷	📄 Systems	
Ready.		

The options dialog is displayed as shown below.

💐 Library settings		×
- Configuration for: 'IMGSERV'		Ok
Current settings	Setting_IMG	Causal
SAPType default value	FAX	Cancel

In the options dialog, the following settings need to be configured:

- Current Settings: refers to the Capture settings to be used for the selected library. The Capture settings specify the document class to which the document is to be committed. It also specifies the settings for scanner, assembly, indexing and other capture components. For information on configuring settings in Capture, refer to Installation & Configuration Manual -Client.
- SapType default value: refers to the default value of the document index SapType. For scanned documents, this is usually FAX.

**Note:** The document class must contain an index SAPType. For information on DWSAP conform document classes, refer to FileNet DWSAP Installation & Configuration Manual – Server.

### Scanning A Document

To start scanning after logging on to a library, click **Capture**  $\rightarrow$  **Scan** menu, as shown in the figure below.

⋗ FileNe	et IDM Deskl	top For R/	3 - [File	eNet Capture for R/3]	<u> </u>
🛃 Eile	<u>Capture</u> <u>W</u> i	ndow <u>H</u> el			_ 8 ×
FileNET 1	<u>S</u> can				
Ē. 🔁 E	Cancel ses	sion	_		
🖹 🖻 🏦 I	Continue a	ssignment			
	Cancel ass	ignment			
	Options				
÷[	Finance				
+	📄 HR 📄 Hospital				
÷	Marketing				
÷	Medical				
<u></u>	ParentFolde				
+	📄 ResearchDe 📄 Systems	evlopment			
	_ byscoms		•		
Ready.					

**Note:** The scan session is not initialized, when the user double-clicks a library. User has to single click on the label of the library, or logging on via the library's context menu to select the library. The **Scan** menu item will be disabled as long as the scan session is not initialized. After having started scanning the user cannot change the current library, until the scan session is cancelled or the document has been committed.

Depending on the scanner and driver used, the user will be prompted for various actions, if necessary. For example, user might be asked to insert paper or to press a specific button on the scanner. The scanned pages are displayed in the list view of FileNet Capture For R/3. When the user selects a page in the list view, it is displayed in the FileNet IDM Viewer.

### **Different Views In The List View**

Scanned pages are displayed in the list view of FileNet Capture for R/3. The user can change the way the pages are displayed in the list view using the context menu item **View** of the list view. The different options available with this menu item are:

- Thumbnail: The pages are displayed as thumbnails
- Small Icon: Each page is represented by a symbol and the page's name
- List : The pages are displayed in a list format.
- Details: The pages are displayed in a list format, with additional information about each page in several columns.

FileNet IDM Desktop For R/3 - [File	eNet Capture for R/3]	
ओ Eile ⊆apture Window Help		_ 8 ×
FileNET Neighborhood	Scanned images	
<ul> <li>FileNET Neighborhood</li> <li> Entire FileNET Network </li> <li> IMGSERV </li> <li> Accounts </li> <li> Admin </li> <li> Marketing </li> <li> Medical</li></ul>	1- Page 18     Copy item(s)     Paste item(s)     Delete item(s)     Cut item(s)     View	Thumbnails Small icons <mark>✓ List</mark> Details
Selected item: 'Page 184051'		

The following actions are available for documents displayed in the list view:

- Delete: The selected pages are deleted and the user cannot revert back deletion.
- Copy: The selected pages are copied to the clipboard.
- Cut: The selected pages are moved from the list view to the clipboard.
- Insert: The contents of the clipboard are appended to the list of pages in the list view. User can change the sequence of pages within the document by dragging and dropping the pages in the list view pane. The dragged page is inserted right after the page dropped to.

## Linking A Document

Prior to linking a document or folder to an SAP transaction, the user should scan at least one page. All the pages of the current scan session are then assembled into one document. This document is committed to the selected library. This document can be linked to an SAP R/3 transaction

If the linking finishes without any error, the scan session is closed and the list view is cleared. If any error occurs, the user is informed and the scanned pages remain in their batch. The list view is not cleared.

## Advanced Interaction FileNet Capture For R/3

Advanced Interaction as implemented in FileNet Capture For R/3. is similar to FileNet Queue For R/3.

# **3** Document And Data Archiving

FileNet DWSAP application archives documents generated by SAP, to FileNet. These documents are called outgoing documents. This chapter describes the synchronous and asynchronous archiving of outgoing documents generated by SAP.

# **Archiving Modes**

DWSAP supports both synchronous and asynchronous archiving of outgoing documents generated by SAP R/3.

- **Synchronous** archiving refers to the process in which an archiving request is sent directly from SAP to DWSAP server components which process the request and sends the response back to SAP. SAP waits for the response from DWSAP. If the request is processes successfully, the FileNet document Id is returned in an acknowledgement message.
- **Asynchronous** archiving refers to the process in which the archiving requests are sent to DWSAP server components which sends an acknowledgement immediately. The request is processed later and the FileNet document Id is returned in a separate confirmation message.

# **Archiving Outgoing Documents**

While configuring output, the user must first verify that the definitions exist in the Global Document Type list and in the Links list. For information on these configuration steps, refer to FileNet Installation and Configuration Manual –Server.

The following tables list examples of the documented output types that SAP indicates are achievable as of the 4.6c release. For details, refer to the SAP documentation.

Description	Document Type	SAP Business Object Type
Outline agreement	MEOAGREEM	EKKO

Material Management Purchasing Documents (MM - PUR)

Purchase order (PO)	MEOORDER	EKKO
Request for quotation (RFQ)	MEOREQUOTE	EKKO
Delivery schedule (issued under a scheduling agreement)	MEOSCHEDUL	ЕККО
Reminder/expediter re: ordered goods	MEOREMIND	ЕККО
Acknowledgment expediter	MEOACKNOWL	EKKO

## Sales and Distribution (SD)

Description	Document Type	SAP Business Object Type
Sales activities	SDOACTIV	VBKA
Quotation	SDOQUOTAT	VBAK
Order confirmation	SDOORDER	VBAK
Delivery schedule	SDODELPLAN	VBAK
Picking list	SDOPICKLIS	LIKP
CMR Bill of lading	SDOCMRBOL	VTTK
Foreign trade data	Rebate credit memo	VTTK
Delivery note	SDODELNOTE	LIKP
Invoice (cash sale)	SDOINVOICE	VBAK
Invoice list	SDOINVLIST	VBRK
Rebate credit memo	SDOBONUS	VBAK

### Plant Maintenance (PM)

Description	Document Type	SAP Business Object Type
Maintenance notification	PMONOTFPAP	BUS2038
Service notification	PMOSERVPAP	BUS2080
Maintenance order	PMOWORKPAP	BUS2007

Quality Management (QM)

Description	Document Type	SAP Business Object Type
Complaints field by customers	QMOLETTER1	BUS2078
Complaints against vendors	QMOLETTER2	BUS2078
Internal problem notifications	QMOLETTER3	BUS2078

## Module Specific Settings

Once the Global Document Class is created, it must be assigned to the Output Type. Configuration steps for each module can vary. For more information, refer to SAP documentation.

**Note:** SAP documentation provides valuable information about optical archiving of incoming and outgoing documents, data, and print lists.

# **Archiving Print Lists**

SAP R/3 has the ability to create a Printlist from SAP R/3 database. SAP R/3 creates this printlist and stores it in a temporary location. This printlist is stored onto FileNet IS via DWSAP. Follow the procedure below to generate a printlist and send the archiving request to DWSAP:

1. Start SAPGUI, logon to an SAP System and go to transaction sa38.

<u>P</u> rogram <u>B</u>	<u>E</u> dit <u>G</u> oto <u>U</u> tilities E <u>n</u> viron	iment System <u>H</u> elp	
<b>Ø</b>	1 I I	I 😋 🚱 I 📮 🛗 🖓 I 🏝 🐿 🕰 🕄 📓	8 🚬 I 🕲 🖪
ABAP Ed	litor: Initial Screen		
64 🔭 😔	🕂 🌬 🚺 🕇 🛱 🕪	🕒 Debugging 🕒 Execute with variant 🖄	Variants
Dragram	RFBELJ00		
Program	REBELJUU	Create	
Subobjects			
Source co	de		
◯ Variants			
<ul> <li>Attributes</li> </ul>			
<ul> <li>Document</li> </ul>			
🔘 Text eleme	ents		
		_	
Sc Displ	lay 🥖 Change		

2. Use the program name as **RFBELJ00** and **Execute** or press **F8** key. The following screen is displayed:

	<u>H</u> elp	SAL	
Image: A state of the state	4 📙   😋 🙆 🚷	日日日日  2019	
Compact Document Jo	umal		
😔 🚸 🔁 🔳 🖪			
Company code		to	1 1 1
Document number		to	
Fiscal year		to	-
General selections			
Posting date	01.10.1999	to 10,10,1999	<b>_</b>
Reference number	01.10.1000	to	
Technical settings			
Read items sequentially			
Data sources			
🕒 🛛 Choose data sources			
Data source(s)	Database		
Archive selection			
Further selections			
Standard documents			
Parked documents			
Statistical documents			
Sample documents			
Recurring entry original docs			
Output control			
Only display totals			
		D SA38 🖭 fnetsa	p OVR

**Note:** RFBELJ00 is one of the many reports in Financial Accounting (FI) supported by ArchiveLink interface. For details of different object types and document types supported by ArchiveLink, refer to the SAP R/3 online documentation.

