



SAP Records Management for Purchasers



Welcome to the SAP Records Management course!

This course will give you an understanding of the Records Management system in SAP, and how to move through the various screens and procurement documents.

Select the NEXT  button to continue

Course Navigation

This course is presented on a series of slides.

Navigate through the slides by selecting the NEXT or PREVIOUS button. Access the course menu by selecting the MENU button.



You may exit the course at any time. When you return to the course, you can choose to resume the course or start from the beginning.

Select the NEXT button now to start the course.

INTRODUCTION

This course will address the lessons noted below, followed by a knowledge check:

Records Management Overview

Getting Started in Records Management

Searching for Records

Displaying Records

Manually Attaching Documents

Knowledge Check



INTRODUCTION

Upon completion of this course, you should be able to:

- Access Records Management and understand screen navigation
- Understand how to search for and locate records
- Understand how to open records and view documents and attachments
- Understand how to manually attach various document types to an existing record





SAP Records Management Overview



MENU



Records Management Overview

What is Records Management?

- ❖ SAP Records Management is a system that provides a logical structure for the electronic management of records
- ❖ It is being implemented in the Commonwealth to manage records of procurement-related documents
- ❖ All procurement documents created in SRM, as well as their attachments, will replicate in “real-time” into Records Management



Records Management Overview

Why are we implementing Records Management?

- ❖ It allows us to view all electronic and paper records associated with SRM documents from a single location throughout it's lifecycle
 - From this location, records can also be printed, exported, and/or e-mailed
- ❖ It supports the Commonwealth's standardization of records retention and disposal of both SRM-generated and non-SRM-generated procurement documents



Records Management Overview

Who will be using Records Management?

- ❖ Anyone who has been assigned one of the three “roles” created for the system:
 - **Records Management User**, which is automatically assigned to anyone with a “purchaser” role in SRM
 - These individuals will have authorization to create, edit, and delete certain documents in the Records Management System



Records Management Overview

Who will be using Records Management?

- **Records Management Display**, which is automatically assigned to anyone with a “purchasing display” role, such as Comptroller, Auditors, etc.
 - These individuals will only have the authorization to view documents in the Records Management System
- **Administrator**, for individuals in IES who manage the system





Getting Started in Records Management



MENU



Getting Started

How to access Records Management

There are two different ways to access, or “log-on to”, the Records Management system:

- By selecting the **SAP Logon Pad** on your computer desktop
- By selecting the **Records Management** button while on any screen within a SRM Purchasing document



Getting Started

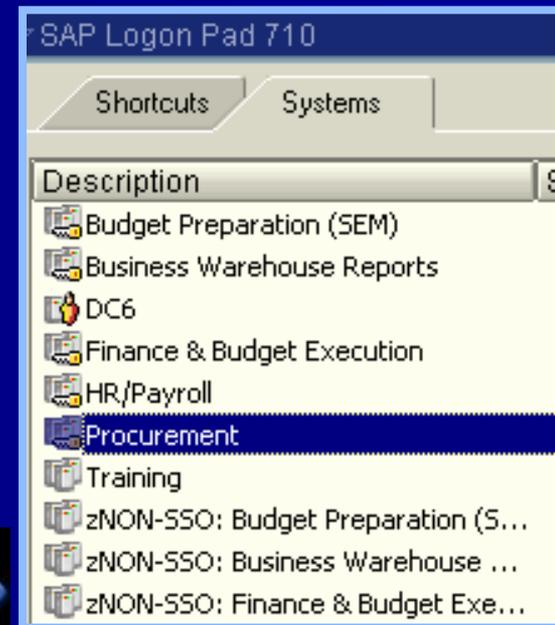
Accessing Records Management via SAP

When using the SAP Logon shortcut to access Records Management, there are several additional steps which need to be followed:



Upon selecting the Logon Pad, a Systems menu will display

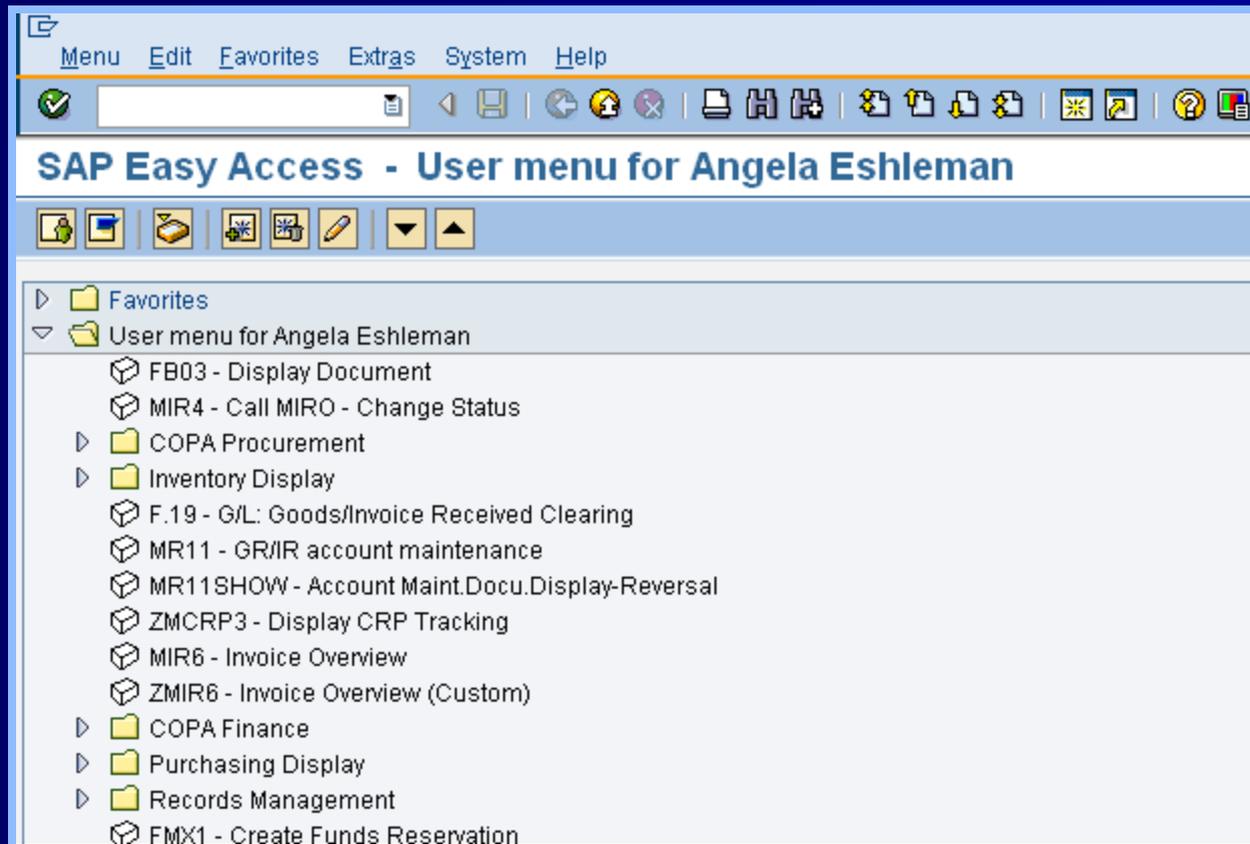
Select the **Procurement** option to continue



