

SAP's Easy Document Management

CIMdata Commentary

Document management is a foundation element for any enterprise. The term “document” is a broad definition that includes files and information of many different types, formats, and media, all of which must be managed in a consistent manner. Managing documents includes capturing them, categorizing them using meta-data information, placing them in secure repositories, providing search mechanisms and schemes, and providing access to documents based on a user’s role and authorizations. Some of the challenges in doing effective document management include:

- Ease of use
- Establishing one logical repository (which may incorporate multiple physical repositories)
- Incorporation of powerful authorization and security methods
- Easy adaptation to customer needs

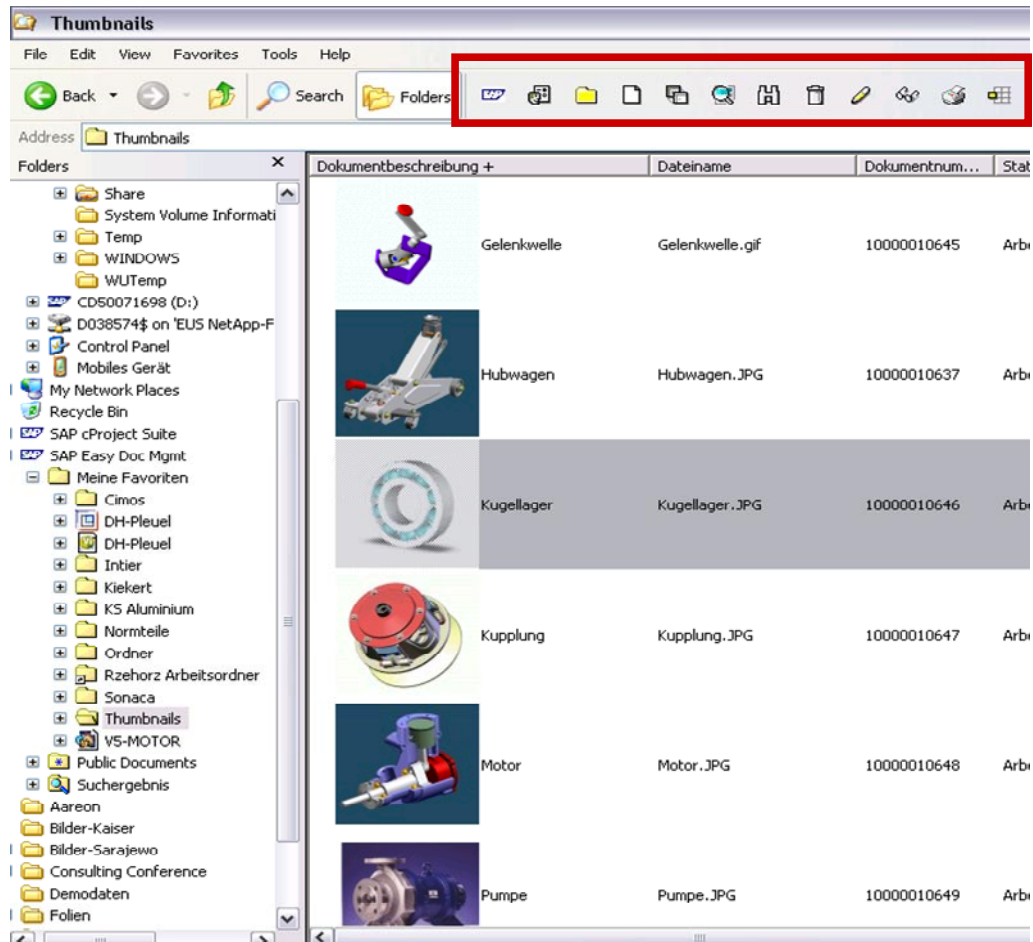
SAP has always had a robust document management capability. However, the capabilities were not always easy to use or adaptable to customer needs. In order to address these issues, SAP has developed SAP® Easy Document Management, which enhances the powerful document management capabilities of mySAP™ Product Lifecycle Management (mySAP PLM) and makes them available through an easy-to-use interface.

The user can create private and public “folders” which are SAP documents that have a similar hierarchical structure to those used in Windows Explorer. Links can be created from these documents to files and other folders. In addition, document search capabilities are provided and the results are displayed in a temporary folder. It is possible to connect other SAP objects to documents or folders as well as adding additional administration fields to the document. E-mails can also be easily stored using the Easy Document Management interface. The standard SAP R/3 customizing for SAP Easy DMS applies as well as the authorization procedure of R/3. Working offline with documents is also supported as well as automated updating of these documents when the user is online again.

Easy Document Management is integrated with MS Explorer®. Users can check documents in and out using drag-and-drop or cut-and-paste techniques. Documents can be checked in and out from Microsoft applications with the “save as” function. Documents and folders can also be moved and copied. Easy Document Management facilities include the ability to define and manage versions of documents and define authorizations at both the document and folder level. The solution lets a user:

- Manage personal and group document structures and documents
- Check documents in and out of the document management system directly from office applications and check them in from Microsoft Explorer
- Search for documents and add them to work lists
- Maintain classification data to add additional information to the documents
- Create links to other SAP objects; for example, link a given document with the appropriate project

As shown in the following illustration, users can establish Favorites which contain frequently-accessed documents and document structures and save search result lists for easy re-use. The Public Documents folder provides fast access on information and data applicable to all involved employees. Easy Document Management also provides previews of managed document via thumbnails to help users more quickly identify and select the needed document.



The complete document management system of mySAP PLM appears as just another hard drive on the user's Microsoft Windows Explorer. As a result, a wide variety of project participants, including occasional users with little experience, can make full, effective use of sophisticated document management tools while remaining within the office tools (e.g., MS Word, MS Excel, etc.) that they use on a daily basis.

Easy Document Management delivers benefits to SAP customers by simplifying the handling of documents in the SAP® Document Management System. Its user interface is similar to MS Explorer, which makes it easy for the occasional user and reduces the time and effort required for the maintenance of documents within SAP. SAP Easy Document Management and the document management capabilities of mySAP PLM can be used as stand-alone or in conjunction with the complete mySAP PLM offering.

SAP provides an Implementation Kit for SAP Easy Document Management. It is preconfigured with best-practices for the special requirements of project-oriented document management. The Implementation Kit includes document classification, release

process, versioning, document distribution, and object links to other different SAP objects. Standardized template structures are included and they can be copied to create new documents inside a new project structure.

CIMdata believes that SAP Easy Document Management provides a significantly improved capability for SAP users. This new product enables users to work within their daily applications while having access to SAP's document management facilities. This results in more users with access to product-related information managed within SAP and enables the use of that information more effectively throughout the complete product lifecycle.

About CIMdata

CIMdata, an independent worldwide firm, provides strategic consulting to maximize an enterprise's ability to design and deliver innovative products and services through the application of Product Lifecycle Management (PLM). CIMdata provides world-class knowledge, expertise, and best-practice methods on PLM. CIMdata also offers research, subscription services, publications, and education through international conferences. Visit <http://www.CIMdata.com> for more information.