

SAP ArchiveLink - Scenarios in Applications (BC-SRV-ARL)



HELP.BCSRVARLSC

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Icons

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SAP ArchiveLink - Scenarios in Applications (BC-SRV-ARL)

SAP ArchiveLink[®] is one of the SAP Basis cross-application communication interfaces between the SAP System and external components. External components may be general desktop applications or external storage systems. The integration of SAP ArchiveLink in the various SAP applications enables the storage scenarios explained in this cross-application documentation.

The documentation is structured as follows:

- An [Introductory Section \[Seite 10\]](#) containing general information about storing using SAP ArchiveLink and about the following documentation
- An application-specific section for each SAP application component (for example, FI, SD, HR) with the relevant storage scenarios

For information on related areas, see the following documentation:

- [SAP ArchiveLink \[Extern\]](#)
- [SAP Business Workflow \[Extern\]](#)
- [Archiving and Deleting Application Data \[Extern\]](#)

SAP ArchiveLink - Introduction

The following sections contain general information about this scenarios documentation.

SAP ArchiveLink and Application Scenarios

SAP ArchiveLink and Application Scenarios

SAP ArchiveLink[®] is one of the integrated interfaces in the SAP Basis System that can be used to store all kinds of documents in external content servers.

SAP ArchiveLink therefore complements the existing range of SAP application software. For a detailed description of SAP ArchiveLink, see [Introduction to SAP ArchiveLink \[Extern\]](#).

The SAP **application components**, for example, SD, FI, HR and MM, support storing using SAP ArchiveLink by providing various application scenarios. **Inbound documents, outbound documents, print lists, archive files, desktop files and binary files** are supported.

How the inbound documents are entered in the system and forwarded for processing and storing depends on the storage scenario used. For information about the possible [Storage Strategies \[Extern\]](#), see the documentation [SAP ArchiveLink \[Extern\]](#).

This documentation describes the storage scenarios that are integrated in the SAP applications, for example, how Sales and Distribution (SD) documents can be stored in external storage systems using SAP ArchiveLink.



Archiving in databases using the ADK (Archive Development Kit) is **not** the same as storing using **SAP ArchiveLink**.

For information on data archiving using the ADK archiving transaction, see the documentation [Archiving and Deleting Application Data \[Extern\]](#).

SAP ArchiveLink: Overview

Background

There is a growing trend nowadays to transfer stored data from paper/microfiche to external “content servers” (for example, archives). Companies are obliged by law and/or internal standards to keep documents for a certain length of time. Traditionally, paper archives or microfilms have been used, but these methods are very expensive, either due to copying costs or the large amount of space required by such archives. By contrast, electronic storing methods are a much cheaper option and represent an important part of the “paperless office” concept.

SAP’s R/3 System supports a variety of business processes, which can involve documents both in paper form and in electronic form. The documents either serve to trigger all kinds of processing steps in FI, SD, HR and so on, or they are documents relating to processes in one of these application areas.

When linked to SAP applications, content servers and the **SAP ArchiveLink** interface allow flexible access to all document searches available in the SAP System and can therefore lead to considerable time savings. In addition, a combination of the SAP System and SAP ArchiveLink allows users multiple access (parallel and direct) to stored documents from their work center without the need for time-consuming searches, which guarantees faster access to documents.

The subsequent sections of this documentation describe the integration of SAP ArchiveLink in the functions of various application components within the SAP System.

Concept

SAP ArchiveLink provides the following interfaces:

- **User interface**
- **Application Interface**

This interface consists of function modules, which must be integrated in the SAP applications, if SAP ArchiveLink functions are to be used.

Business objects are linked to stored documents and object methods are available that allow storing using SAP ArchiveLink to be integrated flexibly in SAP Business Workflow.

- **Interface between SAP and external components and general desktop applications**

External components may be HTTP content servers, for example. General desktop applications may be MS Word and MS Excel, for example.

Positioning SAP ArchiveLink

SAP ArchiveLink enables

- Incoming documents to be stored in the SAP System
- Information from the SAP System (for example, outgoing documents and print lists) to be stored
- Direct access from SAP application components to stored documents
- Integration of external content servers with the SAP System

SAP ArchiveLink: Overview

The SAP ArchiveLink-specific [Terms \[Extern\]](#) “document”, “technical document class”, “document type”, “object type” and “synchronous storing” and “asynchronous storing” are explained in the SAP ArchiveLink documentation, which also contains information on the [Administration Concept \[Extern\]](#) (content servers, links and link tables).

Technical Basis

Links from documents to business objects are created by the generation of a link table entry, which contains both a unique identification for each business object using the object type and object key and a reference to a stored document using the content server ID and a unique key for each document stored in this content server. It is therefore possible to create a link between a business object and any number of documents using a simple 1:n relationship in a table. No entry is required in the application tables in which the business objects are managed. If the link table entry for an stored document is deleted, all references in the SAP System to this stored document are also deleted. This technique allows the options for accessing stored documents to be integrated flexibly into the SAP System.

Application Interface

The interface to the SAP applications contains the following functions:

- **Linking business objects with stored documents**

This function is used to display, retrieve or store stored documents directly from the business object. An example of this is the link between an F1 business object invoice and original invoices that have been scanned into the system.

- **Linking business objects with stored outgoing documents**

This function is used to store documents generated using SAPscript and link them with the relevant business objects. Examples of documents are outbound quotations, order confirmations, purchase orders and invoices.

- **Storing print lists**

The process for storing print lists is the same as for outgoing documents.



As of R/3 Release 4.6C, application objects archived in data archiving (ADK) are not stored using SAP ArchiveLink, but rather using the [Content Management Service \[Extern\]](#) of the [SAP Knowledge Provider \[Extern\]](#) (KPro).

Integration Status

Many applications in the SAP System are linked directly or indirectly with SAP ArchiveLink:

- **Direct link**

- FI
- MM
- SD
- ...

- **Indirect link**

- Via the **DMS** (document management system): MM, PP,...

SAP ArchiveLink: Overview

SAP ArchiveLink is centrally integrated in the DMS and all applications with object links to the DMS are therefore linked to SAP ArchiveLink.

- Via **MC** (Message Control): MM, SD,...

The integration of SAP ArchiveLink in message control allows outgoing documents to be stored.

- Via **SAPconnect** and the **Business Workplace**: Faxes

Inbound faxes can be processed directly in the Business Workplace, stored and linked with business objects without having to be printed first.

Generic Object Services



For R/3 Release 4.0A, generic object services are provided for four SAP ArchiveLink functions via the system menu for **all** SAP applications.

From the business objects implemented in the SAP applications, four SAP ArchiveLink functions can be executed **in all applications** and **independently** of which application is involved:

- You can display the hit list of stored documents
- You can assign stored documents subsequently to a business object.
- You can store documents in dialog
- You can create a bar code for a business object

These functions are integrated into **all** SAP applications via object services. There is no need for special function modules to be integrated in the applications. For more information, see [Generic Object Services \[Extern\]](#).



For these functions to work smoothly, object orientation in the SAP application and support of object services are important.

For more information, see [Business Context Facilities and Generic Object Relationships \[Extern\]](#).

Business Applications

MM

The following documents relating to purchasing in MM can be stored:

- Outgoing purchasing documents
- Requests for quotation
- Purchase orders
- Scheduling agreements
- Forecast delivery schedules
- Contracts

SAP ArchiveLink: Overview

- Incoming purchasing documents
 - Quotations
 - Order confirmations
- Incoming invoices and credit memos
- Incoming delivery notes
- Print lists

For more information about storing in MM, see [SAP ArchiveLink - Storage Scenarios in MM \[Seite 74\]](#).

SD/WS

The following are examples of sales documents that can be stored:

- Incoming customer inquiries and customer inquiry changes
- Outgoing customer quotations
- Incoming purchase orders and purchase order changes
- Outgoing order confirmations

For more information about storing in SD, see [SAP ArchiveLink - Storage Scenarios in SD \[Seite 50\]](#).

PA

The following personnel administration and payroll documents can be stored:

- Incoming HR master data documents
- Incoming recruitment documents
- Incoming travel management documents

For more information about storing in PA, see [SAP ArchiveLink - Storage Scenarios in PA \[Seite 204\]](#).

QM

The following QM documents can be stored:

- Incoming documents for quality notifications (for example, customer complaints)
- Outgoing documents for quality notifications (for example, letter of complaint to vendor)
- Outgoing quality certificates

For more information about storing in QM, see [SAP ArchiveLink - Storage Scenarios in QM \[Seite 93\]](#).

The DMS and Applications Connected with the DMS

In the DMS and in applications that are connected with the DMS (often MM and PP), the following documents can be stored:

- Incoming documents
- Originals managed in the DMS (PC files)

For more information about storing in the DMS, see [Storing in Document Management \(CA-DMS\) \[Seite 24\]](#).

Customizing

Customizing

Customizing is divided into three areas:

- General Customizing for SAP ArchiveLink
- Customizing for SAP Business Workflow
- Application-specific Customizing for individual SAP ArchiveLink scenarios

General Customizing for SAP ArchiveLink

To make these settings, proceed as follows:

Use the Implementation Guide (IMG):

Basis → *Basis Services* → *SAP ArchiveLink*

For further information, see the [Customizing \[Extern\]](#) section in the documentation *SAP ArchiveLink*.

Customizing for SAP Business Workflow

For the storage scenarios that use SAP Business Workflow:

- [Storing for Subsequent Entry \[Extern\]](#)
- [Storing for Subsequent Assignment \[Extern\]](#)
- [Storing and Entering \[Extern\]](#)
- [Storing and Assigning \[Extern\]](#)

you must make Workflow Customizing settings.

For further information, see the section [Specific Customizing \[Extern\]](#) in the documentation *SAP ArchiveLink* and the IMG (*Basis* → *Basis Services* → *SAP ArchiveLink*).

Application-Specific Customizing

In the individual **application scenarios**, further customizing settings are required. The application-specific customizing for each SAP application component is described in the following sections of this documentation.

Aim of this Documentation

This documentation describes the SAP ArchiveLink scenarios that are delivered as part of the standard system by SAP. There is a section for each storage scenario. The documentation describes the standard software.

Each storage scenario description is assigned to one of the “big” application components in the SAP System. Storage scenarios in the following application components are currently described:

- BC (Basis)
- CA (Cross-Application Components)
- FI (Financial Accounting)
- SD (Sales and Distribution)
- MM (Materials Management)
- IS-RE (Real Estate Management)
- QM (Quality Management)
- PP (Production Planning and Control)
- PM (Plant Maintenance and Service Management)
- PA (Human Resource Management)
- PY-DE (Payroll Germany)

The individual storage scenarios are structured as function descriptions and generally contain the following sections:

Section	Description
Use	Business background (this section is sometimes separate from the pure function description). You learn which application scenarios SAP ArchiveLink supports, which employees are involved and the advantages and simplifications offered by SAP ArchiveLink. This information is enough to give you a first overview of the storage scenarios.

Aim of this Documentation

Prerequisites	<ul style="list-style-type: none">• Technical implementation <p>You become familiar with the document types and the corresponding technical document classes that form the basis of the scenario. You discover which object types and link tables are used.</p> <p>This information is particularly useful if you are planning to enhance or change the scenario.</p> <ul style="list-style-type: none">• Preparation and Customizing <p>The settings that are necessary to adapt the scenario to the specific requirements of your corporate structure are described.</p> <p>The settings described are scenario-specific and usually complement the SAP application component Customizing.</p>
Activities	This section describes the technical and business connection of the scenario to the R/3 application and how the corresponding application functions are called.



This documentation is not intended to replace the SAP ArchiveLink documentation and should only be seen as a central reference point for documentation relating to the implementation of SAP ArchiveLink in the individual SAP applications.

To find out more about using SAP ArchiveLink and make full use of the functions for enhancements and in-house developments, see the [SAP ArchiveLink \[Extern\]](#) documentation.

SAP ArchiveLink - Storage Scenarios (BC)

[Ablegen von Listen mit SAP ArchiveLink \[Extern\]](#)

The following sections describe storage scenarios in R/3 Basis (BC):

- Storing Lists in the Report Tree
- Storing Print Lists
- Storing SAPoffice Documents

See also:

- General [Introduction \[Seite 10\]](#) to this scenario documentation
- [SAP ArchiveLink \[Extern\]](#) documentation
- [General Report Selection \[Extern\]](#) documentation
- [BC - ABAP Programming \[Extern\]](#) documentation

Storing Lists in the Report Tree (BC)

Storing Lists in the Report Tree (BC)

Use

This section describes the **storing** of lists generated by executing reports in report trees. The process is not application-specific and is usually possible for any list unless storing is specifically prohibited in the program.

Users can access reports that they require in the hierarchical structure of the report tree easily from all applications, via general report selection in the SAP information system.

The SAP standard report tree contains several standard reports for all applications. To access reports from a particular application, you must expand the structure until you reach a list of reports on the lowest level. Here you select and execute the required report. You can display the result on the screen or print it via the spool system.

Companies can configure the standard report tree to suit their requirements. For example, you can add your own reports or pre-generated lists and even change the entire structure.

Prerequisites

Technical Implementation (BC)

Object type

SREPOTREE

Document type

ABAP

Link table

TOA01

For further information on executing reports and displaying pre-generated lists in report trees, see [General Report Selection \[Extern\]](#).

Technical Implementation (BC)

Although storing lists generated in the report tree is similar for all applications, the report tree available to you may vary from the SAP standard, since your company can adjust the SAP standard report tree to suit its requirements.

For further information on Customizing the report tree, see the Implementation Guide (IMG).
Choose

*Tools → Business Engineer → Customizing
Implementation projects → Display SAP Reference IMG
and then Basis → Reporting - Report tree.*

Activities

Storing lists

When you have executed a report in the report tree, you can save the result list there and store it simultaneously.

Storing Lists in the Report Tree (BC)

To save your list and store at the same time:

1. Choose *System* → *List* → *Save* → *Report tree*.
2. Select *Store* in the dialog box displayed and specify where the list should be stored in the report tree. Specify the values for *Report tree* and *Nodes*.
3. Choose *Save*.

You have now saved your list in the report tree and the process is complete.

Displaying information on storing lists

You can check whether a list has been stored in the report tree:

To check whether a list has been stored:

1. Position the cursor on the relevant list.
2. Choose *Utilities* → *List information*.

The System displays a dialog box. The check boxes indicate whether the list has been stored.

Displaying stored lists

To display a stored list in the report tree, choose the relevant list by double-clicking.

Storing Business Workplace Documents

Storing Business Workplace Documents

Use

Documents stored in the [Business Workplace \[Extern\]](#) are usually stored in the R/3 database (PC documents and binary documents can also be stored in an HTTP content server). To save memory space in the database, you can store documents in an external storage system using SAP ArchiveLink. The content of the documents that you have stored using SAP ArchiveLink is then deleted from the database.



You can only retrieve Workplace documents stored using SAP ArchiveLink from the external storage system, from within the R/3 System. Direct access within the storage system is not possible.

Prerequisites

Technical Implementation

Object type

SOFM

Link table

TOA01

Document class

BIN

Document type

SOAARCHIVE Description: Office data object

Preparation and Customizing

To store documents from the Business Workplace, a content server must be maintained for the object type SOFM and the object class SOAARCHIVE in [Customizing \[Extern\]](#) for SAP *ArchiveLink*.

To perform mass archiving of Workplace documents, you need [authorization \[Extern\]](#) for Workplace administration. This authorization is contained in the role SAP_BPT_USER.

Activities

Proceed as described in [Mass Archiving \[Extern\]](#).

The procedure for displaying and changing documents stored in the archive is no different for the user than the procedure for documents stored in the R/3 database. Calling documents from the archive usually takes longer, however.

SAP ArchiveLink - Storage Scenarios (CA)

The following sections describe the storage scenarios in the R/3 application component CA (Cross-Application):

- Document Management System (CA-DMS)
- Data Archiving (CA-ARC)

See also:

- General [Introduction \[Seite 10\]](#) to the scenario documentation
- [SAP ArchiveLink \[Extern\]](#)
- [Application Data Archiving \[Extern\]](#)
- [Document Management System \[Extern\]](#)

Optical Archiving in Document Management (CA-DMS)

Optical Archiving in Document Management (CA-DMS)

[eingehende Dokumente \[Seite 30\]](#)

You can use **SAP ArchiveLink**[®] to archive documents from the document management system (DMS) in optical archiving systems.

[Documents Input when Processed \(CA-DMS\) \[Seite 30\]](#)

[Checking a Document into an Archive \(CA-DMS\) \[Seite 31\]](#)

[Displaying an Archived Document \(CA-DMS\) \[Seite 32\]](#)

[Copying an Archived Document to a Document Info Record \(CA-DMS\) \[Seite 33\]](#)

[Digital Original Application Files \(CA-DMS\) \[Seite 25\]](#)

[Archiving an Original Application File \(CA-DMS\) \[Seite 26\]](#)

[Creating a New Version \(CA-DMS\) \[Seite 27\]](#)

[Changing an Original Application File for an Existing Version \(CA-DMS\) \[Seite 28\]](#)

[Displaying an Archived Original Application File \(CA-DMS\) \[Seite 29\]](#)

Digital Original Application Files (CA-DMS)

For each document info record, you can maintain and archive two original application files.

Each original application file can be linked to a maximum of 99 additional files. These are archived automatically when you archive the original application file.

Functions

You process original application files with the following menu option of the document info record:

Extras → *Originals* → *File 1(2)*

The following functions for archiving and processing archived original application files are available:

- [Archiving an Original Application File \(CA-DMS\) \[Seite 26\]](#)
- [Creating a New Version \(CA-DMS\) \[Seite 27\]](#)
- [Changing an Original Application File for an Existing Version \(CA-DMS\) \[Seite 28\]](#)
- [Displaying an Archived Original Application File \(CA-DMS\) \[Seite 29\]](#)

Notes on archiving original application files

- The system checks the application that is used to process the original application file (for example, *WinWord 7.0*).
In the IMG for the *Document Management System* in the activity *Define workstation applications*, you define the archives for the various applications (for example, archive **A2** for the application *WinWord 7.0*).
- The system does **not** log the archiving of original application files. However, in the IMG for the *Document Management System*, you can define in the activity *Define document types* that all field changes are to be logged (*Indicator: Create change documents*).
If you have archived an original application file with the function *Check in archive*, you can track any changes to the storage data (fields *Data carrier* and *Original*) in the change documents.

Notes on processing archived original application files

You have two options for processing an archived original application file:

- [Creating a New Version \(CA-DMS\) \[Seite 27\]](#)
- [Changing an Original Application File for an Existing Version \(CA-DMS\) \[Seite 28\]](#)

See also:

[Figure: Changing an Archived Original Application File \[Extern\]](#)

Archiving an Original Application File (CA-DMS)

Archiving an Original Application File (CA-DMS)

You archive an original application file if you want to save the current processing status for documentation purposes.

See also:

[Figure: Archiving Original Application Files \[Extern\]](#)

To archive an original application file:

1. Process the document in change mode (*Basic data* screen).
2. Choose *Extras* → *Originals* → File 1(2) → Check in archive.

The system saves the original application file to the optical disk defined in Customizing.

You see a dialog box with the following message:

Document archived successfully

3. You can check which archive the document was saved to.

To do this, display the data carrier and path for the original application data by choosing *Storage data*.

The data carrier and the path where the original application file was stored **before** being checked in the archive is **no longer** displayed. The system has overwritten this data with the archive data.



If the document type is defined such that all field changes are logged, you can still display the previous storage place (*Goto* → *Display changes*).

4. Save your document info record.

Creating a New Version (CA-DMS)

This means that you keep the old version (for example, 00) containing the archived original application file and create a **new** version (for example, 01) **directly** from the old version. For the new version, you then change the original application file.

To process the archived original application file (new version):

1. On the *Basic data* screen, choose *Document* → *New version*.
The system copies the data of the existing version (for example, 00), including the archived original application data.
2. In the new version (for example, 01), the original application file is still archived.
3. Choose *Extras* → *File 1(2)* → *Change*.

The system automatically creates a **copy** of the checked in original application file.

- Enter the target for the copy. This path identifies the place where the original application file for the new version (for example, 01) is stored.
- If the system accepts your entries, you see a dialog box with the following message:

Data copied from archive

Changing an Original Application File for an Existing Version (CA-DMS)

Changing an Original Application File for an Existing Version (CA-DMS)

This means that you change the version whose original application file has been archived. There is only **one** version in this case.

You can display the processing status that the original application file had in the archive from the **status log** if the following applies:

When checking the original application file into the archive, you set a status for which the *Indicator: Audit function* is selected. This indicator causes original application files that are checked into the SAP database, a vault, or an archive with this status to be stored automatically.

To change the archived original application file (existing version):

1. Choose *Extras* → *Originals* → *File 1(2)* → *Change*.

The system automatically creates a **copy** of the archived original application file.

2. You see a dialog box, where you can enter the target for the copy. As a default value, you see the path where the file was stored **before** being archived.
 - To accept the default value, choose *Continue*.
 - If you want the file to be copied elsewhere, enter the required data (data carrier, path, and file name) in the dialog box. This path identifies the place where the original application file for the same version is stored. The system overwrites the previous archive data.

If the system accepts your entries, you see a dialog box with the following message:

Data copied from archive

Displaying an Archived Original Application File (CA-DMS)

To display an original application file, you always use the following function, whether the data is stored on a server or in an archive:

Extras → Originals → File 1 (2) → Display.

The system automatically determines the path in the computer network. If the original application file is stored in an archive, you see a dialog box with the following message:

Data copied from archive



You can display archived data only from computers that have SAP ArchiveLink software installed.

Documents Input when Processed (CA-DMS)**Documents Input when Processed (CA-DMS)**

You process documents input when processed in the *Archive* menu of the document info record.

The following functions are available:

[Checking a Document into an Archive \(CA-DMS\) \[Seite 31\]](#)

[Displaying an Archived Document \(CA-DMS\) \[Seite 32\]](#)

[Copying an Archived Document to a Document Info Record \(CA-DMS\) \[Seite 33\]](#)

Checking a Document into an Archive (CA-DMS)

You use this function to check a scanned-in document (image) into an optical archive.

See also:

[Scenario: Checking a Document into an Archive \[Extern\]](#)

To check a document into an archive:

1. Two windows are active on your computer screen:
 - a scan window with a scanned-in document
 - a window for the R/3 document management system
2. In the document management window, choose the function you require (*Document* → *Create* or *Change*).

Enter the required data on the initial screen and choose ENTER. You see the *Basic data* screen.
3. Choose *Archive* → Check into archive.

The system checks whether a status network that supports a status of status type **A** (*archived*) is defined for the chosen document type.

Archiving is possible in the following cases:

 - if the status network does **not** support a status of status type **A**
 - if the status network supports a status of status type **A** at the current processing stage.

The system automatically sets the status of status type **A** and records the status change in the status log.

The system automatically determines the archive that is defined in the IMG function *Optical Archive*.

When the data has been archived, you see a dialog box with the following message:

Document archived successfully
4. Save your document info record.

Displaying an Archived Document (CA-DMS)

Displaying an Archived Document (CA-DMS)

You use this function you to display documents that were either scanned in when processed, then archived, or copied from the archive from the document info record.



This function is only active if at least one document has been archived for the chosen document info record.

To display a document from the archive:

1. Choose menu option *Archive* → *Display from archive*.
2. What you do next depends on the situation:
 - If only **one** archived document exists for the document info record, the system goes directly to the display program (viewer) and displays the document.
 - If **more than one** archived documents exist for the document info record, you first see a dialog box listing the archived objects with the date on which they were archived.
 - On the list, select the archived objects you want to display in the viewer.
 - Choose the *Choose* pushbutton.

The system goes to the first selected object.

In the viewer, you can switch between the objects you selected by choosing the appropriate function (*Object +* or *Object -*) from the *Goto* menu.
3. To exit the display function for archived objects, close the viewer with *Document* → *Exit*.

You can now continue processing the document info record.

Copying an Archived Document to a Document Info Record (CA-DMS)

This function allows you to copy a document that has been archived by another application (for example, SAPoffice) to a document info record.

See also:

[Scenario: Copying an Archived Document to a Document Info Record \[Extern\]](#)

[Figure: Copying an Archived Document to a Document Info Record \[Extern\]](#)

To copy a document from an archive:

1. Two windows are active on your screen:
 - a window showing the document in the display program (viewer) of the archive
 - a window for the R/3 document management system
2. In the document management window, choose the function you require (*Document* → *Create* or *Change*).
3. Place the cursor on the viewer window again.
 - Choose *Edit* → *Select*
This selects the scanned-in document for processing in the document management system.
4. Place the cursor on the document management window.
Choose *Archive* → *Copy from archive*.
The system makes the same status checks as described in [Checking a Document into an Archive \(CA-DMS\) \[Seite 31\]](#).

SAP ArchiveLink and Application Data Archiving (CA-ARC)

Use

You can use the Archive Development Kit data archiving transaction and SAP ArchiveLink to store archive files in external archives. For more information see: [Technical Background \(CA-ARC\) \[Extern\]](#).

Prerequisites

You must enter the following settings in customizing in order to use the SAP ArchiveLink interface to archive application data:

- Platform-independent filename
- Document type
- Automatic transfer of archive files

Activities

- [Checking Storage Status of Archive Files \(CA-ARC\) \[Seite 38\]](#)
- [Storing Archive Files Manually \(CA-ARC\) \[Seite 39\]](#)

See also:

- [Setting Platform-independent Filenames for SAP ArchiveLink \(CA-ARC\) \[Seite 35\]](#)
- [Setting Archive File Document Type \(CA-ARC\) \[Seite 36\]](#)
- [Storing Archive Files Automatically \(CA-ARC\) \[Seite 37\]](#)

Setting Platform-independent Filenames (CA-ARC)

1. Call the Archive Management.
2. Enter the name of the archiving object and press *Enter*.
3. Choose the *Customizing* function.
4. In archiving object-specific customizing choose *Technical Settings*.
5. In the *logical filename* field enter a filename that refers to the exchange directory of the attached SAP ArchiveLink archive system. For example, the logical filename **ARCHIVE_DATA_FILE_WITH_ARCHIVE_LINK**. The system delivers the following standard defined filename:

<PARAM_1>_<PARAM_3>_<DATE>_<TIME>_<PARAM_2>.ARCHIVE

- **PARAM_1**
Two character application abbreviation to classify the archive files in the system. The value is derived from the definition of the relevant archiving object.
- **PARAM_2**
Single character alpha-numeric counter (0-9, A-Z). The value is increased by the ADK when a new archive file is created.
- **PARAM 3**
A multiple character string containing the name of the archiving object. The value is given the name of the archiving object at runtime. In archive management, this enables you to check the file contents or to store the archives by archiving objects.



In the previous screen you can also branch to platform-independent filename maintenance. The path can be found automatically using the runtime variable <F=ARCHIVELINK>, if you use this runtime variable in the specification of the physical path. For example, the physical path could be: **ARCHIVE_GLOBAL_PATH_WITH_ARCHIVE_LINK**. See the **FILE** transaction documentation for further information.

See also:

- [Setting Archive File Document Type \(CA-ARC\) \[Seite 36\]](#)
- [Storing Completed Archive Files in the Archive System Automatically \(CA-ARC\) \[Seite 37\]](#)

Setting Archive File Document Type (CA-ARC)**Setting Archive File Document Type (CA-ARC)**

1. Call the Archive Management.
2. Enter the name of the archiving object and press *Enter*.
3. Choose the *Customizing* function.
4. Choose *Technical Settings* in archiving object-specific customizing.
5. Choose the document type **Archive** in the group box *Archive System Link*.

See also:

- [Setting Platform-independent Filenames for SAP ArchiveLink \(CA-ARC\) \[Seite 35\]](#)
- [Storing Completed Archive Files in the Archive System Automatically \(CA-ARC\) \[Seite 37\]](#)

Storing Completed Archive Files in the Archive System Automatically (CA-ARC)

1. Call the Archive Management.
2. Enter the name of the archiving object and press *Enter*.
3. Choose the *Customizing* function.
4. Choose *Technical Settings* in archiving object-specific customizing.
5. Mark the checkbox *Exec. automat.* in the group box *Archive System Link*.

See also:

- [Setting Platform-independent Filenames \(CA-ARC\) \[Seite 35\]](#)
- [Setting Archive File Document Type \(CA-ARC\) \[Seite 36\]](#)

Determining Whether an Archive File is Stored in the Optical Archive (CA-ARC)

Determining Whether an Archive File is Stored in the Optical Archive (CA-ARC)

1. Call the Archive Management.
2. Enter the name of the archiving object and press *Enter*.
3. Choose the *Management* function.
4. Set the cursor on the file whose archive residence you want to know, and double-click.
The *Archive Management: Archiving File Detail* popup appears. Read the *Storage* option status text.

See also:

[Storing Completed Archive Files in the Archive System Manually \(CA-ARC\) \[Seite 39\]](#)

Storing Completed Archive Files in the Archive System Manually (CA-ARC)



Only archive files whose data objects have been deleted in the database can be stored in an external archive system.

1. Call the Archive Management.
2. Enter the name of the archiving object and press *Enter*.
3. Choose the *Management* function.
4. Set the cursor on the file which you want to store in the external archive system.



If you want to store all the files in a session, set the cursor on the session number.

5. Choose the *Store* function.

The *Archive Management: Store via ArchiveLink* popup appears.

6. Choose the *Store Files* function.

The file is passed to the external archive system.

See also:

[Determining Whether an Archive File is Stored in the External Archive \(CA-ARC\) \[Seite 38\]](#)

SAP ArchiveLink - Storage Scenarios (FI)

The following sections describe storage scenarios in the *Financial Accounting* (FI) application component.

See also

- The general [introduction \[Seite 10\]](#) to this scenario documentation
- [SAP ArchiveLink \[Extern\]](#) dokumentation
- *Financial Accounting* documentation

Storing Print Lists (FI)

Use

In the FI application component, you can use **SAP ArchiveLink** to transfer the following print lists to an external storage system:

- Compact document journal (RFBELJ00)
- Line item journal (RFEPOJ00)
- Open item account balance audit trail (RFKKBU00)
- Accumulated account balance audit trail (RFKLBU10)

Storage using SAP ArchiveLink has the following advantages:

- Reduced burden on online system
- Safer storage
- Faster, easier access

Prerequisites

Technical Realization (FI)

Following improvements to the print reports, the print lists are now provided with an index when they are stored, enabling you to access objects (including sub-objects) at a later date.



A particular account in the account balance audit trail.

The system also generates a link to any stored documents that might exist, enabling you to display the corresponding stored document from the stored print list.

For a detailed description of how to store print lists, refer to [Print Lists \[Extern\]](#) in the *SAP ArchiveLink* documentation.

There are no plans for enhancements.

Preparation and Customizing (FI)

No special Customizing settings are required to be able to store print lists in FI. For information on the Customizing settings for **SAP ArchiveLink**, see [Customizing \[Seite 16\]](#).

Special authorizations are not required.

Storing Print Lists (FI)

Activities



For notes on using these functions (in particular displaying stored print lists) see [Searching for, Displaying and Printing Print Lists \[Extern\]](#) in the *SAP ArchiveLink* documentation.

To store print lists in the FI application component, proceed as follows:

1. Run the appropriate program and enter your selection criteria.
2. On the selection screen, choose *Optical archiving* and enter the following information in the dialog box that is now displayed:
 - Object class: DRAW (document)
 - Object type: D01 (print list)
 - Identification: XXX (three figure alphanumeric code of your choice)
 - Text: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX (up to 30 characters long).
3. Now choose *Execute in background* or *Execute + Print*.

To view the stored list, from the R/3 System initial screen, choose *Office* → *Business Documents* → *Find lists*. Enter the name of the report program and any additional selection criteria. Choose *Enter*. From the list that is now displayed you can select a print list and display its contents.



When displaying the list, you can also display the incoming and outgoing documents (provided these were also stored). You do this via hyperlinks which are recognizable as such by being underlined.

Storing Incoming Documents (FI)

Use

In the FI application component, you can transfer incoming documents (invoices, credit memos) to an external archive system using **SAP ArchiveLink**. Data can be stored in different ways:

- Store for subsequent entry
- Store and enter, and
- Late storing with bar codes
- Assign, then store



For detailed information on the ways in which you can store documents, see [Storage Strategies \[Extern\]](#) in the *SAP ArchiveLink* documentation.

The procedure **Store for entry later with document parking** is different to other storage methods. Under this procedure, processing is even more automated than it would otherwise be. The accounting clerk responsible for parking documents receives an incoming document (an invoice for example) via **SAP Business Workflow**. In the entry transaction to which the invoice is subject, the clerk can park this document using the existing incoming document. He or she can then send the parked invoice together with the incoming document for further processing (approval or additional investigation) to the relevant colleague. This colleague can then complete processing and post the invoice.

Prerequisites

Technical Realization (FI)

Object type

BKPF (financial accounting document)

Link table

TOA01

Document class

FAX

Document type

In the standard system, the following document types are supplied for the R/3 FI application component.

FI document	Document type
Incoming invoice without invoice verification	FIINVOICE
Incoming credit memos without invoice verification	FICREDIT
Incoming invoice parking	FIINVPREL

Storing Incoming Documents (FI)

Fast invoice entry	FIIPAYMEN2
Incoming payment	FIIPAYMENT

Enhancements

- You can define your own document types under
Tools → Business Documents
→ *Document types → Global document types* and
Tools → Business Documents
→ *Document types → WFL document types*.
- You can define your own transaction links under
Tools → Business Documents
Document types → Workflow parameters.

Further information

For basic technical information on adding **SAP ArchiveLink** functions to the R/3 application components, refer to the section [Incoming Documents \[Extern\]](#) in the *SAP ArchiveLink* documentation.

Preparation and Customizing (FI)

The basic preliminary settings that you must make in **SAP ArchiveLink** are described in [Customizing \[Seite 16\]](#)

You need to make settings in Customizing for *Financial Accounting* only for the activity **Late storing with bar codes**. For more information, see the documentation for the activities *Specify Control Parameters for Bar Code Entry* and *Maintain Document Types for Bar Code Entry* located in Customizing for *Financial Accounting* under *Financial Accounting Global Settings → Document → Document Header*.

Activities**Scenario: Assignment and Storage in FI**

For information on this procedure, see the following sections of the *SAP ArchiveLink* documentation:

Scenario: Late Storage with Bar Codes in FI

For information on this topic, see:

- [Process: Late Storing with Bar Codes \[Extern\]](#)
- [Concept: Storing with Bar Codes \[Extern\]](#)

Scenario: Store for Subsequent Entry in FI

For information on this topic, see:

- [Concept: Store for Subsequent Entry \[Extern\]](#)
- [Process: Store for Subsequent Entry \[Extern\]](#)
- [Store for Subsequent Entry \[Extern\]](#)

Scenario: Entry and Storage in FI

For information on this topic, see:

- [Concept: Store and Enter \[Extern\]](#)
- [Process: Store and Enter \[Extern\]](#)
- [Store and Enter \[Extern\]](#)

Document Processing Functions

In certain document processing transactions in FI you have direct access to the functions available under SAP ArchiveLink. These transactions include:

- Changing documents (FB02)
- Displaying documents (FB03)
- Changing parked documents (FBV2)
- Displaying parked documents (FBV3)

When carrying out these transactions, you can use the following functions:

- Subsequently assign a stored document from the external content server (see [Assign Stored Documents Subsequently \[Extern\]](#))
- Display the stored document for an FI document from the external content server (see [Searching for Incoming Documents \[Extern\]](#))

The assignment and display functions might typically be accessed as follows:

1. From the *General Ledger* menu, choose *Document* → *Display*.
2. Enter the document number and the company code in which it was posted. Choose ENTER.
The system now displays the R/3 document.
3. To display the stored document for this R/3 document, choose *Environment* → *Object links*
To assign this document to a document already stored, choose *Environment* → *Assign original*.

Storing Incoming Documents (FI)

Storing Outgoing Documents (FI)

Use

You can store documents transferred from the *General Ledger* (FI-GL), *Accounts Receivable* (FI-AR) and *Accounts Payable* (FI-AP) application components using SAP ArchiveLink. Documents that you created using SAPscript are stored in an external storage system and linked to the documents or accounts from which they are derived. You can store the following outgoing financial accounting documents:

- Payment advice notes
- Checks
- Correspondence like payment notifications and bank statements
- Dunning notices

Storage using SAP ArchiveLink takes place using Business Transaction Events, to which end SAP supplies sample function modules that you can activate by making the appropriate Customizing settings.



If you already use your own programs (user exits) or Business Transaction Events to manage printing, faxing, email or dispatching, check whether you need to replace these developments with a function module enhanced to perform these functions. **IMPORTANT:** Ensure that no data is overwritten.

Prerequisites

Technical Realization (FI)

Object type

BKPF (financial accounting document)

BUS3007 (customer account)

BUS3008 (vendor account)

Link table

TOA01

Document class

PDF

Document type

The following document types exist in the standard system:

FI document	Document type	Function module
Payment advice note	FIOPAYAVIS	FI_OPT_ARCHIVE_PAYMENT_ADVICE

Storing Outgoing Documents (FI)

Check	FIOPAYMENT	FI_OPT_ARCHIVE_PAYMENT
Correspondence: Payment notification Bank statement	FIOPAYCONF FIOACCSTAT	FI_OPT_ARCHIVE_CORRESPONDENCE
Dunning notice	FIODUNNING	FI_OPT_ARCHIVE_DUNNING_NOTICE

If you make changes in Customizing to the object types and document types, you will need to adapt the corresponding function modules in each case.