Getting Started

Accessing Records Management via SAP (cont'd)

Your individual SAP Procurement User menu will display:



Getting Started

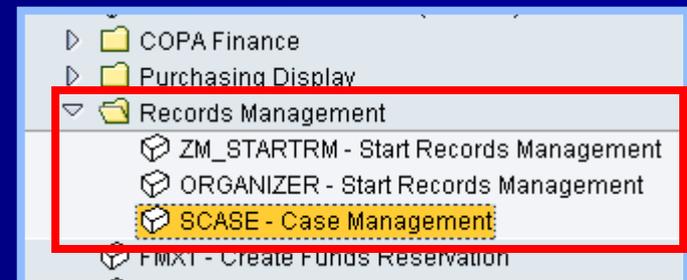
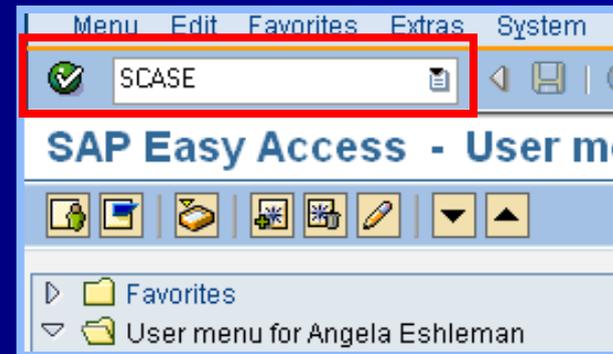
Accessing Records Management via SAP (cont'd)

You now have two different ways to choose from when opening the Records Management application:

Type "SCASE" in the Transaction Code field, and select the ENTER  icon

or

Expand the Records Management folder in the menu, and choose the Case Management link

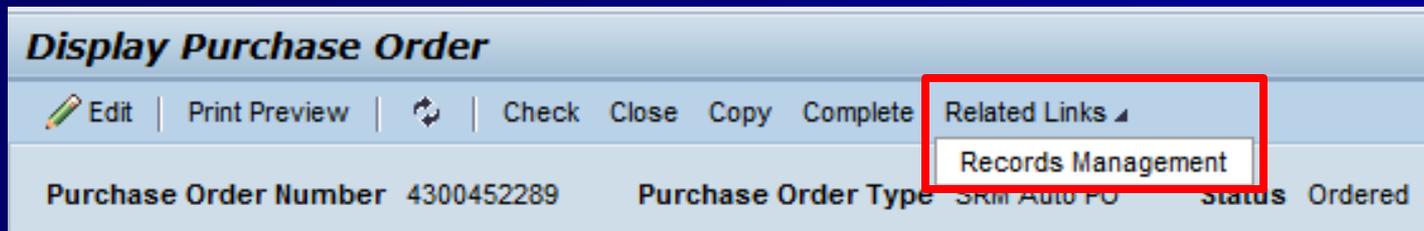


Getting Started

Accessing Records Management via SRM

When working in or viewing a SRM procurement document, you will see several command buttons in the function bar beneath the application name

Note that the Related Links button with the Records Management dropdown is among these



Getting Started

Accessing Records Management via SRM (cont'd)

Selection of the Records Management button will open an additional browser window containing the Records Management application

The screenshot displays the SAP Records Browser interface. The title bar reads "Records Browser - Record 'COPA Purchase Order 15 Vehicle, DEP (2) Ford'". The main content area shows a record for "COPA Purchase Order 15 Vehicle, DEP (2) Ford Ranger XLT ext" with version 1. The record ID "4300190417" is highlighted. Below the record details is a table with the following data:

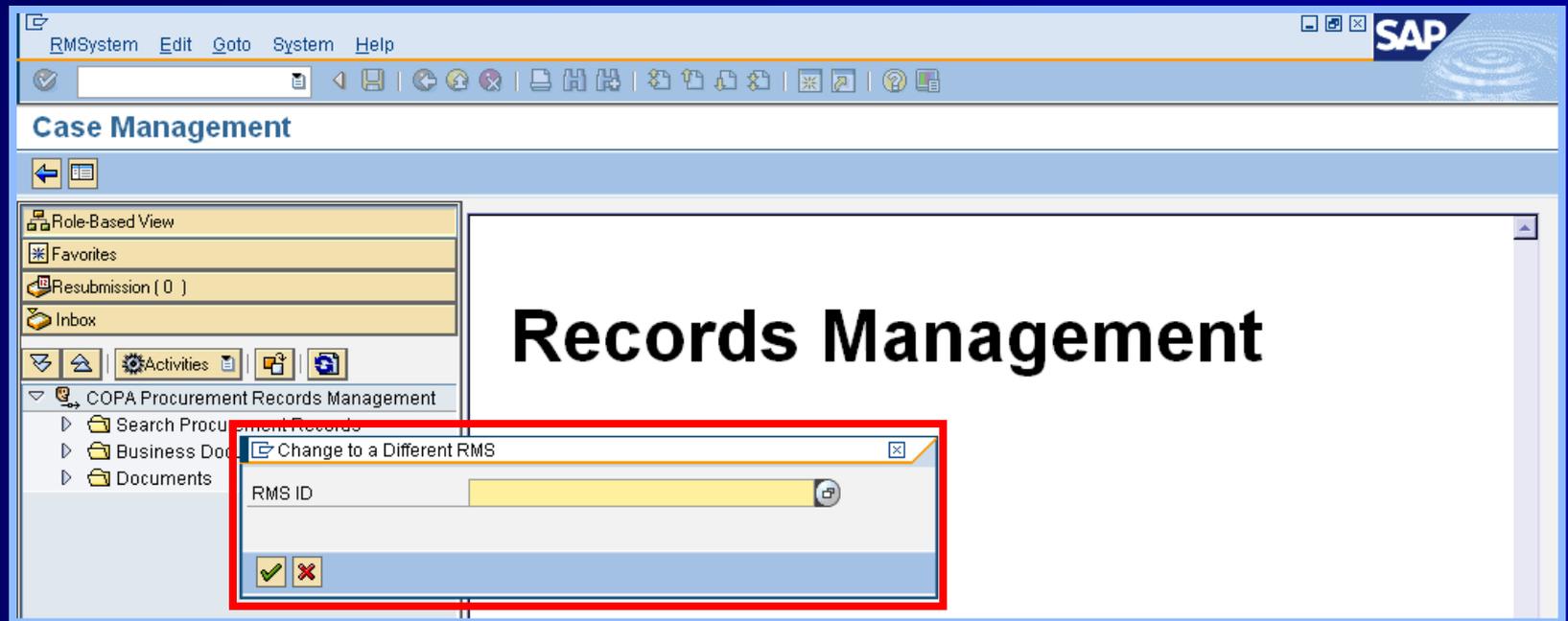
Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼ COPA Purchase Order 15 Vehicle, DEI			SRMRFC / 09/30/2009 / ...	
COPA Purchase Order 15 Vehicle, COPA Purchase Order		All Roles	SRMRFC / 09/30/2009 / ...	48
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFC / 09/30/2009 / ...	71
Related Contract Records	COPA Related CTR Rec...	All Roles	SRMRFC / 09/30/2009 / ...	63
COPA Document Attachments Folc		All Roles		1