- 3. Enter the selection criteria. Generate the printlist by pressing **Execute** or **F8** key.
- 4. A Compound Document Journal is displayed. This is the content of the Printlist.

**Note:** There are two ways to generate printlists – in the foreground or in the background. Foreground generated printlists do not create an Index file that gets stored when it is archived. Background generated printlists create an Index file that is stored when it is archived. Printlists searching can only be performed on printlists that were generated in the background. To create and archive the printlists in the background, the **Optical Archiving** box must be checked.

⊡ List Edit <u>G</u> oto System <u>H</u> elp		SAP
C Print	- 🕒 I 🕸 🚱 I 📮 🛗 🛗 I 🏵 🖸 🕰 I 🗟	K MB 🛛 🛁
C Save Exit Shift+F3 nt Jou	mai	
IDES AG Frankfurt	Compact Document Journal	<b>▲</b>
Document header	Subledger accounts	Taxes
CoCd Document Do Posting number ty date	A Account Postg Open item amount T number ky L in DEM (FC)	Tx Tax on sls/pur. cd amount in DEM
1000 1600000723 DA 01.10.1999 Reference: 000000132000MVS0	D 0000003450 09J 534.75	A1 900.00- A1 69.75- A1 42.75-
1000 1600000724 DA 01.10.1999 Reference: 000000132000MVS0	D 0000003453 09J 414.00	A1 909.00- A1 54.00- A1 7.50-
1000 1600000725 DA 01.10.1999 Reference: 000000132000MVS0		A1 975.00- A1 60.00-
	D	SA38 🖻 fnetsap OVR

5. Archive the displayed printlist by choosing the command List → Print under the list option. The following screen is displayed:

<i>⊆</i> 	
8 🔹 🔹 🖓 🔤 🖉 🚱 😫 🖓 🖓 🔤 🖓 🖓 🔤	
Print Screen List	
Continue 🛐 User-specific print parameters	
Output device  Printer 3 Number of copies 1	▲ ▼
Number of pages          • Print all       • Print from page       • To       • To	
Spool request Name RFBEL J00_BAS Title Authorization	
Spool options         Print immediately         Delete after output         New spool request         Print priority         5 Medium         Retention period         8 Day(s)         Archiving mode	
	SA38 🖻 fnetsap INS

- 6. Enter the following parameters for the print job and press the **Print** or **Enter** button.
  - Output Device: Printer defined on the SAP system (the ARCH output device does not display in this list).
  - Title: Text description of the print job.
  - Print immediately: Select this option to force immediate printing.
  - Delete After Print: Select this option to delete the document from the work list after archiving/printing.
  - Archiving Mode: Determines the output of a Printlist. It can have values Archive Only, Print Only and Print and Archive.

The following screen is displayed:

🖙 Archive parameters				$\mathbf{X}$
Obj. type		<b>a</b>		
Doc.type		Incoming invoice		
Additional information	in /			
Information	RFBELJ00		R	
Text				
Date	18.02.2003			
User	BASIS			
OutputDevice	BT Printer			
Format	X_65_132			
				••
Archive 🔀				

- 7. Complete the following parameters:
  - Object Type: Object Type defined in SAP R/3. The object type determines the link table where the printlist is indexed and determines the archive where the document is stored.
  - Document Type: Type of document defined in SAP R/3. The object type determines the link table where the printlist is indexed and determines the archive where the document is stored.
  - Information: Any information that can be used to identify the Printlist easily.
  - Text: Text description of the printlist. This description displays as an attribute on the resulting output request.
- 8. Press the **Archive** or **Enter** button. The following screen is displayed:

🖙 Start Time	
Immediate Date/Time After job	After event At operation mode >>
Date/Time	
After job	At operation mode
After event	
Check 📙 🗶	

- 9. Enter the start time for the background job. Press the **Immediate** and **Save** buttons to execute the job immediately. This will start the process of generating the output file.
- 10. A message is displayed in the status line indicating that a background job has been generated.
- Depending on the size of the Printlist, generating the printlist can take some time. The status of the job can be checked by choosing **Own** jobs from the **System** menu.
- 12. Asynchronous archiving, which is used for archiving Printlists, is usually scheduled only once a day in the off-peak operating hours. In order to archive the printlist immediately, an archive request must be triggered.
- 13. Go to transaction **oam1**. The following screen is displayed:

☑ Monitor Edit Goto Settings Environment System	
🖉 🖸 🗧 🖾 🖉	
SAP ArchiveLink: Monitor	
<b>3 B</b>	
Asynchronous requests Consider when refreshing Consider when refreshing 44 Requests via tRFC Consider when refreshing	Background processing         Image: Consider when refreshing         Image: Consider when refreshing
Requests  251018    Queues  Image: Consider when refreshing	Bar codes Salader ✓ Consider when refreshing
Confirmation         7         92         10           Confirmation         7         92         84           Confirmation         7         92         84           Confirmation         7         92         84	Green     1       Green     1       Logging     1
Connection test Consider when refreshing	Consider when refreshing
	D FN1 (2) (800) 🛅 fnetsap OVR 🦯

14. In the **Queues Group** Box, click the **Storage** button. A list of open requests referenced by spool request number will be displayed.

⊡ ListEdit (	∋oto <u>S</u> ettin	igs Syste	rm <u>H</u> elp	SAP
<b>©</b>		1	- E C C C 😡 E H H E T M	
Queue: Co	ontent s	erver (	CARA)	
o 🔍 🕄	1 🖬 📥	78	3 8 7 7 8 9 1	
Unit	Log	Version	ReferenceFlag	-
4	DWRFC	0031	0000025004_00001	
5	DWRFC	0031	0000025005_00001	
6	DWRFC	0031	0000025101_00001	
7	DWRFC	0031	0000025601_00001	
8	DWDP	0045	0000025603_00001	
9	DWRFC	0031	0000025608_00001	
_ 10	ALVIEWER	0031	0000024912_00001	
_ 11	ALVIEWER	0031	0000024920_00001	
12	ALVIEWER	0031	0000024921_00001	
13	DWRFC	0031	0000024909_00001	
14	DWRFC	0031	0000024910_00001	
_ 15	DWRFC	0031	0000025041_00001	
16	ALVIEWER	0031	0000025300_00001	
17	DWRFC	0031	0000025501_00001	
L 18	DWRFC	0031	0000025503_00001	
19	DWRFC	0031	0000025507_00001	
20	DWRFC	0031	0000025609_00001	
21	DWHTTP	0045	0000025710_00001	
22	DWHTTP	0045	0000025711_00001	
23	DWHTTP	0045	0000025712_00001	
24	ALVIEWER	0031	0000025700_00001	
				<b></b>
				-
			FN1 (2) (800)	🖻 fnetsap OVR 🃈

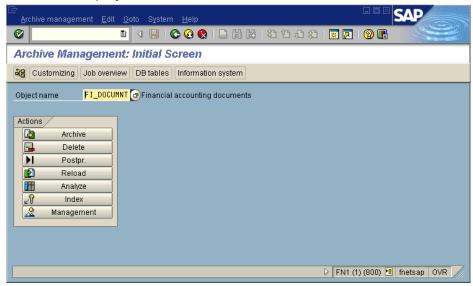
15. Double click on the spool request number representing the newly created printlist. Press the **Execute** button or **F8** to start the archiving process. The request is sent to DWSAP for processing.

# **Data Archiving**

The data archiving process is used to reduce the size of the SAP R/3 database primarily for performance reasons. SAP R/3 has the ability to create a data archive file that contains data records from tables. This data archive file is created and stored at a temporary location. SAP R/3 does not have a permanent storage archiving system to store the data archive file that it creates. The data archive files created are stored on FileNet Image Services (IS) via DWSAP. After the data archive file has been created, data is deleted from SAP R/3 database. Then, data archive is stored or archived onto FileNet IS via DWSAP. The temporary data archive file is deleted after the archival is complete.

