

Start Easy DMS:

Easy DMS in your Desktop



Double click the icon

Select the client, (Ex:110 SAP Dev Client)

Enter the User Name & Password (its same as ECC system)

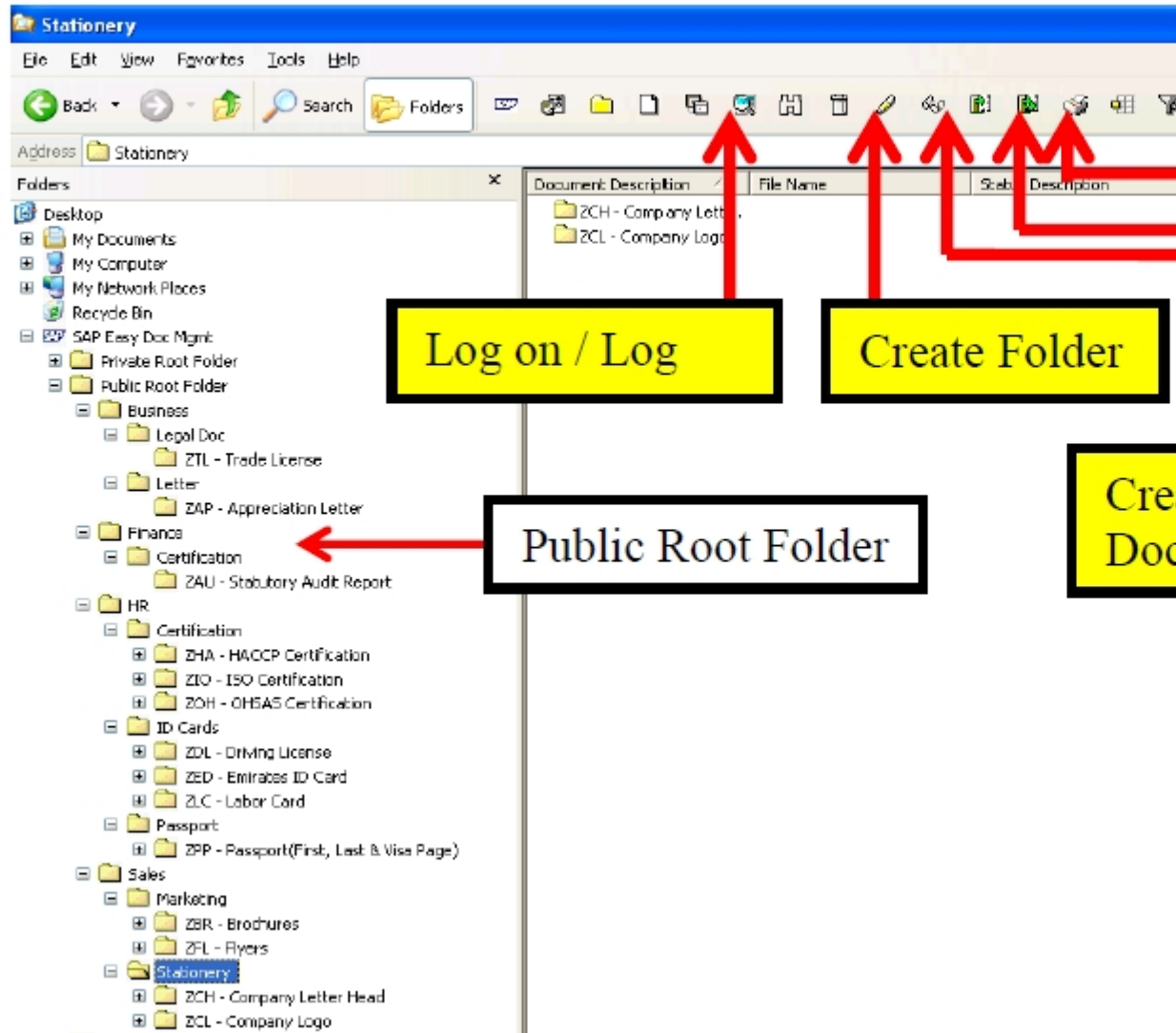
Note: After log in it will prompt to create "Private Root Folder" you can ignore this and go ahead.
Click AGI Public Root Folder to create and Save DMS Documents.

Easy DMS – Initial Screen

Search Result		
Private Root Folder	FOL	AGISUPP
AGI Public Root Folder	FOL	EDIPUBLI

Menu Option Details of Easy DMS as follows:

Screen detail:



Steps to create Folder creation in Easy DMS:

Click Icon "Create Folder" to create folder



Select required document type for folder creation. Please use below guidelines to create folder creation.

