CaptureBites[™] ERP Document Export Connector for use with SAP R/3

SAP R/3 Configuration Guide

Version 01.61 20. February 2013

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1 Introduction

The CaptureBites ERP Document Export connector makes use of the *KGS Activator light for SAP R/3*. This provides connectivity to SAP ArchiveLink Interface and all SAP ArchiveLink 4.5 certified Archive Systems.

2 SAP Software (Release 4.6C)

The SAP Modules are available as an SAP Transport and can be imported using the SAP Transport Management System.

2.1 Adding KGS Activator Lite functionality

A fter installing the CaptureBites ERP Document export connector, you need to prepare your SAP system for the transport.

You find the required files on your desktop in the folder:

\Desktop\CaptureBites\ERP Document Export\SAP Transport\SAP47_V1_30_KGSActivatorL

Copy the file that you find in $SAP47_V1_30_KGSActivatorL$ to the transport directory of the SAP Application Server (sapmnt)

Copy the file that you find in $SAP47_V1_30_KGSActivatorL$ data to the transport directory of the SAP Application Server (sapmnt)

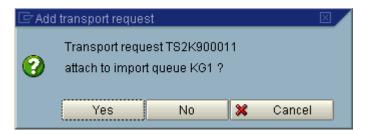
You should now find the files "Kxxxxx.XXX" and "Rxxxxx.XXX" in your $\sum \sqrt{\frac{1}{2}}$ and $\sum \sqrt{\frac{1}{2}}$.

To add this transport to the SAP's Transport Management System, please start transaction "STMS", press "F5" for Import Overview and select the import queue for your target system by double clicking it's queue name.

Now choose from the menu "Extras -> Other requests -> Add" and type specify the transport name as shown

| 🖙 Add Transport Request to Import Queue 🛛 🛛 📈 | | | | | | |
|---|------------|--------------|--|--|--|--|
| | | | | | | |
| Transp. request | TS2K900011 | | | | | |
| ImportQueue | KG1 | Einzelsystem | | | | |
| | | | | | | |

Continue (Enter) and confirm the following screen to add this transport to the desired import queue



The transport should now appear in the import queue

| ⊡ <u>Q</u> ueue <u>E</u> dit <u>G</u> oto <u>R</u> equest E <u>x</u> tra: | s E <u>n</u> vironment S <u>y</u> stem <u>H</u> elp | | | | | |
|--|---|-------------------|-------------------------------|--|--|--|
| | 3 0 0 0 1 1 1 1 1 1 1 2 1 2 2 3 | 1 🛒 🔁 🔞 📭 | | | | |
| Import Queue: System KG1 | | | | | | |
| S 4 7 4 9 7 6 4 3 | 1 🕏 🖻 🚔 😂 🖻 📓 🚱 目 | | | | | |
| 🖶 Requests for K61: 1 | | 27.05.2003 20:03: | 49 ▼ | | | |
| Number Request Owner | Short text | s | t | | | |
| 1 TS2K900011 R00T | KGS Activator light | | | | | |
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To start the import select the queue entry and press Ctrl+F11 to import the request.

| Please fill | in the target | client in | the subseque | ent dialog (e. | g. 800) | and use | default s | settings fo | or the o | ther op | tions |
|-------------|---------------|------------|--------------|----------------|---------|---------|-----------|-------------|----------|---------|-------|
| ("Start dat | te" should be | set to "In | mmediate"). | | | | | | | | |

| Transport request TS2K900011 Target system KG1 Einzelsystem |
|--|
| Target client Date Execution Options |
| Start date Immediate At start time Planned start 27.05.2003 In 17:54:47 No start after Image: After event Event Parameters |
| |

Continue (Enter) to start the import procedure and confirm this by pressing "Yes" in the subsequent dialog.

The progress of the import procedure is shown in the status bar of the SAP GUI window. To finish the import may take several minutes, depending on the SAP environment.