Follow the steps listed below to create a data file and archive it to FileNet IS:

 Go to archive management screen through Tools → Administration → Administration → Archiving (Transaction sara). The following screen is displayed:



2. Enter the archive object name as **FI\_DOCUMNT** and press enter. The following screen is displayed:

Archive management Edit Goto System Help
Archive Management: Initial Screen
Customizing Job overview DB tables Information system
Object name FI_DOCUMNT @Financial accounting documents
Actions /
Actions
Postpr.
Reload Reload
Analyze Analyze
Index Index
Management
SARA 🖻 fnetsap OVR 🦯

**Note:** Archive objects are the core of SAP data archiving. It specifies which data is archived and how it is archived. It also describes which database objects must be handled together as a single business object and which must be interpreted independently.

3. Click Archive. The following screen is displayed:

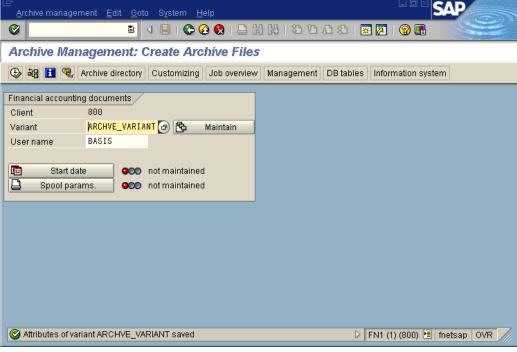
Image: Edit Goto System Help Image: Edit Goto System Help	SAP
Archive Management: Create Archive Files	
🕒 🍇 🖪 🥵 Archive directory Customizing Job overview Mar	agement DB tables
Financial accounting documents         Client       800         Variant       ARCHIV_VARIANT (a) (b) (b) (c) (c) (c) (c) (c) (c) (c) (c) (c) (c	
Image: Start date       Image: Start date         Image: Spool params.       Image: Spool params.         Image: Spool params.       Image: Spool params.	
SARA L	🗄 fnetsap OVR 🥖

4. Enter the name of a variant to be created. This variant is used to specify the values of financial documents that will be archived. Click **Maintain** button. The following screen is displayed:

⊡ 			
🕑 🔳 🛛 🖡	]   😋 😧 🔕   🗅 [	3003(3)(3)(3)(3)	
Maintain Variant: Report S	APF048, Varian	t ARCHVE_VAP	RIANT
🚸 Variant attributes 📑 📘			
Archive description (note)			
Archiving quantity selection			
Company codes	1000	to 1000	_ <b>→</b>
Document numbers	100102211	to 100102300	<b>-</b>
Document type	AB	to CI	<b>-</b>
Fiscal year/period	1991 1	to 1991 12	
Min.no.of days in the system			
Key date	17.02.2003		
Program control			
Testrun			
✓ Detail log			
Only incorrect docs in det.log			
			🕨 FN1 (1) (800) 🖻 fnetsap OVR

5. On the screen for variant maintenance, enter the selection criteria to identify the financial documents that need to be archived. Press **Save** 

to save the variant. Make sure that the check box **Test Run** is not selected. If it is selected, then the data will not be archived and just a test run would be executed. After saving the variant return back to Archive management screen.



6. On the archive management screen, click the **Start date** button. The following screen is displayed:

🖙 Start Time					$\times$
Immediate	Date/Time	After job	After event	At operation mode	>>
Date/Time					
After job			At operation	n mode	
After event					
🖌 Check	X				

 Click Immediate and then Save the settings. On the archive management screen click Spool params button. The following screen is displayed:

Output device	BT Printer	
Number of copies	1	
Number of pages /	/	
Print all		
O Print from page	je To	
Spool request		
Name	SAPF048BAS	
Title	Financial accounting documents	
Authorization		
<ul> <li>Print immediat</li> <li>Delete after ou</li> <li>New spool req</li> <li>Print priority</li> <li>Retention period</li> <li>Archiving mode</li> </ul>	tput D SAP cover page uest D OperSys cover pa 5 Medium Selection cover p	
Print settings		
Lines	65	
Columns	132 Without control chars	
Format	X_65_132 ABAP list: At least 65 rows by 132 colu	Jm

- 8. Maintain spool settings and select do not output immediately.
- 9. Press **Execute** or **F8**. Go to Job overview **sm37**. The following screen is displayed .After a while, three archiving jobs are displayed and have a status of finished.

⊡ JobEditOoto E <u>x</u> tras <u>S</u> ettings Sys	tem	<u>H</u> elp				SAP		
🕑 🚺 🖣 🔛 I	C	🙆 🚷 I 🖨 🛗	128   名)	1 🕄 🖧 🖓	🕱   🛛			
Job Overview								
🛐 🍂 Release 👜 🗃 🛒 Spool 🗟	Jo	b log 🦻 Step	🙏  🕎	Application se	rvers 🏂 🔁	7 <b>4</b> 7		
JobName	Ln	Job CreatedBy	Status	Start date	Start time	Duration(sec.)	De	H
ARV_FI_DOCUMNT_DEL20030217170630				17.02.2003		14		
ARV_FI_DOCUMNT_SUB20030217170628 ARV FI DOCUMNT WRI20030217170628		BASIS BASIS		17.02.2003 17.02.2003		0		
	20	DA313	rmisneu	17.02.2003	17.00.20	2		
*Summary						16		
						•		
								▼
	_						• •	
				D	FN1 (1) (80	0) 🖻 fnetsap 🛛 O\	'R	///.

10. On archive management screen, click **Management** that brings Archive Session Overview screen:

Archive management Edit Goto System Help	
2 4 🕒 6 6 6 6 1 📮 前 (法 ) 2 1 🖉 🖉 📳	
Archive Management: Archiving Session Overview	
🕱 🎮 🖷 🛐 🗞 By Spool list Archive system Customizing Job overview DB tables Information system	
	F
- CE 000892 02.12.2002 - CE 000848 21.10.2002	
- 🔤 000796 27.08.2002 Test for ServerLink4.1	
000754 26.08.2002 Test for ServerLink4.1	
000742 19.08.2002 Test for Data Archiving 000735 14.08.2002 Test for ServerLink4.1	
- 1000/33 14.00.2002 Test Tul ServerLink4.1	
- COMPlete archiving sessions	
- 🖬 000922 17.02.2003 Test for Data Archiving	
000921 17.02.2003	
- 000920 17.02.2003	
000919 17.02.2003	
└─ 000917 17.02.2003 └─ ─ 000916 17.02.2003	
000914 17.02.2003	
a 000913 17.02.2003 Test for Data Archiving	
000913-001FI_DOCUMNT ©©© Deletion completed	
- 🚥 000012 17.02.2003 Test for Data Archiving	
000910 17.02.2003 Test for Data Archiving	
000909 17.02.2003 Test for Data Archiving	
000908 17.02.2003 Test for Data Archiving	
- 🚾 900907 17.02.2003 Test for Data Archiving - 🚾 900906 17.02.2003 Test for Data Archiving	
000904 17.02.2003 This is a test variant	
- 🗖 000903 17.02.2003 This is a test variant	
- 🗖 000902 17.02.2003 This is a test variant	
000901 17.02.2003 This is a test variant	
└─ 000900 17.02.2003 This is a test variant └─ 000899 17.02.2003 This is a test variant	
	FN1 (1) (800) 🖭 fnetsap 🛛 OVI

- 11. Under the complete archiving sessions branch, there is a new session with the current date.
- 12. Select this session and click the **Archive system** button. The following screen is displayed:

🖻 Archive Management: S	Store via ArchiveLink			$\mathbf{X}$
Archiving) 913				
Status 💽	o complete			
Note Test	for Data Archiving			
Archive file	Status	Storage		
000913-001FI_DOCUM	ODeletion completed	OCO not stored	<b>000</b> A	
				_
			<u> </u>	_[]]
				-11
				-11
				-11
				-11
				-11
				-11
				•
				•
🖌 🛐 Store files 🗙				

13. Click the Store files button. The following screen is displayed:

🖙 Archive Management: S	Store via ArchiveLink		
Archiving 924			
	o complete		
Note Test	for Data Archiving		
Archive file	Status	Storage	
000924-001FI_DOCUM	Deletion completed	Stored Stored	👀 Arc 🔺
🖌 🛐 Retrieve files	×		

14. A request is issued to DWSAP server components. The status of storage will change from **Not Stored** to **Request Made**. After some time and refreshing the screen, the status eventually changes to **stored**. This means that archive file has been stored in the FileNet IS.