Folder Types:

Region-ZRG

Year-ZYR

Month-ZMT

Remaining Folders-FOL

QuickBase Tools

SAP Easy Document Management - Create Folder

Document Data | Authorizations | Object Links | Technical Details

Main Data

Document Type: Region (ZRG)

Description: Ireland IP

Status: Creation (CR)

User Name: AGISUPPORT

Change Number:

Authorization Group:

Laboratory:

Additional Data

Characteristic	Value
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Original Files

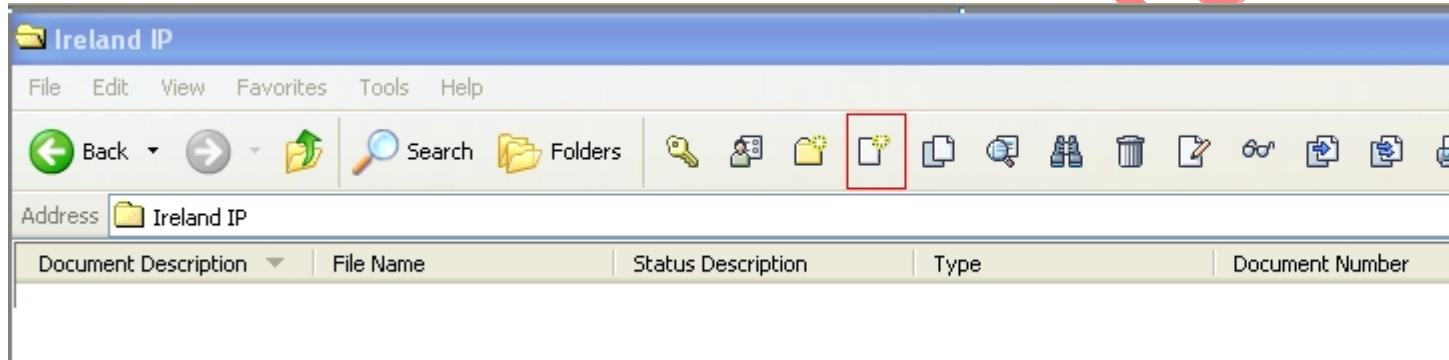
S...	Ap...	Storage Lo...	File Name
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OK Cancel Apply

TOOLS

Steps to create DMS Document Creation:

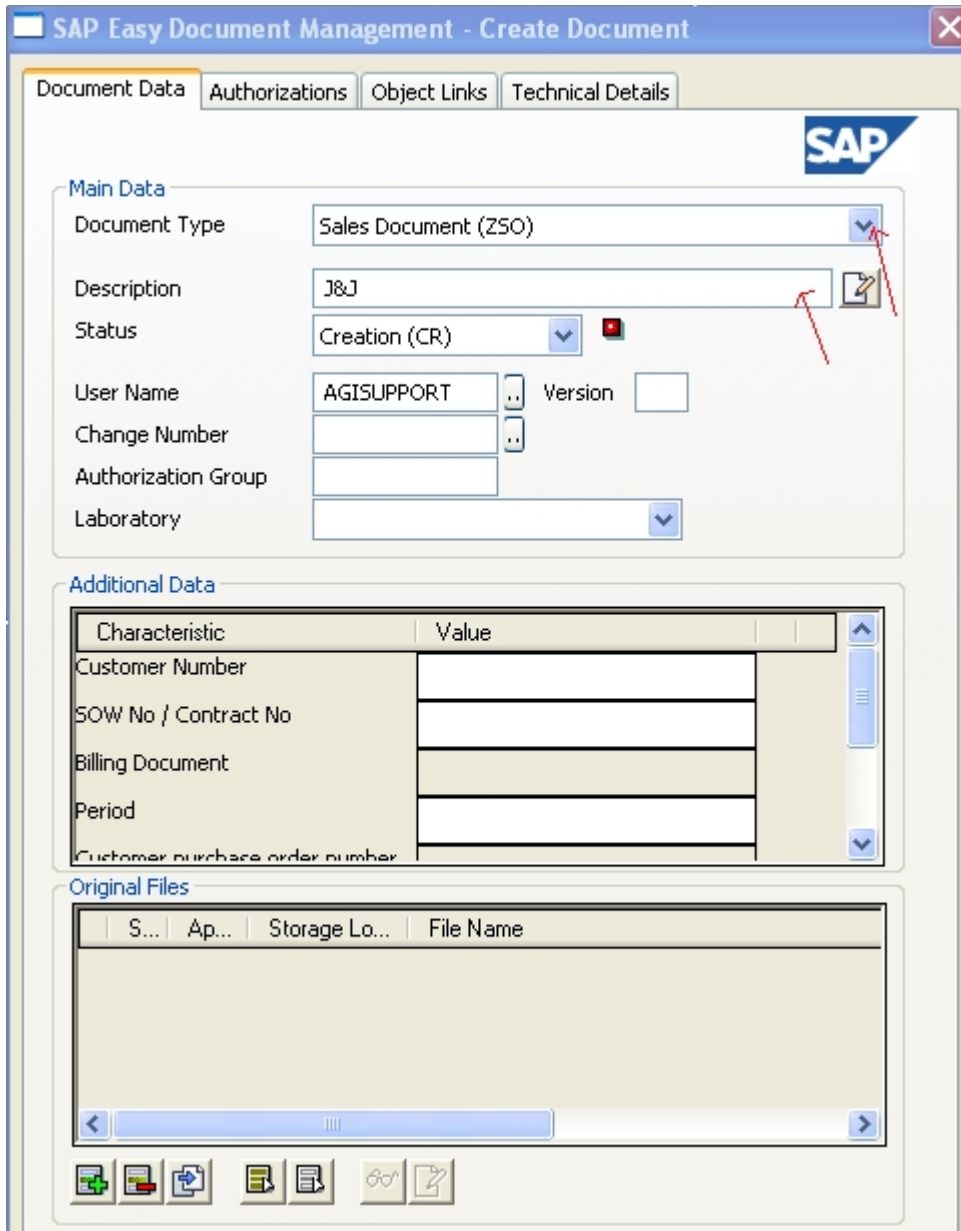
Click "Create document" Menu option to create document in Easy dms