2.2 ArchiveLink Customizing for ContentRepositories

As a preparation for the following ArchiveLink scenarios "Early Archiving with SAP Business Workflow" and "Late Archiving with Barcode" a ContentRepository where the images are stored (in an external Archiving solution) has to be customized using Transaction OAC0

| | ury Edit Goto Environment System Help |
|-----------------|---|
| Ø | 🛛 🖉 🖉 🚱 😫 🖓 😫 🖓 🖓 🖓 🖓 🖓 🔛 🖉 |
| Display Con | itent Repositories: Detail |
| 1 | Simple admin. Full administration |
| Content rep.) | T1 Active 40 / 42 |
| Description | Train. Archive on hs2086 |
| DocArea | ARCHLINK ArchiveLink |
| Storage type | 04 HTTP content server |
| Protocol | DMSAL45 Generation Generatio Generation Generation Generation Generation Generation Gen |
| Version no. | 0045 Content Server version 4.5 |
| HTTP srvr:port | KGS-GRAU:1090 |
| HTTP script | servlet/ContentServer |
| Transfer drctry | IX GLOBAL |
| Phys. path | D:\usr\sap\TS2\SYS\global\ |
| | |
| Time created | 10.03.00 22:02:16 |
| Created by | |
| Last changed at | 27.05.03 13:58:11 |
| Last changed by | ROOT |
| Name | Joe |
| | |
| | |
| | DACO 🖻 sapides46cv2 INS 🦯 |
| | |

push button Display/Change (CRTL-F4) push button "Full administrator"

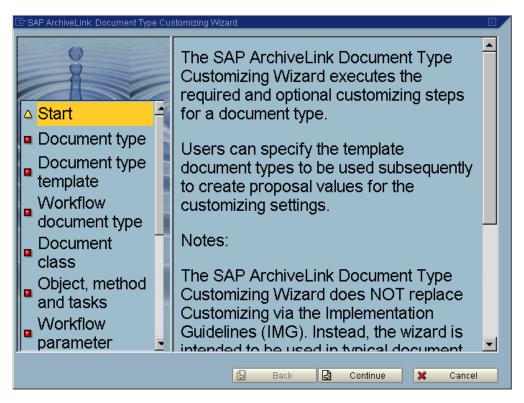
| Content reposit | tory <u>E</u> dit <u>G</u> oto E <u>n</u> vironment System <u>H</u> elp SAP | | | | | | | |
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| Change Co. | Change Content Repositories: Detail | | | | | | | |
| 1 | Simple admin. Full administration | | | | | | | |
| Content rep. | T1 Active 40 / 42 | ▲ ▼ | | | | | | |
| Description | Train. Archive on hs2086 | Ť | | | | | | |
| DocArea | ARCHLINK ArchiveLink | | | | | | | |
| Storage type | 04 HTTP content server | | | | | | | |
| Protocol | DMSAL45 CS Admin | | | | | | | |
| Version no. | 0045 Content Server version 4.5 | | | | | | | |
| HTTP srvr:port | KGS-GRAU:1090 | | | | | | | |
| HTTP script | servlet/ContentServer | | | | | | | |
| Basic path | IX GLOBAL | | | | | | | |
| Phys. basicPath | D:\usr\sap\TS2\SYS\global\ | | | | | | | |
| Archive path | IX GLOBAL | | | | | | | |
| Phys. arch.path | D:\usr\sap\TS2\SYS\global\ | | | | | | | |
| OutputDevice | | | | | | | | |
| No signature | | | | | | | | |
| Server status | online | | | | | | | |
| Description | | | | | | | | |
| Vendor | KGS Software GmbH - KGS Archiv | | | | | | | |
| Version | 4.5 | | | | | | | |
| Build | | • | | | | | | |
| pVersion | 0045 | v | | | | | | |
| Connection te | est for content repository T1 was successful 🛛 🕑 🛛 OACO 🖭 sapides46cv2 🛛 INS 🏸 | | | | | | | |

push button connection test.

It is very important due security reasons that a certificate has been sent to the external ContentServer during installation of the external archiving solution.

2.3 SAP Customizing for Early Archiving

To enable the SAP environment for the ArchiveLink scenario "Store for subsequent entry" using the SAP Business Workflow a workflow document type has to be defined using transaction "OAD5"



You can either use an existing Document Type (e. g. FIIINVOICE) or create a new one. Please follow this example for details:

| 🔄 SAP ArchiveLink: Document Type Customizing Wizard 🛛 🛛 🛛 | | | | | | |
|---|---|---|--------------------------|--|--|--|
| • | Start Document type | Enter an existing or new document type. Click here for further information | | | | |
| 0 0 0 | Document type template Workflow document type Document class Object, method and tasks | Doc.type Name | FIIINVOICE | | | |
| | | ß | Back 🛃 Continue 🔀 Cancel | | | |

If "FIIINVOICE" is used the Doc.type template may be empty.