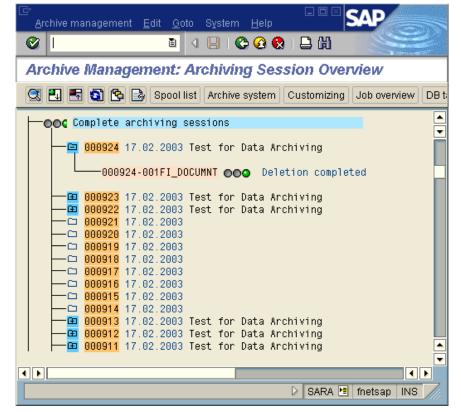
### **Display Archived Data**

Follow the steps listed below to retrieve a data file:

- 1. Go to display document screen of financial accounting, transaction **fb03**.
- 2. Enter the same document number that has been archived in the previous steps and press **Enter**.
- 3. The dialog box comes up saying that the document is not in the database.
- 4. Click **Yes** and a request is made to DWSAP and the document is displayed from archive. This is called a partial restore.
- In order to do a full restore of the data, go to archive management screen, transaction sara, enter archive object as FI\_DOCUMNT .The following screen is displayed:

C	- <u>A</u>	rchiv	e managen	nent <u>E</u>	l 🗆 🖂 dit	SAP	
(	2	Г			Ē		2
1	4r	chi	ive Man	agem	ent:	lniti	
ĺ	<b>18</b>	Cu	istomizing	Job ov	erview	DB tables	Informatio
	Ok	ject	name	FI_D	CUMNT	@Financia	l accountin
	A	tion	s				
		4	Arch	ive			
			Dele	ete			
		۶I.	Post	tpr.			
		Ð	Relo	ad			
			Anal	yze			
		2P	Ind	ex			
		2	Manage	ement			
•	Þ						• •
				D	BARA 🕑	🗐 fnetsap	INS ///

6. Select Management. The following screen is displayed:



7. Select the archive run and click **Archive system**. The following screen is displayed:

🖙 Archive Manage	ement: S	tore vi:	a ArchiveLink					$\times$
Archiving)	924							
Status		com	nloto					
Note			a Archiving					
NOLE	Test		a Archiving					
Archive file		Status	3	Storag	ge		_	
000924-001FI_D	DCUM	000	Deletion completed		stored	000	Arc	
				_				
				_				
				_				
				_				
				_				
				_				
								ŧ
							• •	
							كالك	
🖌 🛐 Retriev	e files	×						

- 8. The screen shows the status of the archive run as stored. Click on **Retrieve files**. A retrieval request is made to DWSAP and the complete file is restored from the archive.
- 9. Leave the management screen. And return back to Archive Management. The following screen is displayed:

C		chive managem	ent <u>E</u> dit	SAP	
(	0		Ē		
1	Are	chive Mana	igement:	Initi	
ĺ	<b>6</b> 8	Customizing	Job overview	DB tables	Informatio
	Obj	iect name	FI_DOCUMN1	🙆 Financia	il accountin
		tions			
	1.18	🔄 Archiv 🚽 Deleti			
		Postp	r.		
	1 8	🔁 Reloa			
	1 12	🖁 Analyz			
	L 25	27 Index			
		🧏 Manager	nent		
		L		_	
			D SARA	🖻 fnetsap	INS

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- 10. Now, choose the function **reload** for the archive object **FI\_DOCUMNT**.
- 11. Maintain a variant for this reload and enter the document numbers that you want to reload into database.
- 12. Click the **Archive** selection button. The choose files to reload screen is displayed which shows all the complete archiving sessions. Select the archive session from which the data is to be reloaded. Also, specify the start date and spool parameters as above.

**Note:** Reloading data is not possible for all the archiving objects. When reloading data, SAP R/3 can only process complete archiving sessions.

- 13. Press **Execute** or **F8** key. This will generate new jobs for reload. These jobs can be verified in the job overview, transaction **sm37**.
- 14. The completion of these jobs means that the data has been restored in the SAP R/3 database.
- 15. Display the financial document from transaction **fb03**. Now, the document will be displayed from the database and not from the archive.

# **4** Document Retrieval And Display

This chapter describes how to retrieve and display documents and printlists stored on the Image Services (IS) library. The following viewers are supported for document display by DWSAP:

- FileNet IDM Viewer.
- Internet Explorer.
- Custom Viewer.

Printlists can be displayed in either SAPGUI or ArchiveLink viewer.

# **Displaying PDF Documents**

For document types other than printlists, the following viewers are supported:

- FileNet Viewer.
- Internet Explorer.
- Java Based Viewer
- Custom Viewer.

In order to display all the documents other than printlists stored in IS library perform the following steps:

 Click Tools → Business Documents → Miscellaneous → Stored documents or transaction oaad, in the main window of SAP R/3, the following screen is displayed:

☑ <u>S</u> tored documents <u>E</u> dit	Goto Environment System Help
<b>©</b>	
SAP ArchiveLink:	Administration of stored documents
9	
(Documents)	Print lists
Find	Find
Display	Display
Create	
	Archive files
Assign subsequently	Find
Reassign	Display
	▼ OAAD 🖻 fnetsap OVR

## 2. Click **Find** button. The following screen is displayed:

<u>P</u> rogram <u>E</u> dit <u>G</u> oto System <u>H</u> el	þ	DAY
S (		
SAP ArchiveLink: Stored	locuments search	
•		
Business object	ВКРЕ	
Client	800	
Archive	R1	
Document ID		
Document type		
Document class		
Archiving date from	11.02.2003	
Archiving date to	11.02.2003	
Delete date		
	DAAD (	🛅 fnetsap INS 🥢

- 3. Enter selection criteria to search for linked documents. Any combination of the above criteria can be used to get the linked documents. Press **Execute** or **F8** key to continue.
- 4. The linked documents corresponding to the above search criteria are displayed as shown below.

Image: Solution of the second deciments         Image: Solution o	•
Obj. type       SAP	
Obj. type SAP object ID Archive Document ID Doc.type Strge date Delete Doc. class Status BKPF DARAOTF000 R1 100113 ZR1PDF 16.01.2003 PDF	
Obj. type SAP object ID Archive Document ID Doc.type Strge date Delete Doc. class Status BKPF DARAOTF000 R1 100113 ZR1PDF 16.01.2003 PDF	
Archive Document ID Doc.type Strge date Delete Doc. class Status BKPF DARAOTF000 R1 100113 ZR1PDF 16.01.2003 PDF	
Archive Document ID Doc.type Strge date Delete Doc. class Status BKPF DARAOTF000 R1 100113 ZR1PDF 16.01.2003 PDF	
Doc.type         Strge date Delete         Doc. class         Status           BKPF         DARAOTF000	-
BKPF DARAOTF000 R1 100113 ZR1PDF 16.01.2003 PDF	
R1 100113 ZR1PDF 16.01.2003 PDF	
R1 100113 ZR1PDF 16.01.2003 PDF	
ZR1PDF 16.01.2003 PDF	
BKPF DARAOTF000	
R1 100943	
ZR1PDF 16.01.2003 PDF	
BKPF DARAOTF000	
R1 103592	
ZR1PDF 20.01.2003 PDF	
BKPF DARAOTF000	
R1 104007	
ZR1PDF 16.01.2003 PDF	
BKPF DARAOTF000	
R1 104577 ZR1PDF 20.01.2003 PDF	
ZR1PDF 20.01.2003 PDF BKPF DARAOTF000	
R1 105560	
103300	
DAAD 🛅 fnetsap INS	•

5. Double click on one of these entries. The following screen is displayed:

	Goto System <u>H</u> elp	
<b>©</b>		
SAP ArchiveLink:	Hit list for stored documents	
🕼 🍪 🚨 🗋 Re	assign Assign subsequently Change document type	
Client Business object Object key Company code Document number Fiscal year	800 BKPF Accounting document DARADARADARADARADARADARADARADARADARADAR	<pre> • • • • • • • • • • • • • • • • • • •</pre>
ContServer Document ID	R1 RFC Arhive for UTC Online Admin 260073	
Doc.type Arch.date Expiry date Doc. class	ZR1PDF pdf doc type for r1 07.01.2003 00.00.0000 PDF Portable Document Format	
Storage date (external) Storage time (external) Content srvr status		
		♦ ► OAAD ► fnetsap INS

- 6. To display the document, click the **Display** button. The following scenarios exist when displaying the documents:
  - Display in FileNet IDM Viewer: In this case, SAPGUI communicates with the FileNet IDM Desktop for R/3, which invokes the FileNet IDM viewer to display the linked document.
  - Display in Internet explorer in Server add-on environment: In this case, SAPGUI communicates with IDM desktop for R/3, which displays the document in Internet Explorer.
  - Display in Internet Explorer in Pure-thin environment: In this case, none of the FileNet component needs to be present on the client machine. SAP sends the display request to DWSAP server components and displays the document in Internet Explorer.
  - Display in a custom viewer: Customers can also use their custom viewers to display the linked document. For details on how to achieve this, refer to DWSAP 5.1 Installation and Configuration manual-Client and Programmer's Handbook.

