

SAP ArchiveLink - Storage Scenarios PM



HELP.BCSRVARLSCPM

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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 \[Ext.\]](#) to this scenario documentation
- [SAP ArchiveLink \[Ext.\]](#)
- [Maintenance Orders \(PM-WOC-MO\) \[Ext.\]](#)
- [Maintenance Notifications \[Ext.\]](#)
- [Service Processing \[Ext.\]](#)

Storage of Outgoing Documents (PM-WOC-MO)

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 \(PM-WOC-MO\) \[Page 8\]](#).

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 \(Maintenance Order\) \[Ext.\]](#). 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 \[Ext.\]](#).

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*).

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 \[Ext.\]](#) 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)

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.

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)

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 \(PM-WOC-MO\) \[Page 13\]](#).

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 \(Maintenance Order\) \[Ext.\]](#)

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 \(ImageAssign\) \[Ext.\]](#)

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 \[Ext.\]](#) 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 \[Ext.\]](#) (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.

Storage of Incoming Documents (PM-WOC-MO)

See also:

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

- **Processing of Maintenance Orders:**

[PM - Maintenance Orders \[Ext.\]](#)

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 \(PM-WOC-MO\) \[Page 14\]](#)

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

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)

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 \(PM-SMA-SC\) \[Page 18\]](#).

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 \(Service Notification\) \[Ext.\]](#)

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 \(ImageAssign\) \[Ext.\]](#)

Storage of Incoming Documents (PM-SMA-SC)

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 \[Ext.\]](#) and [Presettings for Storage Strategies \[Ext.\]](#) 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 \[Ext.\]](#) (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 \[Ext.\]](#) 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 \[Ext.\]](#) in the *SAP ArchiveLink* documentation.

- **Processing of Service Notifications:**

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

Business Background (PM-SMA-SC)

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.

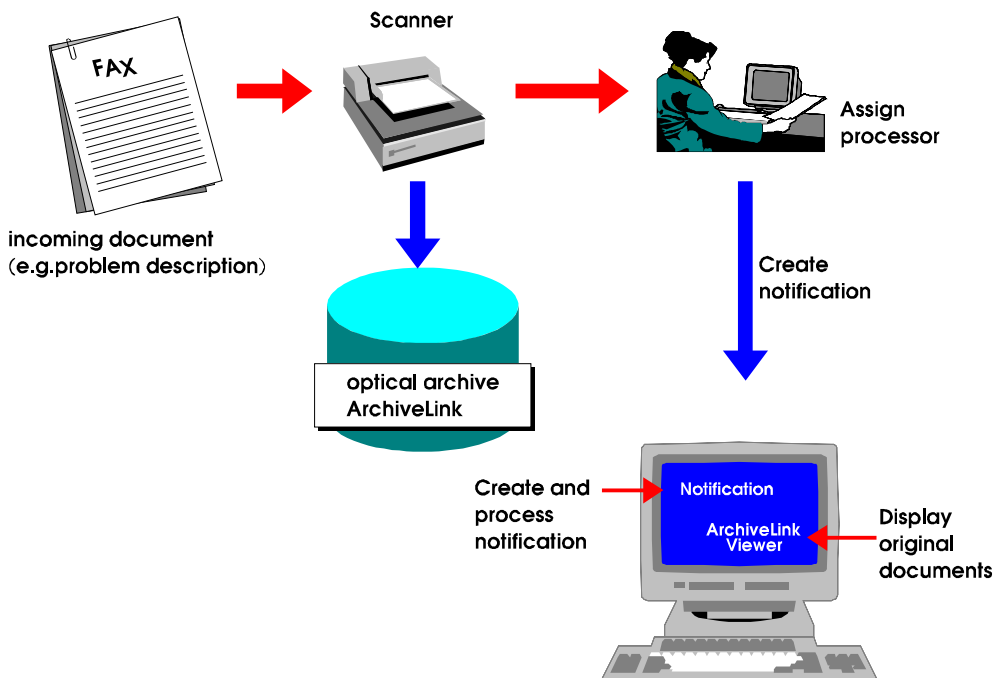
The SAP ArchiveLink interface supports a storage scenario for incoming documents in the SM application component:

- “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 \(PM-SMA-SC\) \[Page 20\]](#)

Process Flow for Storage for Subsequent Entry (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)

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 \(PM-SMA-SC\) \[Page 23\]](#).

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 \(Service Notification\) \[Ext.\]](#). 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 \[Ext.\]](#).

Storage of Outgoing Documents (PM-SMA-SC)

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 \(PM-SMA-SC\) \[Page 21\]](#).

