



## WHITE PAPER

### Document Management in SAP Enterprise Asset Management

By John Adendorff

Document Management System (DMS) is provided as part of the standard SAP ERP installation as a repository to enable simple document management integrated with the SAP environment.

The primary purpose is to connect documents to transactional or master data elements with SAP ERP, enabling a paperless experience for the end-user with relevant documents being available at the appropriate point in time.

This is especially important for organisations in asset intensive industries, which must store technical drawings and controlled documents

like procedures, policies and work instructions, equipment masters, material masters, asset numbers and even photographs of physical assets in their the Enterprise Asset Management (EAM) system.

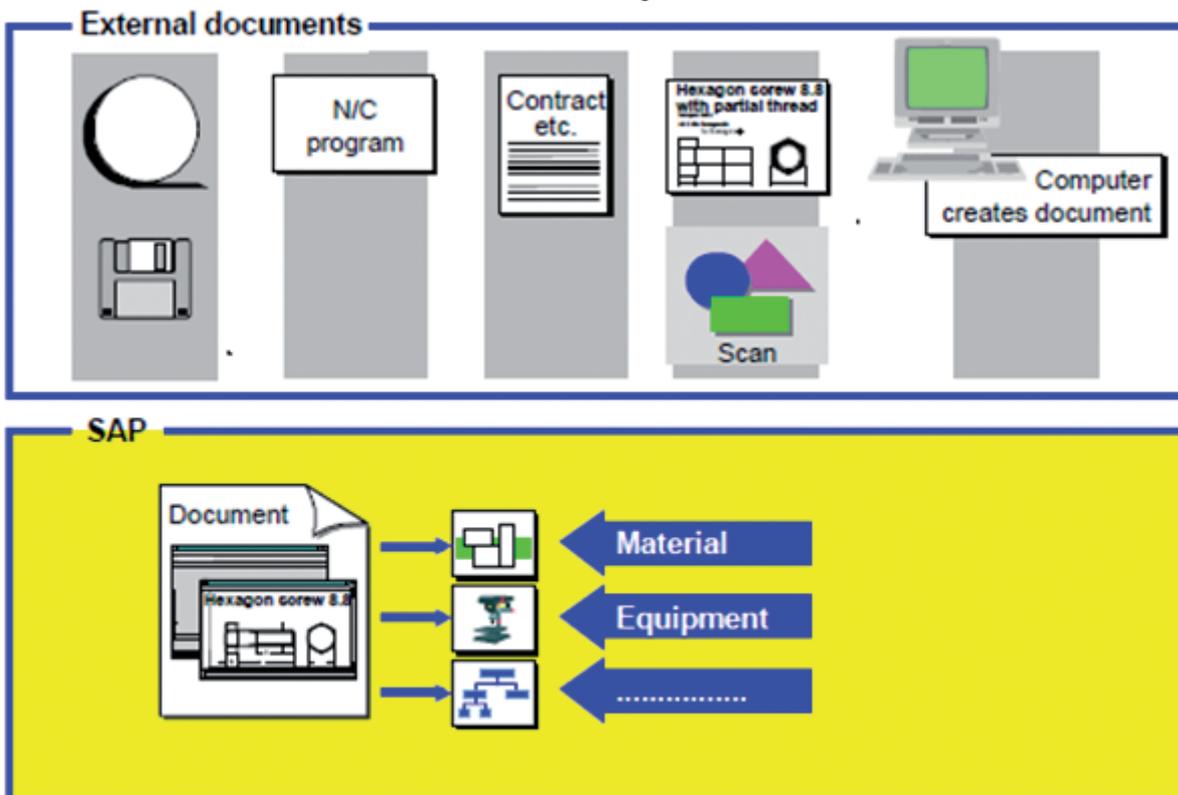
In many businesses the following are seen as being the more common issues with managing documents within an organisation.

- Important documents reside in multiple repositories
- Difficulty when trying to find and retrieve information
- Multiple versions of same document floating around information silos

- Licensing costs for document management tools.

As SharePoint is the most commonly used application for the storage and tracking of electronic documents or images of paper documents, we will briefly discuss its pros and cons. SharePoint is usually capable of keeping track of the different versions of a document created by different users. In addition to being a platform for digital record management systems that meet government and industry compliance standards, SharePoint also provides a central location for storing and working on documents. This can significantly reduce emails and duplicated work

SAP DMS is designed for technical drawings and controlled documents such as procedures, policies and work instructions which need to be linked to Asset Management.