Enter the correct document type, for help check the document type by clicking dropdown list as shown below

Note: Please use only Custom document types that starts with Z*

Enter Description of DMS Document



Select "Add a New File" icon to attach file to DMS Document

SAP Easy Document Management - Create Document

Document Data | Authorizations | Object Links | Technical Details

Main Data

Document Type: Sales Document (ZSO)

Description: J&J

Status: Creation (CR)

User Name: AGISUPPORT | Version:

Change Number:

Authorization Group:

Laboratory:

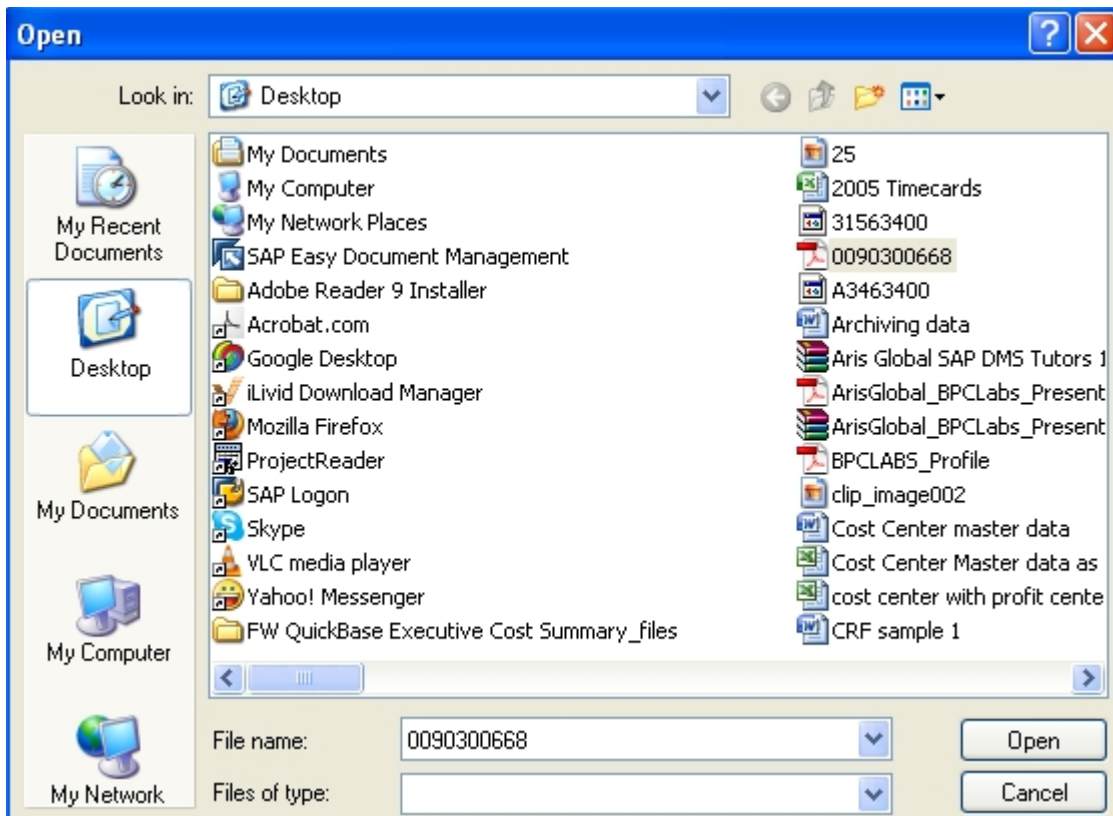
Additional Data

Characteristic	Value
Customer Number	<input type="text"/>
SOW No / Contract No	<input type="text"/>
Billing Document	<input type="text"/>
Period	<input type="text"/>
Customer purchase order number	<input type="text"/>