Enhancements

There are no restrictions to the way in which sample function modules in the standard system can be enhanced. They can also be duplicated for additional document types and object types as many times as necessary.

- You can define your own document types in the *Basis* Implementation Guide under Basis Services → SAP ArchiveLink → System Settings → Maintain Document Types.
- To define your own object types, on the *SAP R/3* screen, choose *Tools → Business Framework → BAPI development → Business Object Builder*.
- The sample function module FI_OPT_ARCHIVE_CORRESPONDENCE contains the correspondence types SAP01 (payment notification) and SAP08 (account statement). Additional correspondence types can be added to this function module. You can **define correspondence types** in Customizing for *Financial Accounting* under the Implementation Guide under *Financial Accounting Global Settings → Correspondence → Define Correspondence Types*.

Preparation and Customizing (FI)

To activate storage for financial accounting documents using SAP ArchiveLink, make the following settings in Customizing:

1. If you want to make changes to the function modules (changing the document type defined in the standard system for example) copy the sample function modules to your name range. You should then make these changes in the source text. For a detailed description of the procedure for copying sample function modules to your name range, see the IMG documentation for the activity *Use Business Transaction Events* (located under *Financial Accounting Global Settings*.)
2. Define the storage method in the function modules. Enter the setting in source text for the parameter *c_itcpo-tdarmod*. The following settings are possible:
 - 2 Store only
 - 3 Print and store
3. Create a product with which all function modules that you want to activate can be summarized at a later date.

To do this, choose the activity *Use Business Transaction Events*, located in Customizing for *Financial Accounting* under *Financial Accounting Global Settings*. On the *SAP*

Storing Outgoing Documents (FI)

Business Framework: Business Transaction Events screen, choose *Settings → Products → ... of a customer*. Mark this product as active by selecting the *Active* indicator.

4. Assign the function modules to processes (Events).

To do this, choose the activity *Use Business Transaction Events*, located in Customizing for *Financial Accounting* under *Financial Accounting Global Settings*. On the *Business Framework: Business Transaction Events* screen, choose *Settings → P/S function modules → ... of a customer*. In the table that is now displayed, enter the names of the function modules that you want to activate, together with the Events or products required. Enter also the name of the product already created.

The names of the processes defined in the standard system are as follows:

Function module	Process
FI_OPT_ARCHIVE_PAYMENT_ADVICE	00002050
FI_OPT_ARCHIVE_PAYMENT	00002060
FI_OPT_ARCHIVE_CORRESPONDENCE	00002310
FI_OPT_ARCHIVE_DUNNING_NOTICE	00001040

Activities

Storing outgoing documents (FI)

Outgoing documents are stored automatically if you have carried out the above-mentioned settings in Customizing.

Displaying stored documents

Stored documents can be displayed as follows:

- On the *SAP R/3* screen, by choosing *Office → Business Documents → Documents → Find lists*
- From the *Accounts Receivable* or *Accounts Payable* menu by choosing *Master records → Display*. Enter the customer or vendor you wish to display, select one of the indicators under *Company code data* and choose ENTER. On the screen that is now displayed, choose *System → Display relationships → Stored documents*.

SAP ArchiveLink - Archiving Scenarios (SD)

The following sections describe the archiving scenarios in the R/3 application component SD (Sales and Distribution):

- General sales and distribution (SD)
- Sales support (SD-CAS)

See also

- General [Introduction \[Seite 10\]](#) to this scenario documentation
- [SAP ArchiveLink \[Extern\]](#) documentation
- [Sales and distribution \[Extern\]](#) documentation
- [Sales support \[Extern\]](#) documentation

Optical Archiving of Incoming Original Documents (SD)

[Betriebswirtschaftlicher Hintergrund \(SD\) \[Seite 52\]](#)

[Weitere Voreinstellungen \[Extern\]](#)

[Spezial-Customizing \[Extern\]](#)

[Ablegen für spätere Erfassung \[Extern\]](#)

[Zuordnen und Ablegen \[Extern\]](#)

[Spät ablegen mit Barcode \[Extern\]](#)

[Ablegen und Erfassen \[Extern\]](#)

Business Background (SD)

Business Background (SD)

The Sales and Distribution application component contains an **SAP ArchiveLink** function that provides sales personnel with a quick and efficient means of optically archiving and processing a wide range of incoming documents including inquiries, purchase orders, contracts, and complaints. SAP ArchiveLink offers easy **online** access to these archived documents during the planning, processing, and analyzing of business transactions in Sales and Distribution.

The SAP ArchiveLink interface supports the following archiving scenarios for incoming documents in SD:

- Early archiving
- Late archiving
- Late archiving using bar codes
- Simultaneous archiving

Early Archiving

In the early archiving scenario, incoming paper documents are archived in the R/3 System before an SD document is created.

In early archiving, the archiving process usually begins in a central mailroom where a designated person opens, presorts, prepares, and records (scans) the incoming mail. Once an incoming document is scanned and an incoming document type is assigned to it, the system triggers the **SAP Business Workflow** to notify the authorized employee(s) that an incoming document has been received and is due to be processed. When the employee accesses the archived document, the system automatically calls up the relevant business transaction, such as *Create sales order*, according to the incoming document type. After the employee creates and saves the SD document, the system automatically assigns the archived document to it.

For a detailed description of early archiving, see [Early Archiving \(SD\) \[Seite 54\]](#).

Late Archiving

In the late archiving scenario, incoming paper documents are archived in the R/3 System and assigned to existing Sales and Distribution documents.

In late archiving, an employee processes an original document directly from paper or carries out a sales activity before receiving an original document. At a later point in time, the original document is scanned into the system and archived as a *facsimile*. It is then assigned to the existing SD document by:

- The person at the archiving station who scans the original documents
- The person responsible for processing the SD document

As in the scenario for early archiving, the archiving process usually takes place in a central location at the company.

For a detailed description of late archiving, see [Late Archiving \(SD\) \[Seite 55\]](#).

Late Archiving Using Bar Codes

Late archiving using bar codes is a special form of late archiving. In this case, however, a bar code is attached to the incoming document either in the mail room or at the time of processing.

Business Background (SD)

An SD document is created from the original document whose bar code ID is linked to the SD document number. Later, the original document is scanned into the system which recognizes the bar code ID and automatically makes the proper assignment to the SD document.

For a detailed description of late archiving using bar codes, see [Late Archiving Using Bar Codes \(SD\) \[Seite 56\]](#).

Simultaneous Archiving

Simultaneous archiving is a special form of early archiving in which the incoming document is scanned into the system, optically archived and, *at the same time* in another window, the corresponding SD document is created or changed. The system does not activate **SAP Business Workflow** in this case; no mail is sent.

For a detailed description of simultaneous archiving, see [Simultaneous Archiving \(SD\) \[Seite 57\]](#).

Early Archiving (SD)

Early Archiving (SD)

The following steps describe a typical scenario in which incoming paper documents are archived **before** a Sales and Distribution document is created:

1. A clerk in the central mail room of a company receives a letter from a customer who wishes to buy several products.
2. The clerk scans the letter into a scanning system.

The system displays the letter in the scan dialog window.

3. Using the **SAP ArchiveLink** interface in the R/3 System, the clerk or another designated employee selects the function for early archiving and chooses an appropriate incoming document type for the scanned document, for example, the general description "Customer response to a sales activity", SDIACTRESP.
4. The clerk confirms the assignment of the incoming document type.

This triggers a workflow in which a mail is sent to the employee who is responsible for creating sales documents, in this case Mr. Jones in the Sales department.



All employees who are to be notified by SAP Business Workflow must first be listed in the company's organizational structure (see Customizing for SAP Business Workflow).

5. Mr. Jones receives the work item in his integrated inbox. When he calls up the work item for processing, a dialog box appears in which Mr. Jones can confirm or overwrite the document type entered by the clerk. Mr. Jones overwrites the clerk's entry with the incoming document type for "Sales order", SDIORDER. The system then automatically calls the following functions:
 - The transaction to create a sales order
 - The **SAP ArchiveLink** viewer to display the scanned original document
6. Using the displayed archived document, Mr. Jones enters relevant data into the sales order. When he saves the order, the system automatically assigns the archived document to it.
7. When Mr. Jones or another employee calls up the sales order again, he or she can display the original document in the **SAP ArchiveLink** viewer by choosing *Environment* → *Display facsimile* and selecting *Archived documents* in the order header.

Late Archiving (SD)

The following steps describe a typical scenario in which incoming paper documents are archived **after** a Sales and Distribution document has already been created:

1. Mrs. Reynolds, a sales representative, receives a letter from a customer inquiring about a new product.
2. Using the original paper document, she immediately creates a customer inquiry in the R/3 System.
3. Once the SD document has been created, Mrs. Reynolds forwards the original document to Mrs. Miller who is responsible for scanning documents into the system. Mrs. Reynolds sends along additional information on the customer inquiry she has just created, such as the document number and SD document type.
4. Using the **SAP ArchiveLink** interface in the R/3 System, Mrs. Miller chooses the function for late archiving and assigns an appropriate incoming document type to the original document, in this case "Customer inquiry", SDIINQUIRY.
5. The system displays a dialog box in which Mrs. Miller enters the number of the SD document. When she confirms her entry, the system automatically archives the original document and assigns it to the SD document.
6. When Mrs. Reynolds calls up the customer inquiry again, she can display the original document in the **SAP ArchiveLink** viewer by choosing *Environment* → *Display facsimile* and selecting *Archived documents* in the inquiry header.

Late Archiving Using Bar Codes (SD)

Late Archiving Using Bar Codes (SD)

The following steps describe a typical late archiving scenario using bar codes.

1. An incoming document is received in the mailroom. A clerk affixes a ready-made bar code label to the document, recognizes it to be a complaint and forwards it to Mr. Jones in the Sales department.
2. Working from the original document, Mr. Jones creates a complaint in the R/3 System. When processing is complete and the data confirmed, the system issues a dialog box requesting the bar code number of the original document. Mr. Jones, who usually enters the number manually, decides to scan in the number with his new bar code wand.
3. He then forwards the original document to Mrs. Miller who is in charge of scanning documents into the system. When she has finished archiving the document, she checks it for quality and completeness. From this point, the procedure is carried out automatically.
4. The scanning component recognizes the bar code and reports it back to the R/3 System together with the archived document ID.
5. **SAP ArchiveLink** assigns the archived document to the complaint which Mr. Jones created. Mr. Jones or any other authorized employee can now access the document directly from the SD document.

Simultaneous Archiving (SD)

The following steps describe a typical scenario in which incoming documents are archived at the same time that a Sales and Distribution document is created:

1. Mr. Stevens has a small stack of incoming documents which require processing. He sorts them, scans them into the system with equipment at his desk, and checks the scanned documents for quality and completeness from the dialog window.
2. He then selects the predefined setting for Sales and Distribution in the "Simultaneous archiving" window.
3. A variety of incoming document types are defined for Sales and Distribution, allowing Mr. Stevens to freely assign types to the documents he has archived. He assigns the incoming document type for "Contract", SDICONTRAC, to one of the displayed originals.
4. Mr. Stevens confirms the assignment and automatically branches to the business transaction specified for the incoming document type, in this case, "Create contract".
5. He creates the contract, and after successfully processing it, assigns the original document to it.

Optical Archiving of Documents in Sales Support (SD-CAS)

[eingehender Originalbelege \[Seite 59\]](#)

eingehender Originalbelege

[ausgehender Kontakte \[Seite 67\]](#)

[Vorbereitung und Customizing bei ausgehenden Kontakten \(SD-CAS\) \[Seite 70\]](#)

[Ablagestrategien \[Extern\]](#)

Archiving Outgoing Sales activities (SD-CAS)

[Preparation and Customizing for Incoming Original Documents \(SD-CAS\) \[Seite 69\]](#)

[Preparation and Customizing for Outgoing Sales Activities \(SD-CAS\) \[Seite 70\]](#)

Archiving Incoming Original Documents (SD-CAS)

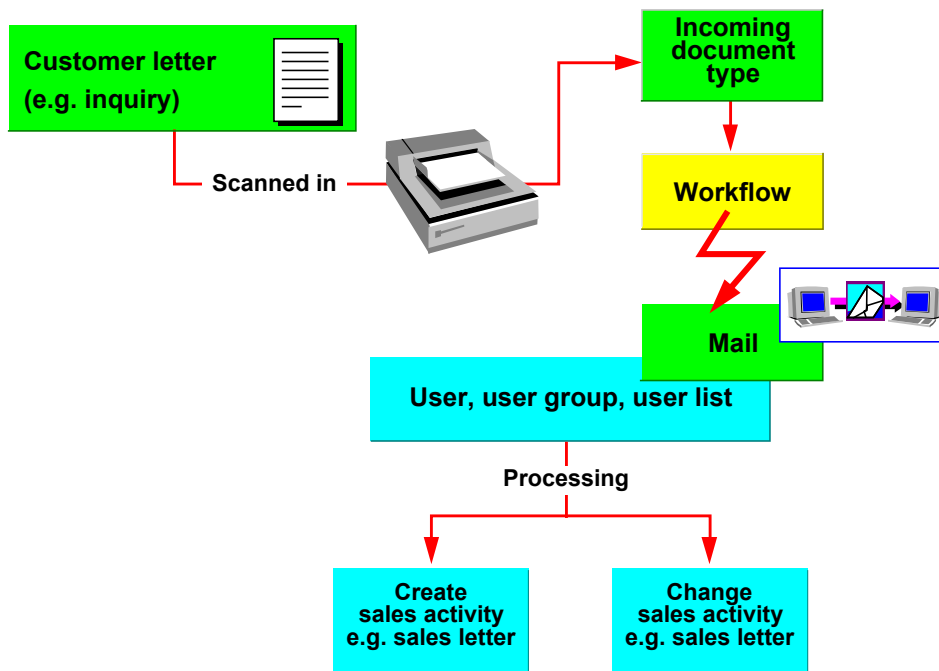
The **SAP ArchiveLink** interface supports the following archiving scenarios for incoming original documents in Sales Support:

- Early archiving
- Late archiving
- Late archiving using bar codes
- Simultaneous archiving

Early Archiving

In the early archiving scenario, incoming paper documents are archived in the R/3 System **before** a sales activity is created.

The Early Archiving Process



The early archiving process usually begins in a central mailroom where a designated person opens, presorts, prepares, and records (scans) the incoming mail. Once an incoming document is scanned and an incoming document type is assigned to it, the system triggers the **SAP Business Workflow** to notify the authorized employee(s) that an incoming document has been received and is due to be processed. When the employee accesses the document, the system automatically calls up the relevant business transaction, such as "Create sales letter", according to the incoming document type. After the employee creates and saves the sales activity, the system automatically assigns the original document to it.

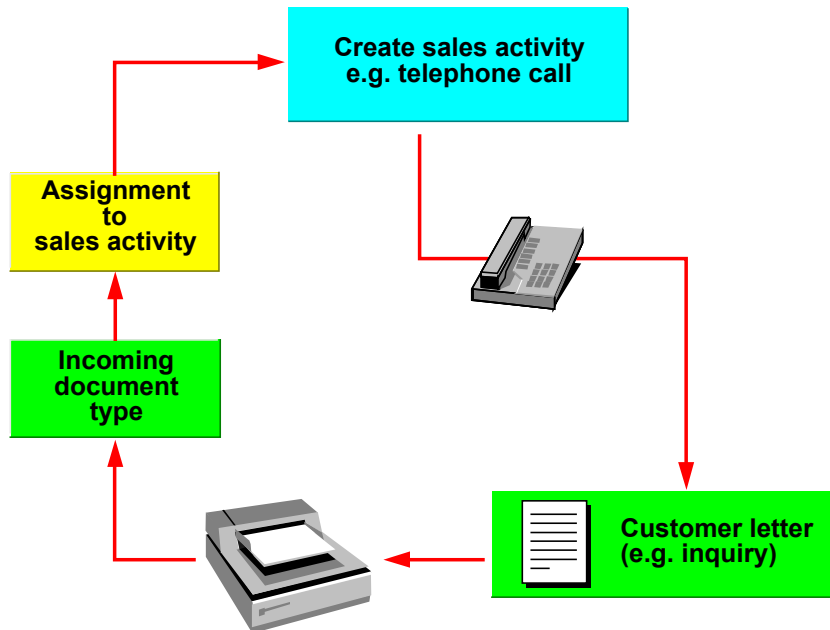
For a detailed description of early archiving, see [Early Archiving of Incoming Original Documents \(SD-CAS\) \[Seite 63\]](#).

Archiving Incoming Original Documents (SD-CAS)

Late Archiving

In the late archiving scenario, incoming paper documents are archived in the R/3 System and assigned to existing sales activities.

The Late Archiving Process



In late archiving, an employee processes an original document directly from paper or carries out a sales activity before receiving an original document. At a later point in time, the original document is scanned into the system, archived as a *facsimile*, and given an incoming document type. It is then assigned to the existing sales activity by:

- The person at the archiving station who scans the original documents
- The person responsible for processing the sales activity

As in the early archiving scenario, the archiving process usually takes place in a central location at the company.

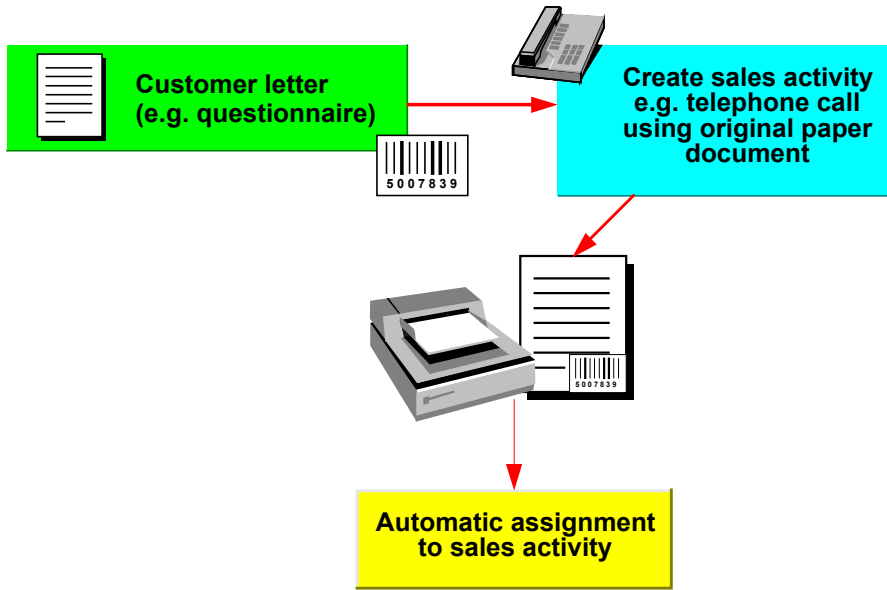
For a detailed description of late archiving, see [Late Archiving of Incoming Original Documents \(SD-CAS\) \[Seite 64\]](#).

Late Archiving Using Bar Codes

Late archiving using bar codes is a special form of late archiving. In this case, however, a bar code is attached to the incoming document either in the mail room or at the time of processing. A sales activity is created from the original document whose bar code ID is linked to the sales activity number. Later, the original document is scanned into the system which recognizes the bar code ID and automatically makes the proper assignment to the sales activity.

The Late Archiving Process Using Bar Codes

Archiving Incoming Original Documents (SD-CAS)

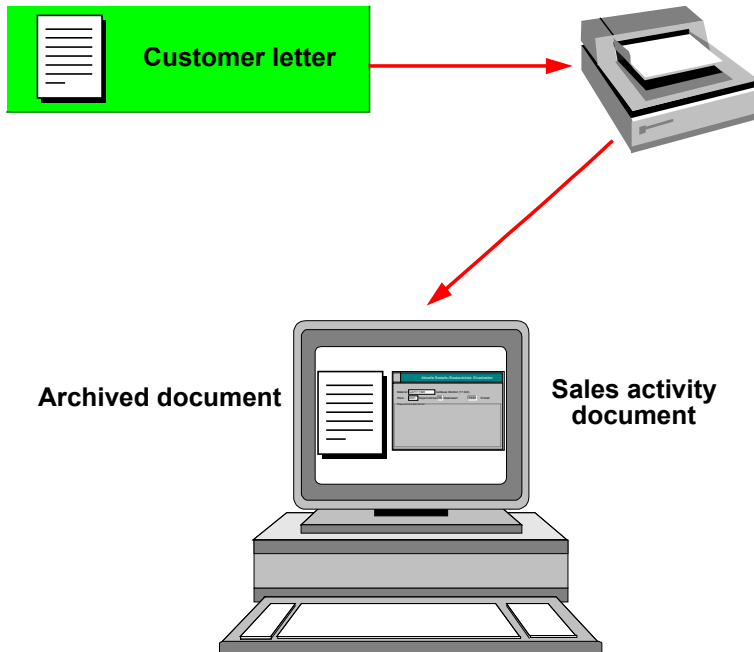


For a detailed description of late archiving using bar codes, see [Late Archiving of Incoming Original Documents Using Bar Codes \(SD-CAS\) \[Seite 65\]](#).

Simultaneous Archiving

Simultaneous archiving is a special form of early archiving in which the incoming document is scanned into the system, optically archived and, *at the same time* in another window, the corresponding sales activity is created or changed. The system does not activate **SAP Business Workflow** in this case; no mail is sent.

The Simultaneous Archiving Process



Archiving Incoming Original Documents (SD-CAS)

For a detailed description of simultaneous archiving, see [Simultaneous Archiving of Incoming Original Documents \(SD-CAS\) \[Seite 66\]](#).

Early Archiving of Incoming Original Documents (SD-CAS)

The following steps describe a typical scenario in which incoming paper documents are archived **before** a sales activity is created:

1. A clerk in the central mail room of a company receives a letter from a customer who needs several catalogs for promotional purposes.
2. The clerk scans the letter into a scanning system.

The system displays the letter in the scan dialog window.

3. Using the **SAP ArchiveLink** interface in the R/3 System, the clerk or another designated employee selects the function for early archiving and chooses an appropriate incoming document type for the scanned document, in this case "Customer inquiry - Sales activity", SDIACTINQ.
4. The clerk confirms the assignment of the incoming document type.

This triggers a workflow in which a mail is sent to the employee who is responsible for creating sales activities, in this case Mr. Frank in Sales Support.



All employees who are to be notified by SAP Business Workflow must first be listed in the company's organizational structure (see Customizing for SAP Business Workflow).

5. Mr. Frank receives the work item in his integrated inbox. When he calls up the work item for processing, a dialog box appears in which Mr. Frank can confirm or overwrite the document type entered by the clerk. Mr. Frank confirms the clerk's entry. The system then automatically calls the following functions:
 - The transaction to create a sales letter
 - The **SAP ArchiveLink** viewer to display the scanned original document
6. Using the displayed customer inquiry, Mr. Frank enters relevant data into the sales letter. When he saves his document, the system automatically assigns the archived document to it.
7. When Mr. Frank or another employee calls up the sales letter again, he or she can display the original document in the **SAP ArchiveLink** viewer by choosing *Environment* → *Optical archive* → *Display facsimile* and selecting *Archived documents* in the sales letter header.

Late Archiving of Incoming Original Documents (SD-CAS)

Late Archiving of Incoming Original Documents (SD-CAS)

The following steps describe a typical scenario in which incoming paper documents are archived **after** a sales activity has already been created:

1. Ms. Bauer, a sales representative, receives a call from a customer who requests the demonstration of a new product.
2. She immediately creates a sales call in the SAP R/3 System.
3. As a result of the demonstration which takes place several days later, the customer sends in an inquiry requesting further information. Ms. Bauer wants this inquiry assigned to the sales call, so she forwards it to Mr. Miller to be scanned into the system and assigned to the sales call. She sends along additional information on the sales call, such as the document number and type.
4. Using the **SAP ArchiveLink** interface in the R/3 System, Mr. Miller chooses the function for late archiving and selects an appropriate incoming document type, in this case "Customer inquiry - Sales activity", SDIACTINQ.
5. The system displays a dialog box in which Mr. Miller enters the number of the sales call. When he confirms the entry, the system automatically archives the original document and assigns it to the sales call.
6. When Ms. Bauer calls up the sales call again, she can display the original document in the **SAP ArchiveLink** viewer by choosing *Environment* → *Optical archive* → *Display facsimile* and selecting *Archived documents* in the sales call header.

Late Archiving of Incoming Original Documents Using Bar Codes (SD-CAS)

The following steps describe a typical late archiving scenario using bar codes.

1. As part of a promotion, the Cookie Company sends out a questionnaire to customers and sales prospects to gauge their reaction to a new product.
2. The mailroom clerk affixes a ready-made bar code label to completed questionnaires as they are sent in, and forwards them to Mr. Baker in Sales Support who is in charge of calling up each customer who sends in a questionnaire.
3. Working from an original questionnaire, Mr. Baker creates a telephone call in the R/3 System. When he finishes processing the sales activity and confirms his data, the system issues a dialog box requesting the bar code number of the original document. Mr. Baker, who usually enters the number manually, decides to scan in the number with his new bar code wand.
4. He then forwards the original document to Mrs. Collins who is in charge of scanning documents into the system. When she has finished archiving the document, she checks it for quality and completeness. From this point, the procedure is carried out automatically.
5. The scanning component recognizes the bar code and reports it back to the R/3 System together with the archived document ID.
6. **SAP ArchiveLink** assigns the archived document to the telephone call which Mr. Baker created. Mr. Baker or any other authorized employee can now access the document directly from the sales activity.

Simultaneous Archiving of Incoming Original Documents (SD-CAS)

Simultaneous Archiving of Incoming Original Documents (SD-CAS)

The following steps describe a typical scenario in which incoming documents are archived at the same time that a sales activity is created:

1. Mr. Stevens has a small stack of incoming documents which require processing. He sorts them, scans them into the system with equipment at his desk, and checks the scanned documents for quality and completeness from the dialog window.
2. He then selects the predefined setting for Sales Support in the "Simultaneous archiving" window.
3. A variety of incoming document types are defined for Sales Support allowing Mr. Stevens to freely assign types to the documents he has archived. He assigns the incoming document type for "Customer response to a sales activity", SDIACTRESP, to one of the displayed originals.
4. Mr. Stevens confirms the assignment and automatically branches to the business transaction specified for the incoming document type he has specified, in this case, "Create sales letter".
5. He writes the letter, and after successfully processing it, assigns the original document to it.

Archiving Outgoing Sales activities (SD-CAS)

Outgoing documents which you create using *SAPscript* are stored in an optical archive and linked to the documents on which they are based. This archiving process is carried out directly from the document being processed and output.

For a detailed description of archiving outgoing sales activity documents, see [Archiving Outgoing Sales Activities \(SD-CAS\) \[Seite 68\]](#).

Archiving Outgoing Sales Activities (SD-CAS)

Archiving Outgoing Sales Activities (SD-CAS)

The following steps describe a typical scenario in which outgoing sales activities are archived in the R/3 System:

1. Ms. Stevens from the Sales department writes a sales letter informing a customer of a new product and offering a discount with purchase. She does this in the sales activities screen for creating a sales letter.
2. She finishes the letter and prints it out to send it off to the customer. For later reference, she archives the document using **SAP ArchiveLink**.
3. Several weeks later, Ms. Stevens receives a letter of inquiry from the customer in response to the sales letter. She calls up the archived sales letter to confirm information on the product and product price.
4. From this information and information sent in by the customer, she creates a quotation, faxes it to the customer, and archives it using **SAP ArchiveLink**.

Preparation and Customizing for Incoming Original Documents (SD-CAS)

[Customizing \[Extern\]](#)

[Spezial-Customizing \[Extern\]](#)

You must make several application-specific settings for **late archiving using bar codes**. All other functions for archiving incoming documents are controlled centrally in Customizing for **SAP ArchiveLink**. For further information, see the Cross Application (CA) documentation on **SAP ArchiveLink**.

Customizing in Sales and Distribution

Assigning Incoming Document Types

In Customizing for Sales and Distribution, you can assign incoming document types to those sales activity types which you wish to optically archive.

To assign incoming document types to sales activity types:

1. Maintain archiving document types centrally via *Tools → Administration → Management → Process technology → Optical archive → Document types*.
2. In Customizing for Sales and Distribution, choose *Data Transfer and Archiving → Optical archiving*. Select the transaction for assigning incoming document types for late archiving.
3. Assign incoming document types to the different sales activity types.
4. By making your assignments in the *DocType - Create* or *DocType - Change* fields, you can control whether optical archiving is activated when you create and/or change a document.

Once you have made these assignments, a dialog box appears when you create or change a sales activity of the specified type. Here, you confirm whether or not to archive that particular document.

If no incoming document type is maintained, optical archiving will not be carried out.

Setting bar code functions

You can set bar code functions in Customizing for Sales and Distribution by choosing *Data transfer and archiving → Optical archiving → Set Bar Codes*. Or you can set them centrally in **SAP ArchiveLink**. This procedure is described in the Basis Components documentation: *Basis Services / Communication → SAP ArchiveLink → SAP ArchiveLink: Information for Administrators → Presetting Archiving with Bar Codes*.

Application-Specific Authorizations

There are no special archiving authorizations.

Preparation and Customizing for Outgoing Sales Activities (SD-CAS)

[Customizing \[Extern\]](#)

To archive outgoing documents, you must first carry out general Customizing functions for **SAP ArchiveLink**. For further information, see the *Basis Components - Basis Services / Communication* documentation on **SAP ArchiveLink**.

Customizing in Sales and Distribution

Optical archiving is controlled through output determination in Customizing for Sales and Distribution. To set the optical archiving function for outgoing sales activities:

1. Choose *Basic Functions* → *Output* → *Output determination* → *Output proposal using the condition technique*. Select the document category for which you wish to maintain output determination, for example "Sales activities".
2. Then choose the action *Maintain output types*.
3. Choose the detail screen for the relevant output type.
4. Here, you can maintain one of the following archiving modes under the group heading *Archiving*:
 - 1: Print only
This setting is default. With archiving mode 1, archiving is not carried out.
 - 2: Archive only
Set archiving mode 2 if you wish to archive documents without having to print or fax.
 - 3: Print and archive
Set archiving mode 3 if you wish the system to carry out archiving automatically when you print, or fax, a document. Only those outgoing documents which are output by printer or fax can be stored in an optical archive.
5. Enter an outgoing document type.
6. Save your data.

Application-Specific Authorizations

There are no special archiving authorizations.

Optical Archiving of Outgoing Sales and Distribution Documents (SD)

[Weitere Voreinstellungen \[Extern\]](#)

Weitere Voreinstellungen

Business Background (SD)

[Archiving Outgoing Documents \(SD\) \[Seite 73\]](#)

Business Background (SD)

Business Background (SD)

The Sales and Distribution application component contains an **SAP ArchiveLink** function that provides sales personnel with a quick and efficient means of creating and optically archiving a wide range of outgoing Sales and Distribution documents including quotations, order confirmations, contracts, scheduling agreements, delivery notes, and invoices. SAP ArchiveLink offers easy **online** access to these archived documents during the planning, processing, and analyzing of business transactions in Sales and Distribution.

Archiving Outgoing Documents

Outgoing documents which you create using *SAPscript* are stored in an optical archive and linked to the documents on which they are based. This archiving process is carried out directly from the document being processed and output.

For a detailed description of archiving outgoing documents, see [Archiving Outgoing Documents \(SD\) \[Seite 73\]](#).

Archiving Outgoing Documents (SD)

The following steps describe a typical scenario in which outgoing SD documents are archived in the R/3 System:

1. Mrs. Jackson from the Sales department writes a sales letter informing a customer of a new product and offering a discount with purchase. She does this in the sales activities screen for creating a sales letter.
2. She finishes the letter and prints it out to send it off to the customer. For later reference, she archives the document using SAP ArchiveLink.
3. Several weeks later, Mrs. Jackson receives an order from the customer in response to the sales letter. Before creating the order, she calls up the archived sales letter to confirm information on the product and product price. She then creates an order from this information and information sent in by the customer.
4. Later she creates an order confirmation, faxes it to the customer and archives it. She assigns the archived order confirmation to the sales order.

SAP ArchiveLink - Storage Scenarios (MM)

The following sections describe the storage scenarios in the R/3 application component MM (Materials Management):

- Purchasing (MM-PUR)
- Inventory Management (MM-IM)
- Invoice Verification (MM-IV)

See also

- General [Introduction \[Seite 10\]](#) to this scenario documentation
- [SAP ArchiveLink \[Extern\]](#)
- [Purchasing \[Extern\]](#)
- [Inventory Management \[Extern\]](#)
- [Logistics Invoice Verification \[Extern\]](#)

Storing Incoming Purchasing Documents with Workflow

Use

After they have been scanned, you can file away quotations and order acknowledgments that vendors have sent you in printed form (as hardcopies) on an electronic content server.

Storage for subsequent entry is supported for quotations. Storage for subsequent assignment is supported for order acknowledgments. In both cases *SAP Business Workflow* is integrated.

You will find information on these document storage processes in the *SAP ArchiveLink* component:

- Store for subsequent entry
 - For background information, refer to [Store for Subsequent Entry \[Extern\]](#)
 - Process: [Store for Subsequent Entry \[Extern\]](#)
 - Procedure: [Store for Subsequent Entry \[Extern\]](#)
- Store for Subsequent Assignment
 - For background information, refer to [Store for Subsequent Assignment \[Extern\]](#)
 - Process: [Store for Subsequent Assignment \[Extern\]](#)



You can carry out both storage processes using bar codes instead of *SAP Business Workflow* (see [Storing Incoming Purchasing Documents with Bar Code \[Seite 78\]](#)).

Prerequisites

Technical Realization (MM-PUR)

Object Types

- BUS2011 (Quotation)
- BUS2012, BUS2013, BUS2014 (Acknowledgment of PO, scheduling agreement, contract)

Link Table

TOA01

Document Class

TIF

Document Type

The following types of document are provided in the standard system:

Description	Document type	Assigned workflow task
Quotation	MEIQUOTA	WS24500028
Acknowledgment of PO	MEIORDERSP1	WS24500012

Storing Incoming Purchasing Documents with Workflow

Acknowledgment of scheduling agreement	MEIORDERSP2	WS24500039
Acknowledgment of contract	MEIORDERSP3	WS24500040

Enhancements

No enhancements are planned.

Preparation and Customizing (MM-PUR)

You need not make any settings in Customizing for Purchasing.

The basic pre-settings in *SAP ArchiveLink* are contained in [Customizing \[Seite 16\]](#).

For more information, refer to the following sections:

- [Pre-Settings for Storage Scenarios \[Extern\]](#)
- [Basic Settings \[Extern\]](#)
- [Further Pre-Settings \[Extern\]](#)

Activities

Storing Print-Format Documents and Creating or Assigning R/3 Documents

The incoming acknowledgment or quotation in print-format is scanned and placed on a content server via *Office* → *Business documents* → *Documents* → *Store*. At the same time, a workflow is started in the R/3 System, which places a work item in the integrated inbox of the buyer responsible.

The buyer processes the work item. The stored acknowledgment or quotation is displayed in a window.

The remaining activities differ according to whether you are processing quotations or acknowledgments:

- Quotation
 - The buyer goes to the transaction for entering a quotation. He or she enters the number of the RFQ and can then enter the quotation data.
- Acknowledgment
 - A dialog box appears, in which the buyer enters the number of the PO, scheduling agreement or contract to which the acknowledgment relates. The buyer then branches to the screen for processing the relevant purchasing document and enters the acknowledgment number.



It is only possible to enter the acknowledgment number on the item detail screen. Acknowledged quantities and dates cannot be entered via *Item* → *Confirmations* → *Overview*.

The buyer saves the relevant data. At the time of saving, the system links the R/3 system document to the stored print-format document.

Displaying Stored Print-Format Documents

From the display of the R/3 system document, choose *System* → *Display links* → *Stored documents*.

Storing Incoming Purchasing Documents with Bar Code

Storing Incoming Purchasing Documents with Bar Code

Use

You can apply a bar code to quotations and order acknowledgments sent to you in printed form (as hardcopies) by your vendors, and then have them electronically scanned and stored on a content server. You can do the same with purchase requisitions originating within your enterprise. The documents are then forwarded to Purchasing or some central department in order for their data to be processed. The employees responsible enter the bar code shown on the document into the relevant R/3 system document.

Storage for subsequent entry is supported for quotations and purchase requisitions. Storage for subsequent assignment is supported for order acknowledgments.

You will find information on these document storage processes in the *SAP ArchiveLink* component:

- Store for subsequent entry
 - For background information, refer to [Store for Subsequent Entry \[Extern\]](#)
 - Process: [Store for Subsequent Entry \[Extern\]](#)
 - Procedure: [Store for Subsequent Entry \[Extern\]](#)
- Store for Subsequent Assignment
 - For background information, refer to [Store for Subsequent Assignment \[Extern\]](#)
 - Process: [Store for Subsequent Assignment \[Extern\]](#)

Prerequisites

Technical Realization

Object Types

- BUS2011 (Quotation)
- BUS2012, BUS2013, BUS2014 (Acknowledgment of PO, scheduling agreement, contract)
- BUS2105 (Purchase requisition)

Link Table

TOA01

Document Class

TIF

Document Type

The following types of document are provided in the standard system:

Description	Document type
Quotation	MEIQUOTA
Acknowledgment of PO	MEIORDERSP1

Storing Incoming Purchasing Documents with Bar Code

Acknowledgment of scheduling agreement	MEIORDERSP2
Acknowledgment of contract	MEIORDERSP3
Purchase requisition	MEIREQUIS

Enhancements

No enhancements are planned.