Getting Started

Initial Login to Records Management

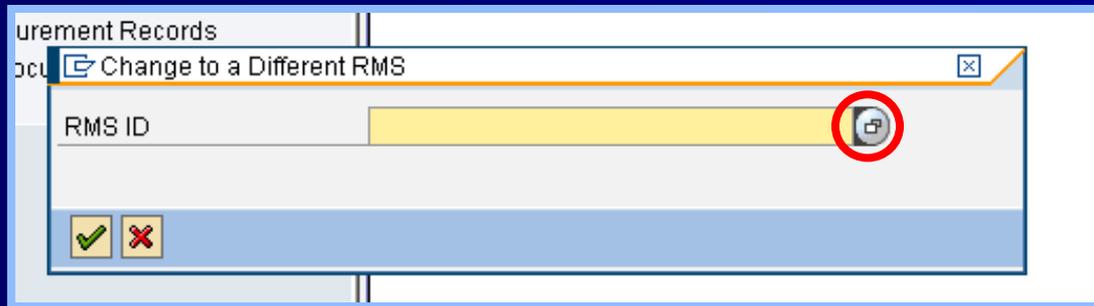
When you log into Records Management for the first time, you will be prompted to set the “RMS ID”



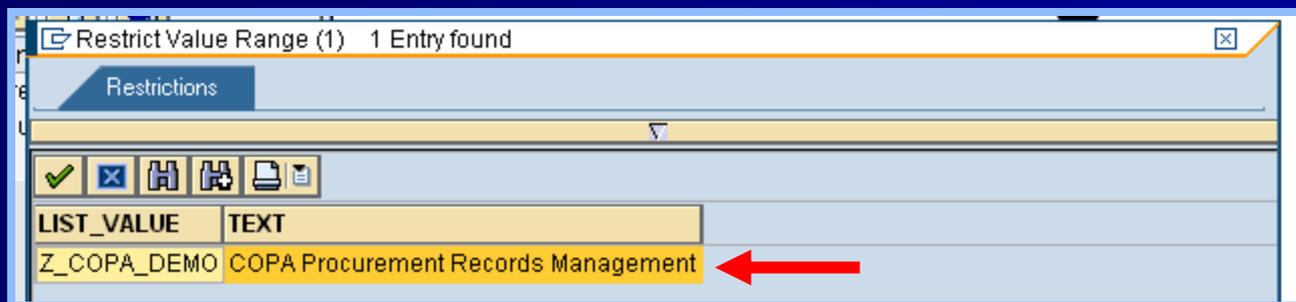
Getting Started

Initial Login to Records Management (cont'd)

In the *Change to a Different RMS* dialog box, select the MATCHCODE  icon to view the available choices



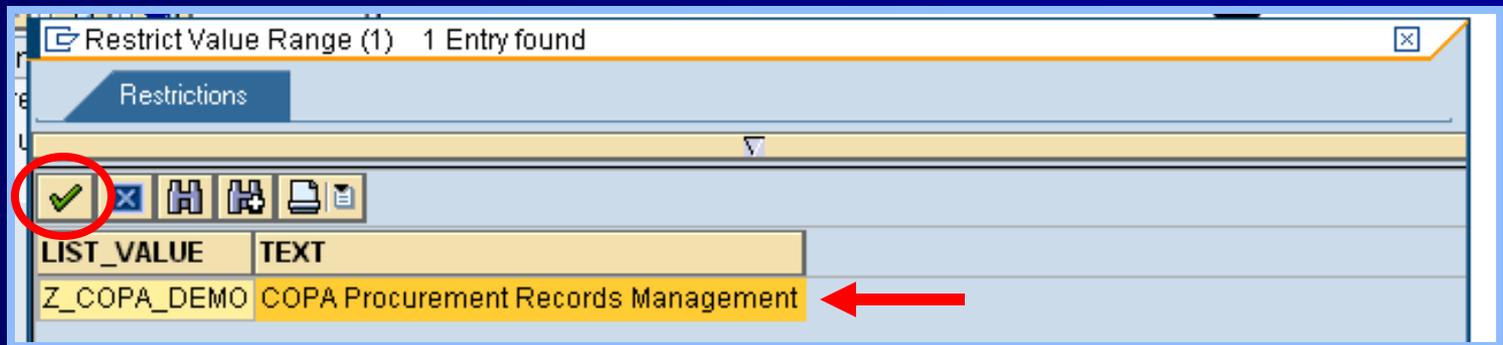
Only one value will display: **Z_COPA_DEMO**



Getting Started

Initial Login to Records Management (cont'd)

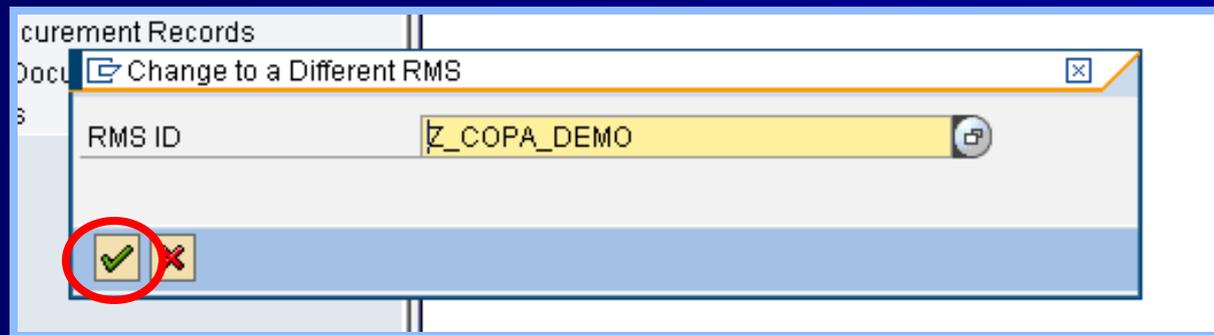
First, select the Z_COPA_DEMO value, then the CONTINUE  icon to pull it into the RMS ID box



Getting Started

Initial Login to Records Management (cont'd)

The RMS ID is now identified, and you must select the CONTINUE icon to assign it.