Original Files

S...	Ap...	Storage Lo...	File Name

Select the required file in this case Invoice-0090300668



QuickBase

SAP Easy Document Management - Create Document

Document Data | Authorizations | Object Links | Technical Details

Main Data

Document Type: Sales Document (Z50)

Description: J&J

Status: Creation (CR)

User Name: AGISUPPORT

Change Number:

Authorization Group:

Laboratory:

Additional Data

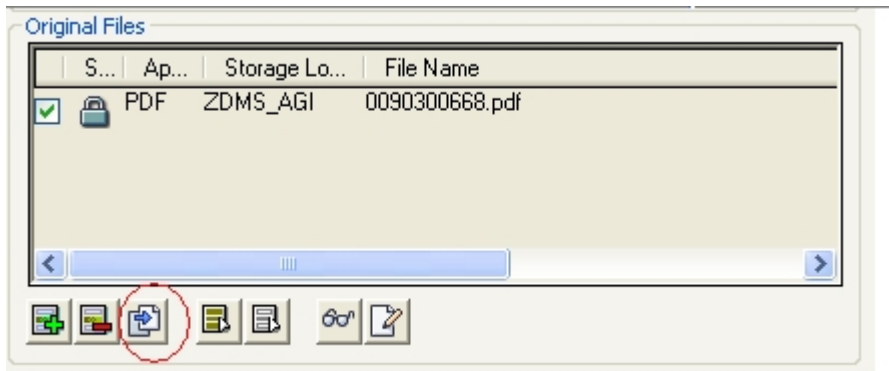
Characteristic	Value
Customer Number	
SOW No / Contract No	
Billing Document	
Period	
Customer purchase order number	

Original Files

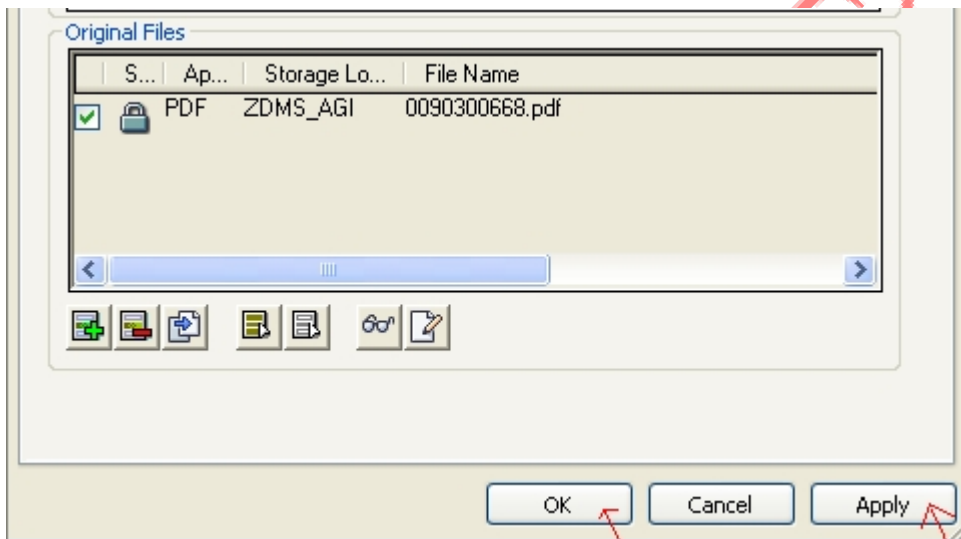
S...	Ap...	Storage Lo...	File Name
<input checked="" type="checkbox"/>		ZDMS_AGI	0090300668.pdf