**Note:** Customers need to customize their SAP system differently for each of the above stated scenarios to work properly. For details on how to configure SAP R/3 for the above scenarios, refer to Installation and Configuration manual-Server and Installation and Configuration Manual-Client.

**CAUTION**: Documents having document types ALF and OTF, proprietary document types of SAP, cannot be displayed using the above viewers.

# **Displaying Print Lists**

Print lists are the reports produced from SAP. These can be printed, archived to the IS library and stored on optical disk in a single operation. Print lists can be retrieved either directly in the SAP office module, or through the Archive Objects Administration module of the ArchiveLink Interface. Printlists can be displayed in the following viewers:

- SAPGUI.
- ArchiveLink Viewer.

To display the Find Archived Print Lists dialog box:

 From the SAP R/3 main window, click Office → Business Documents → Find Lists menu. The following screen is displayed:

	Svstem	Help					SAP	
			G 🙆 🚱	I 🗳 🛱 🛱	ខេះចល	🕄   🔀	ME (S)	
Find stored print	lists							
🕒 🍪 🔁 🖬								
Report name		I	_					
Info								
Archiving date		_		to				
Business object								
Document type			_					
User								
Short text						_		
						D OADF	R 🖻 fnetsap (	

2. Enter the following search criteria in the respective fields:

Field	Description
Report Name	Denotes the type of print list.
Archiving Date (From/To)	Denotes the date range when the print list was archived. (nn/nn/nnn)
Object Type	Denotes the type of object associated with the print list, such as Document.
Document Type	Denotes the document type, such as General Print List.

3. To display a list of matching print list reports, click the **Execute** button. The following screen is displayed:

#### Document Retrieval And Display Displaying Print Lists

Ż <u>L</u> ist <u>E</u> dit Go	to <u>S</u> ettings S <u>y</u> s	stem <u>H</u> elp		_	SAP			
Ø	Ē	4 📙   😋 🙆	😣	9 H H	182 🔛			
SAP ArchiveLink: Hit list for stored print lists								
	7 4 8 8		· ·		ve 🕎 🛃 🚹			
			01100					
						7		
Report name			Info	Agent	Strge date			
Text								
RFBELJ00			r1	BASIS	13.02.2003			
Test1				Diloto	10.02.2000			
RFBELJ00			r1	BASIS	13.02.2003	3		
Test1								
RFBELJ00			r1	BASIS	13.02.2003	3		
Test1								
RFBELJ00			r1	BASIS	13.02.2003	<sup>3</sup>		
accpetance2 RFBELJ00			r1	BASIS	13.02.2003	,		
accep1				DUDIO	13.02.2003	'I		
RFBELJ00			r1	BASIS	13.02.2003	8		
Acceptance				-				
RFBELJ00			R1	BASIS	11.02.2003	3		
PrintList	Archival							
RFBELJ00			R1	BASIS	11.02.2003	81		
						• •		
				D OA				
				D DA	.DR 🔚 fnetsap	INS		

4. To retrieve the full index attributes for the archived Print list, choose any one of the report names, and click **Choose Details** button. If the print list is available for retrieval, then the status is displayed as **ONLINE**, otherwise the status is displayed as **OFFLINE**.

	1 5						
도 Printlist <u>E</u> dit Goto S		SAP SAP					
	E 4 📙   🚱 🚱   🖨 🛗 🛗 😫 🔁 🗘 🕲						
SAP ArchiveLink: Hit list for stored print lists							
🕼 🕒 Print from content s	erver						
Client Report Info Seq. number Printer Form ShortTxt Users Archiving date Storage time Expiry date	800 RFBELJ00 R1 0000014906 BT Printer X_65_132 PrintList Archival BASIS 11.02.2003 13:08:07						
CntSvr Document ID	R1 RFC Arhive for UTC Online Admin 191651						
Business object Doc. type Size (in bytes)	BKPF Accounting document ZR1ALF alf doc for r1 archive 164236						
Storage date (ext.) Storage time (ext.) Content srvr status	11.02.2003 12:24:57 ONLINE						
		OADR					

5. To retrieve the print list from the IS library and display it, select **Printlist → Display from Content Server**. Depending on the protocol configuration, the Printlist can be displayed in either SAPGUI or ArchiveLink Viewer.

#### **Displaying Printlist In SAPGUI**

As of SAP R/3 release 4.5B, Print lists archived to FileNet can be displayed in SAPGUI. Searching for a text string and searching for attributes is also possible. But this functionality of searching for print lists is possible only for those print lists that are archived to HTTP content servers. In case the print list is archived to an RFC content server, free search and attribute are not available. In order to customize SAP R/3 to display print lists in SAPGUI, refer to Installation and Configuration manual-Server.

On selecting **Printlist** → **Display** from content server, the print list is retrieved from FileNet IS and displayed in SAPGUI as shown below:

Interpreter Description	
🖉 🛛 🖉	◁ 🕒   � ֎ ֎   ₽ # # ₩
Display of stored print li	ists
IDES AG Frankfurt	Compact Document Jou 💌
Document header	Subledger accounts
CoCd Document Do Posting number ty date	A Account Postg Open item amount T number ky L in DEM (FC
1000 1600000723 DA 01.10.1999 Reference: 000000132000MVS0	
1000 1600000724 DA 01.10.1999 Reference: 000000132000MVS0	
1000 1600000725 DA 01.10.1999 Reference: 000000132000MVS0	
	● OADR 🖻 fnetsap INS

#### Searching for a Text String

The Free Search feature of SAPGUI is used to search a text string in a Print list document stored on the IS library. The search is conducted directly on the data file of the print list. To search a displayed print list for a specific text string:

1. Click **Edit** → **Free Search** menu. This displays the Find dialog box, as shown in the figure below:

play of stored print li	sts					
🖻 🛗 Free search 🛗 Att	ibute search					
ES AG ankfurt	Compact Document Journa			Time 11.5 RFBELJ00/		02.2003
Document header	Subledger accounts	Taxes			G/L accounts	
CoCd Doc num Find			ls/pur. in DEM	Tx Postg G/ cd ky accour		
000 010 from cursor				40 0621	1,8	12.46
000 010				40 0621	120 1,8	12.46
1000 818 🖌 🗙	(000-123.00*)			40 0621	120 2	22.93
000 0100101729 AB 07.11.2002	K         0000001950         25         222.93           K         0000001950         25         1,812.46           K         0000001950         25         1,868.00           K         0000001950         25         1,968.00           K         0000001950         25         1,765.91           K         0000001950         25         123.00           K         0000001950         25         1,114.65           K         0000001950         25         668.79           K         0000001950         25         1,812.46			50 0621	120 27,4	63.59-
1000 0100101730 AB 07.11.2002	К 0000001950 31 123.00-			40 0621	120 1	23.00
000 0100101731 AB 07.11.2002	K 0000001950 25 123.00			50 0621	120 1	23.00-
000 0100101733 AB 18.11.2002	K 0000001950 25 181.25 (USD 100.00)			50 0621	120 1	81.25-
000 0100179682 AB 26.11.2002	K 0000001950 31 123.00-			40 0621	120 1	23.00

2. To find all the occurrences of the desired text string, enter the text string in the Find textbox, and click enter. The user can also choose to search from the current cursor position by selecting the **from cursor** radio button or in the entire Printlist by selecting the **global in list** radio button. Checking the case-sensitive check box carries out the case-sensitive search.

#### Searching for Attributes

The Attribute Search feature searches a SAP print list document stored on the IS library for a record that matches attributes as mentioned in the search criteria.

To perform attribute search in a Printlist:

- 1. Click Edit → Attribute Search.
- 2. Enter the search criteria and then press search. The SAP ArchiveLink viewer searches the description file of the print list for the above attributes.