Remember, you will only need to do this when you log into Records Management the first time.



Getting Started

Navigating through Records Management

By following the previously described steps, you will have successfully logged into the Records Management system.

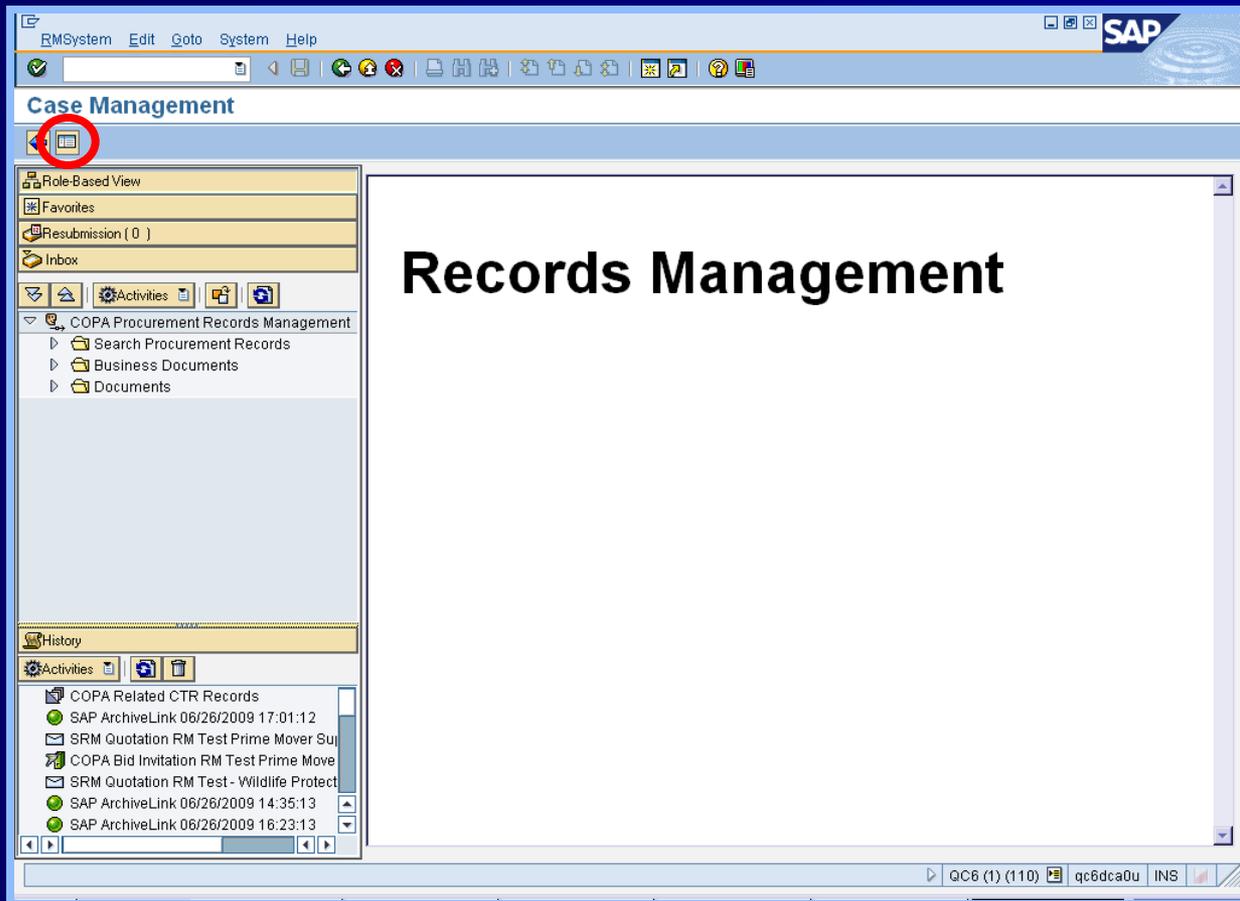
The initial page that displays can be considered a 'home page', and contains an "organizer" with three folders containing links to various search functions. The Records Organizer includes a History, where recently accessed procurement records can be quickly reopened.

Select the NEXT button to learn more about the Organizer



Getting Started

The Records Organizer



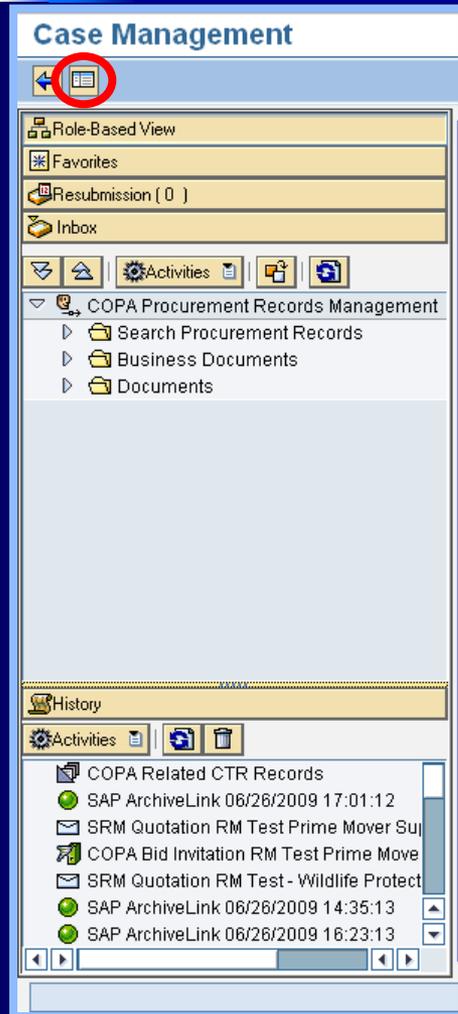
The Records Organizer, located on the left side of the page, can be collapsed and expanded using the **Hide/Show Organizer**

 icon



Getting Started

The Records Organizer (cont'd)



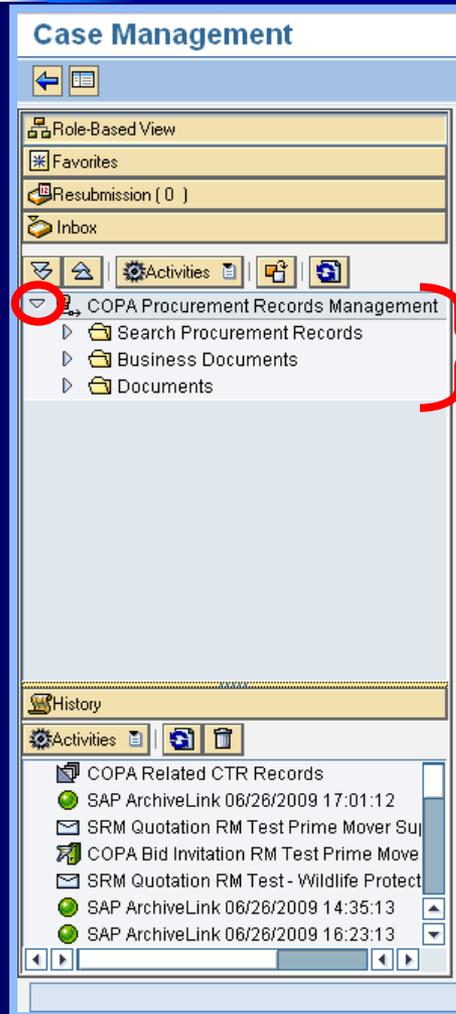
The **Hide/Show Organizer** icon is available at all times in the function toolbar