OK Cancel Apply

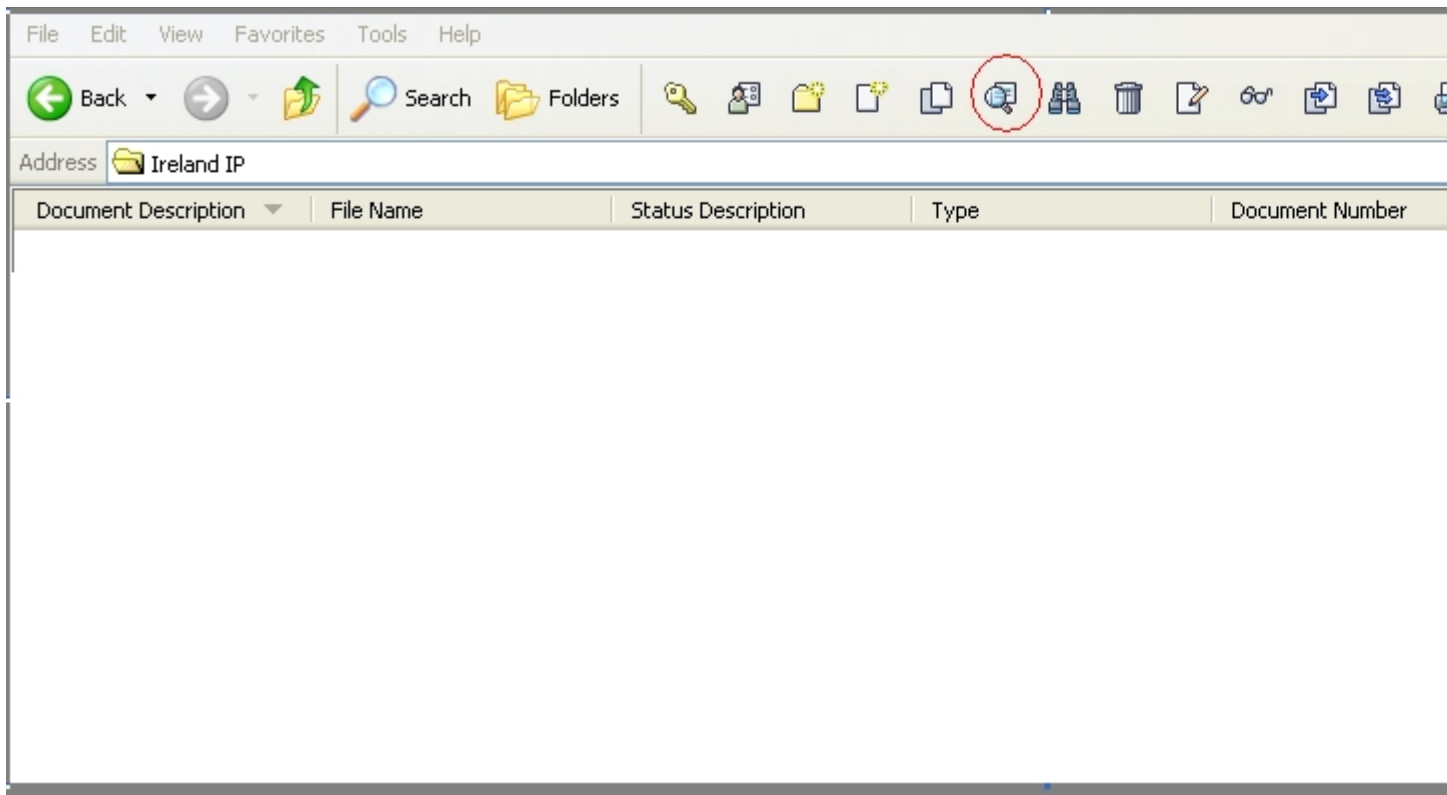
Click "Check In Selected File(S)" to copy the file in content server.



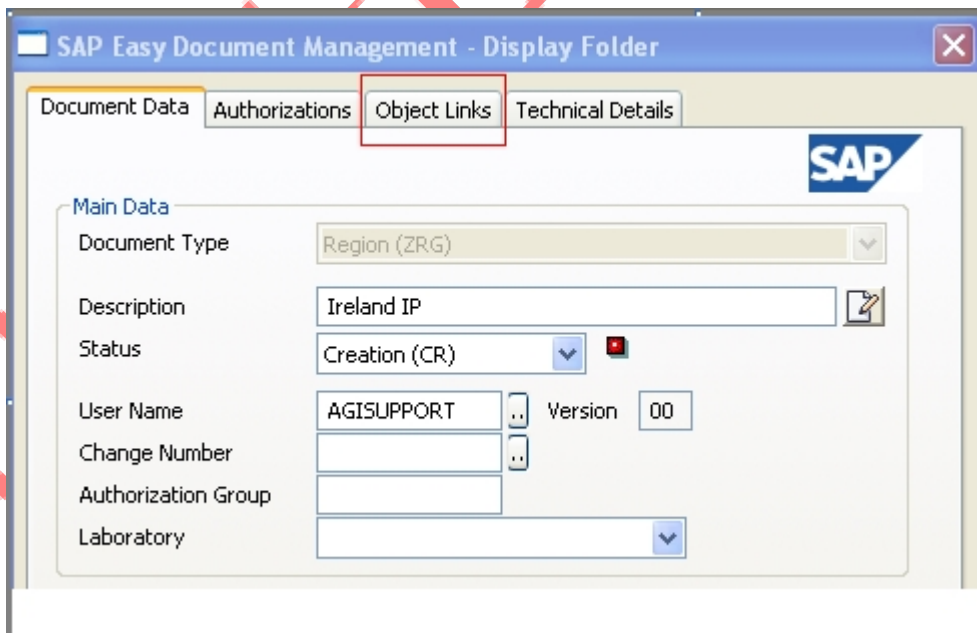
Click "Apply" and "OK" to save the changes.



Click "SAP Properties" to attach the DMS Document to required SAP Object links.