Preparation and Customizing

In Customizing for Purchasing, you have to enter the print-form document types against the R/3 system document types.



We recommend that you define your own R/3 system document types for processing with bar codes. Otherwise a dialog box enabling you to enter a bar code appears each time you save a document of this type.

The basic pre-settings in *SAP ArchiveLink* are contained in [Customizing \[Seite 16\]](#).

For more information, refer to the following sections:

- [Pre-Settings for Storage Scenarios \[Extern\]](#)
- [Basic Settings \[Extern\]](#)
- [Further Pre-Settings \[Extern\]](#)

Activities

Storing Print-Format Documents and Creating or Assigning R/3 Documents

The incoming order acknowledgment, quotation, or purchase requisition in print-format is provided with a bar code, scanned and placed in a content server via *Office* → *Business documents* → *Documents* → *Store*. The documents in print-format are forwarded to the employees responsible.

The employee proceeds as follows:

- Acknowledgment

He or she changes the R/3 system document to which the incoming acknowledgment relates, and enters the acknowledgment number on the item detail screen.



The employee can also enter acknowledged quantities and dates via *Item* → *Confirmations* → *Overview*. To enable the bar code number to be recorded in the system, it is essential that the acknowledgment number is entered on the detail screen.

- Quotation

He or she changes the RFQ and enters the quotation data.

- Purchase requisition

He or she creates a purchase requisition.

Storing Incoming Purchasing Documents with Bar Code

The employee saves his or her data. A dialog box then appears, in which the bar code number shown on the print-format document must be entered.

When the employee confirms the data entered in the dialog box, the R/3 document is linked to the stored scanned document.

Displaying Stored Print-Format Documents

From the display of the R/3 system document, choose *System* → *Display links* → *Stored documents*.

Storing Outgoing Purchasing Documents (MM-PUR)

Use

You can store RFQs, POs, outline agreements, forecast delivery schedules, acknowledgment expeditors, and reminders/urging letters with *SAP ArchiveLink*. The outgoing documents generated with *SAPscript* are placed in an external content server and linked with the R/3 documents upon which they are based. The associated stored documents can be displayed from within the display of the R/3 documents.

Prerequisites

Technical Realization (MM-PUR)

Object Types

- BUS2010 (RFQ)
- BUS2012 (Purchase order)
- BUS2013 (Scheduling agreement)
- BUS2013002 (Forecast delivery schedule)
- BUS2014 (Contract)

Link Table

TOA01

Document Class

PDF

Document Types

The following types of document are provided in the standard system:

Description	Document type
Outline purchase agreement	MEOAGREEM
Purchase order	MEOORDER
Request for quotation	MEOREQUOTE
Forecast delivery schedule	MEOSCHEDUL
Urging letter/reminder	MEOREMIND
Acknowledgment expeditor	MEOACKNOWL

Enhancements

No enhancements are planned.

Preparation and Customizing (MM-PUR)

The following settings in Customizing for Purchasing are necessary to activate the storage of purchasing documents.

Storing Outgoing Purchasing Documents (MM-PUR)

1. Carry out the activity *Messages → Output control → Message types → Define message types for <Document>*.
2. Then choose *Maintain message types: <document>*.
3. Choose the detail screen for a message type (e.g. NEU) and enter the following under *Store*:
 - the storage modus
 - the document type stored
4. Save your entries.

The basic pre-settings in *SAP ArchiveLink* are contained in [Customizing \[Seite 16\]](#).

Activities

Storage is carried out when the R/3 documents are output as messages provided that Customizing has been set up accordingly for the chosen message type.

Storing Outgoing Documents

From the Purchasing menu, choose *Purchase order → Messages → Print/transmit*. Enter the required selection parameters and carry out the program.

Displaying Stored Print-Format Documents

From the R/3 document display, choose *Environment → Display originals*. In the *Choose object links* dialog box, choose the *Stored documents* indicator and then choose *Proceed*.

If this command is not available, you can also display stored documents by choosing *System → Display links → Stored documents*.

Archiving Incoming Service Entry Sheets (MM-SRV)

Use

In External Services Management, you can use *SAP ArchiveLink* to archive service entry sheets that are received on paper. The scanned documents are archived in an external storage system. The system informs the responsible employee via the *SAP Business Workflow* that links the scanned documents with the associated R/3 service entry sheets. You can display the linked service entry sheets using the *Business Document Navigator*.

Storage Strategies

Depending on when the documents are stored, you can use the following storage strategies:

- Storing for subsequent entry
- Storing and entering
- Storing for subsequent assignment
- Storing and assigning
- Assigning and storing
- Storing with bar code



All storage strategies are described in detail in the *SAP ArchiveLink* component, in the section [Storage Strategies \[Extern\]](#).

Prerequisites

Technical Realization (MM-SRV)

Object Type

BUS 2091 (service entry sheet)

Link Table

TOA01

Document Class

FAX

Document Type

The following type of document is provided in the standard system:

Description	Document type
Archive service entry sheet	MMISRVES

Enhancements

No enhancements are planned.

Archiving Incoming Service Entry Sheets (MM-SRV)

Preparation and Customizing (MM-SRV)

You do not have to make any settings in Customizing for External Services Management.

The basic pre-settings in *SAP ArchiveLink* are contained in [Customizing \[Seite 16\]](#).

Activities

Storing for Subsequent Entry

To store the incoming service entry sheet, choose *Office* → *Business Documents* → *Documents* → *Store*. The service entry in the system is carried out later.

Storing and Entering

To store the incoming service entry sheet, choose *Office* → *Business Documents* → *Documents* → *Store* and perform the service entry in the system immediately.

Storing for Subsequent Assignment

To store the incoming service entry sheet, choose *Office* → *Business Documents* → *Documents* → *Store*. The person who enters the service assigns the document to an existing R/3 service entry sheet later.

Storing and Assigning

To store the incoming service entry sheet, choose *Office* → *Business Documents* → *Documents* → *Store* and assign the service entry to an existing R/3 service entry sheet.

Assigning and Storing

To enter an R/3 service entry sheet and store the incoming document, choose *Office* → *Business Documents* → *Documents* → *Store*. You can check and copy the original document before archiving it.

Storing with Bar Code

Add a bar code to the incoming service entry sheet, scan it, and to store it, choose *Office* → *Business Documents* → *Documents* → *Store*. You can store the original service entry sheet either before or after the service entry in the system. When doing this, you transfer the bar code from the original service entry sheet to the appropriate R/3 service entry sheet.

Storing Incoming Delivery Notes (MM-IM)

Use

In Inventory Management, you can put incoming print-format documents (such as delivery notes from vendors or goods accompanying slips) in a content server using *SAP ArchiveLink*. The scanned print-format documents are stored in an external content server and linked with the R/3 documents upon which they are based. From the display of the R/3 documents, you can display the stored print-format documents.

You can store documents both for goods receipts for purchase orders and for goods movements without reference.

Depending on when the incoming documents are stored, you can use the following storage strategies:

- Store for subsequent entry
- Store and enter
- Assign and store
- Subsequent storage with bar code



All storage strategies are described in detail in the *SAP ArchiveLink* component, in the section [Storage Strategies \[Extern\]](#).

Prerequisites

Technical Realization (MM-IM)

Object Type

MKPF (material document)

Link Table

TOA01

Document Class

FAX

Document Type

The following types of document are provided in the standard system:

Description	Document type
Goods receipt for purchase order	MMIDELNTOR
Goods movement without reference to purchase order	MMIDELNT

Enhancements

No enhancements are planned.

Storing Incoming Delivery Notes (MM-IM)

Preparation and Customizing (MM-IM)

In Customizing for Inventory Management, you can activate storage per movement type and transaction.

The basic pre-settings in *SAP ArchiveLink* are contained in [Customizing \[Seite 16\]](#).

Activities

Store for subsequent entry

To store the incoming document, choose *Office* → *Business Documents* → *Documents* → *Store*. The employee responsible receives a work item that indicates that documents have been stored.

From the work item display, he or she then chooses *Document* → *Process* and the initial screen for entering the goods receipt appears.

Store and enter

To enter the goods receipt directly when you store the incoming document, choose *Office* → *Business documents* → *Documents* → *Store*. When storing a document, the initial screen for entering the goods receipt automatically appears.

Assign and store

Enter the goods receipt. To store the incoming document, choose *Office* → *Business Documents* → *Documents* → *Store*. You can enter the material document number in the dialog box.

Assign stored document to a material document

If an incoming document has been stored without a link to a material document, you can assign it to one using the *Change material document* function.

To do so, choose *Environment* → *Originals* → *Assign* from the overview screen.

Display stored document for material document

From the Inventory Management menu, choose *Material document* → *Display* and then *Environment* → *Originals* → *Display* from the overview screen.

Storing Print Lists (MM-IM)

Use

In MM Balance Sheet Valuation, you have to carry out a series of evaluations. You can store the lists that are created during this procedure so that you do not have to keep them online. As the entries in the lists are indexed when you store them, you can find certain entries in the lists more quickly later.

Prerequisites

Technical Realization (MM-IM)

You can store the following lists with *SAP ArchiveLink*:

- Determination of lowest value: market prices
- Determination of lowest value: range of coverage
- Determination of lowest value: rate of movement
- Determination of lowest value: loss-free valuation
- LIFO valuation: compilation of base layer
- LIFO valuation: execution at single level
- LIFO valuation: execution at pool level
- LIFO valuation: execution of lowest value comparison
- LIFO valuation: display at single level
- LIFO valuation: display at pool level
- Evaluations: balance sheet value per account

Enhancements

No enhancements are planned.

Preparation and Customizing (MM-IM)

You do not have to configure anything in Customizing for Material Valuation.

The basic pre-settings in *SAP ArchiveLink* are contained in [Customizing \[Seite 16\]](#).

Activities

To store a print list in MM Material Valuation, set the *Store* indicator on the initial screen. This indexes the entries in the list, so that you can later search the stored list by valuation area and material.

On the list displayed, choose *Print* and enter *Store* as the storage mode on the screen for setting the print list. When you press *Print*, a dialog box appears for entering the storage parameter. Enter the following parameters:

- Object type: DRAW

Storing Print Lists (MM-IM)

- Document type: D01

You can choose the identifier and text you wish. Choose *Store* to store the list. The list display appears again.



For more information on use, particularly for displaying stored print lists, refer to [Processing Print Lists \[Extern\]](#) in the *SAP ArchiveLink* component.

Storing Physical Inventory Count Results (MM-IM)

Use

During a physical inventory, you can use *SAP ArchiveLink* to place count results that have been entered on paper in an external content server. The scanned print-format documents with the count results are stored in an external content server and linked with the R/3 physical inventory documents upon which they are based.

You can use this storage function with the following transactions:

- Entering a physical inventory count (MI04)
- Entering a count without reference to a document (MI09)
- Posting the count and differences (MI08)
- Posting the document, the count, and differences (MI10)

The system is configured in such a way that the storage of documents is linked with the entry of the physical inventory count (transaction MI04). You can maintain this link in Customizing for *SAP ArchiveLink* in *Maintain Workflow Parameters*.

Storage Strategies

Depending on when the documents are stored, you can use the following storage strategies:

- Storing for subsequent entry
- Storing and entering
- Assigning and storing
- Subsequent storage with bar code



All storage strategies are described in detail in the *SAP ArchiveLink* component, in the section [Storage Strategies \[Extern\]](#).

Prerequisites

Technical Realization (MM-IM)

Object Type

BUS 2028 (physical inventory of material)

Link Table

TOA01

Document Class

TIF

Document Type

The following type of document is provided in the standard system:

Storing Physical Inventory Count Results (MM-IM)

Description	Document type
Enter physical inventory count	MMIINVENT

Enhancements

No enhancements are planned.

Preparation and Customizing (MM-IM)

The basic pre-settings in *SAP ArchiveLink* are contained in [Customizing \[Seite 16\]](#).

In Customizing for *SAP ArchiveLink*, in *Administration Settings* → *Activate Bar Code Storing*, you specify whether you want to store documents containing physical inventory count results with a bar code.

Activities

Storing for Subsequent Entry

To store the document with the count results, choose *Office* → *Business Documents* → *Documents* → *Store*. The employee responsible receives a work item that indicates that documents have been stored.

From the work item display, he or she then chooses *Document* → *Process* and the initial screen for entering the count results appears.

Storing and Entering

To enter the physical inventory count directly when you store the count results, choose *Office* → *Business documents* → *Documents* → *Store*. When storing a document, the initial screen for entering the physical inventory count automatically appears.

Assigning and Storing

Enter the physical inventory count. To store the document with the count results, choose *Office* → *Business Documents* → *Documents* → *Store*. You can enter the physical inventory document number in the dialog box.

Subsequent Storage with Bar Code

Add a bar code to the incoming count results, scan them, and to store them, choose *Office* → *Business Documents* → *Documents* → *Store*. You can store the original count results either before or after entering them in the system. When doing this, you transfer the bar code from the original count results to the appropriate R/3 physical inventory document.

Storing Documents in Logistics Invoice Verification (MM-IV)

Use

In the Logistics Invoice Verification component, you can place incoming and outgoing print-format documents in an external content server using *SAP ArchiveLink*. The scanned print-format documents are stored in an external content server and linked with the R/3 documents upon which they are based. From the display of the R/3 documents, you can display the stored print-format documents.

Depending on when the incoming documents are stored, you can use the following storage strategies:

- Storing for subsequent entry
- Storing and entering
- Assigning and storing
- Subsequent storage with bar code



All storage strategies are described in detail in the *SAP ArchiveLink* component, in the section [Storage Strategies \[Extern\]](#).

Storage for subsequent entry with document parking, which automates processing, is a special case. The employee responsible for document parking receives an incoming document through the *SAP Business Workflow*. In the entry transaction that is assigned to the invoice, he or she can park an invoice on the basis of the incoming document that is available in the system. He or she can then forward the invoice and the incoming document for further processing to the employee responsible (for approval or checking). The latter can complete processing and post the invoice.

Prerequisites

Technical Realization (MM-IV)

Object Type

BUS 2081 (incoming invoice)

Link Table

TOA01

Document Class

Incoming documents:

FAX

Outgoing documents:

PDF

Storing Documents in Logistics Invoice Verification (MM-IV)

Document Type

The following types of document are provided in the standard system:

Incoming documents:

Description	Document type
Incoming invoice in Log. Invoice Verification	MMILOGINV
Incoming credit memo in Log. Invoice Verification	MMILOGCRED

Outgoing documents:

Description	Document type
Outgoing complaint in Log. Invoice Verification	MMOCOMPL
Outgoing consignment in Log. Invoice Verification	MMOCONS
Outgoing ERS in Log. Invoice Verification	MMOERS
Outgoing revaluation in Log. Invoice Verification	MMOREVAL

Enhancements

No enhancements are planned.

Preparation and Customizing (MM-IV)

In Customizing for Logistics Invoice Verification, you can define for bar code entry the print-format document type for each company code and R/3 System document. To do this, choose *Incoming Invoice* → *Maintain Bar Code Entry*.

If you do not define a document type in Customizing, the document type MMILOGINV appears for invoices and MMILOGCRED for credit memos.

The basic pre-settings in *SAP ArchiveLink* are contained in [Customizing \[Seite 16\]](#).

Activities

The procedure for storing print-format documents depends on which storage strategy you use.

When entering an invoice with workflow, you cannot see the invoice number of the entered document. If you want to see the invoice number when you enter the invoice, you have to change the message M8 060 (Document no. created) or M8 564 (Invoice document saved) from message type S (note in footer) to message type I (note in window). You maintain this setting in the step *Define Attributes of System Messages* in Customizing for Logistics Invoice Verification.

SAP ArchiveLink - Storage Scenarios (QM)

The following sections describe storage scenarios in the R/3 application component Quality Management (QM):

- Notification creation (QM-QN-NT)
- Notification processing (QM-QN-NM)
- Quality certificates (QM-CA)

See also:

- General [Introduction \[Seite 10\]](#) to this scenario documentation
- [SAP ArchiveLink \[Extern\]](#)documentation
- Quality Management documentation

Storage of Incoming Documents (QM-QN-NT/NM)

Storage of Incoming Documents (QM-QN-NT/NM)

Use

In the R/3 application component Quality Management (QM), you can use the storage scenarios **Storage for subsequent entry** and **Assignment and storage** to store incoming documents in an external storage system.

See also [Business Background \(QM-QN-NT/NM\) \[Seite 98\]](#).

The following storage scenarios are possible:

- [Process Flow: Storage for Subsequent Entry \(QM-QN-NT/NM\) \[Seite 101\]](#)
- [Process Flow: Assignment and Storage \(QM-QN-NT/NM\) \[Seite 102\]](#)
- [Process Flow: Combination of Both Storage Scenarios \(QM-QN-NT/NM\) \[Seite 103\]](#)

Prerequisites

Technical Implementation (QM-QN-NT/NM)

General Settings for Document Types

Field description	Storage for subsequent entry	Assignment and storage
Document type:	QMILETTER1	QMILETTER1
Description:	Customer complaint	Customer complaint
Operation type:	NCI_INPUT	NCI_INPUT
Object type:	BUS2078	BUS2078
Method:	CREATE	<i>None</i>
Task:	TS00007869	<i>None</i>
Parameter:	TYPE Q1 (notification type Q1)	<i>None</i>
Document type:	QMILETTER2	QMILETTER2
Description:	Complaint against a vendor	Complaint against a vendor
Operation type:	NCI_INPUT	NCI_INPUT
Object type:	BUS2078	BUS2078
Method:	CREATE	<i>None</i>
Task:	TS00007869	<i>None</i>
Parameter:	TYPE Q2 (notification type Q2)	<i>None</i>

Storage of Incoming Documents (QM-QN-NT/NM)

Document type:	QMILETTER3	QMILETTER3
Description:	Internal problem notification	Internal problem notification
Operation type:	NCI_INPUT	NCI_INPUT
Object type:	BUS2078	BUS2078
Method:	CREATE	<i>None</i>
Task:	TS00007869	<i>None</i>
Parameter:	TYPE Q3 (notification type Q3)	<i>None</i>

Document Types for Quality Notifications

In the standard system, the following document types are defined for quality notifications:

- QMILETTER1: Documents for a customer complaint
- QMILETTER2: Documents for a complaint against a vendor
- QMILETTER3: Documents for an internal problem notification

The technical document class FAX is assigned to these document types.

See also:

SAP ArchiveLink documentation, section [Specific Customizing \[Extern\]](#)

Object Types That Are Used

Object technology forms the basis of the interface between the R/3 functions and SAP ArchiveLink. In this SAP ArchiveLink scenario, the system processes the following application object:

[Object type BUS2078 \(quality notification\) \(QM-QN-NT/NM\) \[Extern\]](#)

Standard Tasks:

Standard tasks are single-step tasks provided by SAP that describe the elementary business activities from an organizational point of view. A single-step task refers to *one* object method (technical connection to R/3 functions) and is linked to the people responsible for processing the object.

[Standard Task TS00007869 \(ImageAssign\) \(QM-QN-NT/NM\) \[Extern\]](#)

Preparation and Customizing (QM-QN-NT/NM)

General Customizing for SAP ArchiveLink

To store incoming documents, you must first make Customizing settings for SAP ArchiveLink:

- Maintain global document types
- Maintain presettings
- Maintain links

Storage of Incoming Documents (QM-QN-NT/NM)

For more information, see the *SAP ArchiveLink* documentation, sections [Specific Customizing \[Extern\]](#), [Basic Customizing \[Extern\]](#) and [Presettings for Storage Strategies \[Extern\]](#).

Customizing for SAP Business Workflow

SAP Business Workflow plays an important role in the scenario “**Storage for Subsequent Entry**”. SAP Business Workflow automatically notifies the persons responsible for processing that an incoming document has been stored and that a quality notification is to be created. Customizing for SAP Business Workflow covers the following:

- Maintaining Workflow document types
For the scenarios Storage for subsequent entry and Assignment and storage in QM, the corresponding object type is BUS2078 (quality notification).
- Maintaining Workflow parameters
The Workflow parameters specify the quality notification type that the system creates. For the scenarios Storage for subsequent entry and Assignment and storage in QM, the following Workflow parameters are defined in the standard system:
 - Method parameter
TYPE (for quality notification type)
 - + (Value assigned to method parameter)
 - Q1 for notification type “Customer complaint”
 - Q2 for notification type “Complaint against the vendor”
 - Q3 for notification type “Internal problem notification”

See also:

SAP ArchiveLink documentation, section [Specific Customizing \[Extern\]](#)



In the QM application component, you do not need any Customizing settings for the scenarios Storage for subsequent entry or Assignment and storage.

Activities

The scenarios Storage for subsequent entry and Assignment and storage usually involve two or more persons responsible for processing at different locations within the company. They must execute the storage functions corresponding to their areas of responsibility.

In both these scenarios, the person scans the incoming documents and assigns them to document types. This step takes place using the functions for storing business documents in the *Office* menu.

In the scenario Storage for subsequent entry, a second person responsible for processing (in a different department) processes the work items generated by the storing procedure and SAP Business Workflow. In QM, this is usually the person who creates and/or processes the quality notification. The procedure is identical for Assignment and storage, except that SAP Business Workflow is not involved.

Storage of Incoming Documents (QM-QN-NT/NM)

For more information, see the following documentation:

- **Storage for subsequent entry: Assign document types and process work items:**
SAP ArchiveLink documentation, section [Storage for Subsequent Entry \[Extern\]](#)
- **Assign and store**
SAP ArchiveLink documentation, section [Assignment and Storage \[Extern\]](#)
- **Process quality notifications:**
Quality Management → Quality notifications

Business Background (QM-QN-NT/NM)

Business Background (QM-QN-NT/NM)

This section describes the business background for immediately assigning and storing incoming documents, and for storing incoming documents to be entered at a later stage in the QM component.

Quality Management and SAP ArchiveLink

In the QM component, you can use quality notifications to record, process and monitor different types of problems. These problems may or may not be quality-related and their cause may be internal or external. The **SAP ArchiveLink** function is a cross-application tool that supports you in your notification processing activities. It provides a quick and efficient way of entering original documents that are related to problems and storing them in external storage systems.

The SAP ArchiveLink supports the following storage scenarios for incoming documents in QM:

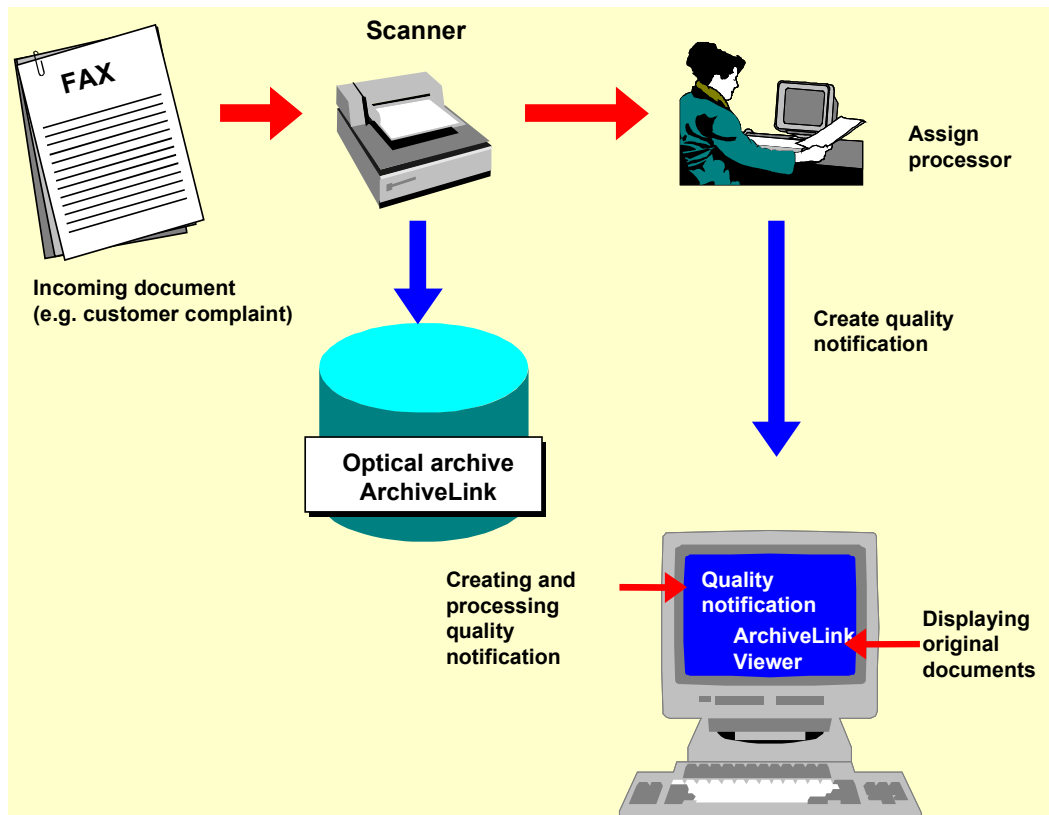
- Storage for subsequent entry
- Assignment and storage

When can you use the scenario “Storage for subsequent entry?”

When storing documents for subsequent entry, the original paper documents relating to a problem are stored in the R/3 System **before** the business object (in this case, the quality notification) is created. When the incoming document is stored, the system triggers the **SAP Business Workflow**, which notifies the authorized person(s) that a quality notification must be created. When this person creates and saves the quality notification, the system automatically assigns the stored original document to the notification. The storage process typically takes place in a central mailroom, where a designated person opens, presorts, prepares, and records (scans) the incoming mail.

Storage for Subsequent Entry

Business Background (QM-QN-NT/NM)



[Process Flow: Storage for Subsequent Entry \(QM-QN-NT/NM\) \[Seite 101\]](#)

When Can You Use the Scenario “Assignment and Storage”?

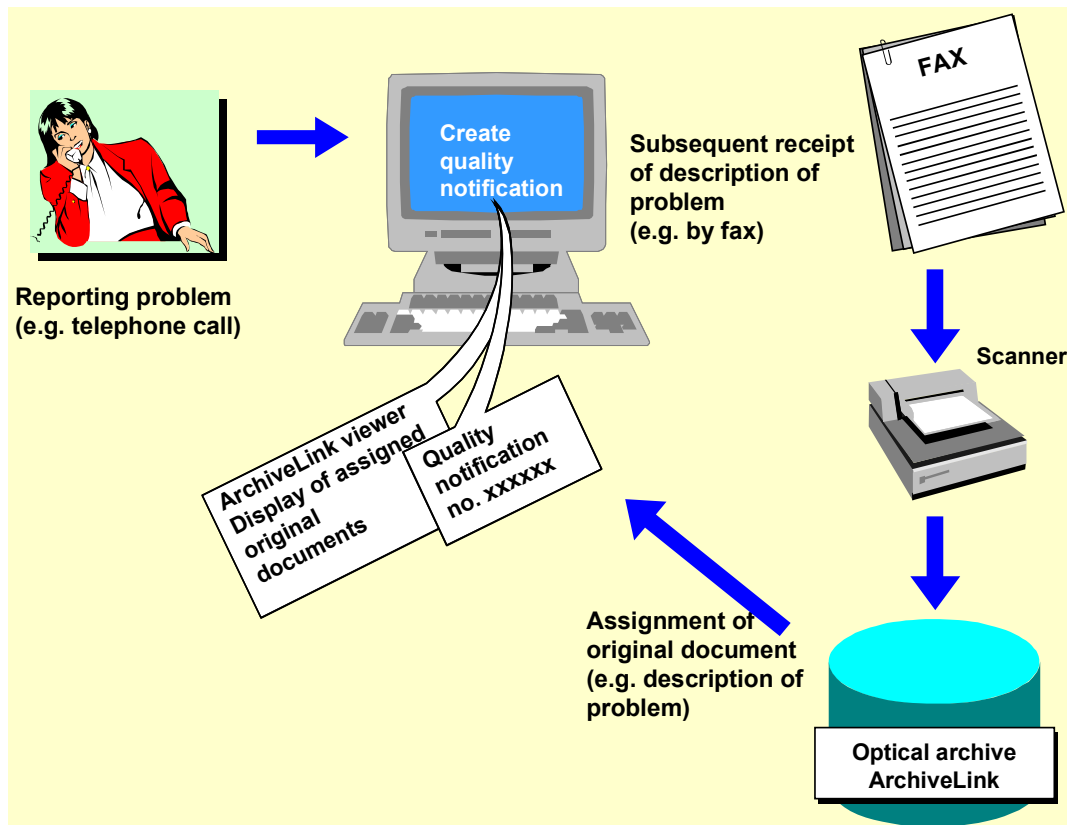
When assigning and storing documents, the original incoming paper documents relating to a problem are stored in the R/3 System **after** the business object (in this case the quality notification) has been created. In this situation, the original documents can be assigned to an existing quality notification by the person:

- At the storage location who scans the incoming documents
- Who is responsible for processing the quality notification

As in the scenario “Storage for subsequent entry”, the storage process usually takes place in a central location in the company.

Assignment and Storage

Business Background (QM-QN-NT/NM)



[Process Flow: Assignment and Storage \(QM-QN-NT/NM\) \[Seite 102\]](#)

Combining Both Storage Scenarios

In certain situations, you may want to use the scenarios "Storage for subsequent entry" and "Assignment and storage" in combination with each other. For more information, see [Process Flow: Combination of Both Storage Scenarios \(QM-QN-NT/NM\) \[Seite 103\]](#).

Process Flow: Storage for Subsequent Entry (QM-QN-NT/NM)

The following steps describe a typical scenario for storage for subsequent entry, in which incoming documents are stored, **before** a quality notification has been created:

1. A clerk in the central mailroom of a company receives a letter of complaint from a customer, who has received a shipment of defective goods.
2. The clerk scans the letter of complaint into his dedicated scanning system. The letter is then displayed in the system's scan dialog window.
3. The clerk (or another designated person) selects the function for subsequent storage and chooses an appropriate document type to which the scanned document will be assigned (for example, "documents for customer complaints").
4. The clerk confirms the assignment of the document type. This triggers a workflow, in which a mail is sent to whoever is responsible for processing the work item (for example, Mr. Jones in the Quality Assurance department).



The employees who are to be notified by the SAP Business Workflow must be defined in the company's organizational structure (see [Customizing \[Seite 16\]](#) for SAP Business Workflow).

5. Mr. Jones receives the work item in his integrated inbox. When he processes the work item, the system automatically calls up the transaction for creating a quality notification and the SAP ArchiveLink Viewer. The SAP ArchiveLink viewer displays the scanned incoming document.
6. Mr. Jones documents the problem in the quality notification and then saves the notification. The system automatically assigns the original document to the quality notification by means of an internal link table entry.
7. When Mr. Jones or any other authorized person calls up the notification again, he can display the original document by choosing *Environment* → *Object links*.

Process Flow: Assignment and Storage (QM-QN-NT/NM)**Process Flow: Assignment and Storage (QM-QN-NT/NM)**

The following steps describe a typical scenario for assignment and storage of incoming documents:

1. During a goods receipt inspection, an inspector determines that a number of mechanical parts in the inspection lot are not within tolerance. The inspector then meets with Mrs Baker in the Quality Assurance department to inform her that “out-of-tolerance” parts have been received. Mrs Baker is responsible for problem management in the company.
2. Mrs Baker creates a quality notification in the R/3 System to document the problem.
3. Mrs Baker then contacts the vendor by phone to inform them of the defective delivery. The vendor informs her that the specifications for these parts were changed at short notice. The vendor agrees to send the new specification drawings by fax.
4. A clerk in the company’s central mail room receives the drawings and scans them into the dedicated scanning system. The drawings are then displayed in the system’s scan dialog window.
5. The clerk contacts Mrs Baker to advise her that the revised specification drawings have been received and scanned into the system.
6. To permit the clerk to assign the incoming original documents to the quality notification which was previously created for the problem, Mrs Baker gives the clerk the number of the quality notification.
7. The clerk uses the SAP ArchiveLink to call up the function for assignment and storage. Provided that the appropriate presettings have been made, the clerk then chooses the document type that is to be assigned to the scanned document (for example, document type for specification drawings). A dialog box appears in which the clerk must enter the number of the quality notification.
8. After the clerk enters and confirms the quality notification number, the system automatically stores the incoming document and assigns to the quality notification.
9. When Mrs Baker calls up the quality notification again, she can display the original document in the SAP ArchiveLink Viewer.

Process Flow: Combination of Both Storage Scenarios (QM-QN-NT/NM)

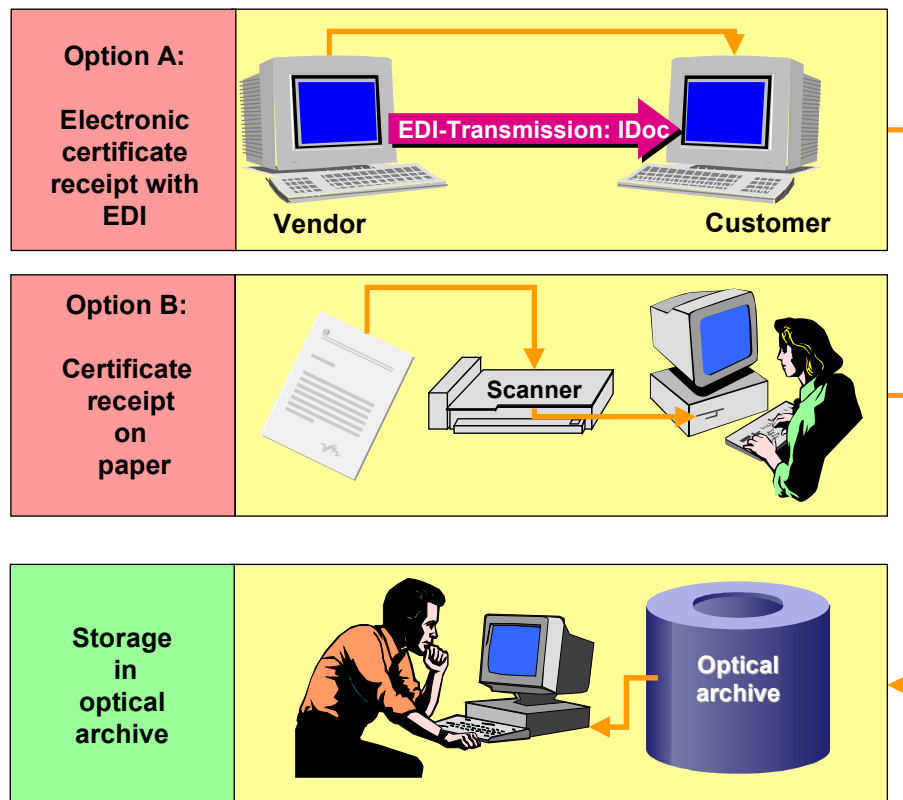
This example describes a scenario in which a single incoming original document is assigned to two separate quality notifications. The incoming document is scanned and assigned to a quality notification using the storage for subsequent entry function. The same incoming document is subsequently assigned to a second quality notification, using the assignment and storage function. The document does not need to be scanned again for this procedure.

1. A customer sends a fax that describes two problems that were confirmed in a recent delivery of goods (for example, a number of parts for a delivery item were defective and several parts for another delivery item were missing).
2. The clerk who received the fax scans it into his dedicated scanning system. The fax is displayed in the system's scan dialog window.
3. The clerk (or another authorized user) uses the SAP ArchiveLink to call up the storage for subsequent entry function. He then chooses a document type that is to be assigned to the scanned document (for example, "documents for customer complaints").
4. The clerk confirms the assignment of the document type. This triggers a workflow in which a mail is sent to the person responsible for creating a quality notification (for example, Mr. Smith in the Quality Assurance department).
5. Mr. Smith receives the work item in his integrated inbox. When he processes the work item, the system automatically calls up the transaction to create a quality notification and the SAP ArchiveLink Viewer. The SAP ArchiveLink viewer displays the stored document.
6. Mr. Smith enters the data for the first problem (defective parts) in the quality notification. When he saves the notification, the system automatically assigns the scanned document to the quality notification.
7. In another session in the R/3 System, Mr. Smith creates a second quality notification. In this notification, he enters the data for the second problem (missing parts). He now assigns the original document (which was previously assigned to the first notification) to this second notification.
8. Mr. Smith saves the second quality notification.
9. Returning to the first session, Mr. Smith calls up the first notification again using the change function. When the system displays the notification header, he selects *Environment* → *Object links* to display the archived letter in the SAP ArchiveLink viewer.
10. In the second session, he calls up the second notification again using the change function. In the notification header, he selects *Environment* → *Assign originals*. The system displays a series of dialog boxes in which he can select the original document and assign it to the second notification.
11. Mr. Smith saves the second notification to complete the storage process.

Storage of Incoming Certificates (QM-CA)

Use

In the *Quality Management (QM)* application component, you can use the *SAP ArchiveLink* to store quality certificates in procurement.



Prerequisites

Technical Implementation (QM-CA)

Document type	QMICERT (on paper); QMICERTPDF (for EDI)
Description	Certificate in procurement
Object type	BUS2117
Method	CREATE

Preparation and Customizing (QM-PT-RP-PRC)

To store certificates in procurement, you need to make the following settings in Customizing for *Quality Management (QM in Procurement)*:

- A control key with the indicator *Certificate required* must be maintained.
- A certificate type is maintained, for which the enhanced certificate processing indicator is set.

Storage of Incoming Certificates (QM-CA)

- A number range is maintained for the certificate receipt.