- Hiding the Organizer provides more room to view displayed records and their details



Getting Started

The Records Organizer (cont'd)



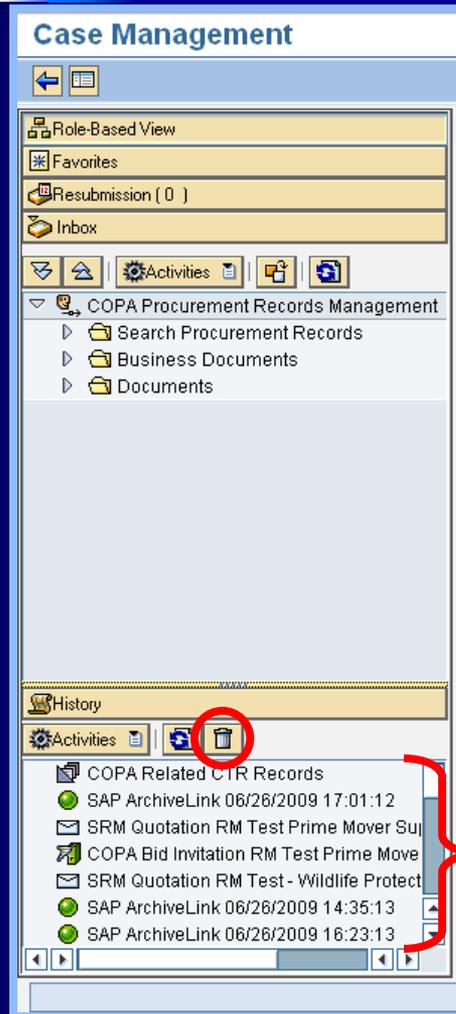
To begin accessing procurement records, you must expand your role “COPA Procurement Records Management” to display the three available folders:

- Search Procurement Records
- Business Documents
- Documents



Getting Started

The Records Organizer (cont'd)



After you have begun accessing records, the History area will begin to populate.

History contains the last 30 records which have been viewed. The most recently viewed record will always appear at the top of the list.

You may clear all of the entries in your History by selecting the Delete  icon



Getting Started

Search Folders



As noted previously, three folders exist as a starting point for searches. Once expanded, specific **Procurement Records**, **Business Documents**, and **Documents** may be accessed via links.

This course will only discuss searching for procurement records; however, it will provide you with sufficient knowledge to be able to perform searches in the other two areas.



Getting Started

Search Procurement Records



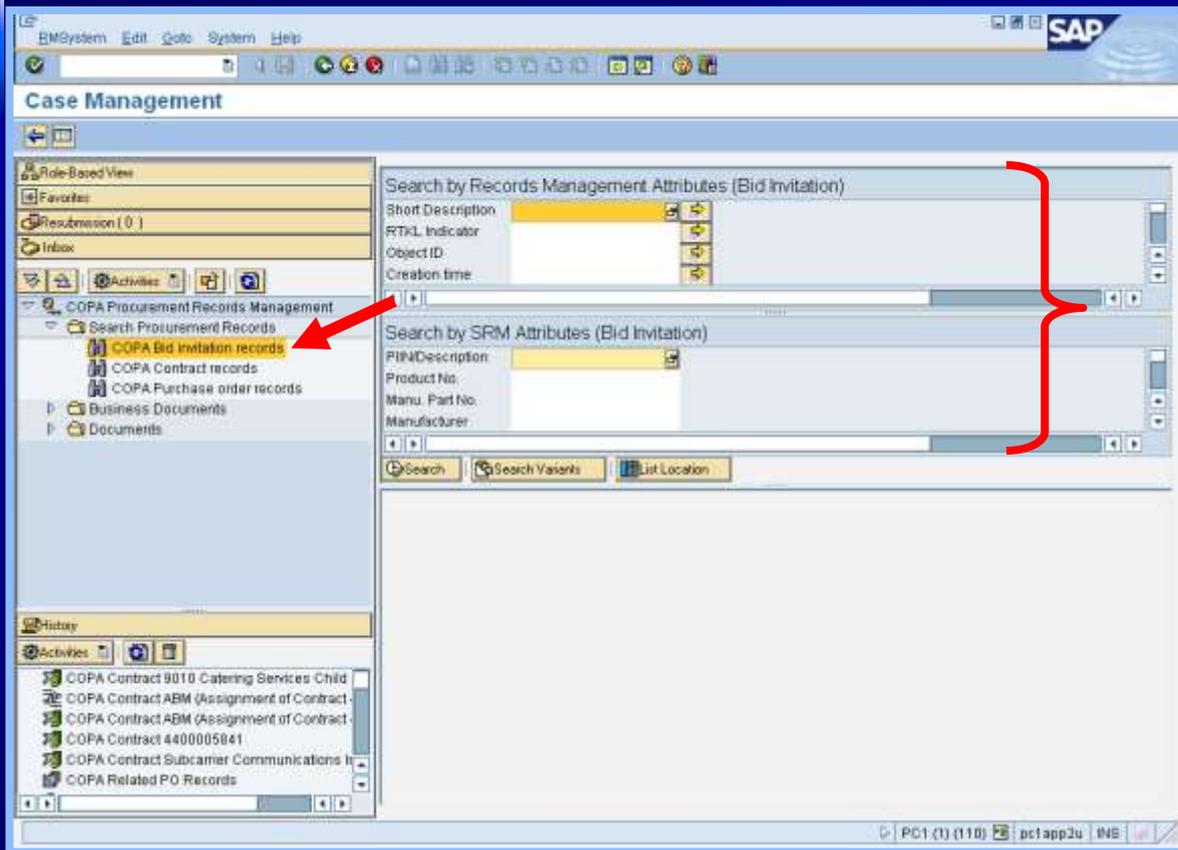
After expanding the **Procurement Records** folder, you have the choice to search within three different COPA Business Object types

The term “COPA Business Object” refers to the kinds of procurement documents – bid invitations, contracts, and purchase orders



Getting Started

Search Procurement Records (cont'd)



- Make your selection by double or right-clicking on the preferred object type
- Following selection, two “Search by” windows display



Getting Started

Search Procurement Records (cont'd)

