Document Management Systems

What Is Document Management System?

1. Document management system or DMS as it is known is used for storing and processing documents and document like objects such as CAD drawings, Materials, pictures etc.
2. With the help of Document Management System, the users will be able to view the documents with ease within their SAP systems.
3. In order to use DMS, you need to implement some Customizing Steps. For details, see the Implementation Guide (IMG) under the following path: SAP Web Application Server ® Basis Services ® Knowledge Provider ® Document Management Service. The IMG modules contain details on the individual Customizing activities.

Standard SAP Transactions for DMS.

Some of the tcodes provided by SAP for managing documents are:
1. CV01N : Create a document
2. CV02N : Change a document
3. CV03N : Display a document
4. CV04N : Find a document

Let's look at each of the transaction in detail.

1. CV01N: Create a Document

a. Upon execution of the tcode CV01N, the following screen is displayed wherein the user has to mention the value of 'Document Type', and if required 'Document Part' and its version. Document Part is only mentioned when a large document is divided into many pages. By default, the system would take a value of '000' for document part and '00' for the document version.
b. Upon execution of the tcode CV01N, the following screen is displayed, wherein the user has to enter the description of the document. Depending on the settings for the particular Document Type, mandatory fields would vary. In this case ‘Authorization Group’ is a mandatory field. The authorization group is defined to restrict the access to certain objects.

Create Document: Basic Data Division (DIV)

![Image of the Create Document screen]

b. Document status can be set, for ex: ‘AL’ for setting the status as create, ‘FR’ as released etc. By default the status is set to ‘AL’ i.e. Create when u execute transaction CV01N.

c. There is a tab called ‘ORIGINALS’, where the user can attach the documents he wishes to upload on the SAP server. When you click on Create button on the tab for Originals, a popup would be displayed, wherein you enter the Application of the object. For ex: if the document is an Microsoft Word Document, select ‘WRD’ from the search help provided, and the path from where you would like to fetch the document.
e. Click on the button highlighted in the screenshot below to Check In the document.

f. The tab 'OBJECT LINKS' provides information about links from the document to SAP object such as material master, change number etc.

g. There is tab for 'CLASSIFICATION' of data, just above the document details as shown in the screenshot attached below, which contains all the information about class assignment and characteristic values that can be relevant for documents are in the tables 'CLASSALLOCATION' and 'CHARACTERISTICVALUES'.

h. Upon saving, the system generates a document number automatically if not specified

2. CV02N: Change a document
a. This transaction is used to modify the document.

b. There is button 'STATUS LOG' which maintains all the info about the history of the document.

c. A deletion indicator can be set here which sets the flag for the document to be deleted. An external program MCDOKDEL is then used to delete the document (as shown below). Enter the document type and execute the report to delete all the documents of the specific document type marked for deletion. Setting the value of Test Mode as 'X' will not delete the document.
3. CV03N: Display the document

This transaction is used to display the document.

4. CV04N: Find Document

Using this transaction all the documents belonging to a particular document type can be fetched and further processed.

Upload Documents Using BAPI's

When a large number of documents have to be uploaded, or when documents are to be transported from a legacy system to the SAP server, it is difficult for the user to manually do this using CV01N. This could be done by using BDC's, but the recording would be a little difficult for such a complex transaction. Hence SAP has provided a set of BAPI'S to avoid such a scenerio.

Some of the BAPI's to be used for DMS uploads or modifications are as follows:

BAPI_DOCUMENT_CREATE2
BAPI_DOCUMENT_CHANGE2
BAPI_DOCUMENT_DELETE.