The following settings are required in the Quality Management view of the material master:

- *QM in procurement* is active.
- A control key with certificate required is set.
- A certificate type is entered.

To store incoming certificates with *SAP ArchiveLink*, certain settings in Customizing for *SAP ArchiveLink* are also required. For more information, see *BC - SAP ArchiveLink* documentation in:

- [Customizing \[Extern\]](#)
- [Basic Settings \[Extern\]](#)
- [Special Customizing \[Extern\]](#)

Activities

The following process flow describes how an incoming certificate in procurement is stored and managed using *SAP ArchiveLink*.

Certificate Receipt on Paper	Certificate Receipt with EDI (IDoc)
<ol style="list-style-type: none"> 1. The person responsible scans in the incoming certificate. 2. They create a certificate object in the system, for which the scanned document can be stored, using predefined document types. For more information, see Assignment and Storage [Extern]. 3. The stored certificate can now be called up and displayed at any time. For more information, see Searching for Stored Documents [Extern]. 	<ol style="list-style-type: none"> 1. The ship-to-party receives the IDoc in their inbox. 2. If the purchase order item can be assigned, the PDF file is stored. If the purchase order item cannot be found (for example, if the goods receipt has not been completed), the incoming document is stored with the help of the <i>SAP Business Workflow</i>. For more information, see Concept: Storage for Subsequent Assignment [Extern].

See also:

[Inbound EDI Message for a Quality Certificate \(QM-CA\) \[Extern\]](#)

Storage of Outgoing Documents (QM-QN-NM)

Use

In the R/3 application component, you can store outgoing documents using the SAP ArchiveLink. For more information, see [Business Background \(QM-QN-NM\) \[Seite 110\]](#).

Prerequisites

Technical Implementation (QM-QN-NM)

Predefined Shop Papers for Quality Notification Types

Quality notification type	Shop papers
Customer complaint (type Q1)	Notification overview, item overview
Customer-related defect (Art F1)	Notification overview, item overview
Complaint against vendor (type Q2)	Notification overview, item overview, complaint
Vendor-related defect (type F2)	Notification overview, item overview, complaint
Internal problem notification (type Q3)	Notification overview, item overview
Material-related defect (type F2)	Notification overview, item overview

Object Types That Are Used

Object technology forms the basis of the interface between the R/3 functions and SAP ArchiveLink.

In this SAP ArchiveLink scenario the System processes the business application object BUS2078 (Quality notification). The attributes, methods and events defined for the object type are found in the R/3 Business Object Repository.

When you store an outgoing document, the document is automatically assigned to the quality notification currently being processed.

Document types

In the R/3 application component QM, the following document types are pre-defined for outgoing documents:

- QMILETTER1: Documents for a customer complaint
- QMILETTER2: Documents for a complaint against a vendor
- QMILETTER3: Documents for an internal problem notification

These global document types have the technical document class **OTF** (Output Text Format).

Storage of Outgoing Documents (QM-QN-NM)

Preparation and Customizing (QM-QN-NM)

Customizing for storing outgoing documents covers the following areas:

- General Customizing for **SAP ArchiveLink**
- Application-specific Customizing for **SAP Business Workflow**

General Customizing for SAP ArchiveLink

To store outgoing documents, you must first define global document types in Customizing for SAP ArchiveLink: For more information, see the *SAP ArchiveLink* documentation, section [Specific Customizing \[Extern\]](#).

Customizing in the R/3 QM Application

When you make Customizing settings in QM for quality notifications, you must define the **print control** for the shop papers. This includes the following:

- Defining the shop papers
- Defining the printer destination and the storage mode for individual shop papers
- Assigning shop papers for quality notification types

When you define the **shop papers**, you must assign **global document types** to them.

You define print control in the Implementation Guide (IMG) (see *Quality management* → *Quality notification* → *Notification processing* → *Print control*).

Activities

To store outgoing documents in QM, you must first create a quality notification or call up an existing quality notification using the change function. Then you can:

- Store the shop papers for a quality notification
- Display previously stored shop papers in the SAP ArchiveLink viewer

Storing Outgoing Documents

To store a shop paper, choose the **Print** function for the quality notification. Several dialog boxes appear, in which you can select the required shop papers and define the corresponding print parameters and storage mode. When you select a shop paper to be stored and then save, the System stores the shop paper in SAP ArchiveLink.

For information on printing quality notifications, see the documentation *QM - Quality Management*.

Displaying Stored Documents in the SAP ArchiveLink Viewer

When you process a quality notification for which one or more documents have been stored, you can display this document in the SAP ArchiveLink viewer. For this, choose *Environment* → *Object links* in the notification header. A dialog box appears, in which you can select the object link for the stored documents. If only one document is stored for the quality notification, it is

Storage of Outgoing Documents (QM-QN-NM)

displayed automatically in the SAP ArchiveLink viewer. If several documents are stored for the quality notification, you can select the required document in a second dialog box.

Business Background (QM-QN-NM)

Business Background (QM-QN-NM)

This section describes the business background for storing outgoing documents in the R/3 application component Quality Management (QM).

Quality Management and SAP ArchiveLink

In the QM component, you can use **quality notifications** to record, process and monitor different types of problems. These problems may or may not be quality-related and their cause may be internal or external. The **SAP ArchiveLink** function is a cross-application tool that supports you in your notification processing activities. It provides a quick and efficient way of storing outgoing documents in external systems.

Quality Notification Shop Papers

When you process a quality notification in the QM application component, you can print and store various **shop papers**. A shop paper is an outgoing original document that contains specific information about the quality notification or contents of the notification. The following shop papers have been predefined for the different **quality notification types** in the QM application component:

- **Notification overview**

The notification overview contains a summary of the pertinent information in a quality notification (for example, information relating to the notification header and the defect items).

- **Item overview**

The item overview contains detailed information about the defect items in a quality notification.

- **Letter of complaint**

The “letter of complaint” is an official letter addressed to the vendor. It lists the defects that were identified in an inspection and processed in a quality notification. This type of shop paper is currently only available for quality notification types F2 (vendor defect) and Q2 (complaint against vendor).

Refer to the table in the section “Technical Implementation (QM-QN-NM)” for an overview of the different quality notification types that are available.

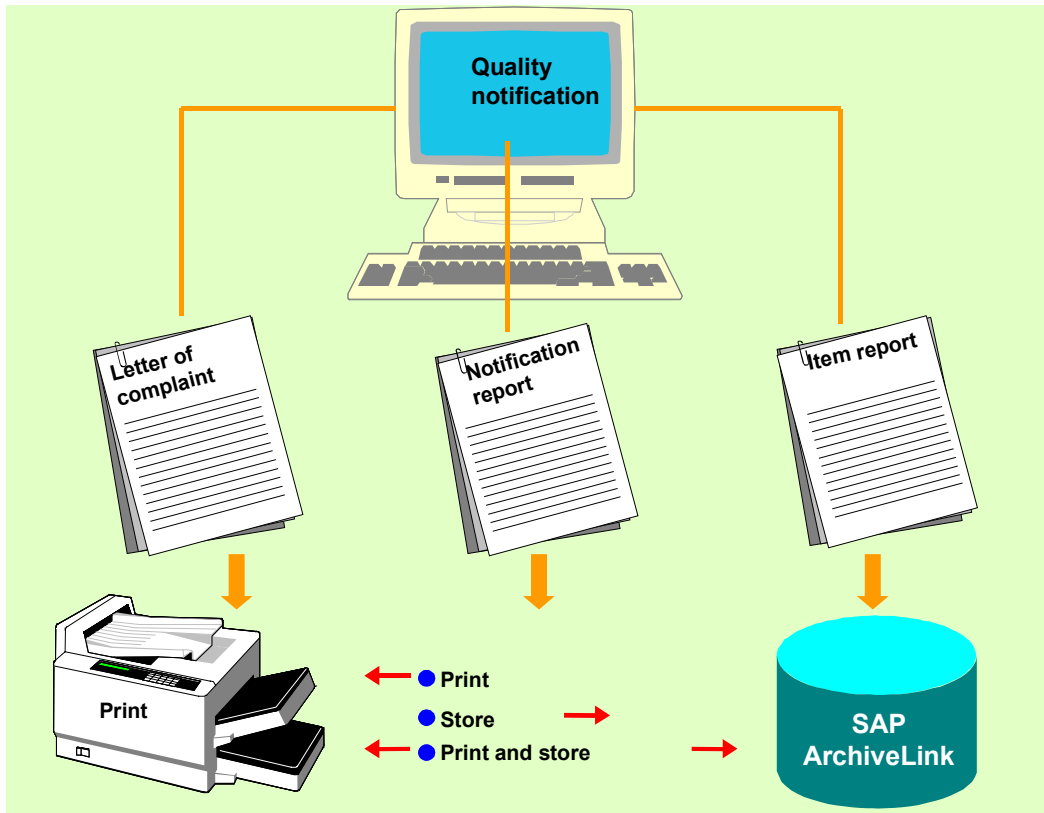
When Can You Use the Scenario “Storage of Outgoing Documents”?

When you create or change a quality notification, you can print the quality notification shop papers. This print function allows you to select one of the following output modes, depending on how the **storage mode** has been set for the shop papers:

- **Print** the selected shop papers.
- **Store** the selected shop papers.
- **Print and store** the selected shop papers simultaneously.

When you store a shop paper, the system stores the document in SAP ArchiveLink. Once the system has stored the shop papers, you can display them, using the SAP ArchiveLink viewer.

Storage of Outgoing Documents

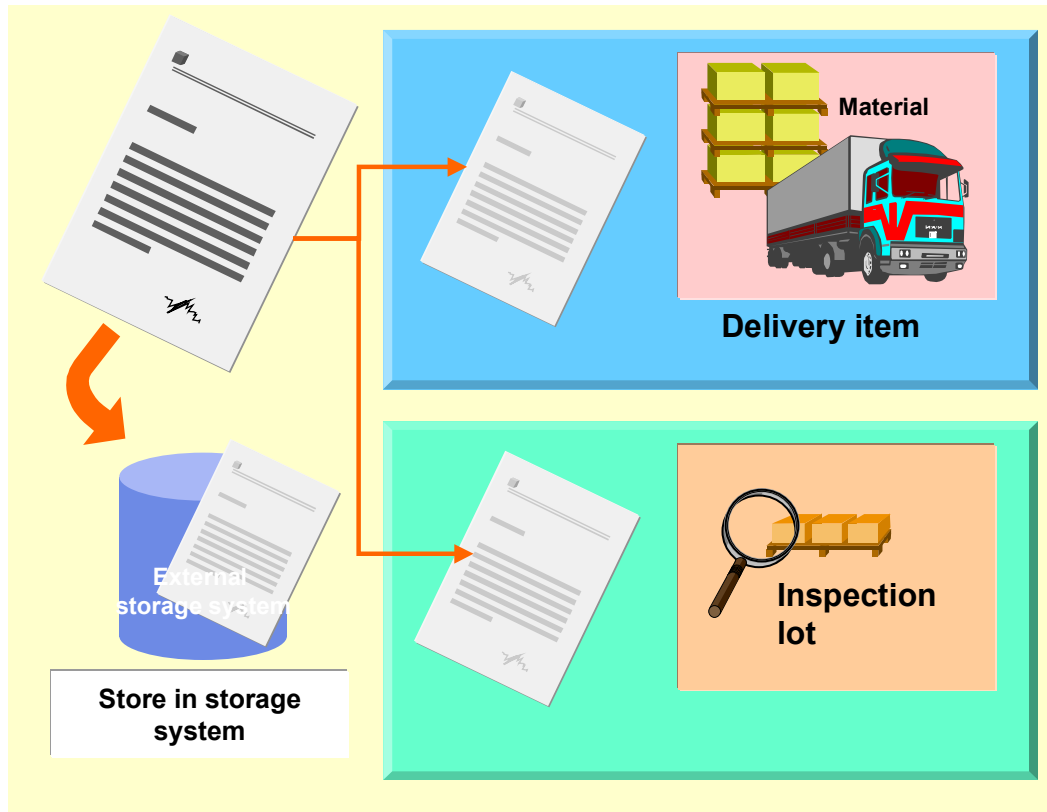


Storage of Outgoing Certificates (QM-CA-CG)

Storage of Outgoing Certificates (QM-CA-CG)

Use

In the *Quality Management* (QM) application component, you can store outgoing quality certificates for the delivery item or for the inspection lot directly after they have been printed, using the *SAP ArchiveLink*.



Prerequisites

Technical Implementation (QM-CA)

Document type	QMOCERT	
Description	Quality certificate	
Object type	LIPS (certificate for delivery item)	BUS2045 (certificate for the inspection lot)

Preparation and Customizing (QM-CA)

To store **certificates for a delivery**, you need to make the following settings in Customizing for *Quality Management*:

Storage of Outgoing Certificates (QM-CA-CG)

1. Choose *Quality Management* → *Quality Certificate* → *Output Determination* → *Define condition types for output determination*.
2. Select the condition type *LQCA* (quality certificate for goods recipient), and choose *Details*.
3. In the *Output type* display view, set the storage mode to *Store only* or *Print and store* on the tab page *Store*.
4. On the *Default values* tab page, set the transmission medium to *Print output*.

To store **certificates for inspection lots**, on the initial screen of the “Certificate for an inspection lot” transaction, set the *Storage mode* to *Store only* or to *Print and store* and the transmission medium to *Print output*.



You cannot, however, store a certificate that was created for a batch in an external storage system.

SAP ArchiveLink - Storage Scenarios (PM)

The following sections describe the storage scenarios in the R/3 application component PM (Plant Maintenance and Service Management):

- Maintenance Orders (PM-WOC-MO)
- Maintenance Notifications (PM-WOC-MN)
- Service Processing (PM-SMA-SC)

See also:

- General [introduction \[Seite 10\]](#) to this scenario documentation
- [SAP ArchiveLink \[Extern\]](#)
- [Maintenance Orders \(PM-WOC-MO\) \[Extern\]](#)
- [Maintenance Notifications \[Extern\]](#)
- [Service Processing \[Extern\]](#)

Storage of Outgoing Documents (PM-WOC-MO)

Use

In the *Plant Maintenance* (PM) application component, you can use the SAP ArchiveLink to store outgoing documents in external content servers.

See also [Business Background \(PM-WOC-MO\) \[Seite 117\]](#).

Prerequisites

Technical Realization (PM-WOC-MO)

Object Types Used

The interface between the R/3 functions and **SAP ArchiveLink** is realized using object technology.

In this scenario, the system processes the business application object, [Object Type BUS2007 \(Maintenance Order\) \[Extern\]](#). You can find the features, methods and events defined for the object type in the object repository in the R/3 System.

When you store an outgoing document, the document is automatically assigned to the maintenance order currently being processed.

Document Types

In the PM application component, a document type is predefined for outgoing documents:

PMOWORKPAP: Maintenance order print - Shop paper

Preparation and Customizing (PM-WOC-MO)

General Customizing for SAP ArchiveLink

In order that you can store outgoing documents, you must first define global document types for SAP ArchiveLink in Customizing. For more information, see the SAP ArchiveLink documentation in [Special Customizing \[Extern\]](#).

Customizing in the PM Application Component

When you make Customizing settings for maintenance orders in the PM application component, you must define the **print control** for the shop papers. This comprises the following:

- Definition of the shop papers
- Definition of the printer destination and the form of storage for the individual shop papers
- Assignment of the shop papers to maintenance order types

When you define the **shop papers**, you must assign **global document types** to them.

You define the print control in the Implementation Guide (see *Plant Maintenance and Service Management* → *Maintenance Processing and Service Processing* → *Maintenance Orders and Service Orders* → *Print Control*).

Storage of Outgoing Documents (PM-WOC-MO)

Activities

To store outgoing documents in the PM application component, you must first create a maintenance order or call up an existing maintenance order using the change function. Then you can:

- Store the shop papers for a maintenance order
- Display previously stored shop papers in the SAP ArchiveLink Viewer

Storing Outgoing Documents

To store a shop paper, choose the function for **printing** the maintenance order. Several dialog boxes appear, in which you can select the required shop papers and define the appropriate print parameters and form of storage. When you select and save a shop paper for storage, the system stores the shop paper in the SAP ArchiveLink.

For more information about printing maintenance orders, see the section [Printing/Faxing of Shop Papers \[Extern\]](#) in *PM - Maintenance Orders*.

Displaying Stored Documents in the SAP ArchiveLink Viewer

When you process a maintenance order, for which one or more documents have been stored, you can display this document in the SAP ArchiveLink Viewer. To do this, choose Environment → *Display original documents*. A dialog box appears, in which you can select the object link for the stored documents.

If only one document is stored for the maintenance order, it is displayed automatically in the SAP ArchiveLink Viewer. If several documents are stored for the maintenance order, you can select the required document in a second dialog box.

Business Background (PM-WOC-MO)

Plant Maintenance and SAP ArchiveLink

In the PM application component, you can use **maintenance orders** (PM orders) to document maintenance tasks. You use the maintenance order to plan tasks in detail, monitor their execution, then enter and settle the costs which arise from the tasks. **SAP ArchiveLink** is a cross-application tool which supports you during the processing of maintenance orders. This tool enables outgoing documents to be stored quickly and efficiently in external content servers.

Shop Papers for Maintenance Orders

When you process a maintenance order in the PM application component, you can print and store different **shop papers** for this maintenance order. A shop paper is an outgoing document that contains information about the maintenance order or the contents of the order. In the PM application component, the following shop papers have been predefined for the **maintenance orders**:

- Operation control ticket
The operation control ticket provides the maintenance employee responsible with a complete overview of the maintenance order. It also contains information about permits.
- Job ticket
The job ticket is a paper that accompanies the order and provides the manual worker performing it with a complete overview of the order.
- Material staging list
The material staging list shows the warehouse clerk which materials have been scheduled for each operation in this order.
- Material withdrawal slip
Material withdrawal slips authorize the manual worker responsible to withdraw the materials required for the order from the warehouse. A material withdrawal slip is printed for each material component.
- Time ticket
Time tickets are only printed for operations where indicated to by the control key. The number of time tickets specified per operation is then printed for each manual worker involved with the order. The worker records on the ticket the time that was required to perform the operation.
- Completion confirmation slip
The employee responsible enters the technical report and, where necessary, relevant measurement and/or counter readings on the completion confirmation slip.
- Order object list
A list of technical objects (equipment or functional locations) which have been assigned to the maintenance order.

In the system, you can set which shop papers are available for which order types.

Business Background (PM-WOC-MO)**When Can the “Storage of Outgoing Documents” Scenario be Used?**

When you create or change a maintenance order, you can print shop papers for the maintenance order. Depending on the **storage mode** that you have defined for shop papers, you can use the print function to select one of the following output modes:

- **Printing** the selected shop papers
- **Storing** the selected shop papers
- **Printing and storing** the selected shop papers simultaneously

When you store a shop paper, the system stores the document in the SAP ArchiveLink. As soon as a shop paper is stored, you can display it using the SAP ArchiveLink Viewer.

Storage of Incoming Documents (PM-WOC-MO)

Use

In the *Plant Maintenance* (PM) application component, you can use the SAP ArchiveLink to store incoming documents in an external content server.

See also [Business Background \(PM-WOC-MO\) \[Seite 122\]](#).

Prerequisites

Technical Realization (PM-WOC-MO)

General Settings for Document Types

Field Description	Content
Document type:	PMIAUFTRAG
Description:	Order
Operation category:	NCI_INPUT
Object type:	BUS2007
Method:	CREATE
Task:	TS00007869
Document type:	PMICONFIRM
Description:	Completion confirmation
Operation category:	NCI_INPUT
Object type:	BUS2007
Method:	CREATE
Task:	TS00007869

Document Types for Maintenance Orders

In the standard system, the following document types are predefined for maintenance orders:

- Documents for maintenance order processing - completion confirmation
- Documents for maintenance order processing - document for order

Storage of Incoming Documents (PM-WOC-MO)

Object Types Used

The interface between the R/3 functions and **SAP ArchiveLink** is realized using object technology. In this SAP ArchiveLink scenario, the system processes the following application object:

[Object Type BUS2007 \(Maintenance Order\) \[Extern\]](#)

Standard Tasks

Standard tasks are single-step tasks provided by SAP which describe simple business activities from an organizational viewpoint. In each case, a single-step task refers to **one** object method (technical link to R/3 functions) and is linked to the people who can process the object.

[Standard Task TS00007869 \(ImageAssign\) \[Extern\]](#)

Preparation and Customizing (PM-WOC-MO)

The Customizing for storage for subsequent entry for incoming documents comprises the following areas:

- General Customizing for **SAP ArchiveLink**
- Customizing for the **SAP Business Workflow**

General Customizing for SAP ArchiveLink

In order that you can store incoming documents, you must first make Customizing settings for SAP ArchiveLink to maintain the following:

- Global document types
- Links
- Presettings

For more information, see the section [Basic Customizing \[Extern\]](#) in the *SAP ArchiveLink* documentation.

Customizing for the SAP Business Workflow

The SAP Business Workflow plays an important role in the scenario “storage for subsequent entry”. The SAP Business Workflow automatically informs the people responsible that an incoming document has been stored and that a maintenance order must be created. The Customizing for the SAP Business Workflow includes the following:

- Maintaining workflow document types

The SAP Business Workflow automatically informs the people responsible that a maintenance order must be created. In order that the workflow can be triggered, the global document types must be defined as workflow document types. For the scenario of storage for subsequent entry in PM, the object type is [BUS2007 \[Extern\]](#) (maintenance order).

- Maintaining workflow parameters

In the workflow document type for PM, the workflow parameters specify the category of maintenance order which is created by the system.

See also:

The section [Special Customizing \[Extern\]](#) in the *SAP ArchiveLink* documentation.

Activities

The scenarios for storage for subsequent entry usually include two or more people who work at different locations within the company. Each of these people must execute the relevant storage functions depending on their task area.

When storing for subsequent entry, one person scans the incoming documents in a storage unit and assigns them to document types. This is performed using the storage functions in the *Office* menu.

When storing for subsequent entry, a second person (in a different department) processes the work items which have been generated by the storage operation and the SAP Business Workflow. In the PM application component, this is usually the person who created and/or processed the maintenance orders.

For more information, see the following documentation:

- **Storage for Subsequent Entry: Assigning Document Types and Processing Work Items:**

The section [Storage for Subsequent Entry \[Extern\]](#) in the *SAP ArchiveLink* documentation.

- **Processing of Maintenance Orders:**

[PM - Maintenance Orders \[Extern\]](#)

Business Background (PM-WOC-MO)

Business Background (PM-WOC-MO)

This section describes the business background of “storage for subsequent entry” for incoming documents in the R/3 application component, Plant Maintenance (PM).

Plant Maintenance and SAP ArchiveLink

In the PM application component, you can use **maintenance orders** (PM orders) to document maintenance tasks. You use the maintenance order to plan tasks in detail, monitor their execution, then enter and settle the costs which arise from the tasks. **SAP ArchiveLink** is a cross-application tool which supports you during the processing of maintenance orders. This tool enables incoming documents to be stored quickly and efficiently in external content servers.

The SAP ArchiveLink interface supports a storage scenario for incoming documents in the PM application component:

- Storage for subsequent entry for incoming documents

When Can the “Storage for Subsequent Entry” Scenario be Used?

When storing for subsequent entry, the original paper documents relating to a problem are stored in the R/3 System **before** the document (in this case, the maintenance order) is created. When the incoming document is stored, the system triggers the **SAP Business Workflow**, which notifies the person responsible that a maintenance order must be created. When this person creates and saves the maintenance order, the incoming document is automatically assigned to the order.

[Process Flow for Storage for Subsequent Entry \(PM-WOC-MO\) \[Seite 123\]](#)

Process Flow for Storage for Subsequent Entry (PM-WOC-MO)

The following steps describe a typical scenario for “storage for subsequent entry” for incoming documents **before** a maintenance order has been created:

1. A clerk receives a document (for example, a car inspection report).
2. The clerk scans the document into a dedicated scanning system. The document is then displayed in the scan dialog window of the external system.
3. The clerk (or another designated person) calls up the function for storing for subsequent entry and selects the document type to which the scanned document should be assigned (for example, “Documents for car inspection reports”).
4. The clerk confirms the assignment to the document type. This triggers a workflow, in which the person responsible for processing the work item is informed (for example, Mrs Jones in Plant Maintenance).



The people who are notified by the SAP Business Workflow must first be defined in the organizational structure for the company (see Customizing for SAP Business Workflow).

5. Mrs Jones receives the corresponding work item in her integrated inbox. When she processes the work item, the system automatically calls up the create transaction for maintenance orders and the SAP ArchiveLink Viewer. The SAP ArchiveLink Viewer displays the scanned incoming document.
6. Mrs Jones creates a maintenance order based on the contents of the car inspection report and saves it. The document is then automatically assigned to the maintenance order using an internal link table.
7. When Mrs Jones or another authorized person calls up the order again later, they can display the archived document in the SAP ArchiveLink Viewer by choosing *Environment* → *Display original documents*.

Storage of Incoming Documents (PM-SMA-SC)**Storage of Incoming Documents (PM-SMA-SC)****Use**

In the *Service Management* (SM) application component, you can use the SAP ArchiveLink to store incoming documents in external content servers.

See also [Business Background \(PM-SMA-SC\) \[Seite 127\]](#).

Prerequisites**Technical Realization (PM-SMA-SC)****Document Type**

The following global document type for “storage for subsequent entry” in the SM application component is already defined in the standard system:

Field Description	Content
Document type:	PMISERVICE
Description:	Service notification
Operation category:	NCI_INPUT
Object type:	BUS2080
Method:	CREATE
Task:	TS00007869

Object Types Used

The interface between the R/3 functions and **SAP ArchiveLink** is realized using object technology. In this SAP ArchiveLink scenario, the system processes the following application object:

[Object Type BUS2080 \(Service Notification\) \[Extern\]](#)

Standard Tasks

Standard tasks are single-step tasks provided by SAP which describe simple business activities from an organizational viewpoint. In each case, a single-step task refers to *one* object method (technical link to R/3 functions) and is linked to the people who can process the object.

[Standard Task TS00007869 \(ImageAssign\) \[Extern\]](#)

Preparation and Customizing (PM-SMA-SC)

General Customizing for SAP ArchiveLink

In order that you can store incoming documents, you must first make Customizing settings for SAP ArchiveLink to maintain the following:

- Global document types
- Links
- Presettings

For more information, see the sections [Special Customizing \[Extern\]](#) and [Presettings for Storage Strategies \[Extern\]](#) in the SAP ArchiveLink documentation.

Customizing for the SAP Business Workflow

The SAP Business Workflow automatically informs the people responsible that an incoming document has been stored and that a service notification must be created. The Customizing for the SAP Business Workflow includes the following:

- Maintaining a workflow document type

For the scenario of storage for subsequent entry in SM, the object type is [BUS2080 \[Extern\]](#) (service notification).

- Maintaining workflow parameters

In the standard system, the following workflow parameters have been defined for storage for subsequent entry in the SM application component:

- Method parameter
TYPE (for service notification type)
- + (value which is assigned to the method parameter)
- *M2* for notification type “Service notification”

See also:

The section [Special Customizing \[Extern\]](#) in the *SAP ArchiveLink* documentation.

Activities

The scenarios for storage for subsequent entry usually include two or more people who work at different locations within the company. Each of these people must execute the relevant storage functions depending on their task area.

When storing for subsequent entry, one person scans the incoming documents in a storage unit and assigns them to document types. This is performed using the storage functions in the *Office* menu.

When storing for subsequent entry, a second person (in a different department) processes the work items which have been generated by the storage operation and the SAP Business Workflow. In the SM application component, this is usually the person who created and/or processed the service notifications.

For more information, see the following documentation:

Storage of Incoming Documents (PM-SMA-SC)

- **Storage for Subsequent Entry: Assigning Document Types and Processing Work Items:**

The section [Storage for Subsequent Entry \[Extern\]](#) in the *SAP ArchiveLink* documentation.

- **Processing of Service Notifications:**

PM - Service Management: [Service Processing \[Extern\]](#)

Business Background (PM-SMA-SC)

Service Management and SAP ArchiveLink

In the SM application component, you can use **service notifications** to enter, process and monitor different types of problems, malfunctions or service requests. These problems may, for example, involve malfunctions whose causes are related to internal or external factors. **SAP ArchiveLink** is a cross-application tool which supports you during the processing of service notifications. This tool enables problem-related documents to be entered quickly and efficiently, and stored in external content servers.

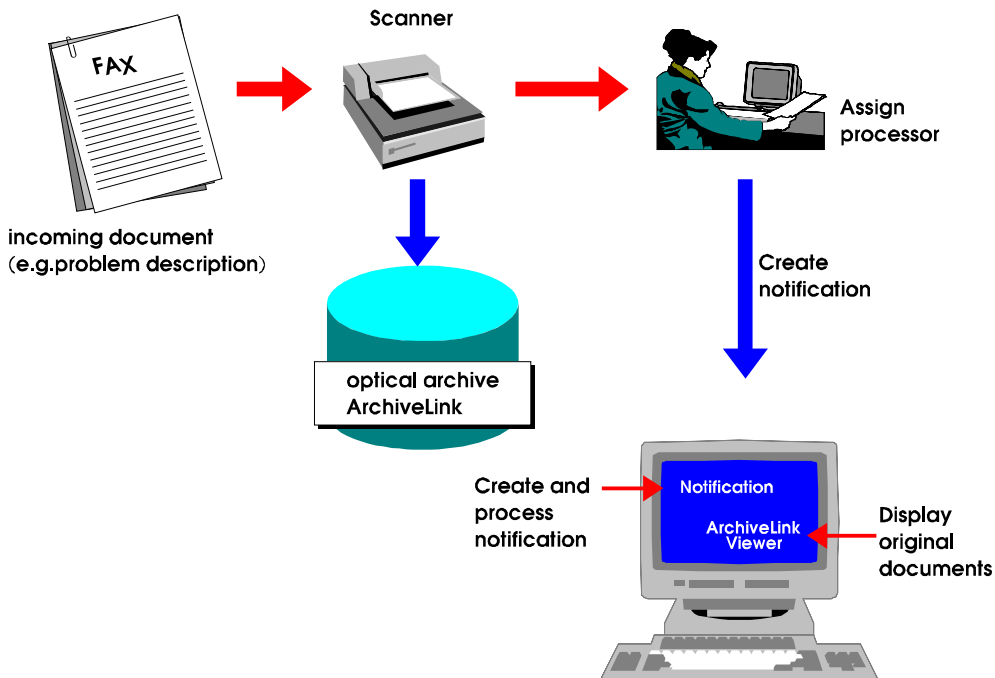
The SAP ArchiveLink interface supports a storage scenario for incoming documents in the SM application component:

- “Storage for subsequent entry” for incoming documents

When Can the “Storage for Subsequent Entry” Scenario be Used?

When storing for subsequent entry, the original paper documents relating to a problem are stored in the R/3 System **before** the document (in this case, the service notification) is created. When the incoming document is stored, the system triggers the **SAP Business Workflow**, which notifies the person responsible that a service notification must be created. When this person creates and saves the service notification, the incoming document is automatically assigned to the notification. Storage is usually in a central mailroom, where incoming post is opened, presorted, prepared and entered (scanned).

Storage for Subsequent Entry for Incoming Documents



[Process Flow for Storage for Subsequent Entry \(PM-SMA-SC\) \[Seite 129\]](#)

Business Background (PM-SMA-SC)

Process Flow for Storage for Subsequent Entry (PM-SMA-SC)

The following steps describe a typical scenario for “storage for subsequent entry” for incoming documents **before** a service notification has been created:

1. A clerk in the central mailroom receives a malfunction report from a customer.
2. The clerk scans the malfunction report into a dedicated scanning system. The letter is then displayed in the scan dialog window of the external system.
3. The clerk (or another designated person) calls up the function for storing for subsequent entry and selects the document type to which the scanned document should be assigned (for example, “Documents for service notifications”).
4. The clerk confirms the assignment to the document type. This triggers a workflow, in which the person responsible for processing the work item is informed (for example, Mrs Brown in Plant Maintenance).



The people who are notified by the SAP Business Workflow must first be defined in the organizational structure for the company (see Customizing for SAP Business Workflow).

5. Mrs Brown receives the corresponding work item in her integrated inbox. When she processes the work item, the system automatically calls up the create transaction for service notifications and the SAP ArchiveLink Viewer. The SAP ArchiveLink Viewer displays the scanned incoming document.
6. Mrs Brown documents the problem in the service notification and saves it. The incoming document is then automatically assigned to the service notification using an internal link table.
7. When Mrs Brown or another authorized person calls up the notification again later, they can display the incoming document in the SAP ArchiveLink Viewer by choosing *Environment* → *Original links*.

Storage of Outgoing Documents (PM-SMA-SC)**Storage of Outgoing Documents (PM-SMA-SC)****Use**

In the *Service Management* (SM) application component, you can use the SAP ArchiveLink to store outgoing documents in an external content server.

See also [Business Background \(PM-SMA-SC\) \[Seite 132\]](#).

Prerequisites**Technical Realization (PM-SMA-SC)****Predefined Shop Papers for Service Notification Types**

Service Notification Type	Shop Papers
Notification type S1	Service notification overview
Notification type S2	Service notification overview
Notification type S3	Service notification overview

Object Types Used

The interface between the R/3 functions and **SAP ArchiveLink** is realized using object technology.

In this scenario, the system processes the business application object, [Object Type BUS2080 \(Service Notification\) \[Extern\]](#). You can find the features, methods and events defined for the object type in the object repository in the R/3 System.

When you store an outgoing document, the document is automatically assigned to the service notification currently being processed.

Document Types

In the standard system, the following global document type is predefined for storing outgoing documents in the SM application component:

- PMOSERPAP: Service notification print - Shop paper

Preparation and Customizing (PM-SMA-SC)**General Customizing for SAP ArchiveLink**

In order that you can store outgoing documents, you must first define global document types for SAP ArchiveLink in Customizing. For more information, see the SAP ArchiveLink documentation in [Special Customizing \[Extern\]](#).

Customizing in the SM Application Component

When you make Customizing settings for service notifications in the SM application component, you must define the **print control** for the shop papers. This comprises the following:

- Definition of the shop papers
- Definition of the printer destination and the form of storage for the individual shop papers
- Assignment of the shop papers to service notification types

When you define the **shop papers**, you must assign **global document types** to them.

You define the print control in the Implementation Guide (see *Plant Maintenance and Service Management* → *Maintenance Processing and Service Processing* → *Notifications* → *Notification Print Control*).

Activities

To store outgoing documents in the SM application component, you must first create a service notification or call up an existing service notification using the change function. Then you can:

- Store the shop papers for a service notification
- Display previously stored shop papers in the SAP ArchiveLink Viewer

Storing Outgoing Documents

To store a shop paper, choose the function for **printing** the service notification. Several dialog boxes appear, in which you can select the required shop papers and define the appropriate print parameters and form of storage. When you select and save a shop paper for storage, the system stores the shop paper in the SAP ArchiveLink.

Displaying Stored Documents in the SAP ArchiveLink Viewer

When you process a service notification, for which one or more outgoing documents have been stored, you can display this document in the SAP ArchiveLink Viewer. To do this, choose *Environment* → *Object links* in the notification header. A dialog box appears, in which you can select the object link for the stored documents. If only one document is stored for the service notification, it is displayed automatically in the SAP ArchiveLink Viewer. If several documents are stored for the service notification, you can select the required document in a second dialog box.

Business Background (PM-SMA-SC)

Service Management and SAP ArchiveLink

In the SM application component, you can use **service notifications** to enter, process and monitor different types of problems. These problems may, for example, involve malfunctions whose causes are related to internal or external factors. **SAP ArchiveLink** is a cross-application tool which supports you during the processing of service notifications. This tool enables outgoing documents to be stored quickly and efficiently in external content servers.

Shop Papers for Service Notifications

When you process a service notification in the SM application component, you can print and store different **shop papers** for this service notification. A shop paper is an outgoing document that contains information about the service notification or the contents of the notification. In the SM application component, the following shop paper has been predefined for the different **service notification types**:

- **Service notification overview (version 1 and version 2)**

The notification overview contains a summary of the relevant information in a service notification (for example, data relating to the notification header and the items).

An overview of the shop papers which are available for the different service notification types is provided in the table of predefined shop papers under “Technical Realization” in [Storage of Outgoing Documents \(PM-SMA-SC\) \[Seite 130\]](#).