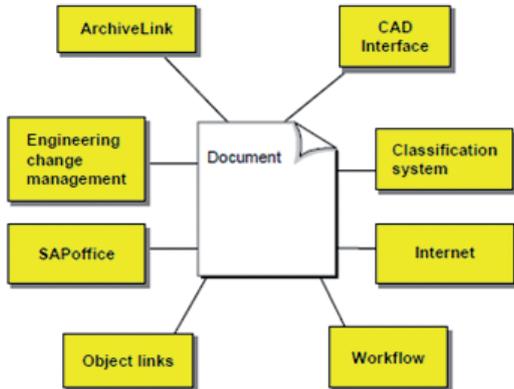


for Device).

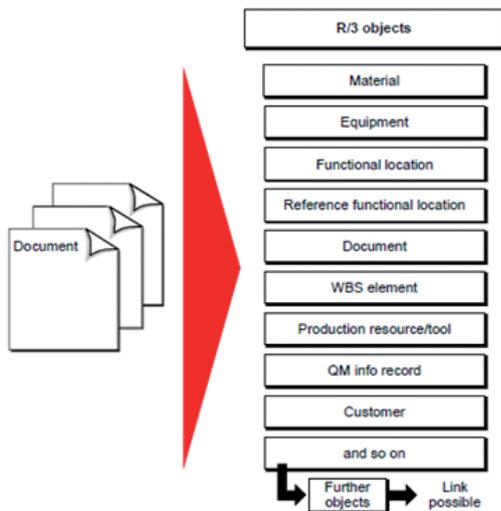
Other advantages of SAP DMS include:

- Secure storage for documents
  - Check-in/out functionality
  - Ability to classify documents for searching
  - Linking of documents to other objects for visibility across the system
  - Integration of Microsoft applications for updating documents
  - Elaborate security profiles to protect access to documents
  - Controlling of documents through change management process
  - Use of versions and revisions
  - Full text search across stored documents
  - Single source of truth in one storage point
  - Easy retrieval of documents
  - Excellent search capabilities to cut down on time searching for documents
  - A controlled environment for updates to documents
  - Complex security rules to control access
  - Increased visibility of key documents
  - One source and one set of rules for managing documents
  - Reduced time and effort spent on document management
  - Ability to maintain document history to meet legal requirements
  - Setting up the team to establish DMS functionality in your organisation.
- In general, SAP DMS projects are not especially complex projects in the SAP world.
- The complexity of an SAP DMS project will be driven by:
- The number of different types of documents you want to manage
  - And by the rules for each document
  - How do I want to search for the document?
  - What is its lifecycle?

The following graphic shows the integration of Document Management in the SAP System.



The following graphic shows some of the SAP objects that you can link to a document info record in the standard system.



in an organisation. Other strengths of Sharepoint include:

- Its familiarity to MS Office users with reduced training required as a result
- MS Office Integration e.g. Check in, check out and update document metadata from within Word/Excel/etc
- Offline capabilities i.e. checkout to "SharePoint Drafts" folder so you can work from home
- Licensing - no SAP licenses required. A significant benefit if most users are not using SAP.

However, Sharepoint is for adhoc desktop documents that would normally be contained in network file storage, you cannot link SAP objects to SharePoint documents – an important requirement for SAP-installed organisations, particularly

those in the asset intensive industries.

The alternative for these enterprises is the Document Management System (DMS) module, which is available as standard in SAP. The benefits of SAP DMS are as follows:

- Cross-application component of SAP ECC
- Provides robust document, content and digital asset management capabilities
- Capability to manage documents for your business
- Part of base SAP system therefore no extra cost
- No Additional Licenses required if all users are using SAP
- Direct link of document to Business Entities without specifying additional metadata (e.g. supporting documentation

- What are the security rules?

In a simple project, you might only want to manage documents such as device category certificates and photographs attached to the appropriate device record in SAP.

This is a simple and straightforward project because you are working on developing rules for only two document types.

An SAP DMS implementation project will require a varied set of resources, including:

- Business users - Personnel who know about the rules for the documents that are being stored, such as who needs to approve a document before it becomes official. Business users will work with the SAP application consultant to map out a process for the documents being stored.
- SAP application consultant - Works with business users to define a process for each document being stored. Once this process is defined, map it to the SAP system and complete the configuration.
- SAP Basis/IT infrastructure resources - Set up the infrastructure components required to support SAP DMS. This includes items such as content servers, cache servers.
- Setting up the infrastructure components is usually one of the first activities accomplished in a project.

#### About the author:



John Adendorff is a Senior Consultant at Soltius New Zealand with more than fifteen years' SAP experience, covering multiple projects in multiple countries.