Search by Records Management Attributes (Bid Invitation) ←

Short Description [input field] [icon] [dropdown]

RTKL Indicator [input field] [dropdown]

Object ID [input field] [dropdown]

Creation time [input field] [dropdown]

Search by SRM Attributes (Bid Invitation) ←

PIIN/Description [input field] [icon]

Product No. [input field]

Manu. Part No. [input field]

Manufacturer [input field]

Search Search Variants List Location

- Search criteria can be entered in either section:
Search by Records Management Attributes or **Search by SRM Attributes**



Getting Started

Search Procurement Records (cont'd)

Search by Records Management Attributes (Bid Invitation)

Short Description
RTKL Indicator
Object ID
Creation time

Search by SRM Attributes (Bid Invitation)

PIIN/Description
Product No.
Manu. Part No.
Manufacturer

Search Search Variants List Location

[area for search result list]

QC6 (1) (110) qc6dca0u INS

- The results list will display in the area below the search windows



Getting Started

Browser Icons and Buttons



Command Buttons

- Some buttons contain text that indicates what command will be performed



Action Icons

- One example is the **DISPLAY/CHANGE** icon, used to switch the user between display and change modes
- Another example shown here is the **COPY TO CLIPBOARD** icon
- Note that some icons will be grayed-out (inactive), when the user is in display mode or has not selected anything



Getting Started

Browser Icons and Buttons (cont'd)

  	<h3>Buttons and Icons with context menus</h3> <ul style="list-style-type: none">• When the menu portion of the button/icon is selected, further options are available for selection
    	<h3>Buttons and Icons within selected elements *</h3> <ul style="list-style-type: none">• Each time an element is opened, additional command buttons and icons will be available for selection• When selected, the user is able to navigate and/or perform specific functions

* The term *element* will be explained later in the course



Getting Started

Navigation Tips

- Records Management provides users with multiple ways to navigate and arrive at the same location
- For example, while viewing a quotation in SRM, you can return to the record by selecting either:
 - The Back  icon on SAP's browser bar
 - The Previous Object  icon in the Records Management function toolbar
 - The Related COPA Bid Invitation  icon in the SRM window





Searching for Records



MENU



Searching for Records

Search Windows

Earlier, you learned that two search windows display and that criteria can be entered in either one.

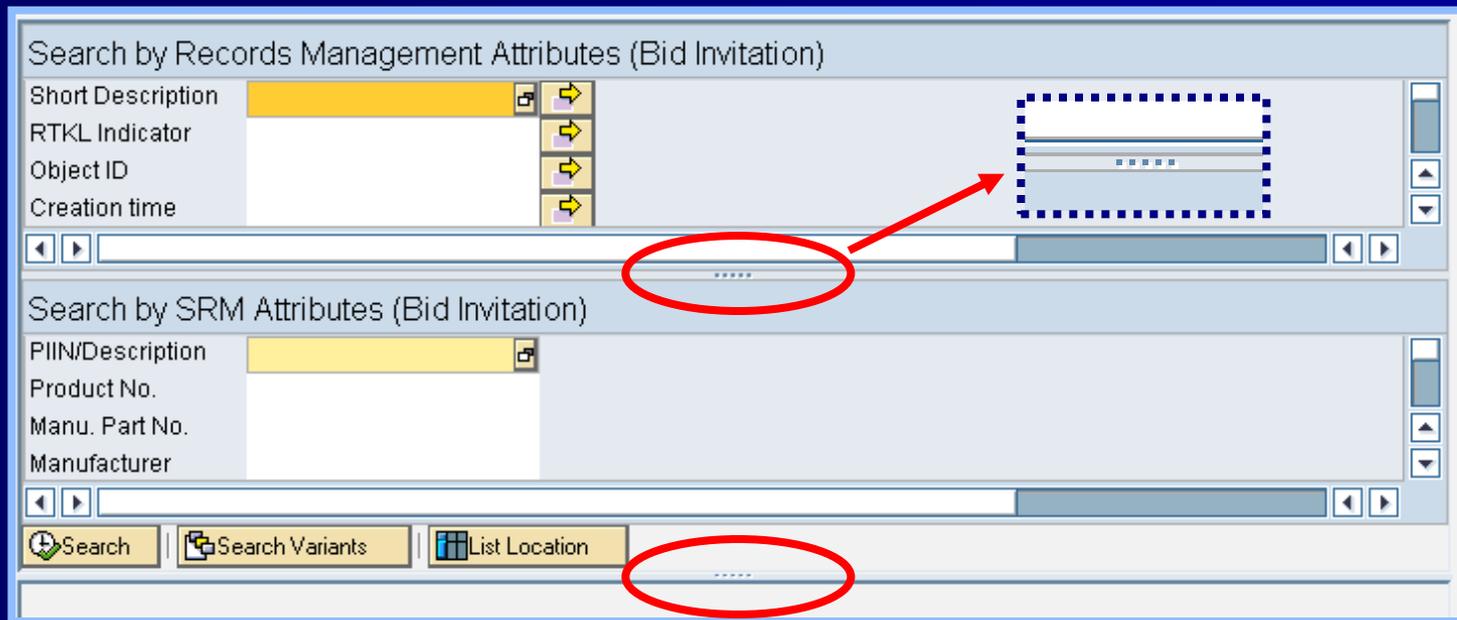
The fields for the criteria, referred to as “attributes” in Records Management, varies between the two areas.

The information entered into attribute fields is referred to as a “value”.



Searching for Records

Search Windows (cont'd)



Expand/reduce the search window area by selecting the bottom handle and moving it up or down



Searching for Records

Search by Records Management Attributes

Search by Records Management Attributes (Bid Invitation)

Short Description	<input type="text"/>		
RTKL Indicator	<input type="text"/>		
Object ID	<input type="text"/>		
Creation time	<input type="text"/>		
Time of change	<input type="text"/>		
Last changed by	<input type="text"/>		
Unique ID	<input type="text"/>		
Full Text Search	<input type="text"/>		