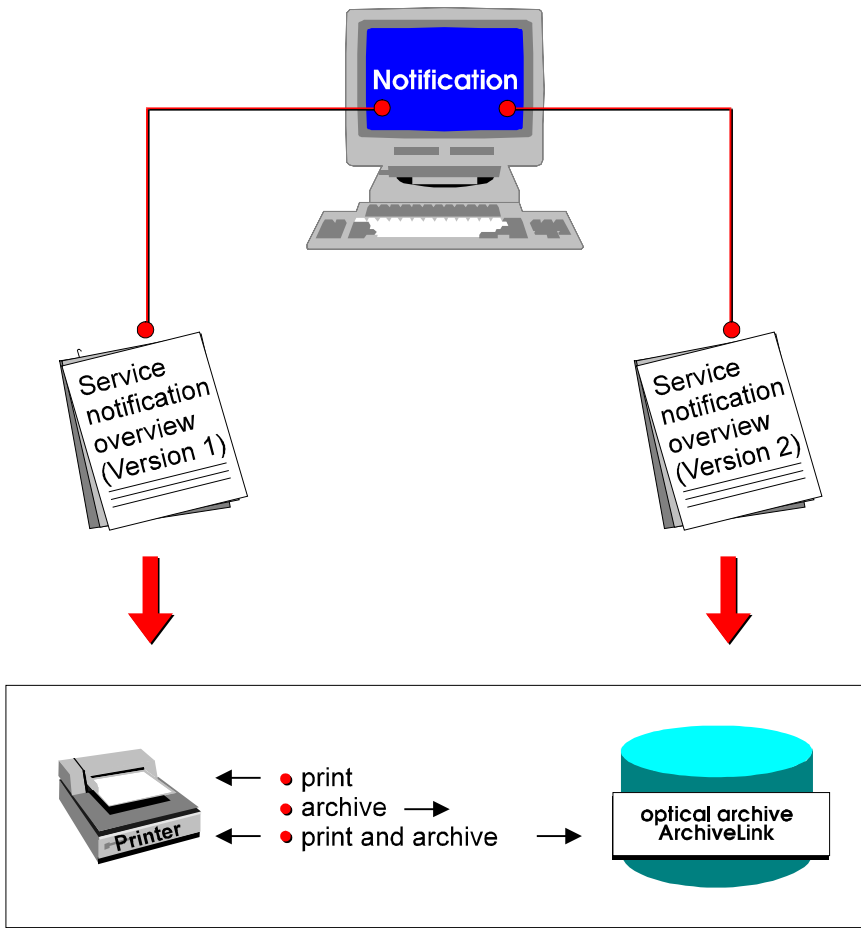
When Can the “Storage of Outgoing Documents” Scenario be Used?

When you create or change a service notification, you can print shop papers for the service notification. Depending on the **storage mode** that you have defined for shop papers, you can use the print function to select one of the following output modes:

- **Printing** the selected shop papers
- **Storing** the selected shop papers
- **Printing and storing** the selected shop papers simultaneously

When you store a shop paper, the system stores the document in the SAP ArchiveLink. As soon as a shop paper is stored, you can display it using the SAP ArchiveLink Viewer.

Storage of Outgoing Documents



Storage of Incoming Documents (PM-WOC-MN)

Storage of Incoming Documents (PM-WOC-MN)**Use**

In the *Plant Maintenance* (PM) application component, you can use the SAP ArchiveLink to store incoming documents in external content servers.

See also [Business Background \(PM-WOC-MN\) \[Seite 138\]](#).

Prerequisites**Technical Realization (PM-WOC-MN)****General Settings for Document Types**

Field Description	Content
Document type:	PMIDAMAGE
Description:	Malfunction report
Operation category:	NCI_INPUT
Object type:	BUS2038
Method:	CREATE
Task:	TS00007869
Document type:	PMIREQUEST
Description:	Notification
Operation category:	NCI_INPUT
Object type:	BUS2038
Method:	CREATE
Task:	TS00007869
Document type:	PMITECHCNF
Description:	Technical completion confirmation
Operation category:	NCI_INPUT
Object type:	BUS2038
Method:	CREATE
Task:	TS00007869

Storage of Incoming Documents (PM-WOC-MN)**Document Types for Maintenance Notifications**

In the standard system, the following document types (document category FAX) are predefined for maintenance notifications:

- **PMIDAMAGE**
Documents for maintenance notification processing - malfunction report
- **PMIREQUEST**
Documents for maintenance notification processing - notification
- **PMITEHCNF**
Documents for maintenance notification processing - technical completion confirmation

Object Types Used

The interface between the R/3 functions and **SAP ArchiveLink** is realized using object technology. In this SAP ArchiveLink scenario, the system processes the following application object:

[Object Type BUS2038 \(Maintenance Notification\) \[Extern\]](#)

Standard Tasks

Standard tasks are single-step tasks provided by SAP which describe simple business activities from an organizational viewpoint. In each case, a single-step task refers to *one* object method (technical link to R/3 functions) and is linked to the people who can process the object.

[Standard Task TS00007869 \(ImageAssign\) \[Extern\]](#)

Preparation and Customizing (PM-WOC-MN)

The Customizing for storage for subsequent entry for incoming documents comprises the following areas:

- General Customizing for **SAP ArchiveLink**
- Customizing for the **SAP Business Workflow**

General Customizing for SAP ArchiveLink

In order that you can store incoming documents, you must first make Customizing settings for SAP ArchiveLink to maintain the following:

- Global document types
- Presettings
- Links

For more information, see the sections [Special Customizing \[Extern\]](#), [Basic Customizing \[Extern\]](#) and [Presettings for Storage Strategies \[Extern\]](#) in the *SAP ArchiveLink* documentation.

Customizing for the SAP Business Workflow

The SAP Business Workflow plays an important role in the scenario “storage for subsequent entry”. The SAP Business Workflow automatically informs the people responsible that an

Storage of Incoming Documents (PM-WOC-MN)

incoming document has been stored and that a maintenance notification must be created. The Customizing for the SAP Business Workflow includes the following:

- Maintaining workflow document types
For the scenario of storage for subsequent entry in PM, the object type is [BUS2038 \[Extern\]](#) (maintenance notification).
- Maintaining workflow parameters
After you have defined the workflow document types, you must assign workflow parameters to the methods entered in the document types. In the workflow document type for PM, the workflow parameters specify the category of maintenance notification which is created by the system. In the standard system, the following workflow parameters have been defined for storage for subsequent entry in the PM application component:
 - Method parameter *TYPE* (for maintenance notification type)
 - + (value which is assigned to the method parameter)
 - M2 for notification type “Malfunction report”

For more information, see [Special Customizing \[Extern\]](#) in the *SAP ArchiveLink* documentation.

Activities

The scenarios for storage for subsequent entry usually include two or more people who work at different locations within the company. Each of these people must execute the relevant storage functions depending on their task area.

When storing for subsequent entry, one person scans the incoming documents in a storage unit and assigns them to document types. This is performed using the storage functions in the *Office* menu.

When storing for subsequent entry, a second person (in a different department) processes the work items which have been generated by the storage operation and the SAP Business Workflow. In the PM application component, this is usually the person who created and/or processed the maintenance notifications.

For more information, see the following documentation:

- **Storage for Subsequent Entry: Assigning Document Types and Processing Work Items:**
The section [Storage for Subsequent Entry \[Extern\]](#) in the *SAP ArchiveLink* documentation.
- **Processing of Maintenance Notifications:**
The section [Maintenance Notifications \[Extern\]](#) in the *PM - Maintenance Notifications* documentation.

Business Background (PM-WOC-MN)

Business Background (PM-WOC-MN)

Plant Maintenance and SAP ArchiveLink

In the PM application component, you can use **maintenance notifications** (PM notifications) to enter, process and monitor different types of problems. These problems may, for example, involve malfunctions whose causes are related to internal or external factors. **SAP ArchiveLink** is a cross-application tool which supports you during the processing of maintenance notifications. This tool enables problem-related documents to be entered quickly and efficiently, and stored in external content servers.

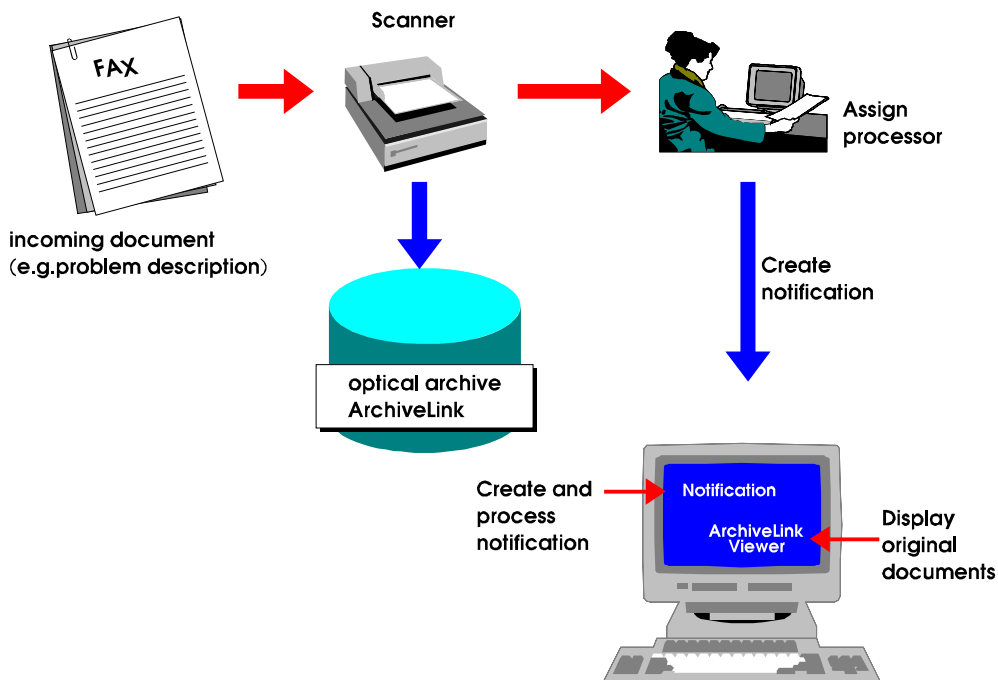
The SAP ArchiveLink interface supports a storage scenario for incoming documents in the PM application component:

- “Storage for subsequent entry” for incoming documents

When Can the “Storage for Subsequent Entry” Scenario be Used?

When storing for subsequent entry, the original paper documents relating to a problem are stored in the R/3 System **before** the document (in this case, the maintenance notification) is created. When the incoming document is stored, the system triggers the **SAP Business Workflow**, which notifies the person responsible that a maintenance notification must be created. When this person creates and saves the maintenance notification, the document is automatically assigned to the notification. Storage is usually in a central mailroom, where incoming post is opened, presorted, prepared and scanned.

Storage for Subsequent Entry for Incoming Documents



[Process Flow for Storage for Subsequent Entry \(PM-WOC-MN\) \[Seite 140\]](#)

Process Flow for Storage for Subsequent Entry (PM-WOC-MN)

Process Flow for Storage for Subsequent Entry (PM-WOC-MN)

The following steps describe a typical scenario for “storage for subsequent entry” for incoming documents **before** a maintenance notification has been created:

1. A clerk in the central mailroom receives a malfunction report from a customer.
2. The clerk scans the malfunction report into a dedicated scanning system. The letter is then displayed in the scan dialog window of the external system.
3. The clerk (or another designated person) calls up the function for storing for subsequent entry and selects the document type to which the scanned document should be assigned (for example, “Documents for malfunction reports”).
4. The clerk confirms the assignment to the document type. This triggers a workflow, in which the person responsible for processing the work item is informed (for example, Mrs Brown in Plant Maintenance).



The people who are notified by the SAP Business Workflow must first be defined in the organizational structure for the company (see Customizing for SAP Business Workflow).

5. Mrs Brown receives the corresponding work item in her integrated inbox. When she processes the work item, the system automatically calls up the create transaction for maintenance notifications and the SAP ArchiveLink Viewer. The SAP ArchiveLink Viewer displays the scanned document.
6. Mrs Brown documents the problem in the maintenance notification and saves it. The document is then automatically assigned to the maintenance notification using an internal link table.
7. When Mrs Brown or another authorized person calls up the notification again later, they can display the document in the SAP ArchiveLink Viewer by choosing *Environment* → *Original links*.

Storage of Outgoing Documents (PM-WOC-MN)

Use

In the *Plant Maintenance* (PM) application component, you can use the SAP ArchiveLink to store outgoing documents in external content servers.

See also [Business Background \(PM-WOC-MN\) \[Seite 143\]](#).

Prerequisites

Technical Realization (PM-WOC-MN)

Predefined Shop Papers for Maintenance Notification Types

Maintenance Notification Type	Shop Papers
Notification type M1	Notification overview, items
Notification type M2	Breakdown report
Notification type M3	Activity report

Object Types Used

The interface between the R/3 functions and **SAP ArchiveLink** is realized using object technology.

In this scenario, the system processes the business application object, [Object Type BUS2038 \(Maintenance Notification\) \[Extern\]](#). You can find the features, methods and events defined for the object type in the object repository in the R/3 System.

When you store an outgoing document, the document is automatically assigned to the maintenance notification currently being processed.

Document Types

In the standard system, the following global document type is predefined for storing outgoing documents in the PM application component:

- PMONOTFPAP: Maintenance notification print - Shop paper

Preparation and Customizing (PM-WOC-MN)

General Customizing for SAP ArchiveLink

In order that you can store outgoing documents, you must first define global document types for SAP ArchiveLink in Customizing. For more information, see the SAP ArchiveLink documentation in [Special Customizing \[Extern\]](#).

Storage of Outgoing Documents (PM-WOC-MN)

Customizing in the PM Application Component

When you make Customizing settings for maintenance notifications in the PM application component, you must define the **print control** for the shop papers. This comprises the following:

- Definition of the shop papers
- Definition of the printer destination and the form of storage for the individual shop papers
- Assignment of the shop papers to maintenance notification types

When you define the **shop papers**, you must assign **global document types** to them.

You define the print control in the Implementation Guide (see *Plant Maintenance and Service Management* → *Maintenance Processing and Service Processing* → *Notifications* → *Notification Print Control*).

Activities

To store outgoing documents in the PM application component, you must first create a maintenance notification or call up an existing maintenance notification using the change function. Then you can:

- Store the shop papers for a maintenance notification
- Display previously stored shop papers in the SAP ArchiveLink Viewer

Storing Outgoing Documents

To store a shop paper, choose the function for **printing** the maintenance notification. Several dialog boxes appear, in which you can select the required shop papers and define the appropriate print parameters and form of storage. When you select and save a shop paper for storage, the system stores the shop paper in the SAP ArchiveLink.

For more information about printing maintenance notifications, see the section [Printing of Maintenance Notifications \[Extern\]](#) in *PM - Maintenance Notifications*.

Displaying Stored Documents in the SAP ArchiveLink Viewer

When you process a maintenance notification, for which one or more documents have been stored, you can display this document in the SAP ArchiveLink Viewer. To do this, choose *Environment* → *Object links* in the notification header. A dialog box appears, in which you can select the object link for the stored documents. If only one document is stored for the maintenance notification, it is displayed automatically in the SAP ArchiveLink Viewer. If several documents are stored for the maintenance notification, you can select the required document in a second dialog box.

Business Background (PM-WOC-MN)

Plant Maintenance and SAP ArchiveLink

In the PM application component, you can use **maintenance notifications** (PM notifications) to enter, process and monitor different types of problems. These problems may, for example, involve malfunctions whose causes are related to internal or external factors. **SAP ArchiveLink** is a cross-application tool which supports you during the processing of maintenance notifications. This tool enables outgoing documents to be stored quickly and efficiently in external content servers.

Shop Papers for Maintenance Notifications

When you process a maintenance notification in the PM application component, you can print and store different **shop papers** for this maintenance notification. A shop paper is an outgoing document that contains information about the maintenance notification or the contents of the notification. In the PM application component, the following shop papers have been predefined for the different **maintenance notification types**:

- **Notification overview**

The notification overview contains a summary of the relevant information in a maintenance notification (for example, data relating to the notification header and the items).
- **Breakdown report**

The breakdown report contains detailed information about the breakdown data (for example, start of malfunction, end of malfunction, breakdown duration) in a maintenance notification.
- **Activity report**

The activity report includes the activities from the notification header and the notification items.

An overview of the shop papers which are available for the different maintenance notification types is provided in the table of predefined shop papers under “Technical Realization” in [Storage of Outgoing Documents \(PM-WOC-MN\) \[Seite 141\]](#).

When Can the “Storage of Outgoing Documents” Scenario be Used?

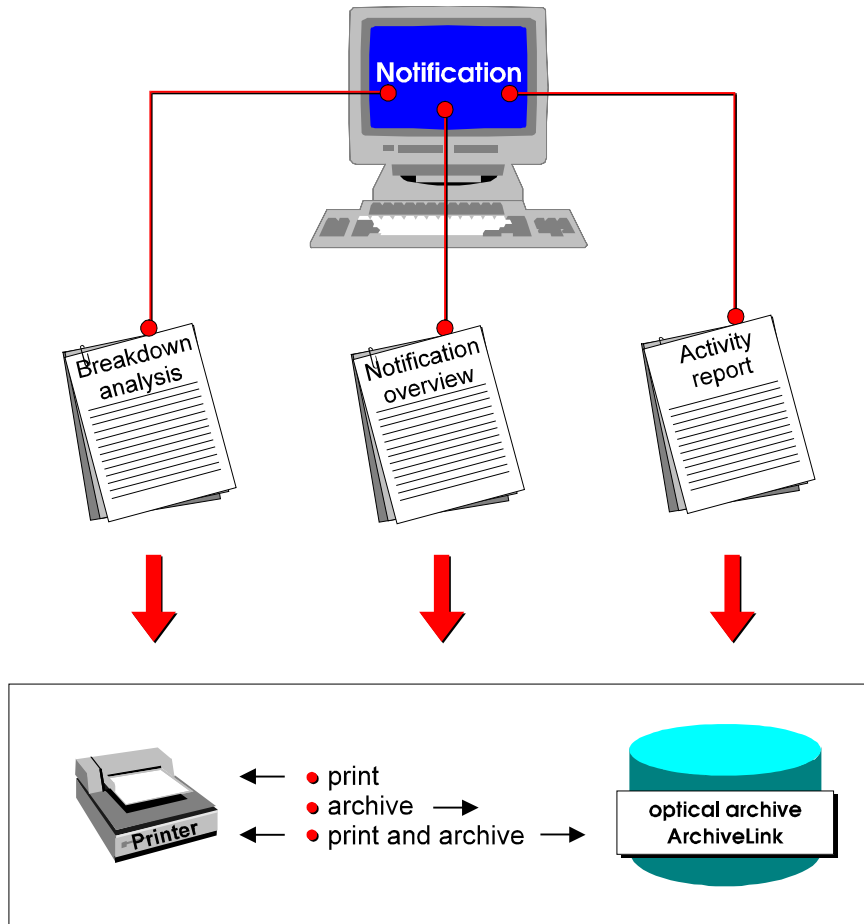
When you create or change a maintenance notification, you can print shop papers for the maintenance notification. Depending on the **storage mode** that you have defined for shop papers, you can use the print function to select one of the following output modes:

- **Printing** the selected shop papers
- **Storing** the selected shop papers
- **Printing** and **storing** the selected shop papers simultaneously

When you store a shop paper, the system stores the document in the SAP ArchiveLink. As soon as a shop paper is stored, you can display it using the SAP ArchiveLink Viewer.

Business Background (PM-WOC-MN)

Storage of Outgoing Documents



SAP ArchiveLink - Application Scenarios (PP)

The following sections describe the storage scenarios in the R/3 application component Production Planning and Control (PP):

- Production Planning - Process Industries (PP-PI)

See also:

- General [introduction \[Seite 10\]](#) to this scenario documentation
- [SAP ArchiveLink \[Extern\]](#)
- [PP - Production Planning - Process Industries \[Extern\]](#)

Storing of Order Records (PP-PI)

Storing of Order Records (PP-PI)

Use

In the R/3 application component *Production Planning for Process Industries (PP-PI)*, you can create [order records \[Seite 149\]](#) and use SAP ArchiveLink to export them to a content server. You can use order records to document the production and processing of your materials even if they are not managed in batches.



If your materials are subject to batch management and are manufactured using approved orders, you can also create batch records. If you want to comply with the requirements on Good Manufacturing Practices (GMP) for the pharmaceutical industry, you must create batch records to document your production (see [Optical Archiving of Batch Records \(PP-PI\) \[Seite 156\]](#)).

Prerequisites

Technical Implementation

Object Type

BUS0001

Document Class

ALF

Document Type

Document Type	Description
PI_AUFTRAG	Print list for process orders
PI_MALI	Print list for material list
PI_MESG	Print list for process messages
PI_SHEET	Print list for PI sheet
PI_PRUEFLOS	Print list for inspection lot
PI_USER	User-defined print list

Enhancements

If the print lists available in the standard system do not satisfy your requirements for an order record, you can create and archive a user-defined list by developing a corresponding customer enhancement. For more information, see the Implementation Guide (IMG), section *Production Planning - Process Industries → Process Data Documentation → Order Record → Develop Enhancements for Order Records*.

Customizing

To create order records and export them to a content server, you must make the following settings in R/3 Customizing:

- [General Customizing for SAP ArchiveLink \[Seite 16\]](#)
- Customizing for the order record
- Settings for the order record in Customizing for *Process Orders*

In the order-type dependent parameters, you must set the *Order record required* indicator for the order types for which you want to create order records. In this way, you also ensure that process orders and their inspection lots, PI sheets, and process messages are not deleted until the corresponding order records have been stored.
- Settings for the order record in Customizing for *Process Messages*

Process messages that you want to include in the order record must be sent to process message records as order-related messages. Therefore, you must make the following settings in Customizing of the message category:

 - You must assign destination PI01 (process message record) to the relevant message category.
 - You must assign a characteristic for the order number to the message category and then assign this characteristic to the target field PROCESS_ORDER of the process message record.

Further Preparations

To create and store an order record, you must note the following when you process the relevant application data:

- The process order must have status *Technically completed* or *Completed*



When you complete an order, the system does not check whether all process messages for the order have been sent successfully. To make sure that all messages are transferred to the order record, check the message log in the message monitor first.

- All inspection lots belonging to the order record must have statuses *Inspection close completed* and *Usage decision has been made*.

Activities

To process order records, you can use the following functions in process data documentation:

[Storing Order Records \(PP-PI\) \[Seite 152\]](#)

[Simulating Order Records \(PP-PI\) \[Seite 151\]](#)

[Displaying Order Records from the Content Server \(PP-PI\) \[Seite 154\]](#)

[Regenerating Order Records After Storing \(PP-PI\) \[Seite 155\]](#)

Storing of Order Records (PP-PI)

Order Record (PP-PI)

Definition

Record that contains all quality-relevant planned and actual data collected around a process order.

Structure

At most, an order record can contain all of the following:

- Print lists with the relevant data of the following R/3 objects:
 - Process order
 - Material list of the process order
 - Inspection lots of inspections during production and incoming inspections for the process order
 - PI sheets for the process order
 - Process messages for the process order
- A print list for user-defined data in which you can combine further R/3 data according to your company's requirements

When you create and store the order record, you decide which print lists you want the order record to contain.

Process: Order Record Storage (PP-PI)

Process: Order Record Storage (PP-PI)

Purpose

This process describes a typical scenario for order record storage.

Prerequisites

The process order has status *Order record required*.

The system sets this status when you release the order, provided that the *Order record required* indicator is set in the order type-dependent parameters (see Customizing for *Process Order*).

Process Flow

1. A process order was executed in your plant. An order record must be created for this process order because this has been specified in the order type.
2. You simulate the order record based on the data currently existing in the system and check whether the data is complete.
 - If the data is not complete, you make sure that missing data is added, for example by sending all process messages to their respective destinations.
3. If it has not been done yet, shop floor control and quality assurance must now set the following statuses for you to be able to store the order record:
 - Order status *Technically completed* or *Completed*
 - Inspection lot status *Inspection close completed* and *Usage decision has been made*
4. When the simulation lists are complete and the status requirements met, you export the record to the content server.

Result


The status *Order record required* is deactivated. This means that you can now delete the process order and its inspection lots, PI sheets, and process messages.

Simulating Order Records (PP-PI)


Use

You can use this procedure to simulate order records. This means, you create print lists with R/3 data without saving or exporting them to the content server. In this way, you can, for example, display and print data of order records whose orders or inspection lots do not yet meet the status requirements for storage.

Procedure

1. On the *SAP R/3* screen, choose *Logistics* → *Production - process* → *Process order* → *Tools* → *Process data document* → *Order record* → *Simulate*.
2. Enter criteria for selecting orders, and select the list type you want to display.
3. Choose .

The system displays an overview of all process orders that match your selection criteria.

4. To display the print lists for an order, position the cursor on the order and choose  *<list type>*.

The system simulates the lists based on the current data, that is, the print lists are prepared for displaying or printing but are not saved.



You can only display the list types you have selected on the initial screen.

5. If you want to print the list, choose , enter the print parameters, and choose .

Storing Order Records (PP-PI)


Storing Order Records (PP-PI)

Use

You can use this procedure to export the print lists of an order record to the content server. On the initial screen, you specify which of the print lists defined in the R/3 System are stored in your order record.

Prerequisites

- The process order has the following statuses:
 - *Order record required*

The system sets this status when you release the order, provided that the *Order record required* indicator is set in the order type-dependent parameters (see Customizing for *Process Order*).
 - *Technically completed* or *Completed*
-  When you complete an order, the system does not check whether all process messages for the order have been sent successfully. To make sure that all messages are transferred to the order record, check the message log in the message monitor before storing the record.
- The inspection lots for the inspection during production and for the incoming inspection have statuses *Inspection close completed* and *Usage decision has been made*.
- If you want to store a user-defined list, you must have configured this list in Customizing for *Order Records*.

Procedure

1. On the SAP R/3 screen, choose *Logistics* → *Production - process* → *Process order* → *Tools* → *Process data document* → *Order record* → *Store*.
2. Specify the following criteria for the creation of a worklist:
 - Criteria for order selection
 - The list types you want to store
 - Details on whether incoming inspection lots are to be taken into account
 - The information to be contained in the inspection lot lists
 - The display option you want to use for the worklist








Note that if you restrict the number of list types to be stored on this screen, you cannot later store additional print lists for an order.

3. Choose .

Storing Order Records (PP-PI)

The system displays a list of all process orders that match your selection criteria and meet the requirements for storing.


4. If you want to display the print lists for an order before storing them, select the order and choose  <list type>.
5. If you want to print the list displayed, choose , enter the print parameters, and choose .
6. Choose  to return to the overview of process orders.
7. To store an order record, select the process order on the overview and choose  *Store*.

Result

- The system creates the print lists that you have selected on the initial screen for the order and exports them asynchronously to the content server.
- The objects belonging to the order record are locked and can no longer be changed.
- The process order is assigned status *Order record archived* and its inspection lots are assigned status *Insp. lot cntd in order record*. You can thus delete them from the R/3 database in the next archiving run.

Displaying Order Records from the Content Server (PP-PI)

Displaying Order Records from the Content Server (PP-PI)

1. On the *SAP R/3* screen, choose *Logistics → Production - process → Process order → Tools → Process data document → Order record → Display from content server*.
2. Select the list type you want to display and choose .
The system displays an overview of all stored lists for the selected list type. The short text of the lists contains the order number and list type.
3. Double-click the list you want to display.
4. Choose *Print list → Display from content server*.

Regenerating Order Records After Storing (PP-PI)


Use

You can use this procedure to regenerate the print lists of order records that have already been stored from the data available in the R/3 System. In this way, you can display and print the data of these order records without accessing the content server. As the R/3 data cannot be changed once the order record has been stored, these regenerated lists are identical to the lists on the content server.




Prerequisites

The process order and its inspection lots, PI sheets, and process messages have not yet been deleted in the R/3 System

Procedure

1. On the SAP R/3 screen, choose *Logistics* → *Production - process* → *Process order* → *Tools* → *Process data document* → *Order record* → *Store*.
2. Enter the criteria for selecting orders and select *Display stored order records*.
3. Choose .

The system displays an overview of all orders that match your selection criteria.

4. Select the order for which you want to generate the order record and choose  *<list type>*.
5. If you want to print the list displayed, choose , enter the print parameters, and choose .

Optical Archiving of Batch Records (PP-PI)

Optical Archiving of Batch Records (PP-PI)

Use

In the R/3 application component *Production Planning for Process Industries (PP-PI)*, you can create, optically archive, and approve [batch records \[Seite 161\]](#) to document the production and processing of your batches. This enables you to meet one of the main requirements laid down in the guidelines on Good Manufacturing Practices (GMP).



If you have materials that are not subject to batch management, you can create order records instead (see [Storing Order Records \(PP-PI\) \[Seite 146\]](#)).

Integration

To create a batch record for the batch, the *Batch record required* indicator must have been set for the order types of the relevant process orders (see *Customizing* below).

In the material master record (*Work scheduling* view), you specify the materials for which you want the system to create batch records. You may not perform the following actions for batches of these materials unless the batch record has been approved:

- Taking the usage decision for incoming inspection lots of the batch
- Changing the batch status from *Restricted* to *Unrestricted*

You can still create batch records if you have not made this setting in the material master record. However, the batch records then only serve documentation purposes.

Prerequisites

Technical Implementation

Header Record of the Batch Record

Every batch record has a header record that manages the version data of a batch record, its status, the data about batch record approval, and the links to the archive documents. The header record is stored in the R/3 System. It is signed when the batch record is approved and can only be deleted after a certain availability period defined in *Customizing*.

Documents of the Batch Record and Archiving them

Batch records can be comprised of the following documents:

- Documents with R/3 data

Except for the browser-based PI sheet, R/3 data is compiled in SAPscript documents and optically archived via SAP ArchiveLink.

The browser-based PI sheet is an XML document that is prepared as an HTML document using an XSL style sheet and is then loaded into the SAP HTML control for maintenance. The following information is archived:

- The XML document of the PI sheet plus the data entered during PI sheet maintenance
- A copy of the XSL style sheet tailored to meet the requirements for archive display

Optical Archiving of Batch Records (PP-PI)

- A copy of all files referred to in the style sheet, except for HTML files



Hyperlinks contained in the document are retained. The files called by these hyperlinks, however, are not archived.

Text symbols that refer to language-specific texts are replaced by the text to which they refer when archiving the PI sheet. The text is inserted in the language that was used when archiving was triggered or that was assigned to the relevant step when the archiving job was scheduled.

- Attachments of any files from external systems

You also use SAP ArchiveLink to transfer these files to the optical archive of the batch record. To do so, you must define your own document types for the object type *Batch record: version* and the corresponding document class.

The table below provides an overview of the document types that are available for the batch record in the standard system. Which of the R/3 documents you want to archive on your batch records, can be defined specifically for materials and plants in Customizing for *Batch Records*. If required, you can include attachments manually in your batch records.

Document Types for the Object Type *BUS3053001 Batch Record: Version*

Document Type	Description	Document Class
PIEBRCONTE	Batch record: table of contents	PDF
PIEBRVERS	Batch record: version data	PDF
PIEBRDEVIA	Batch record: deviations	PDF
PIEBRORDER	Batch record: process order	PDF
PIEBRMATLI	Batch record: material list	PDF
PIEBRPRLOS	Batch record: inspection lot	PDF
PIEBRPOC	Batch record: browser-based PI sheet	HTM
PIEBRSHEET	Batch record: ABAP list-based PI sheet	PDF
PIEBRMESSA	Batch record: process messages	PDF
PIEBRUSER	Batch record: user-defined data	PDF
EBR_DOC	Batch record attachment: DOC	DOC
EBR_RTF	Batch record attachment: RTF	RTF
EBR_PDF	Batch record attachment: PDF	PDF
User-defined	Any external file as attachment	Appropriate file type



Document type PIEBRUSER has been defined for customer-specific enhancements of the batch record. The SAPscript form and print program for this document type

Optical Archiving of Batch Records (PP-PI)

have only been defined as a template that you can tailor according to your own requirements.

Storage System

In general, you can use any type of storage system for SAP ArchiveLink. However, to comply with the requirements laid down in the guidelines on Good Manufacturing Practices (GMP), we recommend using only optical archives for your batch records.

Batch Record Approval

You approve batch records by executing one [digital signature \[Extern\]](#) or by carrying out a [signature strategy \[Extern\]](#).

The basis component [Secure Store and Forward \(SSF\) \[Extern\]](#) is used to realize the digital signature in the SAP System. It provides several different [signature methods \[Extern\]](#). If you use the user signature as your signature method, you need an external security product that is linked to the SAP System using SSF.

See also:

[Approval Using Digital Signatures \[Extern\]](#)

Customizing and other Settings

To archive and approve batch records, you must make the following settings in the R/3 System:

- [General Customizing for SAP ArchiveLink \[Seite 16\]](#)
 - Note that the optical archive in which you store your batch records should be linked to your SAP System via the HTTP Content Server Interface.
- Customizing for the batch record
 - This includes settings for
 - The status profile of the batch record
 - The digital signature
 - The contents and layout of the SAPscript documents to be archived
 - If required, you replace the SAPscript forms and print programs used in the standard system by your own ones.
 - You make the settings for the XSL style sheet of the browser-based PI sheet in the Business Document Service (see [Definition of Contents and Layout of Archive Documents \[Seite 163\]](#)).
- Settings for the batch record in Customizing for *Process Orders*
 - In the order type-dependent parameters, you must set the *Batch record required* indicator for the order types that you want to use to manufacture the batches to be documented. This also ensures that process orders cannot be deleted until the relevant batch records have been archived.
- Settings for the batch record in Customizing for *Process Messages*
 - Process messages that you want to include in the batch record must be sent to the process message records as order-related messages. Therefore, you must make the following settings in Customizing of the message category:

Optical Archiving of Batch Records (PP-PI)

- You must assign destination PI01 (process message record) to the relevant message category.
- You must assign a characteristic for the order number to the message category and then assign this characteristic to the target field PROCESS_ORDER of the process message record.
- Browser settings for the PI sheet
 - To display the browser-based PI sheet and the archive document, you need the Microsoft Internet Explorer, Version 5.0 or higher. Note that the settings you make for the Internet Explorer also apply to the PI sheet.
- An output device must have been defined on the *Defaults* tab page in your user profile.

Further Preparations

To archive and approve a batch record, you must note the following when you process the relevant application data:

- The *Batch management* indicator must have been set in the material master record (*Work scheduling* view).
- All process orders that belong to the batch record must have status *Approval granted*
 - For more information on the approval, see [Creating Process Orders with Approved Master Recipes \[Extern\]](#) in the *Production Planning - Process Industries (PP-PI)* component.
- All process orders that belong to the batch record must have status *Batch record required*.
 - This status is assigned to orders when they are released, provided that the *Batch record required* indicator has been set in their order type (see *Customizing* above).



If more than one process order has been created for a batch and the *Batch record required* indicator has not been set for all of them, you cannot create a batch record for this batch.

If, however, a batch record already exists for a batch, all process orders created for it are assigned the status *Batch record required*. This means that they are included in the batch record even if this has not been defined in the order type.

- All process orders that belong to the batch record must have status *Closed* or *Technically completed*.



When you close an order, the system does not check whether all process messages for the order have been sent successfully. To make sure that all message are transferred to the batch record, check the message status and message logs in the message monitor first.

- All PI sheets that belong to the batch record must have status *Completed*, *Terminated*, or *Discarded*.
- All inspection lots that belong to the batch record must have statuses *Batch record required*, *Inspection close completed*, and *Lot locked for batch record*.

Optical Archiving of Batch Records (PP-PI)

- The usage decision must have been taken for all inspection lots that belong to the batch record and do **not** have inspection lot origin *04 Goods receipt*.

Activities

To edit batch records, you can use the following functions:

[Generating Batch Records \(PP-PI\) \[Seite 174\]](#)

[Editing Batch Records \(PP-PI\) \[Seite 176\]](#)

[Creating Attachments \(PP-PI\) \[Seite 178\]](#)

[Performing Deviation Analyses \(PP-PI\) \[Seite 180\]](#)

[Editing User Statuses \(PP-PI\) \[Seite 182\]](#)

[Entering Comments for Versions \(PP-PI\) \[Seite 184\]](#)

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Batch Record (PP-PI)

Definition

Record containing all quality-relevant planned and actual data on the production of a batch.

Batch records are stored in an optical archive where they cannot be forged and are approved using one or more digital signatures. They comply with international standards for processing records defined in the guidelines on Good Manufacturing Practices (GMP) for the pharmaceutical industry.

Structure

A batch record consists of a currently valid version and possibly a history. The history documents older versions that have become invalid when data was added to the batch record after it has been approved. All versions and their statuses are managed in the header record of the batch record.

At most, the batch record version can contain all of the following:

- One document for the table of contents and the version data of the batch record respectively
 - These documents guarantee that the contents and status of your batch records are documented and can be verified any time.
- One document in which the deviations that occurred during batch processing are listed
- Documents for the following R/3 objects:
 - All [process orders \[Extern\]](#) to which the batch has been assigned in one of the following ways:
 - In the process order while maintaining the header data (*Goods receipt* tab page) or the material list (detail data on the co-product)
 - At the time of the goods receipt for the process order
 - While creating an inspection lot for the order
 - During results recording for an inspection point or a partial lot of the order
 - The [material lists \[Extern\]](#) of these process orders
 - The [PI sheets \[Extern\]](#) of these process orders
 - The [process messages \[Extern\]](#) for these process orders
 - All [inspection lots \[Extern\]](#) for the batch
- One document for user-defined data in which you can combine further R/3 data according to your company's requirements
- One attachment with archive files from external systems, raw data from the process control system, or labels
- The comments entered for the version
- The signatures executed during approval

Under certain circumstances, the following parts of the batch record can be left out:

Batch Record (PP-PI)

- The documents for the table of contents, version data, deviation list, R/3 objects, and user-defined data
 - In Customizing for *Batch Records*, you specify which of these documents you want to include in your batch records for each material and plant.
- Attachments
 - If required, you assign them to your batch records when you edit them.

Definition of Contents and Layout of Archive Documents

Use

In the standard system, a particular layout defined by SAP is used to create the documents with the R/3 data. You can thus use the batch record without having to define your own layout. If, however, you have certain company-specific requirements on what the documents should look like, you can tailor their contents and layout to your needs as follows:

- For the SAPscript documents of the batch record (this means, all R/3 documents except for the browser-based PI sheet), you can create your own SAPscript form along with a print program and assign it to the relevant materials.