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

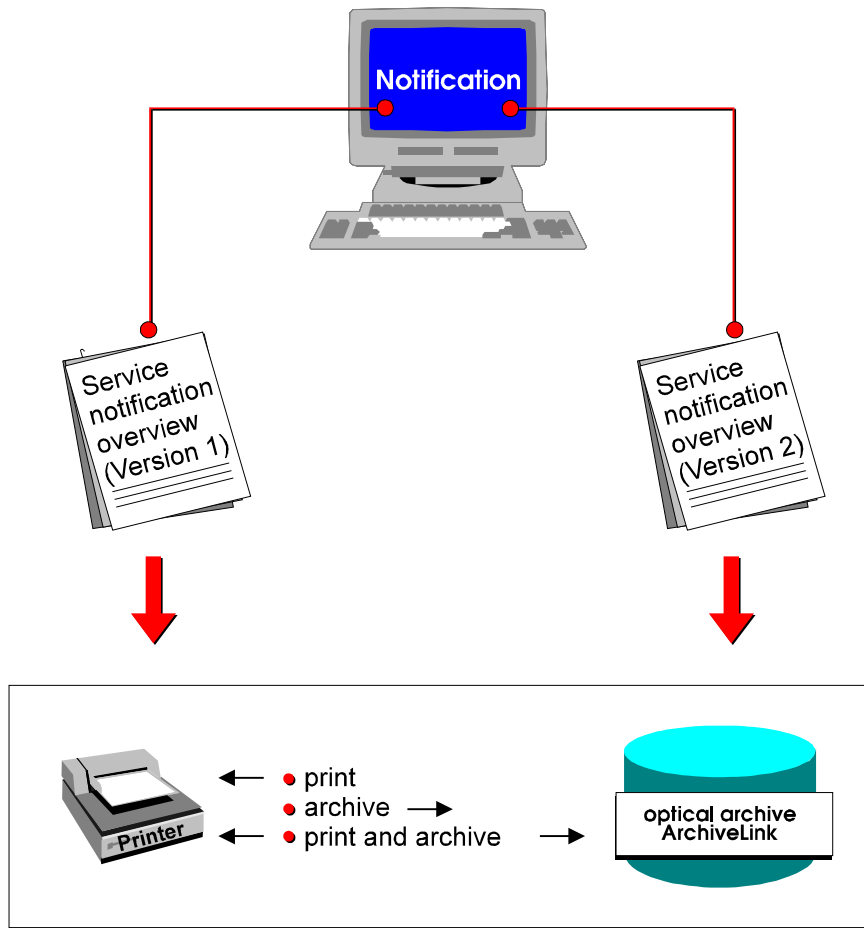
When you create or change a service notification, you can print shop papers for the service notification. Depending on the **storage mode** that you have defined for shop papers, you can use the print function to select one of the following output modes:

- **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

Business Background (PM-SMA-SC)



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 \(PM-WOC-MN\) \[Page 29\]](#).

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:	PMITEHCNF
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 \(Maintenance Notification\) \[Ext.\]](#)

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 \(ImageAssign\) \[Ext.\]](#)

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 \[Ext.\]](#), [Basic Customizing \[Ext.\]](#) and [Presettings for Storage Strategies \[Ext.\]](#) 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 \[Ext.\]](#) (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 \[Ext.\]](#) 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 \[Ext.\]](#) in the *SAP ArchiveLink* documentation.
- **Processing of Maintenance Notifications:**
The section [Maintenance Notifications \[Ext.\]](#) in the *PM - Maintenance Notifications* documentation.

Storage of Incoming Documents (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.

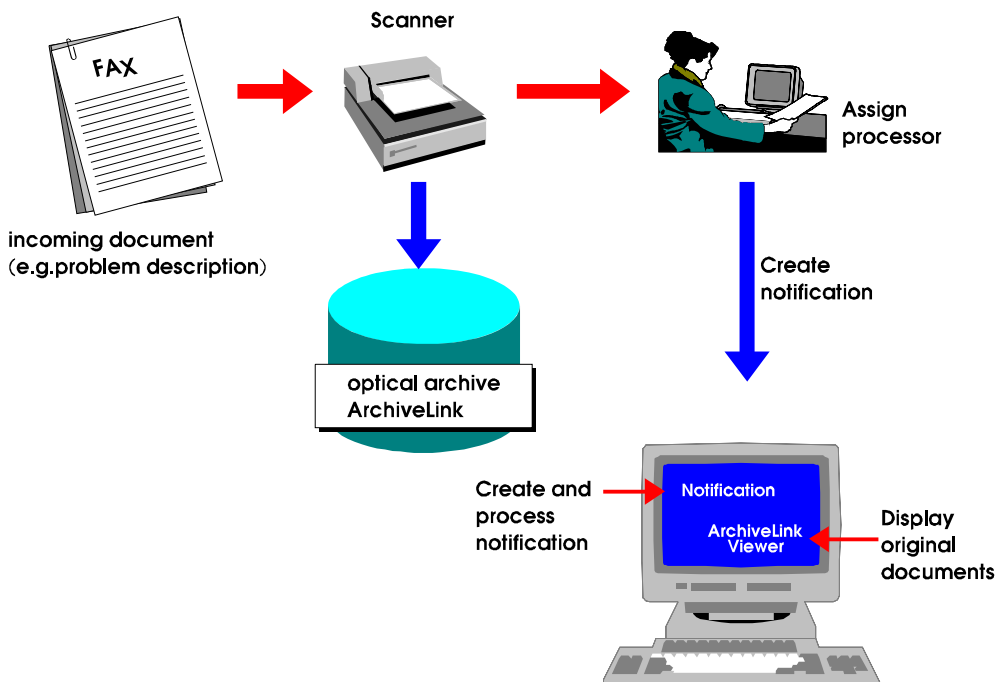
The SAP ArchiveLink interface supports a storage scenario for incoming documents in the PM application component:

- “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 \(PM-WOC-MN\) \[Page 31\]](#)

Business Background (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)

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 \(PM-WOC-MN\) \[Page 34\]](#).

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 \(Maintenance Notification\) \[Ext.\]](#). 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 \[Ext.\]](#).

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 \[Ext.\]](#) 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)

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 \(PM-WOC-MN\) \[Page 32\]](#).

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.

Storage of Outgoing Documents