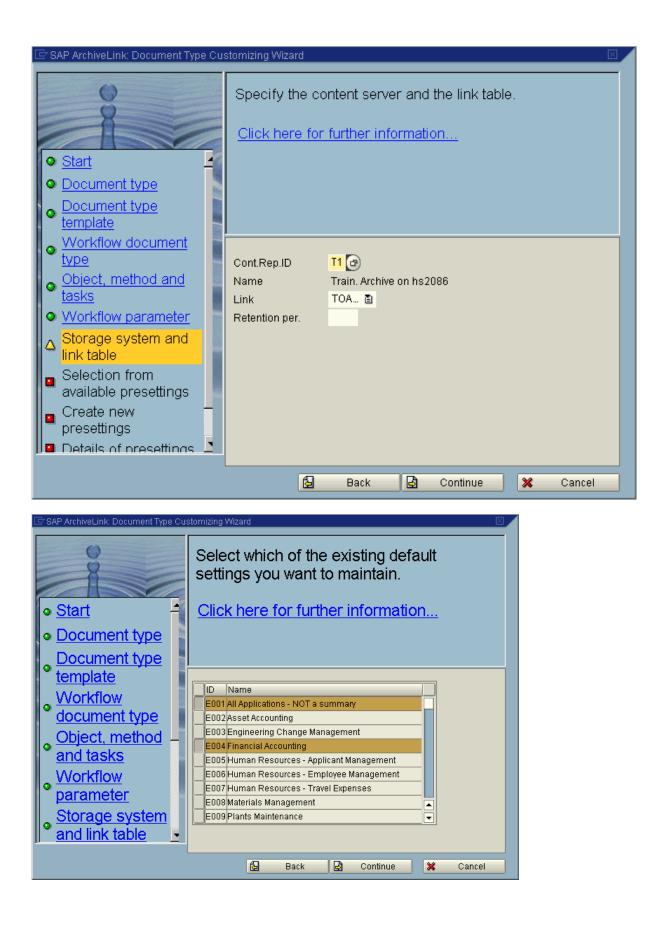
| 🔄 SAP ArchiveLink: Document Type Customizing Wizard | | | | | |
|---|---|--|--|--|--|
| | Enter the document type to be used as a template for the following actions. | | | | |
| o <u>Start</u> | Click here for further information | | | | |
| Document type | | | | | |
| Document type template | | | | | |
| Workflow document type | Doc.type 3 | | | | |
| Object, method _ and tasks | | | | | |
| Workflow parameter | | | | | |
| Storage system | | | | | |
| | | | | | |
| | 🛃 Back 🛃 Continue 🔀 Cancel | | | | |

In the following dialog please specify the ContentRepository where the documents should reside in (e. g. FI). Please see ArchiveLink Customizing (OAC0 [2.2]) for repositories for details.

| 🖙 SAP ArchiveLink: Document Type Cu | stomizing Wizard 🛛 🛛 🖉 |
|---|---|
| Start Document type Document type Document type template Workflow document type Object, method and tasks Workflow parameter Storage system and link table | If you also want to perform SAP Business Workflow Customizing, activate the relevant field. Click here for further information |
| | 🔂 Back 🛃 Continue 🗶 Cancel |

| Start Document type Document type | Click her | ecify the object type, the method and tasks for the storage scenarios. | | | |
|--|-----------|--|--|--|--|
| <u>bocciment type</u> <u>template</u> <u>Workflow</u> <u>document type</u> <u>Object, method</u> <u>Object, method</u> <u>And tasks</u> Workflow parameter Storage system and link table | Task | BKPF Accounting docu CREATE TS7869 Confirm Document | ment Create ImageAssign Type/Enter R/3 Document | | |

| 🖙 SAP ArchiveLink: Document Type Customizing Wizard 🛛 🛛 🛛 | | | | | | |
|---|--|--------------------------------|-----------------------|--|--|--|
| • <u>Start</u> • <u>Document type</u> • <u>Document type</u> | Enter the workflow parameters. Click here for further information | | | | | |
| template <u>VVorkflow</u> <u>document type</u> <u>Object, method</u> <u>and tasks</u> | Parameter TRANSACTIONCODE | Contents FB6 <mark>0</mark> | Name Transaction Code | | | |
| Workflow parameter Storage system and link table | <pre></pre> | | | | | |
| | G | Back 🛃 Cont | inue 🔀 Cancel | | | |