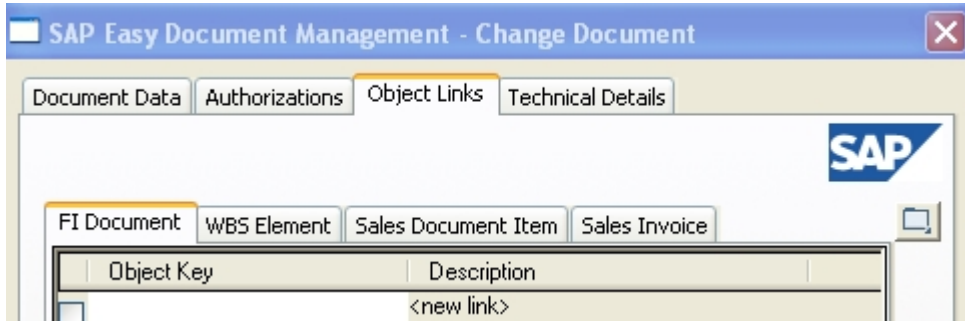


Click "Object Links" tab



Attach the DMS Document to Respective SAP Objects like FI Document,WBS Element, Sales Document Item ,Sales Invoice.

Note: SAP Objects in Object Links tab will appear based on document type(Ex: ZSO in this case) selected.



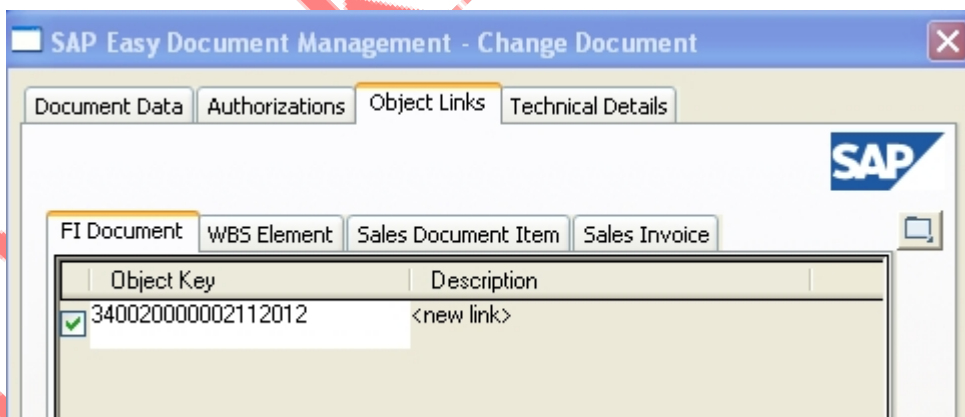
FI Document:

Use below Format while attaching finance document (via Object link) to DMS Document in Easy DMS