For more information, see [Customizing for Batch Records \[Extern\]](#).

- For the browser-based PI sheet, you can define your own XSL style sheet for archiving and assign it to the PI sheet in its layout definition.

The sections below describe what you must bear in mind here.

Features

Settings for the Browser-Based PI Sheet

The browser-based PI sheet is an XML document that is prepared as an HTML document using an XSL style sheet and is then loaded into the SAP HTML control for display or processing.

SAP provides the special archiving style sheet `PMC_STY_A_DEFAULTX.XLS` for the display of archive documents. The style sheet controls which data is selected, how they are formatted, and in which sequence they are displayed in the archive document. Unlike the `PMC_STY_DEFAULTX.XLS` style sheet for processing it also takes the data entered during PI sheet maintenance into account but only permits displaying this data. The advantage as opposed to SAPscript forms is that interactive elements (such as hyperlinks or expanding/collapsing of additional information) can be used.

If you want to use your own archiving style sheets, proceed in the same way as when defining your own processing style sheets (see Process Management documentation, section [Definition of XSL Style Sheets for PI Sheets and Cockpits \[Extern\]](#)). However, note the following:

- Use the archiving style sheet `PMC_STY_A_DEFAULTX` as a template to copy from. You can find it in the Business Document Service (BDS) in class `POC_TEMPLATE`, class type `OT` under object ID `SAP`.
- When you change the copy, note the Document Type Definition `PMC_DTD_DATA_EX.DTD` of the XML documents to be archived. It is stored in the Web Repository under *Binary data for WebRFC applications* in development class `COPOC`.
- The archiving style sheet can only be used for displaying information. For this reason, you do not require additional information for the runtime environment.
- If you need to be able to compare the processing style sheet and archiving style, you must define a way to do so within your own organization. It is not possible to have the system check this automatically.

Definition of Contents and Layout of Archive Documents

- You must assign the modified archiving style sheet in the layout definition of the PI sheet. You must use the following syntax (see Process Management documentation, section [Layout Definition for PI Sheets and Cockpits \[Extern\]](#)):

```
<LAYOUT>
...
<ARCHIVE>
<STYLE>URL of the XSL style sheet for archiving</STYLE>
</ARCHIVE>
</LAYOUT>
```

In the browser-based PI sheet, the settings for output control made in the document profile (see Customizing for *Batch Records*) are not taken into account.

- The following applies to the remaining details in the layout definition:
 - <STYLE> ... </STYLE> (without the archiving tag) specifies the XSL style sheet for PI sheet maintenance. This information is not taken into account for archiving.
 - <FRAMESET...> ... </FRAMESET> is only taken into account for PI sheet maintenance. The PI sheet alone is archived without its surrounding frameset.
 - <HEADER> ... </HEADER> used for displaying the PI sheet and the archive document.

Status Management for Batch Records (PP-PI)

Use

In the course of processing, batch records go through a number of different stages during which different processing steps or business transactions are permitted. In the R/3 System, statuses are used to indicate these processing stages.

A status is set or deactivated when a specific transaction is carried out. A batch record, for example, is assigned status *Created* when it is generated. When you archive the batch record, however, this status is deactivated and replaced by the status *Archived*.

At the same time, the status set for a batch record permits certain business transactions and prohibits certain others. You can, for example, approve a batch record that has status *Archived* but you cannot create a new version for it.

When you create worklists, you can use the status to select batch records that can be used for a certain processing step or transaction.

Features

The following types of statuses are assigned to batch records:

- **System statuses**

They are defined in the standard system and are set and deactivated according to a fixed status profile (see [System Statuses for Batch Records \[Seite 166\]](#)).

- **User statuses**

You define them in your own status profiles to add to the system statuses according to your company's requirements (see [User Statuses for Batch Records \[Seite 169\]](#)).

All statuses set for a batch record, including deactivated statuses, are documented in the header of the batch record.

The system creates a change document when a status is changed. The change documents are archived in the *Version data* document.

System Statuses for Batch Records (PP-PI)

System Statuses for Batch Records (PP-PI)

Use

System statuses document the processing stages of a batch record defined in the standard R/3 system. They are set or deactivated by certain processing steps or business transactions according to a fixed status profile.

At the same time, the status set for a batch record permits certain business transactions and prohibits certain others. This means that system statuses ensure that the sequence of transactions defined in the standard system is followed.

When you create worklists for batch record approval, the R/3 System uses the statuses to select appropriate batch records. You can create worklists for all other system statuses by using a suitable status selection profile.

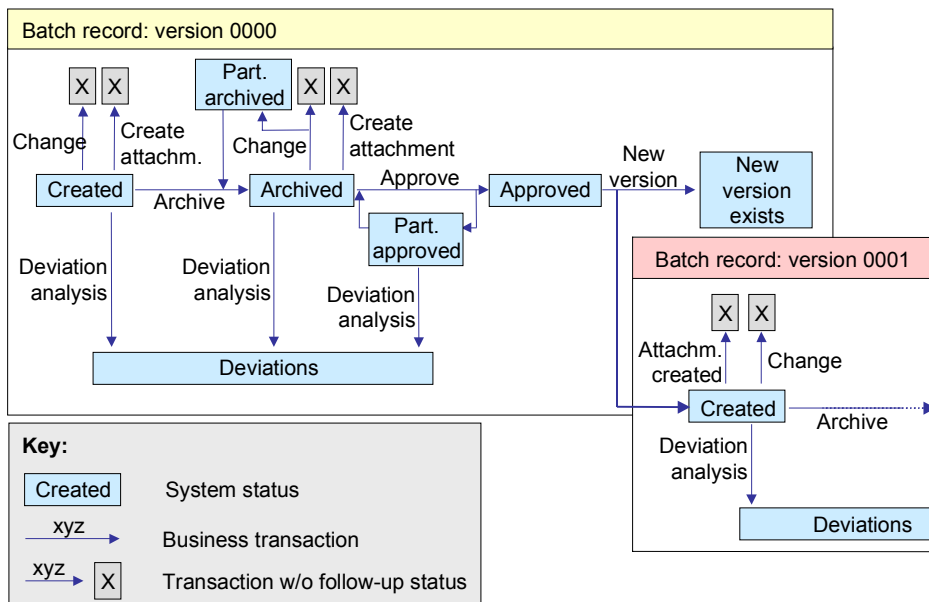


If required, you can add to the system statuses by defining [user statuses \[Seite 169\]](#) that visually reproduce your company's processes in the R/3 System.

Features

The following graphic provides an overview of the system statuses of the batch record together with the business transactions that set or deactivate them.

Status Profile of the Batch Record



Note the following when you process the individual transactions and statuses:

- Status sequence

When the system generates a batch record or a new batch record version, it sets the initial status *Batch record created*. Each new status that is set for a version deactivates

System Statuses for Batch Records (PP-PI)

the previous status. The status *Batch record contains deviations* is the only status that is set in addition to an existing status and is not activated by any other status.

- Business transaction *Change batch record*

You perform this transaction whenever you access the batch record to change it in any way. This means it comprises the following functions:

 - Creating an attachment
 - Performing a deviation analysis
 - Editing user statuses
 - Entering comments for the version
 - Archiving batch records
 - Approving batch records
- Business transaction *Archive batch record*

Depending on your Customizing settings, you perform this transaction as follows (see Customizing for *Batch Records*, *Define Material-Specific Overall Profile*, *Archive during approval* indicator).

 - By carrying out the function [Approving batch records \[Seite 189\]](#), if your batch records are archived automatically when you approve them.

In this case, the system sets the status *Batch record archived* internally and deactivates it immediately afterwards.
 - Otherwise by carrying out the [function Archiving batch records \[Seite 186\]](#).
- Business transaction *Batch record: new version*

You perform this transaction when you change a batch record that has already been approved (see transaction *Change batch record*).
- Status *Batch record contains deviations*

The system sets this status when it detects deviations during deviation analysis.
- Status *Batch record partially archived*


The system assigns this status to a batch record that has not yet been approved when new R/3 objects were created for the batch after the batch record has been archived. It is set when you access the batch record the next time to change it.
- Status *Batch record partially approved* or *Batch record approved*

If a signature strategy is carried out when a batch record is approved, the system does not set the status *Approved* for the batch record unless all required individual signatures have been executed. However, it is assigned the status *Partially approved* once the first individual signature has been executed and can thus no longer be changed (except for performing a deviation analysis).
- Transactions without a system status

The transactions *Change batch record* and *Batch record: create attachment* do not influence a system status. You can, however, use these transactions to set or deactivate a user status ([see User Statuses for Batch Records \[Seite 169\]](#)).

System Statuses for Batch Records (PP-PI)**Activities**

- You can display the following data on status management in the header of the batch record:
 - All statuses set for a batch record, deactivated statuses inclusive
 - The transactions that are permitted or prohibited for the active status

To display this information, choose  next to the status bar when you display or edit a batch record.
- You create status selection profiles in Customizing for *Batch Records*. You can use selection profiles to create a worklist for the following functions:
 - [Displaying and Printing Batch Records \[Seite 200\]](#)
 - [Editing Batch Records \[Seite 176\]](#)
 - [Approving Batch Records \[Seite 189\]](#)

User Statuses for Batch Records (PP-PI)

Use

You can create user statuses to add to the [system statuses \[Seite 166\]](#) of a batch record in your own status profile and thus visually reproduce your company's processes in the R/3 System.

Just like system statuses, user statuses can be set or deactivated by business transactions and influence which transactions are permitted. In addition, you can set and delete user statuses manually. You can assign the authorization to change statuses for each user status separately. In this way, you can restrict the authorization to certain people.

You can thus use user statuses to:

- Document transactions that are not logged in the standard system
- Ensure that certain transactions are performed that are not defined in the standard system or need not necessarily be performed (at the corresponding processing stage)

You can use user statuses in selection profiles to create worklists for a specific processing step or transaction.

Prerequisites

- A status profile with the required user statuses, transaction control, and authorizations has been defined in Customizing for *Batch Records*.
- You should assign the status profile to the materials for which you want to use it in a specific plant in Customizing.

In individual cases, you can, however, also make this assignment when you edit the batch record.

Features

The R/3 System distinguishes between the following types of user status:

- User statuses with a status number
 - They define a status sequence. Only one status with a status number can be active in a batch record at any one time. Once a new status with a status number is set, the previous status is deactivated.
- User statuses without a status number
 - More than one of these statuses can be active at any one time. They can be set in addition to the statuses with a status number.

Activities

- You can use the following functions to update user statuses in the batch record (see [Editing User Statuses \[Seite 182\]](#)):
 - Assigning or replacing a user status profile
 - This function can only be used if no user status has been active in the batch record so far. If you define an initial status in your status profiles, you can no longer change a status profile that you have assigned in Customizing in the batch record.

User Statuses for Batch Records (PP-PI)

- Setting or deactivating user statuses manually

You need this function for statuses that are not set or deactivated by a business transaction.

- You create status selection profiles in Customizing for *Batch Records*. You can use selection profiles to create a worklist for the following functions:
 - [Displaying and Printing Batch Records \[Seite 200\]](#)
 - [Editing Batch Records \[Seite 176\]](#)
 - [Approving Batch Records \[Seite 189\]](#)

Example

Scenario

The batch records in your plant are to be processed as follows:

The assistant of the head of production initiates the following steps before archiving:

- Based on a deviation analysis, he or she checks whether important R/3 data is missing. If data is missing, he or she adds the relevant R/3 documents.
- He or she checks whether external data must be included in the batch record. If there is such data, he or she creates an attachment with the corresponding files for the batch record.

Batch records that are checked in this way are automatically archived after all checks have been made. The batch records are then approved by the head of production.

Realization

To reproduce this process in the system, you assign a user status profile to your materials in Customizing. The status profile contains the following statuses without a status number:

- *Check: R/3 data*
- *Check: attachment*

Both statuses are set as initial statuses when the system generates a batch record. They prohibit batch record archiving. The assistant of the head of production deletes them once he or she has completed the necessary checks.

The batch records are then archived in a background job. Using a status selection profile, the system only selects those batch records for which neither the status *Check: R/3 data* nor the status *Check: attachment* is active.

The head of production edits the archived batch record by creating a worklist for approval.

Process: Batch Record Archiving (PP-PI)

Purpose

This process describes a typical scenario for optical batch record archiving.

Prerequisites

- There is at least one released process order that has been assigned to the batch in one of the following ways:
 - In the process order while editing the header data (*Goods receipt* tab page) or the material list (detail data on the co-product)
 - At the time of the goods receipt for the process order
 - While creating an inspection lot for the order
 - During results recording for a partial lot of the order
- All process orders for the batch have the following statuses:
 - *Approval granted*

The system sets this status when you create a process order with an approved master recipe, use the function *Read master data* to transfer an approved master recipe to the order, or approve the order in a single approval.
 - *Batch record required*

The system sets this status when you release the order, provided that the *Batch record required* indicator is set in the order type-dependent parameters (see Customizing for *Process Order*).



If a batch record already exists for a batch, the system sets the status *Batch record required* in all other process orders for the batch even if this has not been defined for the order type in Customizing. Process orders that are created later are thus completely included in the batch record.

Process Flow

1. You manufacture batches in your plant and the material master record (*Work scheduling* view) specifies that batch records must be created for these batches and their process orders.
2. You generate the batch records for these batches. In doing this, you create a header record for each batch. You can call up all data belonging to the batch record from this header record. However, the system does not archive the data yet.
 - You start batch record generation according to your own requirements as follows:
 - In a periodic background job that takes into account all newly created batches
 - Manually for the batches of specific materials

Process: Batch Record Archiving (PP-PI)

3. You start the deviation analysis and check whether the data is complete and correct based on the results of this analysis.

If required, you also simulate the other documents of the batch record and check the data of the corresponding R/3 objects. If required, you make sure that missing data is added, for example by sending all process messages for the order from within the message monitor.
4. If some of the relevant data is stored outside the R/3 System, you include these files in your batch record as an attachment.

If files are already located in the archive of your batch records (such as notes on the attachment that also apply to other batch records), you assign them directly from the archive. All other files (such as raw data from the process control system or labels) can be transferred to the archive when you create the attachment.
5. If required, you enter comments for your batch records, for example to explain a deviation.
6. If it has not been done yet, shop floor control and quality assurance must now set the following statuses for you to be able to archive the batch record:
 - Order status *Technically completed* or *Closed*
 - Inspection lot status *Lot locked for batch record*
7. If your Customizing settings specify that batch records must be archived before they can be approved, you now archive the batch record. While doing this, the system automatically performs a deviation analysis as specified in your Customizing settings. You archive the results of this deviation analysis in the batch record.

You start batch record archiving according to your own requirements as follows:

 - In a periodic background job for all batch records that meet the status requirements
 - Manually for the batches of a specific material
8. You or somebody else with the corresponding authorization approves the archived batch records by executing a [digital signature \[Extern\]](#) or carrying out a [signature strategy \[Extern\]](#).

If your Customizing settings specify that batch records must be archived during approval, archiving is now started automatically.

At the same time, the system automatically performs a deviation analysis as specified in your Customizing settings. You archive the results of this deviation analysis in the batch record. You check the results of the deviation analysis and enter a comment on the signature to explain why you still approved the batch record.
9. If required, you add to the batch records even though they have been approved. This means, however, that the existing batch record version becomes invalid and the system creates a new, unapproved version of the batch record. You can add to the batch record by:
 - Creating an attachment (see step 4)
 - Entering a comment (see step 5)
 - Archiving other R/3 documents (see step 7 or 8)

You need to do this, for example, if another inspection lot was created for a batch or another process order was assigned to it after the batch record was archived. Documents that have already been archived are not archived again.

Process: Batch Record Archiving (PP-PI)

10. You approve the new version of the batch record by executing a digital signature or carrying out a signature strategy (see step 8).

Result

Your batch record data is completely archived and approved, and stored in your optical archive. You can carry out the following functions after this:

- You can call up the batch records from the archive whenever you want and easily evaluate them using the *Deviations* document.
- For batches whose material master record specifies that an approved batch record is required (*Work scheduling* view), you can now do the following:
 - Take the usage decision for the incoming inspection lot of the batch
 - Change the batch status from *Restricted* to *Unrestricted*
- You can archive the R/3 objects belonging to the batch and delete them from the R/3 database.

The R/3 System guarantees an availability period for batch records. You specify this period in the overall profile of your materials (see *Customizing for Batch Records*). Once this period has expired, you can use a background job to delete the header records of the batch records from the R/3 System. You can then no longer access the archive files from within the R/3 System.

Generating Batch Records (PP-PI)

Generating Batch Records (PP-PI)

Use

Every batch record has a header record that manages the version data of a batch record, its status, the data about batch record approval, and the links to the archive documents. To archive and approve a batch record, you must first generate this header record. You can carry out this function as follows:

- Online for selected batches (see below)
- For a larger number of batches by using a background job for the program PPPI_MCHP_CREATE *Generate Batch Records*
 - You can schedule the background job as follows:
 - In Customizing to repeat the job periodically at certain time intervals
 - From the batch record menu to start the job only once at a specific point in time (see below)

Prerequisites

- At least one released process order is available for the batch.
- All process orders for the batch have the following statuses:
 - *Approval granted*

The system sets this status when you create a process order with an approved master recipe, use the function *Read master data* to transfer an approved master recipe to the order, or approve the order in a single approval.
 - *Batch record required*

The system sets this status when you release the order, provided that the *Batch record required* indicator is set in the order type-dependent parameters in Customizing.
- All inspection lots that belong to the batch record have status *Batch record required*.
- An output device has been defined on the *Defaults* tab page in your user profile.

Procedure

Defining Background Jobs for Generating

1. Choose *Logistics* → *Materials Management* → *Material Master* → *Batch* → <Activity> → *Environment* → *Batch record* → *Environment* → *Background processing*.

A dialog box appears from which you can call up the activities *Define Selection Variant* and *Define Background Job*.
2. Define a selection variant and schedule the background job.


For more information on how to proceed, see Customizing for *Batch Records*, section *Define Background Jobs for Processing*.

Generating Batch Records Online


1. Choose *Logistics* → *Materials Management* → *Material Master* → *Batch* → *<Activity>* → *Environment* → *Batch record*.

2. Specify the following criteria for the creation of a worklist:

- Selection criteria for selecting batches
- The activity *Generating* and, for performance reasons, the maximum number of batch records to be selected
- The display option you want to use for the overview tree

3. Choose .

The system creates a worklist containing the batches that match your selection criteria and meet the requirements listed above. The batches along with their R/3 objects are displayed in an overview tree.

If not all batches within the selection range have been included in the worklist for some reason, the  *Selection log* pushbutton is activated. This means that a selection log exists. Evaluate the selection log if required (see [Evaluating Selection Logs \[Extern\]](#)).

4. Select the batch for which you want to generate the batch record in the overview tree.

You can use the following functions available in the context menus of the overview tree to make your decision (see [Displaying and Printing Batch Records \[Seite 200\]](#)):

- Displaying R/3 objects that belong to the batch record
- Displaying the batch
- Displaying the batch where-used list
- Displaying and printing the documents of the batch record (simulation)

5. Choose  *Batch record*.

Result

The system generates the batch records of the batches you have selected. This means, their header records are created, the documents are, however, not archived yet.

The batch records are assigned the status *Created*.

The batches are deleted from the worklist of batch records to be generated.

Editing Batch Records (PP-PI)

Editing Batch Records (PP-PI)

Use

You can use this procedure to call up a batch record to change it. The system always takes you to the current version of the batch record. If the current version has already been approved, the system creates a new, unapproved version of the batch record when you enter the batch record transaction in the change mode. It transfers the old version to the history of the batch record.

Prerequisites

- The batch record has been generated (see [Generating Batch Records \[Seite 174\]](#)).
- An output device has been defined on the *Defaults* tab page in your user profile.

Procedure


1. Choose *Logistics* → *Materials Management* → *Material Master* → *Batch* → *<Activity>* → *Environment* → *Batch record*.
2. Specify the following criteria for the creation of a worklist:
 - Selection criteria for selecting batches
 - The activity *Displaying/changing*
 - The display option you want to use for the overview tree


3. Choose .

The system creates a worklist containing the batch records that match your selection criteria. The batches are displayed in an overview tree together with their versions, the relevant R/3 objects, archived documents, attachments, comments, and signatures.



The R/3 objects themselves are not part of the batch record. They have only been included in the overview tree to facilitate the navigation to the source objects of the archived documents.

If not all batch records within the selection range have been included in the worklist for some reason, the  *Selection log* pushbutton is activated. This means that a selection log exists. Evaluate the selection log if required (see [Evaluating Selection Logs \[Extern\]](#)).

4. To edit a batch record, select the relevant batch, and choose .

The current version of the batch record appears. If this version has already been approved, the system now creates a new version and displays it.

5. Perform the processing steps as required. The following functions are available:
 - [Creating Attachments \(PP-PI\) \[Seite 178\]](#)
 - [Performing Deviation Analyses \(PP-PI\) \[Seite 180\]](#)
 - [Editing User Statuses \(PP-PI\) \[Seite 182\]](#)

Editing Batch Records (PP-PI)

- [Entering Comments \(PP-PI\) \[Seite 184\]](#)
- [Optically Archiving Batch Records \(PP-PI\) \[Seite 186\]](#)
- [Approving Batch Records \(PP-PI\) \[Seite 189\]](#)

Creating Attachments (PP-PI)

Creating Attachments (PP-PI)

Use

You can use this procedure to transfer files that are stored outside the R/3 System to the batch record as an attachment. In this way, you can, for example, transfer raw data from your process control system to the batch record. Depending on where the files originate, you can proceed as follows:

- If files are already located in the archive of your batch records (such as environmental logs that also belong to other batch records), you assign them directly from the archive.
- All other files can be transferred to the archive when you create the attachment.

The attachment is assigned to the current version of the batch record. If the current version has already been approved, the system creates a new, unapproved version of the batch record when you enter the batch record transaction in the change mode. It transfers the old version to the history of the batch record.


Prerequisites

- The batch record has been generated (see [Generating Batch Records \[Seite 174\]](#)).
- A document type that is suitable for the relevant file type and contains all settings required for the batch record has been defined in Customizing.
- The current version of the batch record does not have status *Partially approved*.

Procedure

1. Create a worklist for batch record editing and call up the batch record you want to edit in the change mode (see [Editing Batch Records \[Seite 176\]](#)).
2. On the *Create attachment* tab page, enter a short text for the attachment.
3. Proceed as follows to transfer the relevant file to the attachment of your batch record:

If the file must also be archived:

- a. Double-click the appropriate document type to call up file selection.
- b. Enter the path and file name and choose .

The file is transferred to the archive of your batch records and is assigned to the batch record.

If the file has already been archived:


- a. Enter the selection criteria for the file in the *Storage date of archive files* section.
If you want to assign, for example, R/3 documents of another batch record (document type *EBR_PDF Batch record.: Portable Document Format PDF*) enter value *BUS3053001* (batch record document) in the *Business Object* field.

- b. Select the file's document type and choose *Assign archive document* in the context menu.

A list of the archive files that the system selected appears.

- c. Double-click the relevant document to transfer it to the attachment of your batch record.

Creating Attachments (PP-PI)

If you want to display a document before you transfer it, position the cursor on the corresponding line and choose .

4. Save the batch record.

Performing Deviation Analyses (PP-PI)

Performing Deviation Analyses (PP-PI)

Use

You can perform a deviation analysis to detect irregularities that may have occurred when a batch was manufactured (for example, deviations from tolerance limits in the PI sheet or a usage decision with the valuation *Rejection* in quality management). Which events are regarded as deviations is specified for each material and plant in Customizing for *Batch Records*.

The deviations the system determines are compiled in a document that you archive as part of the batch record. You can use this document as a basis for batch record approval. The document is assigned to the current version of the batch record. If the current version has already been approved, the system creates a new, unapproved version of the batch record when you enter the batch record transaction in the change mode. It transfers the old version to the history of the batch record.


You can start the deviation analysis as follows:

- Manually for batch records that have status *Created* or *Approved* (see below)
You can repeat the manual deviation analysis as often as you want. The sections below describe how you must proceed here.
- Automatically when you archive a batch record (see [Optically Archiving Batch Records \[Seite 186\]](#))
- Automatically when you approve a batch record (see [Approving Batch Records \[Seite 189\]](#))

Prerequisites

The batch record has been generated (see [Generating Batch Records \[Seite 174\]](#)).

Procedure

4. Create a worklist for batch record editing and call up the batch record you want to edit in the change mode (see [Editing Batch Records \[Seite 176\]](#)).
5. Choose  *Deviations*.

The system checks the R/3 objects that belong to the batch record. If it detects any deviations, it collects them in a document.

Depending on your Customizing settings, the document is either archived immediately or is first displayed in a dialog box.

6. Proceed as follows:

If the *Deviations* document is archived immediately:

Display the document if required. To do so, double-click the document in the overview tree.

If the *Deviations* document is displayed before archiving:

Check the document and decide whether you want to archive it.

If you want to archive the document, choose .

If you do not want to archive the document, choose .

Result

If the system has found deviations, the current version of the batch record is assigned status *Batch record contains deviations*.

Editing User Statuses (PP-PI)

Editing User Statuses (PP-PI)

Use

You can use this function to manually set or deactivate the [user statuses \[Seite 169\]](#) of a batch record. You do not need to perform this function if your user statuses are set or deactivated by a business transaction.

Your changes always apply to the current version of the batch record. If the current version has already been approved, the system creates a new, unapproved version of the batch record when you enter the batch record transaction in the change mode. It transfers the old version to the history of the batch record.


Prerequisites

- The batch record has been generated (see [Generating Batch Records \[Seite 174\]](#)).
- A corresponding user status profile has been defined in Customizing for *Batch Records*.
- You should assign the status profile to the material of the batch record in Customizing.
In individual cases, you can, however, also make this assignment when you edit the batch record.

For you to be able to set or deactivate a specific user status, the following additional requirements must be met:

- The status profile allows status changes at the time of processing.
- You have the authorization that is required in the status profile for the user status.

Procedure

1. Create a worklist for batch record editing and call up the batch record you want to edit in the change mode (see [Editing Batch Records \[Seite 176\]](#)).
2. Choose  next to the status line of the batch record.
3. If required, assign the status profile you want to use for the batch record on the *Status* tab page.

The user statuses contained in the status profile are displayed in the right-hand screen area.



You can only exchange a status profile that has already been assigned if no user status has been active in the batch record so far.

4. Proceed as follows to change the user status of the batch record:

- To set a user status, select the corresponding status.

If you have selected a status with a status number, the system automatically deactivates the previous status with a status number.

- To deactivate a user status without a status number, deselect it.

5. Choose  and save the batch record.

Result

You may now only perform those transactions in the batch record that are permitted by at least one of the active statuses. You may not perform transactions that are prohibited by an active status.

You can display the business process that are allowed or not allowed on the *Business processes* tab page in status management.

Entering Comments for Versions (PP-PI)

Entering Comments for Versions (PP-PI)

Use

You can use this procedure to enter a comment on a batch record. In this way, you can store information on a batch record that is not contained in an archive document (for example, explanations on the deviations documented for the batch record).

The comment is assigned to the current version of the batch record and cannot be changed after you have saved the batch record. If the current version has already been approved, the system creates a new, unapproved version of the batch record when you enter the batch record transaction in the change mode. It transfers the old version to the history of the batch record.









Prerequisites

The batch record has been generated (see [Generating Batch Records \[Seite 174\]](#)).



Procedure

7. Create a worklist for batch record editing and call up the batch record you want to edit in the change mode (see [Editing Batch Records \[Seite 176\]](#)).
8. Enter the text as required on the *Create comments for version* tab page.

The following functions for text processing are available:

Function	Meaning
	Cut selected text passage and transfer it to the clipboard.
	Transfer selected text passage to the clipboard.
	Insert text from the clipboard at the cursor position
	Undo action
	Redo action
	Search and replace
	Find next
	Import local file in TXT format as comment

Entering Comments for Versions (PP-PI)

	Export local file in TXT format as comment
	Transfer comment You use this function to make sure that the text is not lost when you perform a different function in the batch record. However, the comment is only temporarily assigned to the batch record and, unlike after saving the batch record, can still be changed.

9. Save the batch record.

Result

The comment is saved along with the name of the person who entered it, the creation date and time. It is actually transferred to the current version of the batch record and cannot be changed afterwards. If you want to make corrections or add information, you must enter a new comment.

Optically Archiving Batch Records (PP-PI)

Optically Archiving Batch Records (PP-PI)

Use

You can use this function to store the documents with the R/3 data of the batch records in an optical archive. You carry out this function to archive a batch record before approving it. If your batch records are automatically archived during approval (see overall profile of the relevant material), carry out the procedure [Approving Batch Records \[Seite 189\]](#) instead.

Batch records that have status *Created* are processed as follows during archiving:

- For the first version of the batch record, the system at the same time archives all documents that belong to a batch record according to your Customizing settings.
- For all later versions, the system only archives the changed documents *Table of contents* and *Version data* and any documents of R/3 objects that may have been added.

If new R/3 objects are created for a batch record that has already been archived, one of the following situations will occur:

- If the current version has not yet been archived, it is assigned status *Partially archived* as soon as you access it the next time to change it. The documents of the newly added objects and the changed table of contents are archived.
- If the current version has already been approved, the system creates a new version of the batch record when you access the batch record transaction in the change mode. You can then archive this new version (see above).

You can start archiving as follows:

- Online for selected batch records (see below)
- For a larger number of batch records by using a background job for the program `PPPI_EBR_ARCHIVE` *Archive Batch Records*

You can schedule the background job as follows:

- In Customizing to repeat the job periodically at certain time intervals
- From the batch record menu to start the job only once at a specific point in time (see below)

Prerequisites

- The batch record has been generated (see [Generating Batch Records \[Seite 174\]](#)).
- The current version of the batch record does not have status *Partially approved*.
- All process orders that belong to the batch record have status *Closed* or *Technically completed*.



When you close an order, the system does not check whether all process messages for the order have been sent successfully. To make sure that all message are transferred to the batch record, check the message status and message logs in the message monitor first.

Optically Archiving Batch Records (PP-PI)

- All PI sheets that belong to the batch record have status *Completed*, *Terminated*, or *Discarded*.
- All inspection lots that belong to the batch record have statuses *Batch record required*, *Inspection close completed*, and *Lot locked for batch record*.
- The usage decision has been taken for all inspection lots that belong to the batch record and do **not** have inspection lot origin *04 Goods receipt*.

Procedure

Defining Background Jobs for Archiving

3. Choose *Logistics* → *Materials Management* → *Material Master* → *Batch* → <Activity> → *Environment* → *Batch record* → *Environment* → *Background processing*.

A dialog box appears from which you can call up the activities *Define Selection Variant* and *Define Background Job*.

4. Define a selection variant and schedule the background job.

For more information on how to proceed, see *Customizing for Batch Records*, section *Define Background Jobs for Processing*.

Archiving Batch Records Online

10. Create a worklist for batch record editing and call up the batch record you want to edit in the change mode (see [Editing Batch Records \[Seite 176\]](#)).




If you want your worklist to contain only batch records that can be archived, you must enter a selection profile that requires status *Created* or *Partially archived* as a selection criterion on the initial screen.

11. Choose  *Archive*.

The R/3 documents of the batch record are archived.

If archiving terminates due to an error, an archiving log is created and the system issues a corresponding system message.

12. Evaluate the archiving log if required.

- a. Choose  *Archiving log*.
- b. Position the cursor on a message and choose *Long text*.

If available, a long text explaining the message is displayed.

- c. Correct the errors and start archiving again.

Result

- The current version of the batch record is assigned status *Archived*. It can now be approved.
- All R/3 objects belonging to the batch record are locked and can no longer be changed.

Optically Archiving Batch Records (PP-PI)

- The process orders, inspection lots, and PI sheets belonging to the batch record are assigned status *Batch record archived* or *Archived (EBR)*. You can thus delete them from the R/3 database in the next archiving run.



This also applies if the document profile assigned to the batch record in Customizing specified that process orders, inspection lots, or PI sheets are not included in the batch record.

Approving Batch Records (PP-PI)

Use

You can use this procedure to approve a batch record. The approval procedure may vary between materials and plants. Depending on your Customizing settings, you have the following options:

- The batch record is approved by one [digital signature \[Extern\]](#) or a [signature strategy \[Extern\]](#).
- You use the user signature or system signature as your [signature method \[Extern\]](#).
- The system automatically performs a deviation analysis before the approval. You can then check the batch record based on this analysis. The results of this deviation analysis can be archived automatically or after a confirmation prompt.
- The system automatically archives the batch record before the approval.


See also:

[Approval Using Digital Signatures \[Extern\]](#)

Prerequisites

- In Customizing for *Batch Records*, you have specified which of the above approval procedures applies to the material in question in your plant.
- If you use the user signature as your signature method, you need an external security product that is linked to your SAP System using the basis component [Secure Store and Forward \(SSF\) \[Extern\]](#).
- If your Customizing settings specify that your batch records are archived during approval, the prerequisites described in [Optically Archiving Batch Records \[Seite 186\]](#) apply.
- If your batch records are not archived during approval, they must have been archived already (see [Optically Archiving Batch Records \[Seite 186\]](#)). Batch records that have status *Partially archived* cannot be approved.
- You have logged on to the system under your own user name. This name is set as the signatory name during approval. You cannot overwrite the signatory name.
- An output device has been defined on the *Defaults* tab page in your user profile.

Procedure


1. Choose *Logistics* → *Materials Management* → *Material Master* → *Batch* → *<Activity>* → *Environment* → *Batch record*.
2. Specify the following criteria for the creation of a worklist:
 - Selection criteria for selecting batches
 - The activity *Approving*
 - The display option you want to use for the overview tree
3. Choose .


Approving Batch Records (PP-PI)

The system creates a worklist containing the batch records that match your selection criteria and meet the requirements for approval. The batches are displayed in an overview tree together with their versions, the relevant R/3 objects, archived documents, attachments, comments, and signatures.



The R/3 objects themselves are not part of the batch record. They have only been included in the overview tree to facilitate the navigation to the source objects of the archived documents.

If not all batch records within the selection range have been included in the worklist for some reason, the  *Selection log* pushbutton is activated. This means that a selection log exists. Evaluate the selection log if required (see [Evaluating Selection Logs \[Extern\]](#)).

- To approve a batch record, switch to the change mode first. To do so, select the relevant batch, and choose .


The current version of the batch record appears. You can use the following functions available in the context menus of the overview tree as a basis for approval (see [Displaying and Printing Batch Records \[Seite 200\]](#)):

- Displaying header data for the version
You can use this function, for example, to find out if deviations occurred during batch processing.
- Displaying and printing archive files
You can use this function, for example, to check the *Deviations* document or to look up further details on the individual deviations in the other documents.
- Displaying R/3 objects of the batch record
- Displaying the batch where-used list

- Choose  *Approve*.

If the system performs a deviation analysis and detects deviations, a dialog box containing the *Deviations* document appears.

If not, the dialog box for the digital signature or signature strategy appears.

- Check the *Deviations* document if required and specify whether you want to archive it or not.
- If you want to approve the batch record despite the deviations, choose  *Continue approval*.
- Approve the batch record by executing your signature or carrying out the required signature strategy.

[Executing Digital Signatures \[Seite 191\]](#)

[Executing Signature Strategies \[Seite 193\]](#)

Executing Digital Signatures

Use

You use this procedure for batch record approval if only one [digital signature \[Extern\]](#) is required to approve the record.


Prerequisites

- **No** signature strategy has been assigned to the material to which the batch record belongs in your plant (see Customizing for *Batch Records*).
- You have logged on to the system under your own user name. The system sets this name as the signatory name. You cannot overwrite it.
- You have called the function for approving batch records and are on the dialog box for executing the digital signature (see [Approving Batch Records \[Seite 189\]](#)).

Procedure

1. Enter your comment in the text field.
2. If you use the user signature as your [signature method \[Extern\]](#), make sure that the system can access your [Personal Security Environment \(PSE\) \[Extern\]](#).

How you do this, depends on your security product. If you use a smart card reader, for example, insert your smart card in the reader.

3. Enter your password in the dialog box for the digital signature and choose  *Continue*.

The system checks the following:

- Whether you are authorized to execute a digital signature
- Whether your entries match the data in your user master record
- Whether your entries match the data in your PSE (if you use user signatures)

Depending on the result of this check, processing is continued as follows:

- If your entries are invalid or the system cannot access your PSE, it takes you back to the dialog box where you can execute your signature again (step 3).

The function is canceled after a certain number of unsuccessful attempts that can be defined specifically for each customer. Your user is locked and you cannot execute another digital signature. If a system signature is used, you are even locked against logging on to the system again.

- If your entries are correct, the system takes you back to the batch record.

4. Save the batch record.

Result

- The current version of the batch record is assigned status *Approved*.
- For batches whose material master record specifies that an approved batch record is required (*Work scheduling* view), you can now do the following:

Executing Digital Signatures

- Take the usage decision for the incoming inspection lot of the batch
- Change the batch status from *Restricted* to *Unrestricted*

Executing Signature Strategies

Use

You use this procedure for batch record approval if several individual signatures defined in a [signature strategy \[Extern\]](#) are required to approve the record.



If a signature process has already been started by someone else and you want to cancel it for some reason, you can withdraw the signatures executed so far (see [Canceling Signature Processes \[Seite 195\]](#)).