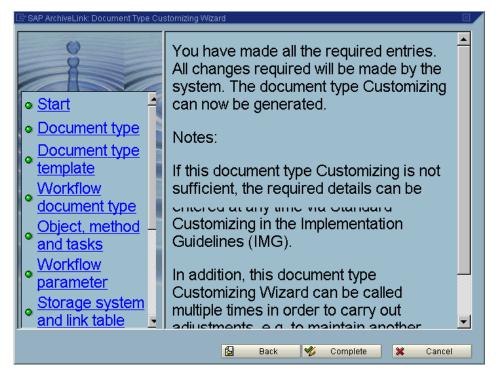


| SAP ArchiveLink: Document Type Cu | Define the default settings that you want to create and maintain. |
|-----------------------------------|---|
| ● <u>Start</u> 4 | Click here for further information |
| Document type | |
| Document type | |
| template Workflow | ID Name |
| document type | |
| Object, method | |
| and tasks | |
| <u>VVorkflow</u> parameter | |
| Storage system | |
| and link table | |
| | 🔁 Back 🛃 Continue 🗶 Cancel |

In the following screen you can specify the user/group/organiziation as the addressee for the work items. Please choose from the selction boxes the appropriate values. In the following example the USER "ROOT" will receive the created work items in his inbox.

| 🖻 SAP ArchiveLink: Document Type Cu | Istomizing Wizard |
|---|---|
| • <u>Start</u> • <u>Document type</u> | Define the default setting in detail. If you have selected or defined several default settings, you can scroll through them. |
| Document type template Workflow | Click here for further information |
| <u>document type</u> <u>Object, method</u> <u>and tasks</u> Workflow | US ROOT |
| parameter Storage system and link table | Delete line |
| | 🔓 Back 🛃 Continue 🗶 Cancel |

Press "Complete" to finish with the Document type definition



Make sure that, the customizing of the agents is done for the Workflowtask (in this example TS00007869)

| Transaction PFTC | | | | |
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| Task type | TS Standard tas | ik 🖺 | | |
| Task | 00007869 | ImageAssign | | |
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push button change or F5

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| Name | | | | | |
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| Name | Confirm Docum | ent Type/Enter R/3 Docun | nent | | |
| Work item text | &Description& | | | | |
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| | | | | | |
| Release status | Not defined | Ē | | | |
| Object method | | | | | |
| Object type | IMAGE | ArchiveLink image | | | |
| Method | IMAGEASSIGN | | ImageAssign | | |
| | Synchronous | | | | |
| | Object method | od with dialog | | | |
| Execution | | | | | |
| Background proces | sing | Executable | as form | | |
| Confirm end of proc | cessing | | | | |
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| Caution: you are mai | ntaining a cross-clie | nt object. | | | PFTC 🖻 KGS-GRAU INS 🥢 |

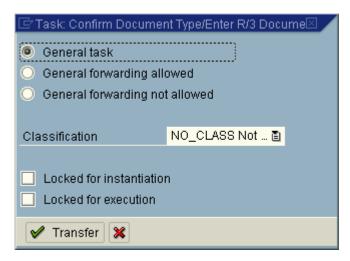
Menu /Additional data/Agent assignment/Maintain

| 🔄 Trai | nsfer container ele | ements | | \square |
|--------|-------------------------------------|--------|----|-----------|
| 3 | Transfer missin the object metho | - | om | |
| | Yes | No | × | Cancel |

press NO

| <i>⊡</i> Agent assignment <u>E</u> dit <u>G</u> oto V <u>i</u> ew System <u>H</u> elp | | |
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| Confirm Document Type/Enter R/3 Document 3 | | |
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push button Attributes



push button Transfer

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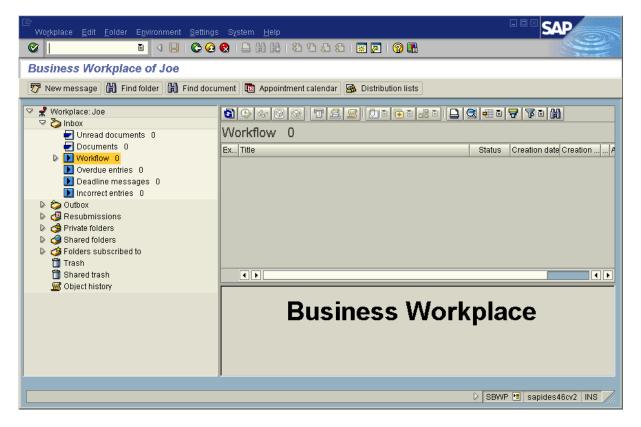
push back button or press F3