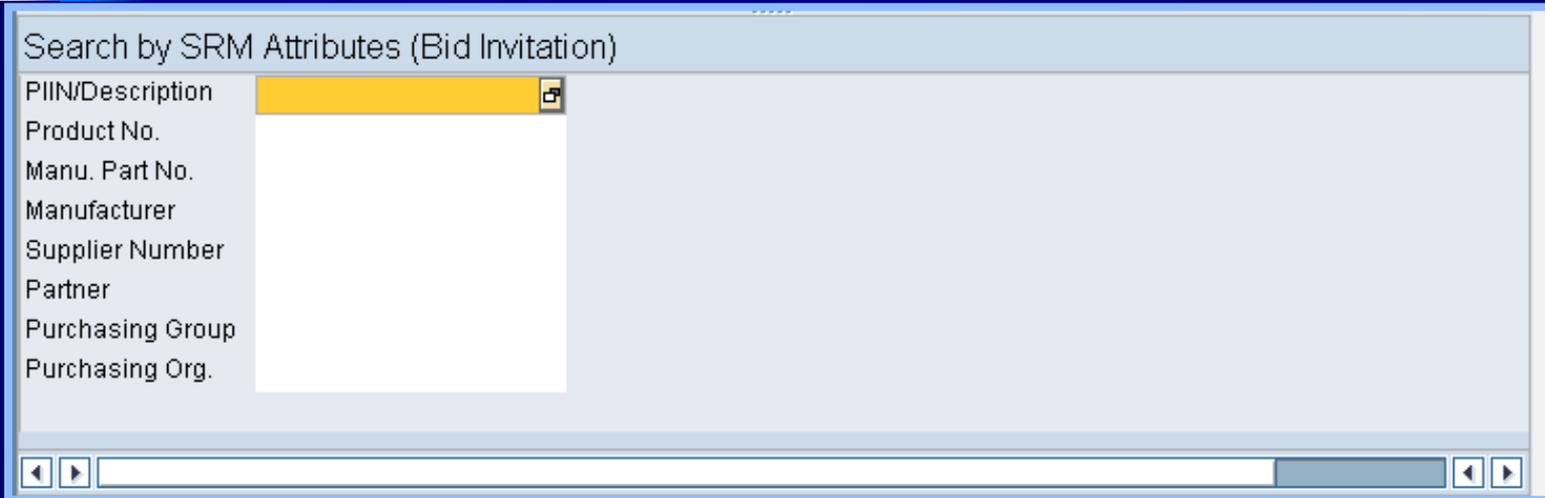
Restrict Hits to Current Versions ...

- The search values for these attribute fields are specific to Records Management: *Short Description*, *RTKL Indicator*, *Object ID*, *Creation time*, *Time of change*, *Last changed by*, *Unique ID*, and *Full Text Search*



Searching for Records

Search by SRM Attributes



Search by SRM Attributes (Bid Invitation)

PIIN/Description

Product No.

Manu. Part No.

Manufacturer

Supplier Number

Partner

Purchasing Group

Purchasing Org.

- The search values for these eight attribute fields are specific to SRM document: *PIIN/Description*, *Product No.*, *Manu. Part No.*, *Manufacturer*, *Supplier Number*, *Partner*, *Purchasing Group*, and *Purchasing Org.*



Searching for Records

Initiating the Search

Search by Records Management Attributes (Bid Invitation)

Short Description		→
RTKL Indicator		→
Object ID	6100003073	→
Creation time		→

Search by SRM Attributes (Bid Invitation)

PIIN/Description		→
Product No.		
Manu. Part No.		
Manufacturer		

Search Search Variants List Location

Enter a value in the appropriate attribute field

- Asterisks may be used along with a partial value to broaden the search (ex. 610000* in the Object ID field)



Searching for Records

Initiating the Search (cont'd)

The screenshot shows a software interface for searching records. It is divided into two main sections: 'Search by Records Management Attributes (Bid Invitation)' and 'Search by SRM Attributes (Bid Invitation)'. The 'Search by SRM Attributes' section is currently active and contains the following fields:

Field	Value	Action
Short Description		Search
RTKL Indicator		Search
Object ID	6100003073	Search
Creation time		Search

Below these fields are navigation arrows and a search button. The search button is circled in red. Other buttons include 'Search Variants' and 'List Location'.

After the value is entered, select the **Search** button to generate a results list



Searching for Records

Understanding Search Results

The results list displays in the tab page below the search windows.

To view the contents of a record, select the document and double-click. The record contents are made up of folders and documents known as “elements”.

An example of a results list is shown on the next slide.



Searching for Records

Understanding Search Results (cont'd)

The screenshot displays the SAP Case Management interface. The top menu bar includes 'RMSystem', 'Edit', 'Goto', 'System', and 'Help'. The main window is titled 'Case Management' and features a left-hand navigation pane with a tree view under 'COPA Procurement Records Management'. The tree view includes 'Search Procurement Records', 'COPA Bid invitation records', 'COPA Contract records', 'COPA Purchase order records', 'Business Documents', and 'Documents'. The 'COPA Bid invitation records' folder is selected.

The main content area is divided into two search sections:

- Search by Records Management Attributes (Bid Invitation):** Fields include Short Description, RTKL Indicator, Object ID (6100003073), and Creation time.
- Search by SRM Attributes (Bid Invitation):** Fields include PIIN/Description, Product No., Manu. Part No., and Manufacturer.

Below the search sections are buttons for 'Search', 'Search Variants', and 'List Location'. A toolbar contains icons for 'Add documents', 'Print', 'Refresh', 'Filter', 'Export', 'Import', 'Copy', 'Paste', 'Delete', and 'Help'.

The search results are displayed in a table with the following columns: Type, Short Description, RTKL Indicator, Object ID, Creation time, and T. The table contains one record:

Type	Short Description	RTKL Indicator	Object ID	Creation time	T
	COPA Bid Invitation RM Test Prime Mover Support Vehicle 2:1		6100003073	06/26/2009 13:00:47	07/28/

Below the table, a large blue text box contains the text: [Tab page for results list].

The bottom status bar shows 'QC6 (1) (110)', 'qc6dca0u', 'INS', and a red error icon.



Searching for Records

Understanding Search Results (cont'd)

The screenshot displays the SAP Records Browser interface. The title bar reads "Records Browser - Record 'COPA Bid Invitation RM Test Prime Mover Supp'". The main content area shows the record details for "COPA Bid Invitation RM Test Prime Mover Support Vehicle 2:1" (Version 2). The details include:

- Short Description: COPA Bid Invitation RM Test Pr...
- RTHL Indicator
- Object ID: 6100003073
- Creation time: 06/26/2008 13:00:47
- Language: EN, English

Below the details is a table with the following columns: Hierarchy, Element Type, Visibility, Last Processed, and Node. The table lists various elements related to the record, including snapshots, quotations, and attachments.