Prerequisites

- A signature strategy has been assigned to the material to which the batch record belongs in your plant (see Customizing for *Batch Records*).
- You have logged on to the system under your own user name. The system sets this name as the signatory name. You cannot overwrite it.
- You have called the function for approving batch records and are on the dialog box for executing a signature strategy (see [Approving Batch Records \[Seite 189\]](#)).

The *Signatures to be executed* section contains an individual signature that may be executed by your authorization or user group (see authorization object C_SIGN_BGR *Authorization Group for Digital Signatures* in your authorization profile).

- You have not yet executed a signature for this batch record or its current version.
If the same authorization or user group is used more than once in a signature strategy, the individual signatures must be executed by different members of the group.

Procedure

1. Enter your comment in the text field.
2. Select the individual signature that is assigned to your authorization group in the *Signatures to be executed* section.
2. If you use the user signature as your [signature method \[Extern\]](#), make sure that the system can access your [Personal Security Environment \(PSE\) \[Extern\]](#).

How you do this, depends on your security product. If you use a smart card reader, for example, insert your smart card in the reader.

4. Enter your password and choose *Continue*.

The system checks the following:

- Whether you are authorized to execute the individual signature
- Whether your entries match the data in your user master record
- Whether your entries match the data in your PSE (if you use user signatures)

Depending on the result of this check, processing is continued as follows:

Executing Signature Strategies

- If you do not have the required authorization or your entries are invalid, or if the system cannot access your PSE, the system takes you back to the dialog box where you can execute your signature again (steps 2 to 4).

The function is canceled after a certain number of unsuccessful attempts that can be defined specifically for each customer. Your user is locked and you cannot execute another digital signature. If a system signature is used, you are even locked against logging on to the system again.

- If your entries are correct, the system takes you back to the batch record.
5. Save the batch record.
 6. If the batch record has status *Partially archived* (and not *Archived*), further individual signatures must be executed according to the signature strategy. Notify the person who must execute the next individual signature. This person must now initiate the following steps:
 - a. He or she must log on to the system under his or her user name.
 - b. He or she must call the function for approving batch records (see [Approving Batch Records \[Seite 189\]](#)).
 - c. He or she must carry out this procedure for the next individual signature.

Result

If a release status of the signature strategy was reached and no further signatures are required, the batch record is assigned status *Approved*.

For batches whose material master record specifies that an approved batch record is required (*Work scheduling* view), you can now do the following:

- Take the usage decision for the incoming inspection lot of the batch
- Change the batch status from *Restricted* to *Unrestricted*

Canceling Signature Processes

Use

You use this procedure for partially approved batch records if you want to cancel the approval process for some reason and withdraw all signatures executed so far.

Prerequisites

- A [signature strategy \[Extern\]](#) has been assigned to the material to which the batch record belongs in your plant (see *Customizing for Batch Records*).
- You have logged on to the system under your own user name. The system sets this name as the signatory name. You cannot overwrite it.
- You have called the function for approving batch records and are on the dialog box for executing a signature strategy (see [Approving Batch Records \[Seite 189\]](#)).

The *Signatures to be executed* section contains an individual signature that must be executed by your authorization group or user group.


- You have not yet executed a signature for this batch record or its current version.

Procedure

3. Select the individual signature that is assigned to your authorization group in the *Signatures to be executed* section.



When you cancel a signature process, the system does not save any comments. Do not enter a text for this reason.

4. If you use the user signature as your [signature method \[Extern\]](#), make sure that the system can access your [Personal Security Environment \(PSE\) \[Extern\]](#). How you do this, depends on your security product. If you use a smart card reader, for example, insert your smart card in the reader.
5. Enter your password and choose  *Signature process*.

The system checks the following:

- Whether you are authorized to execute the individual signature
- Whether your entries match the data in your user master record
- Whether your entries match the data in your PSE (if you use user signatures)

Depending on the result of this check, processing is continued as follows:

- If you do not have the required authorization or your entries are invalid, or if the system cannot access your PSE, the system takes you back to the dialog box where you can enter your password again (steps 1 and 2).

The function is canceled after a certain number of unsuccessful attempts that can be defined specifically for each customer. Your user is locked and you cannot execute another digital signature. If a system signature is used, you are even locked against logging on to the system again.

Canceling Signature Processes

- If your entry is correct, the signature process is canceled and the system takes you back to the batch record.
7. Save the batch record.

Result

- All signatures executed during the signature process are withdrawn. This is documented in the log for the digital signature.
- The status *Partially approved* is withdrawn for the current version of the batch record.

Monitoring and Logging of Signature Processes

Use

Digital approval processes must be reliable and transparent in order to comply with security requirements. For this reason, the SAP System offers the following:

- You can lock users after a customer-specific number of unsuccessful attempts has been reached.
- You can monitor security-relevant activities that occurred during the signature process.
- You can analyze all activities performed in the context of the signature process.

Features

User Lock

When a signature is executed, unsuccessful attempts can take place for a number of different reasons (for example, the user has entered the wrong password, the user is not authorized to execute the signature, or the system could not verify the signature). After a certain number of unsuccessful attempts has been exceeded, the user is locked as follows:

- When a system signature is executed, the user is locked by the SAP System. The lock applies to the digital signature and a new system logon. You set up the number of unsuccessful attempts in the system profile (see [Limiting Logon Attempts and Defining Clients \[Extern\]](#)).
- When a user signature is executed, the user is locked by the external security product. The lock only applies to the digital signature. The number of allowed unsuccessful attempts is managed by the external security product.

Security Audit Log

Any failed signature attempt is logged in the Security Audit Log along with other security-relevant events of the SAP System. The system documents, for example, the reason for the error, date and time, and the signatory's user ID. The security administrator can use the CCMS alert monitor to evaluate the Security Audit Log.

Log for Digital Signature

The log for the digital signature documents all relevant steps in a signature process. This includes successful and canceled signatures as well as signatures that were deleted when the signature process was canceled. You can evaluate the signature log, for example, by signature object, signature time, and the signatory's user ID (see [Analyzing Logs for Digital Signatures \[Seite 198\]](#)). It contains the result of the signature steps along with all messages and the data that is transferred to the signed document if the signatures were successful.

Analyzing Logs for Digital Signatures

Analyzing Logs for Digital Signatures

Use

You can use this procedure to get an overview of the course signature processes took and evaluate all activities performed in the course of the signature process.



If you only want to analyze the security-relevant events that occurred both in the context of digital signatures and during other activities in the SAP System, use the CCMS alert monitor to analyze the Security Audit Log instead (see [The Alert Monitor \[Extern\]](#)).

Procedure

1. Call up the log for the digital signature as follows:

Area	Choose:
Engineering Change Management (ECH)	<i>Reporting → Log for Digital Signature</i>
Process management (PP-PI)	<i>Evaluations → Log for Digital Signature</i>
Batch record (PP-PI)	<i>Goto → Log for digital signature</i>

2. Enter the criteria for log selection and choose .




The overview of the logs that the system selected appears. The following data is displayed:

- In the top screen area, the logs' header data, that is, the date and time, the signatory name, the number or log messages, and the reason for signature


There is exactly one log for each signature attempt.

- In the bottom screen area, the messages of the logs selected, that is, the result of the signature steps and all relevant signature data

Messages are marked according to their type and logs are marked according to the most serious message type they contain:


Symbol	Message Type
	Information
	Warning
	Error

Analyzing Logs for Digital Signatures

	Abend
---	-------

In addition, the following log classes are highlighted in different colors:

Log or Error Class	Text Color
Signature process canceled	Log red, message highlighted in yellow
Wrong password, name not maintained, missing SSF info	Log and message highlighted in yellow

3. Use the following functions to analyze the logs:
 - If you only want to display messages of a particular type, choose the corresponding icon in the symbol bar at the bottom of the screen.
 - If you only want to display messages of a particular log, double-click the log in the top screen area. By double-clicking the higher-level node, the system again displays all logs of the corresponding object type.
 - To display the long text for a message, choose  in the corresponding line in the bottom area of the screen.


Displaying and Printing Batch Records (PP-PI)

Displaying and Printing Batch Records (PP-PI)


Prerequisites

- The batch record has been generated (see [Generating Batch Records \[Seite 174\]](#)).
- An output device has been defined on the *Defaults* tab page in your user profile.

Procedure


3. You can call up batch records at the following locations in the system: According to your requirements, choose:
 - *Environment* → *Batch record* in the area menu for batch maintenance or in the batch master record
 - *Tools* → *Process data document* → *Batch record* in the area menu of the process order
 - *Extras* → *Batches* → *Batch record* in the usage decision for an inspection lot
2. Specify the following criteria for the creation of a worklist:
 - Selection criteria for selecting batches
 - If you want to evaluate data of batch records that have not yet been generated, choose activity *Generating*.
 - If you want to evaluate the data of all existing batch records, choose activity *Displaying/Changing*.
 - If you only want to evaluate data of batch records to be approved, choose activity *Approving*.
 - The display option you want to use for the overview tree
3. Choose .

The system creates a worklist containing the batch records that match your selection criteria. The batch records are displayed in an overview tree together with their versions, the relevant R/3 objects, archived documents, attachments, comments, and signatures.

If not all batch records within the selection range have been included in the worklist for some reason, the  *Selection log* pushbutton is activated. This means that a selection log exists. Evaluate the selection log if required (see [Evaluating Selection Logs \[Extern\]](#)).

4. Depending on the data you want to display or print, perform the functions described below.


Displaying Data

Function	Procedure
Displaying header data for the version	<p>Double-click the version of the batch record you want to display in the overview tree.</p> <p>To display more detailed information on the system and user statuses of the batch record, choose  next to the status line of the batch record.</p>

Displaying and Printing Batch Records (PP-PI)

Displaying R/3 objects	Double-click the object you want to display in the overview tree.
Displaying the batch	Choose <i>Display batch</i> in the context menu of the batch in the overview tree.
Displaying the batch where-used list	Choose <i>Display batch where-used list</i> in the context menu of the batch in the overview tree.
Displaying documents with R/3 data before archiving (simulation)	Choose <i>Display print preview</i> in the context menu in the overview tree. You can find the document types <i>Version data</i> and <i>User-defined data</i> in the context menu for the top node of the current version. The print preview displays the current R/3 data.
Displaying archive documents (R/3 data and attachment)	Double-click the archive document in the overview tree.
Displaying comment for the version	Double-click the comment in the overview tree.
Displaying signatures on approval	Expand the <i>Approvals</i> node in the node of your batch record or the corresponding record version in the overview tree. The signatures together with the creation date and time are directly displayed in the overview tree.
Displaying comment on signature	Double-click the signature in the overview tree.

Printing Documents

Function	Procedure
Printing documents with R/3 data (except for browser-based PI sheet)	<ol style="list-style-type: none"> Choose <i>Print w/o dialog</i> or <i>Print with dialog</i> in the context menu of the relevant object in the overview tree. If you have chosen <i>Print with dialog</i>, enter the print parameters and choose . <p>When you print without dialog, the document is printed according to the settings made in your user defaults.</p> <p>You can find the document types <i>Version data</i> and <i>User-defined data</i> in the context menu for the top node of the current version.</p>
Print document for browser-based PI sheet	<ol style="list-style-type: none"> Choose <i>Display print preview</i> in the context menu of the PI sheet in the overview tree. Choose <i>Print</i>, enter the print parameters, and choose OK.

Displaying and Printing Batch Records (PP-PI)

Printing documents from attachment	<ol style="list-style-type: none">a. Double-click the document in the overview tree.b. Print the document from the print preview. How you proceed, depends on the file type and the display program used.
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Deleting Batch Records (PP-PI)

Use

You can use this procedure to physically delete header records of batch records from the R/3 database.

To do so, you perform a background job for program PPPI_MCHP_DELETE *Delete Batch Record*. You can schedule the job as follows:

- In Customizing, to repeat the job periodically at certain time intervals
- From the batch, record menu to start the job only once at a specific point in time (see below)

After the header records have been deleted, you can no longer access the archive files from within the R/3 System.

Prerequisites

- The batch record has status *Approved*.
- The availability period for the batch record defined in Customizing has expired (see overall profile of the relevant material).

Procedure

1. Choose *Logistics* → *Materials management* → *Material master* → *Batch* → <Activity> → *Environment* → *Batch record* → *Environment* → *Background processing*.

A dialog box appears from which you can call up the activities *Define Selection Variant* and *Define Background Job*.

2. Define a selection variant and schedule the background job.

For more information on how to proceed, see Customizing for *Batch Records*, section *Define Background Jobs for Processing*.

SAP ArchiveLink - Storage Scenarios (PA)

The following sections describe the storage scenarios in the R/3 application component PA (Personnel Management):

- Personnel Administration (PA-PA)
- Recruitment (PA-RC)
- Travel Management (PA-TV)

See also

- General [introduction \[Seite 10\]](#) to the documentation on these scenarios
- Documentation on [SAP ArchiveLink \[Extern\]](#)
- Documentation on [Personnel Administration \[Extern\]](#)
- Documentation on [Recruitment \[Extern\]](#)
- Documentation on Travel Management

Storage Within Personnel Administration (PA-PA)

Use

Within **Personnel Administration (PA-PA)**, the storage functions provided by **SAP ArchiveLink** facilitate the use of content servers to store copies of incoming documents, such as employment contracts, appraisals, and employee photos. This enables the Human Resources department to save time and money by managing the personnel file centrally as it increases in size and detail.

If an employee at your enterprise receives a personnel appraisal, for example, the written incoming document can be scanned and then stored. If this employee receives more than one personnel appraisal over time, your ability to access them makes it much easier for you to track his or her development. There is no need to waste time searching through different files stored at various locations.

This improves access to employee data while saving time, money, and storage space.

Prerequisites

Technical Implementation (PA-PA)

An external scanner is used to import written incoming documents into the system. The scanner communicates with **SAP ArchiveLink**. Individual documents are linked directly to an infotype and employee using the personnel number, or they are assigned generally to an employee using the personnel number. The link is created using the document type.

The standard system includes the following document types for Personnel Administration:

Name of document type	Document type	Object type	Document class	Infotype	Subtype**
Retirement pension plan	HRIBENEFIT	PREL	FAX	0053	-
Certificate for child	HRIBESCHKI	PREL	FAX	0021	2
Qualifications	HRICERTIFI	PREL	FAX	0024	-
Color photos	HRICOLFOTO	PREL	FAX	0002	-
Employment contract	HRICONTRAC	PREL	FAX	0016	-
Supplements to employment contract	HRICONTRAD	PREL	FAX	0016	-
Obligation to observe data secrecy	HRIDATASEC	PREL	FAX	0002	-
Appraisal	HRIDATES	PREL	FAX	0019	10
Final certificate for education	HRIDIPLOMA	PREL	FAX	0022	+
Photo of employee	HRIEMPFO	PREL	FAX	0002	-
Appraisal	HRIEVALUAT	PREL	FAX	0025	-

Storage Within Personnel Administration (PA-PA)

Health insurance certificate	HRIHEALTHI	PREL	FAX	0013	-
Personnel master data sheet	HRIMASTERD	PREL	FAX	0002	-
Appraisal	HRIPERAPPR	PREL	FAX	0019	10
Reference	HRIREFEREN	PREL	FAX	0023	-
Resume	HRIRESUME	PREL	FAX	*	-
Social security card	HRISOCIALS	PREL	FAX	0013	-
Registration certificate	HRISTUDID	PREL	FAX	0013	-
Wage tax card	HRITAXCARD	PREL	FAX	0012	-
Certificate of contributions to savings scheme	HRIVL	PREL	FAX	0010	+
Work permit	HRIWORKPER	PREL	FAX	0016	-

In the standard system, these document types are assigned to technical document class FAX (format for scanned incoming documents).

If you do not want to use the SAP standard setting, you can determine the infotypes to which individual document types are assigned. The exact assignment depends on the specific infotypes for which specific document types are stored. In principle, a connection to **SAP ArchiveLink** is available for all Personnel Administration infotypes.

Key to Table:

- * The “resume” document type is not set up for specific infotypes because it can be linked to a variety of infotypes.
- ** When an incoming document is assigned, you can enter the following when specifying the subtype:
 - + The subtype must be entered when the incoming document is assigned.
 - The subtype must not be specified.

Specific value: a default subtype appears when the incoming document is assigned. It cannot be overwritten.

Preparation and Customizing (PA-PA)

Customizing for **SAP ArchiveLink** is divided into general, cross-application Customizing, and application-specific Customizing for individual **SAP ArchiveLink** scenarios.

General Customizing for SAP ArchiveLink

See: [Customizing \[Seite 16\]](#)

Application-Specific Customizing

To make application-specific settings for **SAP ArchiveLink**, call up the Implementation Guide (IMG) for Personnel Administration:

Storage Within Personnel Administration (PA-PA)

Personnel Administration → *Tools* → *Optical Archiving* → *Set up Document Types for HR*

To set up document types for HR, you assign an infotype, subtype, and object ID to the various document types, as necessary. If you want the *Date* field to be a required entry field, flag it with the + sign. The *Authorization* field controls the authorization check that is performed when the document is entered at the scan work center, and when the document is assigned to a document type. To check that the employee has authorization for the infotype linked to the document type in question, select the *Authorization* checkbox.



Personnel Administration recommends that you start the ten-character, alphanumeric, document type ID with **HRlxxxxxxx** (x = characters that you can define as required).

Features

The following application scenarios are supported by **SAP ArchiveLink** within Personnel Administration:

[Store for subsequent entry \(PA-PA\) \[Seite 208\]](#)

[Assign then store with bar code \(PA-PA\) \[Seite 211\]](#)

[Store and enter \(PA-PA\) \[Seite 214\]](#)



SAP recommends that you store employee documents with a bar code. For this reason, the following example illustrates how to **assign then store with bar code**. However, it is also technically possible to store without a bar code (that is, you can use the “assign then store” scenario).

Activities

Storage

Please see “Features”.

Display

You can display documents stored for an employee as follows:

- [Display all documents for an infotype assigned to an employee \(PA-PA\) \[Seite 218\]](#)
- [Display all documents for an employee \(PA-PA\) \[Seite 219\]](#)

Store for Subsequent Entry (PA-PA)

Store for Subsequent Entry (PA-PA)

Use

When the “store for subsequent entry” scenario is performed, incoming documents are scanned and then assigned to a document type.

This document type is usually assigned to the personnel administrator responsible. However, it can also be linked to an organizational unit, job, position, or work center.

The scanned document is then forwarded as a mail to the personnel administrator’s inbox. He or she can check the provisional assignment to a document type, and confirm or change the assignment.

Activities

There are two ways of assigning a document to an employee using the “store for subsequent entry” scenario:

- If the document type is assigned to an infotype and just one infotype record exists, the infotype record is displayed directly when document processing continues. If more than one data record exists for the infotype, a list of all data records is displayed. The personnel administrator can then choose the required data record from the list. To link the document to an employee and infotype, he or she chooses *Extras* → *Assign facsimile*.

[Assign document with infotype reference to an employee \(PA-PA\) \[Seite 209\]](#)

- If the document type is not assigned to an infotype, the *Maintain HR Master Data* screen is displayed when document processing continues. To link the document to an employee, the personnel administrator chooses *Extras* → *Assign facsimile*.

[Assign document without infotype reference to an employee \(PA-PA\) \[Seite 210\]](#)

Assign Document With IT Reference to EE (PA-PA)

Procedure

If you want to use the “store for subsequent entry” scenario to process a document **with infotype reference** for an employee, proceed as follows.

1. On the *SAP R/3 System* screen, choose *Office* → *Inbox*.
This takes you to the initial screen of your integrated inbox.
2. Use the appropriate function to choose the list that you require.
The system displays the employee documents sent to you by the scanning department.
3. Select a document and choose *Document* → *Execute*.



The *Process Document Type* dialog box is displayed. Check that the document type in this dialog box is correct. You can assign the specified document to a different document type by choosing *Change*, or to another document type by choosing *Create*.

4. Place the cursor on the document type you want to process and choose *Process*.
The *Enter Personnel Number* dialog box is displayed.
5. Enter the personnel number of the employee to whom the document belongs and choose *Continue*.
If there is just one infotype record, the system immediately accesses the entry screen of the infotype linked to the chosen document type. If the infotype has more than one record, a list of all records is displayed. To access the infotype entry screen, choose the record that you require.
6. Maintain an infotype record for the employee, if required.
7. On the infotype entry screen, choose *Extras* → *Assign facsimile*.
This takes you to the *Assign Facsimile* dialog box, which contains information on the current assignment, such as the document type, infotype, and personnel number.
8. Enter the date of origin, if necessary, and choose *Continue*.
The *Confirm Assignment of Facsimile* dialog box is displayed.
9. Confirm the assignment.
A message informs you that the facsimile has been processed and stored successfully.
10. Save the infotype record, if necessary.

Result

The document is processed and linked to the appropriate infotype record of the employee.

Assign Document Without IT Reference to EE (PA-PA)

Assign Document Without IT Reference to EE (PA-PA)

Procedure

If you want to use the “store for subsequent entry” scenario to process a document **without infotype reference** for an employee, proceed as follows:

1. On the *SAP R/3 System* screen, choose *Office* → *Inbox*.
This takes you to the initial screen of your integrated inbox.
2. Use the appropriate function to choose the list that you require.
The system displays the employee documents sent to you by the scanning department.
3. Select a document and choose *Document* → *Execute*.



The *Process Document Type* dialog box is displayed. Check that the document type in this dialog box is correct. You can assign the specified document to a different document type by choosing *Change*, or to another document type by choosing *Create*.

4. Place the cursor on the document type you want to process and choose *Process*.
The *Enter Personnel Number* dialog box is displayed.
5. Enter the personnel number of the employee to whom the document belongs and choose *Continue*.
This takes you to the *Maintain HR Master Data* screen.
6. Choose *Extras* → *Assign facsimile*.
The *Assign Facsimile* dialog box is displayed containing information on the current assignment, such as the document type and personnel number.
7. Enter the date of origin, if necessary, and choose *Continue*.
The *Confirm Assignment of Facsimile* dialog box is displayed.
8. Confirm the assignment.
A message informs you that the facsimile has been processed and stored successfully.

Result

The document is processed and assigned to the employee.

Assign Then Store With Bar Code (PA-PA)

Use

SAP recommends that you store employee documents with a bar code. For this reason, the following example illustrates how to **assign then store with bar code**. However, it is also technically possible to store without a bar code (that is, you can use the “assign then store” scenario).

Activities

When data is assigned then stored with a bar code, the incoming document is received by the appropriate personnel administrator. He or she enters the employee’s personnel number in the *Maintain HR Master Data* infotype selection screen.

- If the document needs to be assigned to an employee with reference to an infotype, the personnel administrator selects the required infotype and then links the document to the employee and infotype by choosing *Extras* → *Assign facsimile*.

[Assign document with infotype reference to an employee \(PA-PA\) \[Seite 212\]](#)

- If the document needs to be assigned to an employee without reference to an infotype, the personnel administrator links the document to the employee by choosing *Extras* → *Assign facsimile*.

[Assign document without infotype reference to an employee \(PA-PA\) \[Seite 213\]](#)

The personnel administrator sticks a bar code on the incoming document, and uses an optical scanner to read the bar code into the system. He or she then forwards it to the scanning department. When the employee document is scanned into the system, the system can use the bar code to assign the document to the employee automatically.

Assign Document With IT Reference to EE (PA-PA)

Assign Document With IT Reference to EE (PA-PA)

Procedure

If you want to use the “assign then store with bar code” scenario to process a document with infotype reference for an employee, proceed as follows.

1. Choose *Human resources* → *Personnel management* → *Administration*, and then *HR master data* → *Maintain*.

This takes you to the *Maintain HR Master Data* screen.

2. Enter the personnel number.
3. Select an infotype and choose *Change*.

This takes you to the entry screen for the infotype you selected.

4. Choose *Extras* → *Assign facsimile*.

A dialog box is displayed containing a list of document types for the infotype you selected.

5. Place the cursor on the document type you require and choose *Copy*.

This takes you to the *Assign Facsimile* dialog box, which contains information on the current assignment, such as the document type, infotype, and personnel number.

6. Enter the date of origin and choose *Continue*.

The *Confirm Assignment of Facsimile* dialog box is displayed.

7. Confirm the assignment.

A dialog box is displayed that requires you to enter a bar code ID.

8. Stick a bar code on the original document, use an optical scanner to read the bar code into the system, and choose *Continue*.

A message informs you that the bar code has been assigned successfully.

9. Forward the original document to the scanning department.



The bar code creates the link between the document and the infotype. When the document is scanned into the system, the scanner reads the bar code ID and then assigns the document to a document type and infotype accordingly.

Result

The document is assigned to an employee and provided with a bar code.

Assign Document Without IT Reference to EE (PA-PA)

Procedure

If you want to use the “assign then store with bar code” scenario to process a document without infotype reference for an employee, proceed as follows.

1. On the *SAP R/3 System* screen, choose *Human resources* → *Personnel management* → *Administration*, and then *HR master data* → *Maintain*.

This takes you to the *Maintain HR Master Data* screen.

2. Enter the personnel number.

3. Choose *Extras* → *Assign facsimile*.

The *Document Type* dialog box is displayed.

4. Place the cursor on the document type you require and choose *Copy*.

The *Assign Facsimile* dialog box is displayed containing information on the current assignment, such as the document type and personnel number.

5. Enter the date of origin, if necessary, and choose *Continue*.

The *Confirm Assignment of Facsimile* dialog box is displayed.

6. Confirm the assignment.

A dialog box is displayed that requires you to enter a bar code ID.

7. Stick a bar code on the original document, use an optical scanner to read the bar code into the system, and choose *Continue*.

A message informs you that the bar code has been assigned successfully.

8. Forward the original document to the scanning department.

Result

The document is assigned to an employee and provided with a bar code.

Store and Enter (PA-PA)

Store and Enter (PA-PA)

Use

The only difference between the “store and enter” and “store for subsequent entry” scenarios is that the former requires the administrator to scan the incoming document into the system directly within the Human Resources department. The inbox is not used.



[Store for subsequent entry \(PA-PA\) \[Seite 208\]](#)

Activities

There are two ways of assigning a document to an employee using the “store and enter” scenario:

- [Assign document with infotype reference to an employee \(PA-PA\) \[Seite 215\]](#)
- [Assign document without infotype reference to an employee \(PA-PA\) \[Seite 217\]](#)

Assign Document With IT Reference to EE (PA-PA)

Procedure

If you want to use the “store and enter” scenario to process a document with infotype reference for an employee, proceed as follows.

1. Scan the incoming document into the system.
2. On the *SAP R/3 System* screen, choose *Office* → *Business Documents* → *Documents* → *Move*.

The system displays a list of presettings.

3. Place the cursor on the required presetting and choose *Edit* → *Choose*.
A list is displayed of document types defined for this setting.
4. Place the cursor on the appropriate document type and choose *Edit* → *Choose*.



The system requires you to confirm the scanned document's assignment to the chosen document type. Confirm the assignment. Once the link has been created, the document is deleted from the scan queue.

The *Enter Personnel Number* dialog box is displayed.

5. Enter the personnel number of the employee to whom the document belongs and choose *Continue*.

If there is just one infotype record, the system immediately accesses the entry screen of the infotype linked to the chosen document type. If the infotype has more than one record, a list is displayed of all records. To access the infotype entry screen, choose the record that you require.

6. Maintain an infotype record for the employee, if required.
7. On the infotype entry screen, choose *Extras* → *Assign facsimile*.

This takes you to the *Assign Facsimile* dialog box, which contains information on the current assignment, such as the document type, infotype, and personnel number.

8. Enter the date of origin, if necessary, and choose *Continue*.

The *Confirm Assignment of Facsimile* dialog box is displayed.

9. Confirm the assignment.

A message informs you that the facsimile has been processed and stored successfully.

10. If you have made changes, save the infotype record.

Result

The scanned incoming document is processed and linked to the appropriate infotype and employee.

Assign Document With IT Reference to EE (PA-PA)

Assign Document Without IT Reference to EE (PA-PA)

Procedure

If you want to use the “store and enter” scenario to process a document without infotype reference for an employee, proceed as follows.

1. Scan the original into the system.
2. Choose *Office* → *Business Documents* → *Documents* → *Store*.
The system displays a list of presettings.
3. Place the cursor on *HR: Personnel Administration* and choose *Continue*.
A list is displayed of document types defined for this setting.
4. Place the cursor on the appropriate document type and choose *Choose*.



The system requires you to confirm the scanned document's assignment to the chosen document type. Confirm the assignment. Once the link has been created, the document is deleted from the scan queue.

The *Enter Personnel Number* dialog box is displayed.

5. Enter the personnel number of the employee to whom the document belongs and choose *Continue*.

This takes you to the *Maintain HR Master Data* entry screen.

6. Choose *Environment* → *Assign facsimile*.

The *Assign Facsimile* dialog box is displayed containing information on the current assignment, such as the document type and personnel number.

7. Enter the date of origin, if necessary, and choose *Continue*.

The *Confirm Assignment of Facsimile* dialog box is displayed.

8. Confirm the assignment.

A message informs you that the facsimile has been processed and stored successfully.

Result

The document is processed and assigned to the employee.

Display all Docs for an IT Assigned to EE (PA-PA)

Display all Docs for an IT Assigned to EE (PA-PA)

Procedure

If you want to display a document from a list of documents stored for a particular infotype assigned to an employee, proceed as follows.

1. Choose *Human resources* → *Personnel management* → *Administration*, and then *HR master data* → *Display*.

This takes you to the *Display HR Master Data* screen.

2. Enter a personnel number.
3. Select an infotype.
4. Choose *Display*.

An infotype record is displayed for the specified employee.

5. Choose *Extras* → *Display specific facsimiles*.

The system displays a list of all documents stored for the infotype you selected.

6. Select a document and choose *Display facsimiles*.

Result

The selected document is displayed.

Display all Documents for an Employee (PA-PA)

Procedure

If you want to display a document from a complete list of documents stored for an employee, proceed as follows.

1. Choose *Human resources* → *Personnel management* → *Administration*, and then *HR master data* → *Display*.

This takes you to the *Display HR Master Data* screen.

2. Enter a personnel number.
3. Choose *Extras* → *Display all facsimiles*.

A list is displayed of all documents stored for the specified employee.

4. Select a document and choose *Display facsimiles*.

Result

The selected document is displayed.

Storage Within Recruitment (PA-RC)

Storage Within Recruitment (PA-RC)

Use

Within **Recruitment** (PA-RC), the storage functions provided by **SAP ArchiveLink** facilitate the use of content servers to store copies of incoming applicant documents, such as letters of application, resumes, and certificates. Any number of documents can be stored for each applicant.

Thus, a personnel officer, for example, can easily display a training certificate or resume, check an applicant's aptitude, and even make an initial selection. He or she can then forward the stored documents to the line manager, who checks the applications once again and invites an applicant to an interview, rejects an applicant, or puts an applicant on hold.

This greatly accelerates the time-consuming process of several personnel officers and line managers checking application documents to determine the applicant's aptitude. Furthermore, important application documents cannot be lost because they are stored centrally. There is no need to waste time searching through different files at various locations.

Prerequisites

Technical Implementation (PA-RC)

An external scanner is used to import written documents into the system. The scanner communicates with **SAP ArchiveLink**. Individual documents are assigned to an applicant using the applicant number. It is also possible to assign specific document types directly to an applicant infotype. To do this, you must use Customizing to link the document types in question to the appropriate infotype.

The standard system includes the following document types for Recruitment:

Name of document type	Document type	Object type	Document class	Infotype
Written application	HRIAPPLICA	PAPL	FAX	4001
Qualifications of applicant	HRICERTAPL	PAPL	FAX	
Training certificate for applicant	HRIDIPLAPL	PAPL	FAX	0022
Reference for applicant	HRIREFEAPL	PAPL	FAX	
Applicant's resume	HRIRESUAPL	PAPL	FAX	



You can activate and deactivate the authorization check function for individual document types.

Preparation and Customizing (PA-RC)

In **Recruitment**, Customizing for **SAP ArchiveLink** is divided into the following areas:

General Customizing

To make general settings for storing data, please see the [customizing \[Seite 16\]](#) section.

Application-Specific Customizing

To make application-specific settings for storing data in *Recruitment*, please see the Implementation Guide for *Personnel Administration*:

Personnel Administration → *Tools* → *Optical Archiving*



SAP recommends that you start the ten-character, alphanumeric, document type ID with HRIxxxxxx (x = characters that you can define as required).

Features

Within **Recruitment** (PA-RC), the following storage scenarios are supported by **SAP ArchiveLink**:

[Store for subsequent entry \(PA-RC\) \[Seite 223\]](#)

[Assign then store \(PA-RC\) \[Seite 227\]](#)

[Store and enter \(PA-RC\) \[Seite 234\]](#)



If application documents are assigned then stored, SAP recommends that you use a **bar code**. For this reason, the following example illustrates how to assign then store with bar code. However, it is also technically possible to store without a bar code (that is, you can use the “assign then store” scenario).

Activities

Storage

Please see “Features”.

Display

You can display documents stored for an applicant as follows:

- You can display documents from most applicant lists and statistics, such as *applicants by name* or *applications*.

[Display documents using applicant lists \(PA-RC\) \[Seite 238\]](#)

- You can display application documents from any screen concerned with displaying and maintaining applicant master data. If you call up the maintenance or display mode for a particular infotype, you can also display just those document types that are assigned to the infotype in question.
 - [Display all documents for an applicant \(PA-RC\) \[Seite 240\]](#)
 - [Display all documents for an infotype assigned to an applicant \(PA-RC\) \[Seite 239\]](#)

Storage Within Recruitment (PA-RC)

Store for Subsequent Entry (PA-RC)

Use

When the “store for subsequent entry” scenario is performed, incoming application documents such as a letter of application are scanned and then assigned to a document type. The document types are assigned to the appropriate personnel officer. For this reason, the scanned letter of application is forwarded as a mail to his or her inbox. He or she can check the provisional assignment to a document type, and confirm or change the assignment.

Activities

There are two ways of assigning the document:

- If the document type is linked to infotype 4001 *Applications*, the *Initial Entry of Basic Data* screen is displayed to the personnel officer when document processing continues so that he or she can enter the applicant data. The system assigns the document type to the applicant automatically.

[Assign documents to an applicant during initial data entry \(PA-RC\) \[Seite 224\]](#)

- If the document type is not linked to infotype 4001 *Applications*, the *Maintain Applicant Master Data* screen (PB30) is displayed to the personnel officer when document processing continues so that he or she can assign the document to the applicant. The prerequisite is that the applicant data is already in the system.

[Assign documents to an applicant after initial data entry \(PA-RC\) \[Seite 225\]](#)

Assign Docs to Applicant During Initial Data Entry (PA-RC)

Assign Docs to Applicant During Initial Data Entry (PA-RC)

Prerequisites

You can only use this procedure if the document type to be processed is linked to infotype 4001 *Applications*.

Procedure

If you want to assign a document to an applicant during initial data entry, proceed as follows.

1. On the *SAP R/3 System* screen, choose *Office* → *Inbox*.
This takes you to the initial screen of your integrated inbox.
2. Use the appropriate function to choose the list that you require.
The system displays the applicant documents sent to you by the scanning department.
3. Select a document and choose *Document* → *Execute*.



The *Process Document Type* dialog box is displayed. Check that the document type in this dialog box is correct. The *Change* function enables you to change the current assignment. The *Create* function enables you to assign the document to another document type.

4. Place the cursor on the document type you want to process and choose *Process*.
This accesses the *Initial Entry of Basic Data* screen because the document type is linked to infotype 4001 *Applications*.
5. Maintain the basic data.
6. Save your entries.
A message informs you that the facsimile has been processed and stored successfully.
7. Confirm the message.

Result

The document is assigned to the applicant. At the same time, basic data is entered for the applicant.

Assign Docs to Applicant After Initial Data Entry (PA-RC)

Prerequisites

You can only use this procedure if the document type to be processed is **not** linked to infotype 4001 *Applications*, and if the applicant data is already in the system.

Procedure

If you want to assign a document to an applicant after initial data entry, proceed as follows.

1. On the *SAP R/3 System* screen, choose *Office* → *Inbox*.
This takes you to the initial screen of your integrated inbox.
2. Use the appropriate function to choose the list that you require.
The system displays the applicant documents sent to you by the scanning department.
3. Select a document and choose *Document* → *Execute*.



The *Process Document Type* dialog box is displayed. Check that the document type in this dialog box is correct. The *Change* function enables you to change the current assignment. The *Create* function enables you to assign the document to another document type.

4. Place the cursor on the document type you want to process and choose *Process*.
The *Enter Applicant Number* dialog box is displayed.
5. Enter the applicant number and choose *Continue*.
This accesses the entry screen of the infotype linked to the document type you have chosen, or the *Maintain Applicant Master Data* screen.
6. Maintain the applicant's infotype record as required.
7. On the infotype entry screen, choose *Environment* → *Assign facsimile*.
The *Assign Facsimile* dialog box is displayed containing information on the current assignment, such as the document type and applicant number.
8. Enter the date of origin, if necessary, and choose *Continue*.
The *Confirm Assignment of Facsimile* dialog box is displayed.
9. Confirm the assignment.
A message informs you that the facsimile has been processed and stored successfully.
10. Confirm the message.
11. If you have made changes, save the infotype record.

Result

The document is assigned to the applicant.