CCODE followed by FINANCEDOCUMENT followed by YEAR

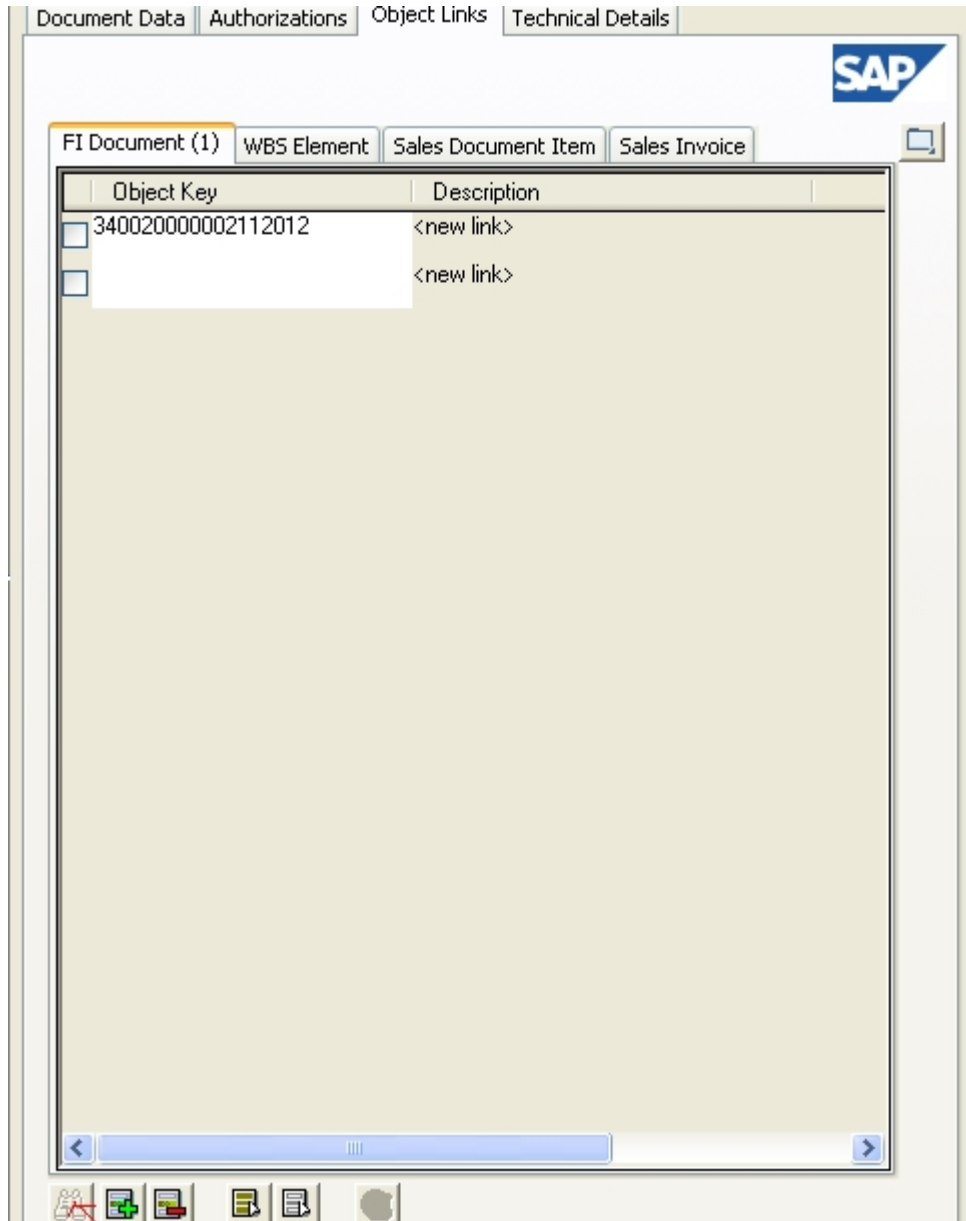
EX:510020000002112012

Note: This format is only for FI Doc number in Easy DMS. There is no restrictions for remaining object links.



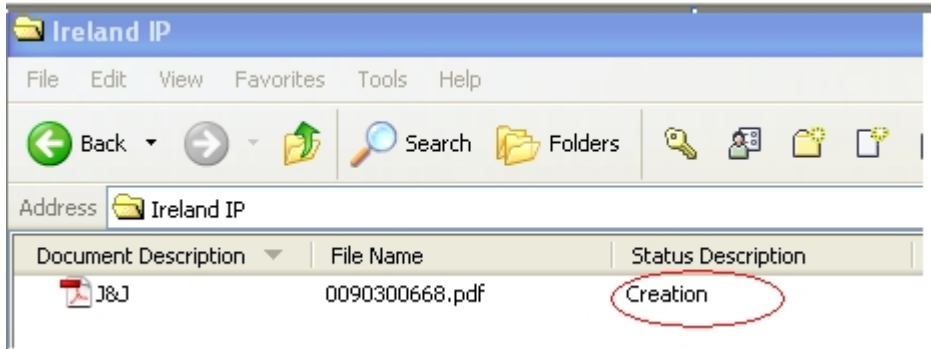
Find Object option is inactivated for most of the documents like FI Document, Sales document Item, Sales Invoice except for WBS element:

Ex: Find Object is inactivated for FI document in Easy DMS as highlighted in below screenshot.

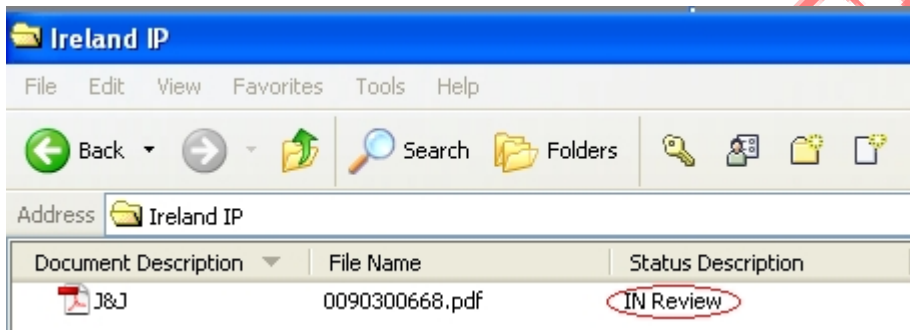


Once DMS Document is attached to file and assigned to respective SAP Objects, kindly change the status to "released"

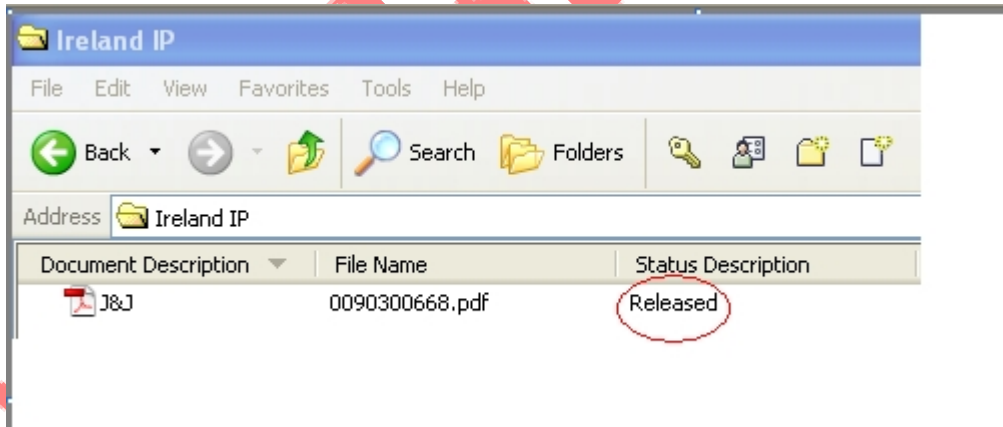
Change Status:



Right click on document and select “Change Status” option .It displays two options to select: Creation (CR) and IN Review (IR).Please select IN Review (IR) to change the status to In Review



Right click on document and select “Change Status” option .It displays two options to select: Creation (CR) and Released (RE) .Please select Released (RE) to change the status to Released.



Note: If any additional file needs to be attached, please make document status as creation, attach the additional file and repeat the above change status steps.

To view DMS document (created in SAP R/3) in Easy dms.

1. Consider some created dms document as shown below:

Change Document: Initial Screen

Change Document: Initial Screen

Select Document via ...

Document: 70000004
 Document Type: ZJV
 Document Part: 000
 Document version: 01

2. Requirement to view the above dms document in below easy dms folder.

02 Feb

File Edit View Favorites Tools Help

Back Search Folders

Address: 02 Feb

Document Description	File Name	Status Description	Type	Document Number
PO		Creation	ZPO	20000193

This folder "PO" contains no dms document yet.

PO

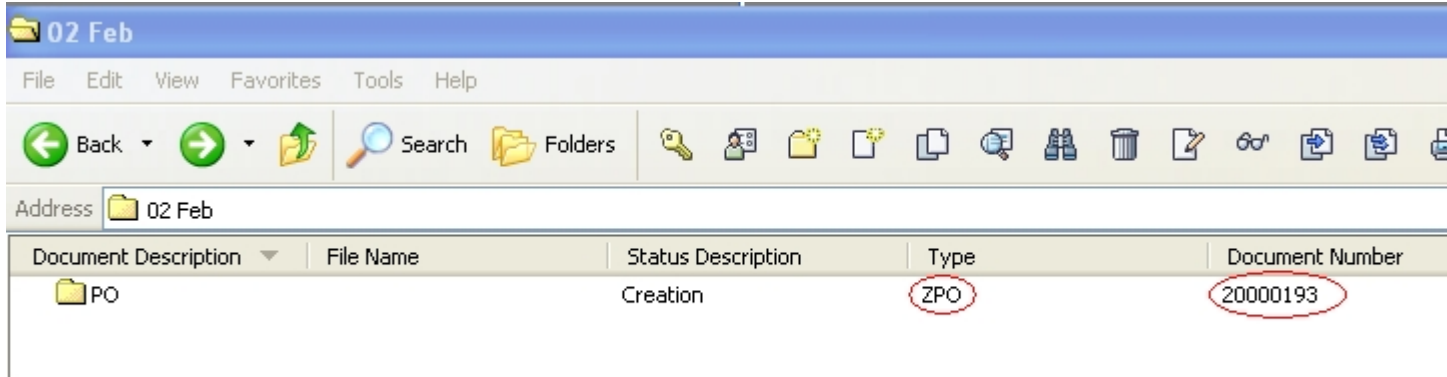
File Edit View Favorites Tools Help

Back Search Folders

Address: PO

Document Description	File Name	Status Description	Type	Document Number
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Copy the "PO" folder document number and document type and paste it in transaction code CV12 in SAP R/3



Document Description	File Name	Status Description	Type	Document Number
PO		Creation	ZPO	20000193



Change document structure: Initial Screen

CV12

Change document structure: Initial Screen

Document	<input type="text" value="20000193"/>
Document Type	<input type="text" value="ZPO"/>
Document Part	<input type="text" value="000"/>
Doc. Version	<input type="text" value="01"/>

Validity

Change Number	<input type="text"/>
Valid From	<input type="text" value="12.07.2012"/>

Click enter icon

Enter "DMS Document "to view in this folder in Easy dms.

Always enter "d" as item category, document as 70000004 and document type as ZJV (sample example) ,click "save" icon" to save the dms document in "20000193" folder.

Change document structure: General Item Overview

Change document structure: General Item Overview

Document 20000193 ZPO 000 00

PO

Document General

Item	ICt	Document	Ty.	DPt	Vr	Component description	Valid From	Valid to	Change No.
0010	D	70000004	ZJV	000	01	TEST DOC 04 CHANDRA	12.07.2012	31.12.9999	

Now we can able to view the same document in 20000193 folder in easy dms

PO

File Edit View Favorites Tools Help

Back Search Folders

Address PO

Document Description	File Name	Status Description	Type	Document Number
TEST DOC 04 CHAN...	singtel payment.pdf	Creation	ZJV	70000004

QuickBase Tools