| ⊡ Standard task <u>E</u> dit <u>G</u> | oto <u>A</u> dditional data <u>U</u> tilities S <u>v</u> stem <u>H</u> elp | |
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| Standard Task: C | hange | |
| 🖻 🦅 🚰 🔂 😨 Cor | tainer 🔟 Initial values | |
| Name (| 869 ImageAssign Confirm Document Type/Enter R/3 Document GAOA <u>Appl. component</u> BC-SRV-ARL | |
| 🕒 Basic data 🛛 🖉 | Description 🥻 🛠 Alternative methods 💋 Triggering events 💋 T | erminating events 📊 💶 🗎 |
| Name Abbr. Name Work item text | ImageAssign Confirm Document Type/Enter R/3 Document &Description& | |
| Release status | Not defined | |
| Object method | | |
| Object type Method | IMAGE ArchiveLink image IMAGEASSIGN ImageAssign Synchronous object method ✓ Object method with dialog | |
| Execution Background processi | | |
| | D PF | |

push save button or press Ctrl-S

Business Case for scenario "Early Storing for subsequent entry"

Transaction SBWP



2.4 Trying out the CaptureBites ERP Document Export connector with Kofax Express

Now you are ready to use Kofax Express with the CaptureBites ERP Document Export connector for Archiving and creating SAP Workitems.

Open Kofax Express and find three jobs with a sample batch with some test images:

- 1. CaptureBites ERP Early Archiving with Barcode
- 2. CaptureBites ERP Early Archiving with Workflow
- 3. CaptureBites ERP Late Archiving with Barcode

| | | | | | | | | | Doc | ument | 1 - 1 I | ma |
|-----|----------|-------------------|--------------------------|------------|------|---|---|------|-----|--------------|---------|----|
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| | Batch | Job Name | | | Stat | | | | | arrente i un | 19 | |
| \$ | Batch(| 01 CaptureBites E | ERP Early Archiving with | n Barcode | | 5 | 5 | 3 | | | - | |
| 4 |) Batch | 01 CaptureBites E | ERP Early Archiving with | n Workflow | | 5 | 5 | | | anorthinger | 1.01 | |
| 8 | batch(| 01 CaptureBites E | ERP Late Archiving with | Barcode | | 5 | 5 | | | | 12.2100 | |

Select the ERP Early Archiving with Workflow job.

To configure the connector for your SAP system, open the Job tab and open the setup of the ERP Documents connector.

| VRS Corrections | Job | Setup | I | Bar Code Setup | Index Set | tup | Help | | | |
|-------------------|---------|-------|-------|--------------------------|----------------------------|-----|------|--------|---|---|
| Color One Side | | - | Color | Document Separation • | Connector E PDF Options | | | * * | 4 | Delete batch after export Create new batch after export Background export |
| Associated Scan P | Profile | 2 | Raw | Separation | | | | Export | | |

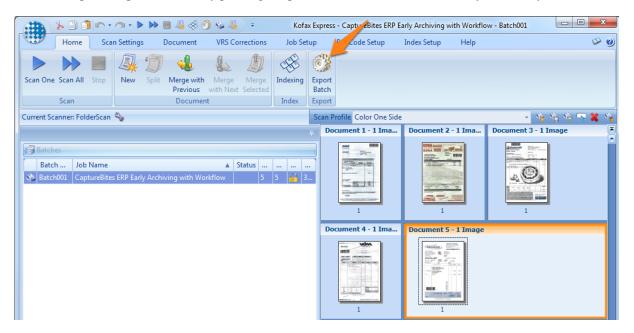
Enter the correct parameters to connect to your SAP system and test the connection by pressing *Test Connection*. If the Connection successful appears, click OK and open the Archiving tab.

| C Export Documents to | ERP - 3.1(0) - Setup - Demonstration mode | × | |
|---------------------------|---|---|------------------------|
| SAP Connection | chiving | | |
| User Information | | | |
| <u>C</u> lient number: | 800 🔲 Log communication | | |
| User name: | MYUSER | | |
| Password: | ***** | | |
| Language: i | EN 👻 | | |
| | | | |
| Connection | | | |
| SAP Server: () | MYSAPSERVER | | |
| System Number: | 0 | | |
| Gateway <u>H</u> ost: (i) | | | |
| Gateway Service: | | | |
| | | | Connected X |
| | Iest Connection | | Connection successful. |
| | Activate Help OK Cancel | | OK |