Assign Docs to Applicant After Initial Data Entry (PA-RC)

Assign Then Store (PA-RC)

Use

When you use the "assign then store" scenario, SAP recommends that you store documents with a bar code. For this reason, the following example illustrates how to **assign then store with bar code**. However, it is also technically possible to **assign then store without a bar code** (that is, you can use the "assign then store" scenario).

When the assign then store scenario is used, the written application documents are sent directly to the personnel officer responsible. Having entered the applicant data, he or she sticks a bar code on the incoming documents, and uses an optical scanner to read the bar code into the system. The bar code is linked to the applicant number. He or she then forwards the documents to the scanning department. When the application documents are scanned into the system, the system can use the bar code to assign the documents to the applicant automatically.

Activities

There are two ways of assigning documents to an applicant:

- Usually, you assign the documents when you first enter the applicant in the system by performing the *Initial Entry of Basic Data* applicant action.
[Assign documents to an applicant during initial data entry \(PA-RC\) \[Seite 228\]](#)
- However, you can also assign the documents at any time after the applicant has been entered in the system, such as when application documents are submitted at a later date.
[Assign documents to an applicant after initial data entry \(PA-RC\) \[Seite 233\]](#)

Assign Docs to Applicant During Initial Data Entry (PA-RC)

Assign Docs to Applicant During Initial Data Entry (PA-RC)

If you assign documents to an applicant during initial data entry, the assignment is effected at the same time that the basic applicant data is entered. The way in which basic applicant data is entered in the system depends on whether the applicant is internal or external.

- If you want to enter data for an internal applicant, the system uses the applicant's existing personnel number to write certain default values, such as the applicant's name and address, to the appropriate fields. You can overwrite these values as necessary.

[Assign documents to an internal applicant during initial data entry \(PA-RC\) \[Seite 229\]](#)

- If you want to enter data for an external applicant, you must enter all of the applicant data yourself.

[Assign documents to an external applicant during initial data entry \(PA-RC\) \[Seite 231\]](#)

Assign Docs to Int. App. During Initial Data Entry (PA-RC)

Procedure

If you want to assign a document to an internal applicant during initial data entry, proceed as follows.

1. On the *SAP R/3 System* screen, choose *Human resources* → *Personnel management* → *Recruitment*, and then *Appl. master data* → *Initial data entry*.

This takes you to the *Initial Entry of Basic Data* screen.

- If the application is in response to a particular job advertisement, enter data in the *Applicant group*, *Applicant range*, *Personnel area*, *Personnel subarea*, *Personnel number*, and *Advertisement* fields.
- If the application is unsolicited, enter data in the *Applicant group*, *Applicant range*, *Personnel area*, *Personnel subarea*, *Personnel number*, and *Unsolicited application group* fields.



When you maintain the *Applicant group* field, you must choose a group that is assigned to applicant class **P** (internal applicant).

2. Confirm your entries.



If the applicant is a multiple applicant, the system accesses the *Further Application* action automatically.

The system suggests default values for the *Personal data*, *Address*, and *Personnel officer* fields.

3. Overwrite the default values retrieved by the system, if necessary.
4. Enter further applicant data, if necessary.
5. If you want to enter further data for a particular infotype, select its *Further data* checkbox.
6. If you want to assign documents to an applicant during initial data entry, select the *Assign facsimiles* checkbox.
7. Save your entries.

If you selected the *Further data* and *Assign facsimiles* checkboxes, the system accesses the required infotype screen. Go to step 8.

If you only selected the *Assign facsimiles* checkbox, the *Document Type* dialog box is displayed. Go to step 10.

8. Enter data for the infotype displayed.
9. Save your entries.

Assign Docs to Int. App. During Initial Data Entry (PA-RC)

If you selected the *Further data* checkbox for more than one infotype, the system accesses the next infotype that you require. Keep repeating steps 8 and 9 until you have processed all of the infotypes that you selected.

If you selected the *Further data* and *Assign facsimiles* checkboxes, the *Document Type* dialog box is displayed. Go to step 10.

10. Place the cursor on the document type you require and choose *Copy*.

The *Assign Facsimile* dialog box is displayed.

11. Enter the date of origin, if necessary, and choose *Continue*.

The *Confirm Assignment of Facsimile* dialog box is displayed.

12. Confirm the assignment.

The *Enter Bar Code* dialog box is displayed.

13. Stick a bar code on the original document and use an optical scanner to read it into the system.

14. Choose *Continue*.

The *Assign Facsimiles* dialog box is displayed.

15. Specify whether you want to assign more documents to the applicant.

If you want to assign more documents, the *Document Type* dialog box is displayed again. Keep repeating steps 11 to 16 until you have assigned all required documents to the applicant.

If you do not want to assign any more documents, you return to the *Initial Entry of Basic Data* screen.

Result

You have entered basic data on an internal applicant. The applicant is assigned one or more bar codes which can then be used when the application documents are entered in the system.

Assign Docs to Ext. App. During Initial Data Entry (PA-RC)

Procedure

If you want to assign a document to an external applicant during initial data entry, proceed as follows.

1. On the *SAP R/3 System* screen, choose *Human resources* → *Personnel management* → *Recruitment*, and then *Appl. master data* → *Initial data entry*.

This takes you to the *Initial Entry of Basic Data* screen.

2. Enter data in the *Applicant group*, *Applicant range*, *Personnel area*, *Personnel subarea*, *Last name*, *First name* and, if necessary, *Date of birth* fields.



When you maintain the *Applicant group* field, you must choose a group that is assigned to applicant class **AP** (external applicant).

3. Confirm your entries.

If the system already contains data on a former employee or applicant with the same name, go to step 4.

If the system does **not** contain data already on a former employee or applicant with the same name, go to step 7.

4. Check the entries in the lists by choosing *Display*.

If one of the former employees or applicants is the same applicant that you are currently processing, go to step 5.

If **none** of the former employees or applicants is the same applicant that you are currently processing, go to step 7.

5. Place the cursor on the applicant you have identified and choose *Person recognized*.



If the applicant is a multiple applicant, the system accesses the *Further Application* action automatically.

The system suggests default values for the *Organizational assignment*, *Personal data*, and *Address* fields.



The organizational assignment defaults are taken from the applicant's former application.

6. Overwrite the default values retrieved by the system, if necessary.
7. Maintain the remaining required fields, and the optional fields if necessary.
8. If you want to enter further data for a particular infotype, select its *Further data* checkbox.

Assign Docs to Ext. App. During Initial Data Entry (PA-RC)

9. If you want to assign documents to an applicant during initial data entry, select the *Assign facsimiles* checkbox.
10. Save your entries.
 - If you selected the *Further data* and *Assign facsimiles* checkboxes, the system accesses the required infotype screen. Go to step 11.
 - If you only selected the *Assign facsimiles* checkbox, the *Document Type* dialog box is displayed. Go to step 13.
11. Enter data for the infotype displayed.
12. Save your entries.
 - If you selected the *Further data* checkbox for more than one infotype, the system accesses the next infotype that you require. Keep repeating steps 11 and 12 until you have processed all of the infotypes that you selected.
 - If you selected the *Further data* and *Assign facsimiles* checkboxes, the *Document Type* dialog box is displayed. Go to step 13.
13. Place the cursor on the document type you require and choose *Copy*.
 - The *Assign Facsimile* dialog box is displayed.
14. Enter the date of origin, if necessary, and choose *Continue*.
 - The *Confirm Assignment of Facsimile* dialog box is displayed.
15. Confirm the assignment.
 - The *Enter Bar Code* dialog box is displayed.
16. Stick a bar code on the original document and use an optical scanner to read it into the system.
17. Choose *Continue*.
 - The *Assign Facsimiles* dialog box is displayed.
18. Specify whether you want to assign more documents to the applicant.
 - If you want to assign more documents, the *Document Type* dialog box is displayed again. Keep repeating steps 13 to 18 until you have assigned all required documents to the applicant.
 - If you do not want to assign any more documents, you return to the *Initial Entry of Basic Data* screen.

Result

You have entered basic data on an external applicant. The applicant is assigned one or more bar codes which can then be used when the application documents are entered in the system.

Assign Docs to Applicant After Initial Data Entry (PA-RC)

Procedure

If you want to use the “assign then store with bar code” scenario to assign a document to an applicant after initial data entry, proceed as follows.

1. On the *SAP R/3 System* screen, choose *Human resources* → *Personnel management* → *Recruitment*, and then *Appl. master data* → *Maintain*.

This takes you to the *Maintain Applicant Master Data* screen.

2. Enter the applicant number.

3. Choose *Extras* → *Assign facsimile*.

The *Document Type* dialog box is displayed.

4. Place the cursor on the document type you require and choose *Copy*.

The *Assign Facsimile* dialog box is displayed containing information on the current assignment, such as the document type, infotype, and applicant number.

5. Enter the date of origin, if necessary, and choose *Continue*.

The *Confirm Assignment of Facsimile* dialog box is displayed.

6. Confirm the assignment.

The *Enter Bar Code* dialog box is displayed.

7. Stick a bar code on the original document and use an optical scanner to read it into the system. Choose *Continue*.

A message informs you that the bar code has been assigned successfully.

8. Forward the original document to the scanning department.



The bar code creates the link between the document and the infotype. When the document is scanned into the system, the scanner reads the bar code number and assigns it to a document type and infotype accordingly.

Result

The document is assigned to an applicant and provided with a bar code.

Store and Enter (PA-RC)

Store and Enter (PA-RC)

Use

The only difference between the “store and enter” and “store for subsequent entry” scenarios is that the former requires the appropriate personnel officer to scan the incoming document into the system directly. The inbox is not used.



[Store for subsequent entry \(PA-RC\) \[Seite 223\]](#)

Activities

There are two ways of assigning a document to an applicant using the “store and enter” scenario:

- [Assign documents to an applicant during initial data entry \(PA-RC\) \[Seite 235\]](#)
- [Assign documents to an applicant after initial data entry \(PA-RC\) \[Seite 236\]](#)

Assign Docs to Applicant During Initial Data Entry (PA-RC)

Prerequisite

You can only use this procedure if the document type to be processed is linked to infotype 4001 *Applications*.

Procedure

If you want to assign a document to an applicant during initial data entry, proceed as follows.

1. Scan the incoming document into the system.
2. On the *SAP R/3 System* screen, choose *Office* → *Business Documents* → *Documents* → *Move*.

The system displays a list of all presettings.

3. Place the cursor on the required presetting and choose *Edit* → *Choose*.

A list is displayed of document types defined for this setting.

4. Place the cursor on the appropriate document type and choose *Edit* → *Choose*.



The system requires you to confirm the scanned document's assignment to the chosen document type. Confirm the assignment. Once the link has been created, the document is deleted from the scan queue.

This accesses the *Initial Entry of Basic Data* screen because the document type is linked to infotype 4001 *Applications*.

5. Maintain the basic data.
6. Save your entries.

A message informs you that the facsimile has been processed and stored successfully.
7. Confirm the message.

Result

The document is assigned to the applicant. At the same time, basic data is entered for the applicant.

Assign Docs to Applicant After Initial Data Entry (PA-RC)

Assign Docs to Applicant After Initial Data Entry (PA-RC)

Prerequisite

You can only use this procedure if the document type to be processed is not linked to infotype 4001 *Applications*, and if the applicant data is already in the system.

Procedure

If you want to assign a document to an applicant after initial data entry, proceed as follows.

1. Scan the incoming document into the system.
2. On the *SAP R/3 System* screen, choose *Office* → *Business Documents* → *Documents* → *Move*.
The system displays a list of presettings.
3. Place the cursor on the required presetting and choose *Edit* → *Choose*.
A list is displayed of document types defined for this setting.
4. Place the cursor on the appropriate document type and choose *Edit* → *Choose*.



The system requires you to confirm the scanned document's assignment to the chosen document type. Confirm the assignment. Once the link has been created, the document is deleted from the scan queue.

The *Enter Applicant Number* dialog box is displayed.

5. Enter the applicant number and choose *Continue*.
This accesses the entry screen of the infotype linked to the document type you have chosen, or the *Maintain Applicant Master Data* screen.
6. Maintain the applicant's infotype record, if necessary.
7. On the infotype entry screen, choose *Environment* → *Assign facsimile*.
The *Assign Facsimile* dialog box is displayed containing information on the current assignment, such as the document type and applicant number.
8. Enter the date of origin, if necessary, and choose *Continue*.
The *Confirm Assignment of Facsimile* dialog box is displayed.
9. Confirm the assignment.
A message informs you that the facsimile has been processed and stored successfully.
10. Confirm the message.
11. If you have made changes, save the infotype record.

Result

The document is assigned to the applicant.

Display Documents Using Applicant Lists (PA-RC)

Display Documents Using Applicant Lists (PA-RC)

Note

You can display documents from any list or statistic (such as *Applicants by name* and *Applications*) in which individual applicants are listed.

Procedure

If you want to use applicant lists to display documents stored for an applicant, proceed as follows.

1. On the *SAP R/3 System* screen, choose *Human resources* → *Personnel management* → *Recruitment*, and then *Reporting* → *Report selection*.

This accesses the *Report Tree: Initial Screen*.

2. Enter the required report tree and choose *Report tree* → *Display*.

This takes you to the *Display Report Tree <name>* screen.

3. Place the cursor on the *Personnel Management* sub-tree and choose *Edit* → *Expand sub-tree*.



You can also save the *Recruitment* sub-tree as your initial screen. To do this, place the cursor on *Recruitment* and choose *Edit* → *Set focus*. Then choose *Settings* → *Define initial position*. The next time you access the report tree for *Personnel Management*, the *Recruitment* sub-tree is displayed immediately.

4. Underneath *Recruitment*, select *Applicants* and choose *Nodes* → *Execute*.

5. Place the cursor on the report that you require and choose *Nodes* → *Execute*.

This takes you to the initial screen of the chosen report.

6. Enter your selection criteria, if necessary, and choose *Program* → *Execute*.

The system displays a list of applicants who meet the selection criteria.

7. Place the cursor on the applicant whose documents you want to display and choose *Environment* → *Display facsimiles*.

The system displays a list of all documents stored for the applicant.

8. Select the required document types and choose *Display facsimiles*.

Result

The system displays the documents for the applicant you selected.

Display all Docs for IT Assigned to App. (PA-RC)

Procedure

If you want to display all of the documents stored for a particular infotype assigned to an applicant, proceed as follows.

1. On the *SAP R/3 System* screen, choose *Human resources* → *Personnel management* → *Recruitment*, and then *Appl. master data* → *Display*.

This takes you to the *Display Applicant Master Data* screen.

2. Enter an applicant number.
3. Select the required infotype and choose *Display*.
An infotype record is displayed for the applicant specified.

4. Choose *Extras* → *Display specific facsimiles*.
The system displays a list of all documents stored for the infotype you selected.

5. Select the required document types and choose *Display facsimiles*.

Result

The system displays the selected documents.

Display all Documents for an Applicant (PA-RC)

Display all Documents for an Applicant (PA-RC)

Procedure

If you want to display all of the documents stored for an applicant, proceed as follows.

1. On the *SAP R/3 System* screen, choose *Human resources* → *Personnel management* → *Recruitment*, and then *Appl. master data* → *Display*.

This takes you to the *Display Applicant Master Data* screen.

2. Enter an applicant number.
3. Choose *Extras* → *Display all facsimiles*.

The system displays a list of all documents stored for the applicant you specified.

4. Select the required document types and choose *Display facsimiles*.

Result

The system displays the selected documents.

Storage Within Travel Management (PA-TV)

Use

Within **Travel Management** (PA-TV), the storage functions provided by SAP ArchiveLink facilitate the use of content servers to store copies of original documents, such as hotel receipts, travel requests, confirmations of booking, and other travel documents.

This makes it far easier for the user department to manage travel documents, and facilitates quick and easy access to travel requests and trip receipts. There is no need to waste time searching through different files at various locations. This greatly accelerates the time-consuming process of using original receipts to check trip facts, and the resulting process of approving a trip so that it is released for trip cost accounting.

For example, the *Display all facsimiles* function enables the user department to quickly determine whether original receipts have already been submitted for trip expenses claimed by an employee in individual statements. This is usually a prerequisite of releasing data for trip cost accounting.

Prerequisites

Technical Implementation (PA-TV)

An external scanner is used to import written incoming documents into the system. The scanner communicates with **SAP ArchiveLink**. Individual documents are linked directly to a trip (using the trip number) and an employee (using the personnel number). This link is created using document types. The incoming document is not assigned to the receipt number used to enter the document during the trip.

The document types included in the standard system for Travel Management are based on the trip expense categories that are also included in the standard system (meals, accommodations, travel costs, etc.) The advantage is that all of the incoming documents related to the same trip expense category can be scanned together when stored.

The standard system includes the following document types for Travel Management:

Name of document type	Document type	Object type	Document class
Receipt for overnight stay	HRITRVACCO	TRAVEL	FAX
Meals receipt	HRITRVBMEA	TRAVEL	FAX
Transportation receipt	HRITRVCAR	TRAVEL	FAX
Other document	HRITRVDOTR	TRAVEL	FAX
Travel document	HRITRVEDOC	TRAVEL	FAX
Travel request	HRITRVFAPL	TRAVEL	FAX

Preparation and Customizing (PA-TV)

The system does not include Travel Management-specific customizing for **SAP ArchiveLink**. If you require information on how to make changes and enterprise-specific enhancements to

Storage Within Travel Management (PA-TV)

document types (that are included in the standard system for Travel Management), go to the documentation on *SAP ArchiveLink* and see [special customizing \[Extern\]](#).

General Notes

- Travel Management recommends that you start the ten-character, alphanumeric, document type ID with **HRITRVxxxx** (xxxx = characters that you can define as required).
- With regard to the input type default values, please note that the document types are displayed in the generic order of their document type IDs.

Store With Bar Code

From the SAP R/3 System screen, choose *Tools* → *Business Documents* → *Basic settings* → *Bar code* → *Bar code entry* to check that the data entry with bar code function is active for the TRAVEL object type, and to define the bar code type you want to use at your enterprise.

Features

In Travel Management, the following storage scenarios are supported by **SAP ArchiveLink**:

- [Store incoming trip documents for subsequent entry with bar code \(PA-TV\) \[Seite 243\]](#)
- [Assign then store incoming trip documents with bar code \(PA-TV\) \[Seite 248\]](#)
- [Assign then store incoming trip documents \(PA-TV\) \[Seite 246\]](#)



Travel Management recommends that you use bar codes to store data. This means that you are only required to scan incoming documents into the system if they have a bar code, which prevents you from having to enter additional data (such as the personnel number and trip number) manually.

The user department assigns the bar code ID to a document type within a receipt (employee trip) by entering the bar code manually. The system assigns the bar code ID to a trip number and personnel number.

This minimizes the time required to effect assignments, and reduces the possible causes of errors, when scanned incoming documents are assigned to receipts.

Store for Subsequent Entry with Bar Code (PA-TV)

Use

The “store for subsequent entry with bar code” scenario is particularly suitable for trip documents if an employee goes on a business trip without an approved travel request and then sends his or her trip facts to the user department, and his or her incoming documents to a central scanning department, once the business trip is complete.

A receipt does not yet exist for the trip. The central scanning department provides the incoming documents with a bar code, and then scans them into the system. The lack of receipt means that an assignment to a trip is not possible. The scanned incoming documents are written to a pool of incoming documents with unassigned bar codes. The user department and the employee can access them from the pool at any time.

Activities

The Travel Management application component includes two functions for storing data with a bar code:

- [Assign incoming documents to a document type \(PA-TV\) \[Seite 249\]](#)
- [Display incoming documents \(PA-TV\) \[Seite 250\]](#)

Neither function can be performed by the user department (centralized entry of trip facts) or employee (decentralized entry of trip facts) until a receipt exists (employee trip) because the incoming documents are assigned on the level of a personnel number and trip number.

Assign Incoming Docs to a Doc. Type (PA-TV)

Assign Incoming Docs to a Doc. Type (PA-TV)

Note

If an incoming document is stored with bar code, the user department (centralized entry of trip facts) or employee (decentralized entry of trip facts) must assign the incoming document, such as a hotel receipt, to a document type on the basis of the existing receipt (employee trip).

Procedure

If you want to assign an incoming document to a document type, proceed as follows.

1. Choose *Human resources* → *Travel management* → *Travel accounting*.

This takes you to the *Travel Accounting* screen.

2. Choose *Trip* → *Travel manager*.

This takes you to the *Travel Manager* screen.

3. Enter the required personnel number.

4. Confirm your entry.

5. Select the required trip and choose *Trip* → *Display*.

This takes you to the *Display Trip Data: Receipts* screen.

6. Choose *Extras* → *Optical archiving* → *Assign facsimiles*.

The *Display Possible Entries* dialog box is displayed.

7. Select the document type that you require.

8. Confirm your entry.

The *Assign Facsimiles* dialog box is displayed.

9. Confirm the entries.

The *Enter Bar Code* dialog box is displayed.

10. Enter the bar code ID that you require.

11. Choose *Continue*.

Result

The incoming document is stored using the document type selected for the trip.

Display Incoming Documents (PA-TV)



It is always possible to display scanned and assigned incoming documents for a trip.

Procedure

If you want to display incoming documents for a trip, proceed as follows.

12. Choose *Human resources* → *Travel management* → *Travel accounting*.

This takes you to the *Travel Accounting* screen.

13. Choose *Trip* → *Travel manager*.

This takes you to the *Travel Manager* screen.

14. Enter the required personnel number.

15. Confirm your entry.

16. Select the required trip and choose *Trip* → *Display*.

This takes you to the *Display Trip Data: Receipts* screen.

17. Choose *Extras* → *Optical archiving* → *Display all facsimiles*.

If the trip has just one facsimile, it is displayed directly on the *ArchiveLink* screen.

If the trip has more than one facsimile, you can use the document type to select the facsimiles that you require from the *Facsimile Hit List* screen.

Select the document type that you require and choose *Display facsimiles*. The facsimiles assigned to the document type you selected are displayed on the *ArchiveLink* screen.

Result

The system displays all of the incoming documents assigned to a trip or selected document type.

Assign Then Store (PA-TV)

Assign Then Store (PA-TV)

Use

When incoming trip documents are assigned and stored, a receipt (employee trip) already exists for a trip. For example, the user department has entered a travel request centrally, or the employee is authorized to enter his or her own trips decentrally. The employee submits his or her original receipts (incoming documents), personnel number and trip number to a central scanning department, or to the user department. In both instances, the personnel number and trip number are entered manually when the incoming documents are scanned into the system. The assignment to a document type is then effected by choosing *Office → Business Documents → Documents → Move*.

The user department must then check the incoming document assignments, and change the assignment to a document type or trip if necessary.

Activities

The assignment to a document type is effected by choosing *Office → Business Documents → Documents → Move*. It is not effected by choosing functions within the Travel Management application component. For this reason, Travel Management only enables you to display incoming documents that have already been assigned to a trip.

[Display incoming documents \(PA-TV\) \[Seite 250\]](#)

The function cannot be performed by the user department (centralized entry of trip facts) or employee (decentralized entry of trip facts) until a receipt exists (employee trip) because the incoming documents are assigned on the level of a personnel number and trip number.

Display Incoming Documents (PA-TV)



It is always possible to display scanned and assigned incoming documents for a trip.

Procedure

If you want to display incoming documents for a trip, proceed as follows.

18. Choose *Human resources* → *Travel management* → *Travel accounting*.

This takes you to the *Travel Accounting* screen.

19. Choose *Trip* → *Travel manager*.

This takes you to the *Travel Manager* screen.

20. Enter the required personnel number.

21. Confirm your entry.

22. Select the required trip and choose *Trip* → *Display*.

This takes you to the *Display Trip Data: Receipts* screen.

23. Choose *Extras* → *Optical archiving* → *Display all facsimiles*.

If the trip has just one facsimile, it is displayed directly on the *ArchiveLink* screen.

If the trip has more than one facsimile, you can use the document type to select the facsimiles that you require from the *Facsimile Hit List* screen.

Select the document type that you require and choose *Display facsimiles*. The facsimiles assigned to the document type you selected are displayed on the *ArchiveLink* screen.

Result

The system displays all of the incoming documents assigned to a trip or selected document type.

Assign Then Store With Bar Code (PA-TV)

Assign Then Store With Bar Code (PA-TV)

Use

When the “assign then store incoming trip documents with bar code” scenario is used, a receipt (employee trip) already exists for a trip. For example, the user department has entered a travel request centrally, or the employee is authorized to enter his or her own trips decentrally. The employee submits his or her bar-coded original receipts (incoming documents) to a central scanning department, or to the user department. Incoming documents are assigned to a receipt (employee trip) by the user department or employee using the receipt. After the document type has been selected, the bar code ID of the incoming document is entered. Finally, the incoming documents with bar code are scanned into the system.

Activities

The Travel Management application component includes two functions for storing data with a bar code:

- [Assign incoming documents to a document type \(PA-TV\) \[Seite 249\]](#)
- [Display incoming documents \(PA-TV\) \[Seite 250\]](#)

Neither function can be performed by the user department (centralized entry of trip facts) or employee (decentralized entry of trip facts) until a receipt exists (employee trip) because the incoming documents are assigned on the level of a personnel number and trip number.

Assign Incoming Docs to a Doc. Type (PA-TV)

Note

If an incoming document is stored with bar code, the user department (centralized entry of trip facts) or employee (decentralized entry of trip facts) must assign the incoming document, such as a hotel receipt, to a document type on the basis of the existing receipt (employee trip).

Procedure

If you want to assign an incoming document to a document type, proceed as follows.

24. Choose *Human resources* → *Travel management* → *Travel accounting*.

This takes you to the *Travel Accounting* screen.

25. Choose *Trip* → *Travel manager*.

This takes you to the *Travel Manager* screen.

26. Enter the required personnel number.

27. Confirm your entry.

28. Select the required trip and choose *Trip* → *Display*.

This takes you to the *Display Trip Data: Receipts* screen.

29. Choose *Extras* → *Optical archiving* → *Assign facsimiles*.

The *Display Possible Entries* dialog box is displayed.

30. Select the document type that you require.

31. Confirm your entry.

The *Assign Facsimiles* dialog box is displayed.

32. Confirm the entries.

The *Enter Bar Code* dialog box is displayed.

33. Enter the bar code ID that you require.

34. Choose *Continue*.

Result

The incoming document is stored using the document type selected for the trip.

Display Incoming Documents (PA-TV)

Display Incoming Documents (PA-TV)



It is always possible to display scanned and assigned incoming documents for a trip.

Procedure

If you want to display incoming documents for a trip, proceed as follows.

35. Choose *Human resources* → *Travel management* → *Travel accounting*.

This takes you to the *Travel Accounting* screen.

36. Choose *Trip* → *Travel manager*.

This takes you to the *Travel Manager* screen.

37. Enter the required personnel number.

38. Confirm your entry.

39. Select the required trip and choose *Trip* → *Display*.

This takes you to the *Display Trip Data: Receipts* screen.

40. Choose *Extras* → *Optical archiving* → *Display all facsimiles*.

If the trip has just one facsimile, it is displayed directly on the *ArchiveLink* screen.

If the trip has more than one facsimile, you can use the document type to select the facsimiles that you require from the *Facsimile Hit List* screen.

Select the document type that you require and choose *Display facsimiles*. The facsimiles assigned to the document type you selected are displayed on the *ArchiveLink* screen.

Result

The system displays all of the incoming documents assigned to a trip or selected document type.

SAP ArchiveLink - RE Storage Scenarios

Refer to the following sections for information on the different storage scenarios used in the Real Estate Management Component (RE):

- General [introduction \[Seite 10\]](#) for this scenario documentation
- [SAP ArchiveLink \[Extern\]](#) documentation
- [Real Estate Management \[Extern\]](#) documentation

Storing Outgoing Documents (RE)

Storing Outgoing Documents (RE)

Use

If you want to have a good overview of your **outgoing** correspondence, you can optically archive it as a document and assign it to the relevant objects in the Real Estate component.



You can store your own user-defined correspondence in external storage systems as well as using the storage function of the **SAP ArchiveLink** in the standard system. For further information, refer to the documentation of the [SAP ArchiveLink \[Extern\]](#) component.

You can optically archive documents related to the following:

- Lease-out
- Contract partner of lease-out with customer account
- Rental offer
- Business entity, property, building, rental unit

Prerequisites

The SAP ArchiveLink (BC-SRV-ARL) component is installed in your system.

In Customizing for Real Estate, you have flagged the *Optical archive installed* indicator and chosen *SAPscript* as the word processing system (*R/3 Real Estate* → *Correspondence* → *Basic Settings for Correspondence in Real Estate*).

Process Flow

Storing outgoing documents

Print the correspondence using the menu options available.

Each time you print a letter, it is saved in electronic format (PDF - Portable Document Format - PDF) and assigned to the respective object.

Document display

When you are editing or displaying an object, you can also display the assigned documents (correspondence).



For further information on how to manage other documents required in the business processes of the Real Estate component, refer to [Document Management \(RE\) \[Extern\]](#).

Storing Lease-Out Correspondence

Use

SAP provides standard lease-out correspondence using SAPscript word processing.

Under certain circumstances, the correspondence is optically stored during print and can be displayed when you process lease-outs or customer master data of the assigned partners. This gives you a good overview of the correspondence relevant to lease-outs.

Prerequisites

Preparation and Customizing for RE

The SAP ArchiveLink (BC-SRV-ARL) component is installed in your system.

In Customizing for Real Estate, you have flagged the *Optical archive installed* indicator and chosen *SAPscript* as the word processing system (*R/3 Real Estate → Correspondence → Basic Settings for Correspondence in Real Estate*).

Technical parameters (RE-RT-RC)

Object type	Link table	Document class
BUS1130 Lease-out	TOA01	PDF

Document type

Correspondence	Document type
Lease-out	VIOMV
Lease-out letter	VIOMVANS
General letter	VIOMVAG
Rent adjustment	VIODJGNRL
Advance notice of structural changes	VIODAEANK
New LO number for RE introduction	VIODINTRO
RE (Real Estate) dunning notice; also assigned to customer	VIODMAHN
Tenant account sheet; also assigned to customer	VIODMKBL
Service charge settlement	VIODKABR
Invoices for lease-outs; also assigned to customer	VIODSOST
Sales settlement	VIODSLST
Correspondence on tenant changeover	VIODTNTCHG

Storing Lease-Out Correspondence

Reminder for rent adjustment	VIOADJDUNN
Rental collateral	VIORCCCU
LO conditions in original currency	VIORACC

Activities

If the appropriate settings have been made in Customizing (see above), the correspondence is stored automatically when it is printed.

Print (= store) correspondence

There are two ways of printing correspondence in RE:

- Central access:** Choose *Real estate management* → *Correspondence*.
 Then select the letter you require from the respective section: *Lease-outs, Tenant changeover, Rental accounting, Service charge settlement, Rent adjustment, General correspondence, Third-party management, Local currency changeover, Legacy data transfer*.
- Access from the applications:** You can access the correspondence from the particular application you are working in, for instance while you are editing a lease-out, notice or rent adjustment.

Display stored documents

Display lease-out documents	Display customer documents
Choose <i>Real estate management</i> → <i>Rental</i> → <i>Lease-out</i> → <i>Change / Display</i> . Then choose <i>System</i> → <i>Links</i> in the editing / display screen.	Choose <i>System</i> → <i>Links</i> in the editing / display screen.

Storing Rental Offer Correspondence

Use

SAP supplies standard correspondence using SAPscript word processing for the application and offer management of Real Estate Management.

Under certain circumstances, the correspondence is optically stored during print and can be displayed when you process rental offers. This gives you a good overview of the correspondence available on rental offers at any time.

Prerequisites

Preparation and Customizing for RE

The SAP ArchiveLink (BC-SRV-ARL) component is installed in your system.

In Customizing for Real Estate, you have flagged the *Optical archive installed* indicator and chosen *SAPscript* as the word processing system (*R/3 Real Estate* → *Correspondence* → *Basic Settings for Correspondence in Real Estate*).

Technical parameters (RE-RT-RC)

Object type	Link table	Document class
BUS1131 Rental offer	TOA01	PDF

Document type

Correspondence	Document type
Lease-out offer	VIOANGANS
Cancellation of a lease-out offer	VIOWDRANG

Activities

If the appropriate settings have been made in Customizing (see above), the correspondence is stored automatically when it is printed.

Print (= store) correspondence

There are two ways of printing correspondence in RE:

- **Central access:** Choose *Real estate management* → *Correspondence*.
Then choose the letter you require from the *Offers* section.
- **Access from the rental offer application:** You can access the correspondence when you are editing an offer.

Display stored documents

Choose *Real estate management* → *Rental* → *Offer* → *Change / Display*.

Then choose *System* → *Links* in the offer editing / display screen.

Storing Rental Offer Correspondence

Storing Master Data Correspondence

Use

The standard system provides general letters created with SAPscript word processing that are relevant to the master data objects business entity, property, building and rental unit.

Under certain circumstances, the correspondence is optically stored during print and can be displayed when you process lease-outs or customer master data of the assigned partners. This gives you a good overview of the correspondence relevant to Real Estate objects.

Prerequisites

Preparation and Customizing for RE

The SAP ArchiveLink (BC-SRV-ARL) component is installed in your system.

In Customizing for Real Estate, you have flagged the *Optical archive installed* indicator and chosen *SAPscript* as the word processing system (*R/3 Real Estate* → *Correspondence* → *Basic Settings for Correspondence in Real Estate*).

Technical parameters (RE-RT-RC)

Object type	Link table	Document class
BUS1123 Business entity	TOA01	PDF
BUS1128 Property		
BUS1126 Building		
BUS1133 Rental unit		

Document type

Correspondence	Document type
Owner settlement	VIOOWNER01

Activities

If the appropriate settings have been made in Customizing (see above), the correspondence is stored automatically when it is printed.

Print (= store) correspondence

There are two ways of printing correspondence in RE:

- **Central access:** Choose *Real estate management* → *Correspondence*.
- **Access from the applications:** Choose *Real estate management* → *Third-party management* → *Owner settlement* → *Print letter*.

Display stored document

1. Choose *Real estate management* → *Master data*.
2. Then choose *System* → *Links* in the editing / display screen.

Storing Master Data Correspondence

SAP ArchiveLink - Storage Scenarios (PY-DE)

The following sections describe the storage scenarios in the R/3 application component PY-DE (Payroll Germany).

See also

- General [introduction \[Seite 10\]](#) to the documentation on these scenarios
- Documentation on [SAP ArchiveLink \[Extern\]](#)
- Documentation on [PY-DE Payroll Germany \[Extern\]](#)

Storage of Contribution Statements for Social Insurance (PY-DE)

Storage of Contribution Statements for Social Insurance (PY-DE)

Use

When you create the contribution statements for social insurance, you can choose to store both the collective statements and also the individual statements using SAP ArchiveLink®. You can store contribution statements for statutory compulsory insurance, miners' compulsory insurance, and lists for supplementary pensions. The contribution statements are printed using SAPscript forms. The contribution statements are created with the following reports:

<u>Document:</u>	<u>Report:</u>
Contribution statements for compulsory insurance	RPCSVBD0
Contribution statements for miners' compulsory insurance	RPCSVKD0
Lists for supplementary pensions	RPCSVCD0

Prerequisites

Technical Implementation (PY-DE)

Object type

SOCINSDOCD

Link table

TOA01

Document class

PDF

Document type

HRODESVNW

Activities

Storage takes place when the contribution statements are created using the above reports.

Store contribution statements

In the report selection screen, the parameter *Print immediately* must not be flagged. Instead, you must release the contribution statements for printing individually. When you release the contribution statements, you use the *Archiving mode* to define whether the statements are

- Printed
- Stored, or

Storage of Contribution Statements for Social Insurance (PY-DE)

- Printed and stored

Display stored contribution statements

You can display the stored contribution statements under *Office* → *Business documents* → *Documents* → *Find*:

1. In the *Business object* field, enter **SOCINSDOCD**.
2. In the *Document type* field, enter **HRODESVNW**.
The *Key Field Entry* dialog box is displayed.
3. Enter the required data in the *Period parameter*, *Payroll year*, and *Payroll period* fields, and choose *Execute*.
The system selects the required contribution statement.
4. Select the required document and choose *Display from store*.

Storage of Letters to DEUEV Payee Fund (PY-DE)

Storage of Letters to DEUEV Payee Fund (PY-DE)

Use

When you create data media with DEUEV notifications, a letter to the respective payee fund is also created for each health insurance fund type. The letter is printed using a SAPscript form and can be stored using SAP ArchiveLink ®.

Prerequisites

Technical Implementation (PY-DE)

Object type

SOCINSDOCD

Link table

TOA01

Document class

PDF

Document type

HRODEDEÜV

Activities

You store the letters when the data medium is created with DEUEV notifications using report *RPCD3TD0* (Create DEUEV Data Medium).

Store letters

In the report selection screen, the parameter *Print immediately* must not be flagged. Instead, you must release the letters for printing individually. When you release the letters, you use the *Storage mode* to define whether the letters are

- Printed
- Stored, or
- Printed and stored

Display stored letters

You can display the stored contribution statements under *Office* → *Business documents* → *Documents* → *Find*:

1. In the *Business object* field, enter **SOCINSDOCD**.
2. In the *Document type* field, enter **HRODEDEÜV**.

The *Key Field Entry* dialog box is displayed.

Storage of Letters to DEUEV Payee Fund (PY-DE)

3. Enter the required data in the *Period parameter*, *Payroll year*, and *Payroll period* fields, and choose *Execute*.

The system selects the corresponding letters.

4. Select the required document and choose *Display from store*.