#### **Creating Notes**

The DWSAP supports the creation of Notes on print lists from SAPGUI. To create a Note associated with the Printlist:

1. Click **Print list → Create note** menu in the displayed print list. The following screen is displayed:

 Print list <u>E</u> dit Goto Sys	tem <u>H</u> elp			P
Ø	◎ 4 🔲 6 6 6 0 1 4 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			
Display of stored p	rint lists			
😥   🛗 Free search 🛗	Attribute search			
IDES AG Frankfurt	Compact Document Journal	Time 19.00.28 RFBELJ00/BASIS	Date 07.02.2003 Page 1	
Document header	ErCreate note This is a test note.	G/L ac	counts	
CoCd Document Do Post number ty date		; a	G/L account mount in DEM	
1000 0100101689 AB 11.0		10	222.93	
	✓ <sup>∞</sup>			
			DADR 🖻	fnetsap OVR

- 2. Enter the text for the note in the above screen and press **Save**.
- 3. This sends a request to DWSAP and the note is stored.
- In order to display the note added, click on the menu item Print list → Display note. The notes added on a print list are displayed in a new screen as shown below:

<sup>날</sup> <u>P</u> rint list <u>E</u> dit Goto Syster	n Heib	SAP
Ø	▲ ■   ♥ ♥ ♥   ₽ ₩ ₩   ♥ ♥ ₽ ₩ ₩   ₩ ₽   ♥ ₩	
Display of stored prin	nt lists	
🕏 🖻 🛗 Free search 🕻	Attribute search	
IDES AG Frankfurt	Compact Document Journal Time 19.00 RFBELJ00/B:	
Document header	도 Display Note 전 전 전 전 전 전 전 전 전 전 전 전 전 전 전 전 전 전 전	L accounts
CoCd Document Do Posting number ty date	HIS IS & LESC HOLE. 07.02.2003 19.25:10 INDIA BASIS (BASIS IDES) This is Test Note #1. 07.02.2003 19.29:25 INDIA BASIS (BASIS IDES)	G/L account a mount in DEM
1000 0100101689 AB 11.09.3		222.93
		3
		_
		DADR 🖪 fnetsap OVR

 Users can also add more than one note on a print list. This can be done through menu item Print list → Expand on note. The following screen is displayed which has the note previously added in display mode. The additional notes can be added in the extra text boxes provided and pressing Save.

<i>⊆</i> <u>P</u> rint list <u>E</u> dit Goto	System <u>H</u> elp	
Ø	ة 🛛 🔲 🕼 🚱 🗋 🖓 🗳 🖞 🖓 🐨 🖓 📰 🖉 📲	
Display of stored	print lists	
💐 🦻 📙 Free searc	h 🔀 Attribute search	
IDES AG Frankfurt	Compact Document Journal	Time 19.00.28 Date 07.02.2003 RFBELJOO/BASIS Page 1
Document heads		G/L accounts
	This is a test note. 107.02.2003 19:25:10 INDIA BASIS (BASIS IDES) 1This is Test Note #1. 17.02.00.0002 40:0002 INDIA DARIE (BASIS IDES)	6/L 6/L account µnt a mount in DEM
1000 0100101689 AB 11	07.02.2003 19:29:25 INDIA BASIS (BASIS IDES) This is test note #2	2120 222.93
		DADR 🖻 fnetsap OVF

#### **Displaying Print Lists In ArchiveLink Viewer**

SAP ArchiveLink Viewer can be used to display archived documents. Print lists, outgoing documents in OTF format and incoming documents in FAX format can be displayed using ArchiveLink Viewer. This viewer uses the functions provided in the IDMForR3.DLL to retrieve documents stored on the FileNet system. For displaying Print list in ArchiveLink Viewer, SAP should be customized accordingly. For details on configuring SAP system for display in ArchiveLink Viewer, refer to Installation and Configuration manual -Client.

Using SAP ArchiveLink Viewer you can:

- Print to a UNIX server using a spool independent of SAP SAPspool.
- Print locally through Microsoft Windows.
- Display and edit a note already displayed with the associated displayed document.
- Create a note if one does not exist with the document.
- Select and de-select a displayed document.
- Copy a selected area of a document image to the Windows clipboard.
- Select an entire page prior to copying to Windows clipboard.
- Search a displayed print list for a text string.
- Search an indexed print list for record matching attributes.
- Navigate through a document using the first page, next page, and previous page commands.
- Navigate between the documents using the first document, next document, previous document, and last document commands.
- Manipulate Windows using the tile and cascade commands.

The following figure shows a print list in ALF displayed in the SAP ArchiveLink viewer:

		or r1 archive] View Window Help	/	•	Compact Document Journal	
	Document	header	5	Subled	ger accounts	т
	Document number	Do Posting ty date	A Account T number	Postg ky L	Open item amount in DEM (FC)	Tx Tax cd am
1000	0100101682	AB 05.11.2002	к 0000001950	31	1,812.46- (USD 1,000.00-)	
1000	0100101683	AB 05.11.2002	к 0000001950	31	1,812.46- (USD 1,000.00-)	
1000	0100101684	AB 04.11.2002	к 0000001950	31	222.93- (USD 123.00-)	
1000	0100101729	AB 07.11.2002	K 0000001950 K 000001950 K 000001950 K 000001950 K 000001950 K 000001950 K 000001950 K 000001950	25 25 25 25 25 25 25	222.93 1,812.46 1,812.46 1,968.00 17,705.91 222.93 123.00 1,114.65	
eady					NOTE	

#### Searching for a Text String

The Free Search feature of SAP ArchiveLink viewer is used to search a text string in a Print list document stored on the IS library. The search is conducted directly on the data file of the print list. To search a displayed print list for a specific text string:

 Click Edit → Free Search menu. This displays the Find dialog box, as shown in the figure below:

Find		<u>?</u> ×
Find what:		<u>Find Next</u>
	Direction	Cancel
🦳 Match <u>c</u> a:	se <u>□ Up</u> • <u>D</u> own	

2. To find all the occurrences of the desired text string, enter the text string in the **Find** textbox, and click the **Find Next** button.

When a search is executed, the displayed page of the print list is searched first. The first occurrence of the text string is highlighted. If the text string is not found on the displayed page, the text string is passed to DWSAP client components, and the search continues on the remaining print list in cache. If the text string is located, the relevant page is retrieved to the workstation, displayed, and the matching text string is highlighted.

#### Searching for Attributes

The Attribute Search feature searches a SAP print list document stored on the IS library for a record that matches attributes as mentioned in the search criteria.

**Note:** Attribute search is supported for only those print lists that are generated in background and store a description file along with the data file.

To perform attribute search in a Printlist:

1. Click Edit -> Attribute Search. The following dialog box is displayed:

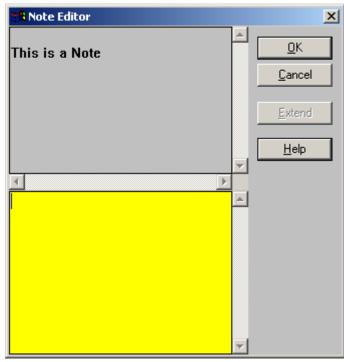
Attribute Search		×
🔲 Search <u>U</u> p		
<u>Attributes :</u>		
Client		
Doc.status		
Company code		
Fiscal year		
Document number		
<u>S</u> earch	<u>Cancel</u> <u>H</u> elp	

2. Enter the search criteria in the above dialog and then press search. The SAP ArchiveLink viewer searches the description file of the print list for the above attributes. This description file is generated and archived together with the print list in the current language of the user, for example English. The resulting pointer navigates to the correct location in the data file.

#### **Creating Notes**

The DWSAP supports the creation of Notes from SAP applications and from SAP ArchiveLink viewer. To display a Note associated with the Printlist, click **Edit**  $\rightarrow$  **Note** menu, from the display window of SAP ArchiveLink viewer.

The Note Editor dialog box displays a note associated with the displayed document, as shown in the figure below:



To add new text to the existing Note or to create a Note, click the **Extend** button in the Note Editor window. The Note is sent to the IS library, where a FileNet annotation is created and stored with the document.

# **5** DMS Sample Web Application

A DMS sample web application is packaged along with DWSAP 5.1 Server add-on. This sample application exposes the DMS functionality over the web. Using this application, multiple users can simultaneously link the FileNet objects to SAP Document Info Records (DIRs).

Using the sample application, the user can:

- Browse the contents of FileNet Libraries and select the FileNet objects that need to be linked to DIRs.
- Link FileNet objects to DIRs.
- Create new versions of DIRs.
- Unlink DIRs from the FileNet objects.
- Link FileNet objects to Material Master.
- Display Material Master Records linked to FileNet object.

## Accessing The DMS Sample Web Application

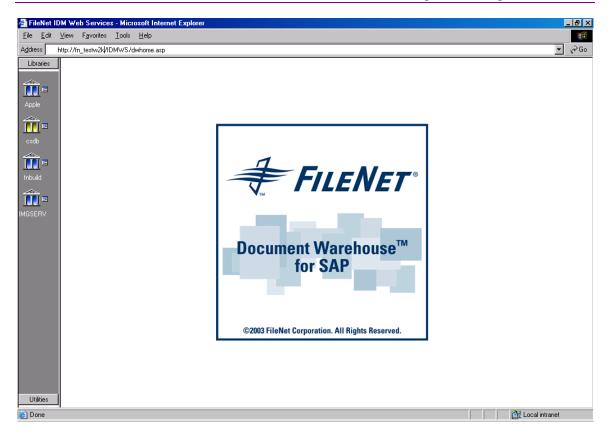
The DMS sample web application can be accessed through a URL. The URL is of the form

http://ServerName/idmws/dwhome.asp

Where,

ServerName is the name of the server on which DWSAP 5.1 server addon is installed.