In the Archiving tab, set the correct Repository ID and the Workflow document type you want to use and press OK.

| SAP Connection Archiving |
|---|
| Image File |
| Eile Type: PDF - Portable Document Format Setup |
| ArchiveLink document class: ① PDF 🔹 |
| |
| Content Respository |
| Content repository ID: () A1 |
| |
| Archiving Scenario |
| © Late archiving with barcode () |
| Barcode: () |
| © Early archiving with barcode ① |
| Barcode: ① |
| Early archiving with workflow (i) |
| Worflow document type: ① FIIINVOICE Setup |
| |

In Kofax Express, export the batch by pressing "Export Batch" and check the result in your SAP system.



go back to transaction SBWP and push refresh button

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| Workplace: Joe Inbox Unread documents 0 Documents 0 Documents 0 Workflow 1 Overdue entries 0 Deadline messages 0 Incorrect entries 0 Outbox Resubmissions Private folders Shared folders Folders subscribed to | | Status Creation date Creation // Y 27.05.2003 23:38:09 5 |
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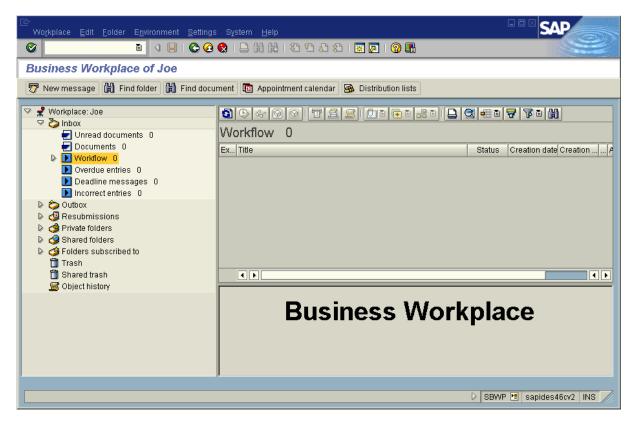
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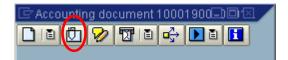
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2.5 SAP Customizing for Late Archiving with Barcode

To enable the SAP environment for the ArchiveLink scenario "Late Archiving with Barcode" please use the following customizing steps:

Transaction "OAC5"

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2.6 Business Case for scenario "Late Archiving with Barcode"

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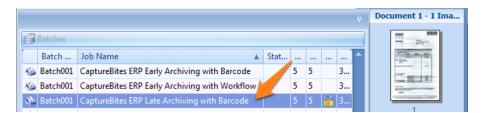
In section "Barcodes", there is 1 open internal barcode

2.7 Trying out the CaptureBites ERP Document Export connector with Kofax Express

Now you are ready to use Kofax Express with the CaptureBites ERP Document Export connector for Archiving and sending Barcodes.

Open Kofax Express and find three jobs with a sample batch with some test images:

- 4. CaptureBites ERP Early Archiving with Barcode
- 5. CaptureBites ERP Early Archiving with Workflow
- 6. CaptureBites ERP Late Archiving with Barcode



Select the ERP Late Archiving with Barcode job.

To configure the connector for your SAP system, open the Job tab and open the setup of the ERP Documents connector.

| VRS Corrections | Job | Setup | | Bar Code Setup | Index S | etup H | elp | | |
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Enter the correct parameters to connect to your SAP system and test the connection by pressing *Test Connection*. If the Connection successful appears, click OK and open the Archiving tab.

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|---|-------------------------|---|---|------------------------|
| | SAP Connection | chiving | | |
| | User Information | | | |
| | <u>C</u> lient number: | 800 🔲 Log communication | | |
| | <u>U</u> ser name: | MYUSER | | |
| | Password: | ***** | | |
| | Language: i | EN 👻 | | |
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| | Connection | | | |
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In the Archiving tab, set the correct Repository ID and and press OK.

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The Image is linked to the SAP business object

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2.8 SAP Customizing for Early Archiving with Barcode

The Early Archiving with Barcode ArchiveLink scenario is very similar to the "Late Archiving with Barcode" scenario.

The key difference is that the transation is created after scanning and thus it is not required to have an open barcode in the internal bar code table when exporting document to SAP R/3 with Kofax Express.