Dwhome.asp page is the home page of DMS sample web application. This page loads all the FileNet libraries configured on the server as shown below.



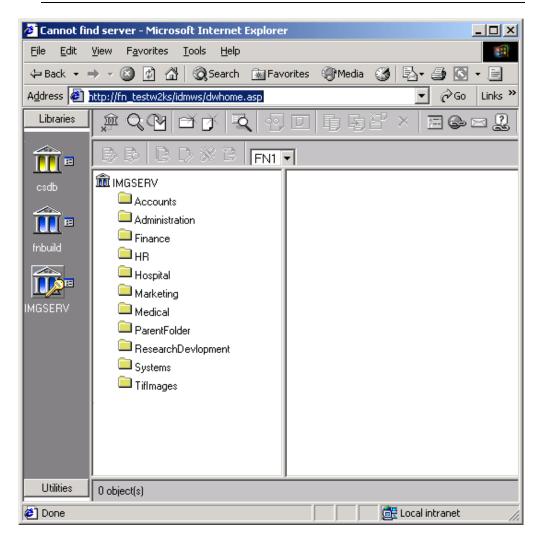
## **Browsing The Configured Libraries**

On the above page, select the library to logon to a library. The logon dialog is displayed as shown below:

🎒 Logon t	o IMGSER¥ - Microsoft Internet Explorer	<u> </u>
	IMGSERV	ок
	User name:	Cancel
	Password:	Help

After logging on to a library DMS toolbar is loaded which exposes the DMS functionality. All the configured SAP systems are also loaded. The SAP system to which the FileNet objects can be linked can be selected via this list.

Note: DMS toolbar is disabled unless a document or a folder is selected



Select a folder to display the contents of the folder as shown below.

🖉 Cannot fi	nd server - Microsoft Internet Expl	orer			<u>- 0 ×</u>
<u>E</u> ile <u>E</u> dit	<u>V</u> iew F <u>a</u> vorites <u>T</u> ools <u>H</u> elp				<b>1</b>
🗘 🗧 🗧	🔿 - 🙆 🙋 🖓 🛛 🥘 Search 🛛 📾	Favorites	🛞 Media 🔇	B- 🥔 🔞 - E	
Address 🧉	http://fn_testw2ks/idmws/dwhome.asp			•	∂Go Links »
Libraries	<u>@</u> Q (Y   A ) ₹   Q	20		× E&> 2	?
💼 🖬	BB BD X B F	J1 🔽			
csdb	m IMGSERV	<b>▲</b>	Name	Entry date	Pages
CSUD			) 🧰 m1	12/15/2002	
	Administration		190912	2/5/2003	1
	Finance		190913	2/5/2003	1
fnbuild	HB HB		191650	2/10/2003	1
	🗀 Hospital		191977	2/13/2003	
	Marketing			2/13/2003	
IMGSERV	Medical				
	ParentFolder				
	🗎 ResearchDevlopment				
	Systems	-			
Utilities	5 object(s)	_,			
é				Local in	itranet //.

DMS toolbar exposes the following functions which are explained in the subsequent sections:

- Link FileNet objects to Material Master.
- Display linked material master records.
- Publish document to SAP R/3.
- Change document status.
- Unlink R/3 objects.
- Publish current document version.

#### Link To Material Master

This function allows searching for material master records in SAP R/3 and linking the selected material master record to the selected FileNet object.

The following procedure needs to be followed in order to link material master records to FileNet objects:

1. Select the library and the object that needs to be linked to the material master record. Also, select the SAP system for which the link is to be established.

2. Click on icon ∴ In case in the configuration tool the option **Prompt for DIR Status and Description** is enabled in Client → DMS, a dialog box is popped. If the option is disabled in Configuration tool, then skip to step 4.

🎒 Update DIR Desc	ription and Initial Sta	tus - Microsoft Internet	Explorer	_ <b>_</b> X
	Update DIR D	Description And	Initial Status	
DIR Description	Default DIR	Ok		
Initial Status	FRReleased	▼ Cancel		
e Done			📃 📄 🦉 Local in	tranet //

3. Enter the value of the DIR description and select the status of DIR to be created and click **Ok**. The following screen is displayed:

Link To Mate	rial Master - Microsoft Internet Explorer	
	Link To Material Master	
Material Id		
Description	Search	
] Done	📃 🛛 🛃 Local intranet	:

4. Enter the search criteria for searching material master records in the above window by entering the values for Material Id and Material Description. After entering the search criteria, click on the **Search** button to execute the search.

5. This searches for the material master records in the selected SAP R/3 system. The following screen is displayed:

🚰 Link To Material Master - Microsoft Internet Explorer					
Material Id	m-0*	Link To Material Master			
Description		Search			
Material II	D	Description			
O M-01		Sunny Sunny 01 - Test			
O M-02		Sunny Xa1			
С м-03		Sunny Tetral3			
О M-04		Sunny Extreme Test			
O M-05		Flatscreen LE 50 P			
О М-06		Flatscreen MS 1460 P			
С M-07		Flatscreen LE 64P			
O M-08		Flatscreen MS 1575P			
O M-09		Flatscreen MS 1585	•		
Link	Cancel				
l 🙋 Done		📃 🛛 🗮 Local intran	et //		

- 6. Select the material master record that needs to be linked to selected FileNet object. The **Link** button is enabled.
- Click on the Link button to link the selected material Id to the FileNet object through a DIR. A DIR is created in SAP R/3 and the DIR Id is popped up as shown below. Click on the Ok button to acknowledge the message and the window closes.

#### **Display Material Master**

This function displays material master records linked to the selected FileNet object.

The following procedure needs to be followed in order to link material master records to FileNet objects:

- 1. Select the library and the object for which material master records need to be displayed. Also, select the SAP system for which the link is to be established.
- 2. Click on the icon . This launches a new window and all the material master records linked to the selected FileNet object are displayed.

Material Data General 🔺							
Material ID	Material Desc.	MDSE Category	Division	Old Material Number	Hierarchy	Unit of Measure	Lab/Office
M-01	Sun ny Sun ny 01 - Test	00207	07			ST	
00000000000000038	Classification test	999				ST	
0000000000000000000058	Ventilation, complete					ST	
000000000000000000008	a portable 1 ton crane	013				ST	
0000000000000000000078	Component Full Repair Service					ST	
0000000000000000088	AS-100 T-shirt	02004	09			ST	
000000000000000000000170	Rebate settlement: gloss paints	004	03			ST	
00000000000000000000188	Value contract material		00			ST	
M-1000	Motor, electrical pump 250kW	011	01			ST	

#### Publish Document To SAP R/3

This function creates a DIR in SAP R/3 and a link is established with the selected FileNet object.

The following procedure needs to be followed in order to link material master records to FileNet objects:

- 1. Select the library and the object for which a DIR needs to be created. Also, select the SAP system for which the link is to be established.
- Click on the icon 
   In case in the configuration tool the option
   Prompt for DIR Status and Description is enabled in Client → DMS
   a dialog box is popped. If the option is disabled in Configuration tool,
   then skip to step 3.

🍯 Update DIR Desc	ription and Initial S	tatus - Micros	oft Internet Expl	orer	
	Update DIR	Descript	ion And Ini	tial Status	
DIR Description	Default DIR	Ok			
Initial Status	FRReleased	📕 Can	cel		
🕘 Done				📄 🕅 🔠 Local intran	iet ///

3. Enter the value of the DIR description and select the status of DIR to be created and click **Ok**. Clicking **Cancel** will create DIR with the default values.

Microsoft	Internet Explorer
⚠	DIR DRW-000000000000000000000000000000000000
	OK

4. Click **OK** to acknowledge the message and the window closes.

#### **Change Document Status**

This function allows changing the status of DIRs linked to selected FileNet object in SAP R/3.

- 1. Select the object in the library and the SAP system.
- 2. Click on the icon 🕑. A dialog box is displayed which shows all the DIRs linked to selected FileNet object along with its current status and list of new statuses as shown below:

Cha	nge Document Status - Microsoft Internet Ex	plorer		_
		Change Document Status		
	DIR	DIR Description	Current Status	Available Status
0	DRW0000000000000100000077200000	88	FR Released	AR Archived 💌
0	DRW0000000000000100000077300000	Default DIR This is for testing of descr	FR Released	AR Archived 💌
Tha	nge Status Cancel			
				aller .
Don	e			📴 Local intranet

- 3. Select a DIR whose status needs to be changed. This enables the button **Change Status**.
- 4. From the list of available status, select the new status of the DIR and click **Change Status**.
- 5. This changes the status of the DIR to the one selected in the available status. After the status has been changed, the web page is refreshed with the updated value of status.

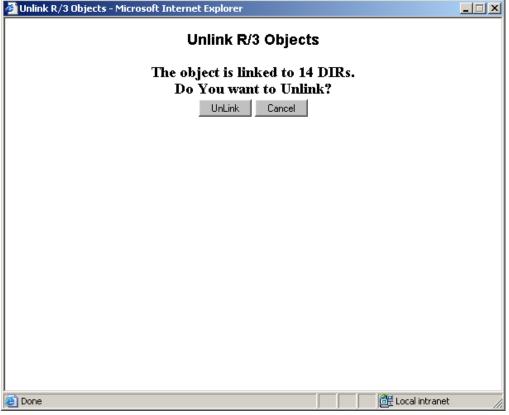
	DIR	nge Document Statu	Current Status	Available Status
2	DRW000000000000001000000211500000	Test DIR	FR Released	AR Archived -
5	DRW000000000000001000000211600000	Test DIR	FR Released	AR Archived -
5	DRW00000000000001000000211700000	Test DIR	FR Released	AR Archived 💌
5	DRW00000000000001000000211800000	Test DIR	FR Released	AR Archived -
5	DRW00000000000001000000211900000	Test DIR	FR Released	AR Archived 💌
5	DRW00000000000001000000212000000	Test DIR	PR Checked	AR Archived 💌
5	DRW00000000000001000000212100000	Test DIR	FR Released	AR Archived 💌
0	DRW00000000000001000000212200000	Test DIR	PR Checked	AR Archived 💌
5	DRW00000000000001000000212300000	Test DIR	FR Released	AR Archived 💌
5	DRW00000000000001000000212400000	Test DIR	FR Released	AR Archived 💌
5	DRW00000000000001000000212500000	Test DIR	FR Released	AR Archived 💌
5	DRW00000000000001000000212600000	Test DIR	FR Released	AR Archived 💌
5	DRW00000000000001000000212700000	Default DIR	FR Released	AR Archived 💌
5	DRW00000000000001000000212800000	Default DIR	FR Released	AR Archived 💌
har	ige Status Cancel			
_				

**Note**: The status of only one DIR can be changed at one time. The application does not allow selecting multiple DIRs at a time.

#### **Unlink R/3 Objects**

This function unlinks the DIRs linked to selected FileNet object in SAP R/3.

- 1. Select the library and the object for which DIRs needs to be deleted. Also, select the SAP system for which the links are to be deleted.
- 2. Click on the icon March The following screen is displayed:



- 3. Click **Unlink** to confirm unlinking all the DIRs linked to the selected FileNet object:
- 4. All the DIRs are deleted in SAP R/3 and message box is displayed for the confirmation of deletion.

#### Publish Current Document Version

This function is used to link a new version of a FileNet Object to a DIR, which is already linked to the earlier version of the document. The display of versions is enabled by default for a CS library while for an IS library the version display is disabled in the Web Application. In case version display is disabled, publish current document version works in the same fashion as Publish document to SAP R/3. In case, versions are displayed, then the system checks whether any former version of the selected document was linked to a DIR. If a DIR linked with a former version is found, then

the version of the DIR is incremented by one and linked to the selected version object.

In order to publish current document version to SAP R/3, follow the steps below:

- 1. Select the library and the object for which the version is to be linked. Also, select the SAP system for which the link is to be made.
- 2. Click on the icon . This will launch a new window that will show all the versions of the document as shown below.

🍯 demo.txt Ve	rsion List - Micro	soft Internet Exp	lorer		
0 D 5	010	<u> 및</u> E & 1	⊴ 🤇 🛛 ?		
<u>1</u>					
Documer Library:		003695850, Clas	s=Account)		
Name	Version Number	Availability Status	Reclaim Pending?	Checked In By User	Checkin Date
C 🛃 demo.txt	3	Online		Admin	2/7/2003 12:20:10 PM
O 🛃 demo.txt	2	Online		Admin	2/7/2003 12:19:24 PM
O 🛃 demo.txt	1	Online		Admin	2/7/2003 12:18:48 PM
<ul> <li>✓</li> <li>3 version(s)</li> <li>Ø Done</li> </ul>					▶ cal intranet

3. Select the version of the document that you want to link with SAP and

again Click the icon  $\bigcirc$ . In case in the configuration tool the option **Prompt for DIR Status and Description** is enabled in **Client**  $\rightarrow$  **DMS**, a dialog box is popped. If the option is disabled in Configuration tool, then skip to step4.

🖉 Update DIR Desc	ription and Initial !	Status - Microsoft	Internet Explorer		_ 🗆 ×
	Update DIF	R Descriptio	n And Initial	Status	
DIR Description	Default DIR	Ok			
Initial Status	FRReleased	▼ Cancel			
E Done				E Local intranet	

- 4. The dialog box has the same default values as that configured. Enter the value for DIR description and select the status of DIR to be created.
- 5. If DIR with the default status and description is to be created, then press **Cancel**, else press **OK**. The following screen is displayed:



6. A new version for a DIR is created and is displayed in the alert box. Press **Ok** to exit.

#### Logging On To SAP System

Before carrying out any of the DMS functionality mentioned above a connection has to be established with the SAP system. The application automatically establishes a connection with SAP when the configuration

option **RFC Auto Logon enabled** is checked. If the configuration option is unchecked the user needs to provide logon credentials for the SAP system and based on them a connection is established with the SAP system.

In order to logon to the SAP system follow the following steps:

- 1. Select the library and the object for which the link is to be made. Also, select the SAP system for which the link is to be made.
- 2. Press the corresponding button as per the desired functionality. Following screen is displayed:

Log on to SAP System - Microsof	t Internet Explorer	
	SAP Logon	
Client	800	
SAP Host Name	fnetsap	
SAP User	basis	
SAP Password	******	
SAP System Number	00	
Log on to SAP Cancel		
E Done		📑 📴 Local intranet 🛛 🖉

3. Specify the different parameters and press **OK**. If the connection is established the user is presented with the next screen depending on the DMS functionality requested. If the connection cannot be established the above screen is again presented to the user to reenter the logon credentials.

# Glossary

#### ABAP

Advanced Business Application Programming. The programming language used for creating SAP applications.

#### ALF

Advanced List Format. This is SAP's proprietary format for outputting summaries of reports such as print lists.

#### ARCH Output Device

A dummy printer where SAP-generated documents are placed in readiness for archiving and/or printing.

#### ArchiveLink

The SAP system's interface between the SAP system and DWSAP.

#### Asynchronous Archiving

When queues are used to buffer both the SAP system's outgoing archive requests and the incoming acknowledgment and confirmation messages.

#### Booking

Creating new transactions such as orders and invoices in the SAP system.

#### Catalog Interface Module

A module that allows the user to choose one or more documents and/or folders for linking to a SAP transaction. Desktop for R/3 comes with three standard Views, FileNet Browse For R/3, FileNet Queue For R/3, and Filenet Capture For R/3,. In addition an integrator can develop a special view for a customer that can be plugged into the Desktop for R/3.

#### CIM

Acronym for Catalog Interface Module.

#### **Document Type**

A document type specifies the possible usages of a document within the SAP R/3 system.

#### Early Archiving

A SAP process where you retrieve committed documents from the archive system and route the documents to another person who completes the processing.

#### FAX

Short for facsimile. A SAP document type that conforms to CCITT Group 4 TIFF format.

#### Hit List

A displayed list of items returned from a query to the SAP database.

#### Incoming Document

A scanned or archived document that can be processed in the SAP system. Also, see NCI.

#### Late Archiving

A SAP process where you process work items and then retrieve and link committed documents from the archive system.

#### Link table

A table in the SAP system that defines the relationships between SAP objects and documents stored in the FileNet system.

#### NCI

Non-Coded Information. A document that has been scanned or faxed.

OTF

Short for SAP's proprietary Outgoing Text Format. This is the format that SAP uses for outputting detailed reports.

#### Outgoing Document

A document created in the SAP system.

#### Print List

Print lists are reports produced from SAP applications such as customer and vendor lists.

#### Process

The operation to be performed on a work item, as defined by the document type.

#### SAP

Systems, Applications and Products in Data Processing.

#### SAPGUI

The SAP R/3 system's Graphical User Interface: windows, buttons, menus, etc.

#### Simultaneous Archiving

A SAP process where you retrieve committed documents from the archive system, link them to work items, and complete the processing.

#### System Setting

A customizable screen in the SAP R/3 system that groups specific document types together.

#### Viewer

The SAP ArchiveLink Viewer as well as FileNet's IDM Viewer can display document images, outgoing documents and print lists.

#### Work Item

A work item is the processing of a document or a message.

#### Work Queue

A FileNet Workflo queue in the selected Workflo workspace containing documents for processing in the SAP system.

#### Workspace

Where the FileNet Queue For R/3 searches for the FileNet Workflo queue containing documents for processing in the SAP system.

# **Appendix A – Software License Agreement**

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