Hierarchy	Element Type	Visibility	Last Processed	Node
COPA Bid Invitation RM Test Prime Mover Support Vehicle 2:1			P00490812 / 09/09/2009 / 1	
COPA Bid Invitation RM Test Prime Mover Support Vehicle 2:1	COPA Bid Invitation	All Roles	SRMRFCSRV / 06/26/2009 / ...	19
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / ...	27
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / ...	27
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / ...	27
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/28/2009 / ...	27
RM Test Prime Mover Support Vehicle 2:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / ...	24
RM Test Prime Mover Support Vehicle 2:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / ...	24
RM Test Prime Mover Support Vehicle 2:1	SRM Quotation	All Roles	SRMRFCSRV / 06/26/2009 / ...	24
Related CTR Records	COPA Related CTR Rec...	All Roles	SRMRFCSRV / 06/26/2009 / ...	21
COPA Document Attachments Folder		All Roles		1
COPA Attachment RM Testing - PA Region 13 - 4500 Specs.	COPA Attachment	All Roles	SRMRFCSRV / 06/26/2009 / ...	2
Additional Documents Folder		All Roles		3
Overview	COPA Manual Documents	All Roles	P00446880 / 07/14/2009 / 1 ...	29
Change to Bid Invitation	COPA Manual Documents	All Roles	P00490812 / 06/29/2009 / 1 ...	29
Notes and Working Papers Folder		Record Management ...		33
Usage Report	COPA Manual Documents	All Roles	P00490812 / 09/09/2009 / 1 ...	34
Meeting Notes	COPA Manual Documents	All Roles	P00490812 / 09/09/2009 / 1 ...	34
Statistical Data	COPA Manual Documents	All Roles	P00490812 / 09/09/2009 / 1 ...	34

This slide shows the contents of a procurement record that has been opened for display



Searching for Records

Understanding Search Results (cont'd)

The record contents are divided into two halves: the **Attributes window** on the top, and the **Browser window** underneath

The screenshot displays the SAP Records Browser interface. The title bar reads "Records Browser - Record 'COPA Bid Invitation RM Test Prime Mover Supp'". The browser window shows the record path: "COPA Bid Invitation RM Test Prime Mover Support Vehicle 2:1 Version 2".

The **Attributes window** (top) displays the following details:

- Short Description: COPA Bid Invitation RM Test Pr...
- RTKL Indicator: [empty]
- Object ID: 6100003073
- Creation time: 06/26/2008 13:00:47
- Language: EN
- English

The **Browser window** (bottom) displays a table of record elements:

Hierarchy	Element Type	Visibility	Last Processed	Node
COPA Bid Invitation RM Test Prime Mover Support Vehicle 2:1			P00490812 / 09/09/2009 / 1	
COPA Bid Invitation RM Test Prime Mover Support Vehicle 2:1	COPA Bid Invitation	All Roles	SRMRFCSRV / 06/26/2009 / ...	19
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / ...	27
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / ...	27
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / ...	27
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 08/28/2009 / ...	27
RM Test Prime Mover Support Vehicle 2:1	SRM Quotation	All Roles	SRMRFCSRV / 06/26/2009 / ...	24
RM Test Prime Mover Support Vehicle 2:1	SRM Quotation	All Roles	SRMRFCSRV / 06/26/2009 / ...	24
RM Test Prime Mover Support Vehicle 2:1	SRM Quotation	All Roles	SRMRFCSRV / 06/26/2009 / ...	24
Related CTR Records	COPA Related CTR Rec...	All Roles	SRMRFCSRV / 06/26/2009 / ...	21
COPA Document Attachments Folder		All Roles		1
COPA Attachment RM Testing - PA Region 13 - 4500 Specs. COPA Attachment		All Roles	SRMRFCSRV / 06/26/2009 / ...	2
Additional Documents Folder		All Roles		3
Overview	COPA Manual Documents	All Roles	P00446890 / 07/14/2009 / 1 ...	29
Change to Bid Invitation	COPA Manual Documents	All Roles	P00490812 / 06/29/2009 / 1 ...	29
Notes and Working Papers Folder		Record Management...		33
Usage Report	COPA Manual Documents	All Roles	P00490812 / 09/09/2009 / 1 ...	34
Meeting Notes	COPA Manual Documents	All Roles	P00490812 / 09/09/2009 / 1 ...	34
Statistical Data	COPA Manual Documents	All Roles	P00490812 / 09/09/2009 / 1 ...	34

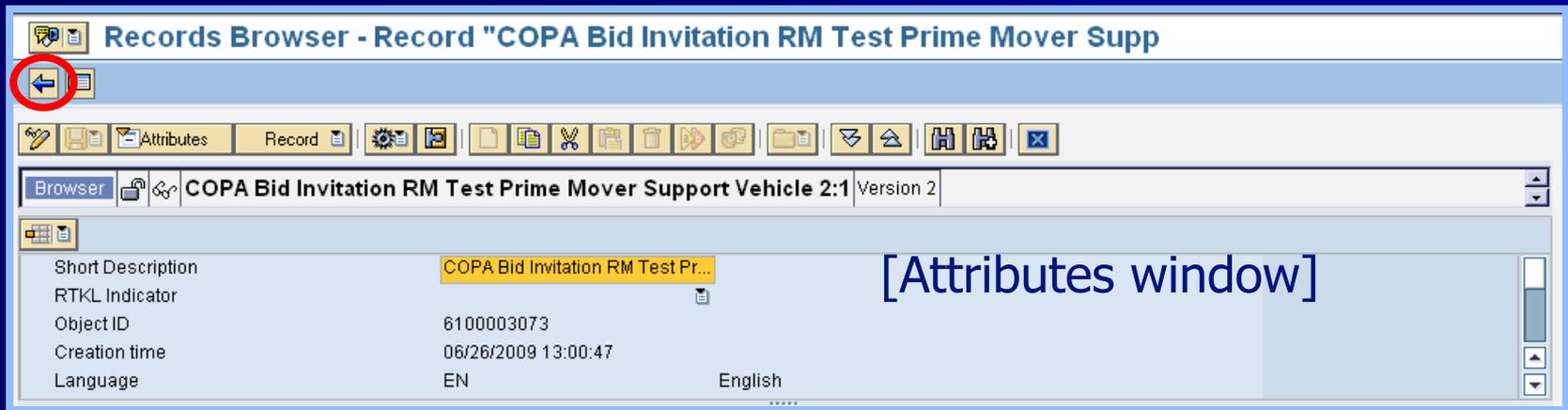
[Attributes window]

[Browser window]



Searching for Records

Understanding Search Results (cont'd)



Records Browser - Record "COPA Bid Invitation RM Test Prime Mover Supp

Attributes Record

Browser COPA Bid Invitation RM Test Prime Mover Support Vehicle 2:1 | Version 2

[Attributes window]

Short Description	COPA Bid Invitation RM Test Pr...
RTKL Indicator	
Object ID	6100003073
Creation time	06/26/2009 13:00:47
Language	EN English

To display multiple elements in sequence, without closing the elements in between, use the **Previous**  and **Next**  icons to navigate through them.



Searching for Records

Understanding Search Results (cont'd)

In the next lesson, **Displaying Records**, you will learn more about the different types of elements which display in the Browser window when the record is opened, and how to identify them. You will also learn how to save, print, and e-mail many of these elements.

Select the Next button to proceed to the next lesson.





Displaying Records



MENU



Displaying Records

Record Structure

Before we move into opening and viewing the elements (content) of a record, it's important that you understand how records are laid out, or "structured", in Records Management.

Earlier in the course, you learned that you could perform searches within the different COPA Business Object types: bid invitations, contracts, and purchase orders.

Each object type has its own three-level record structure in Records Management, as you will see in the upcoming slides.

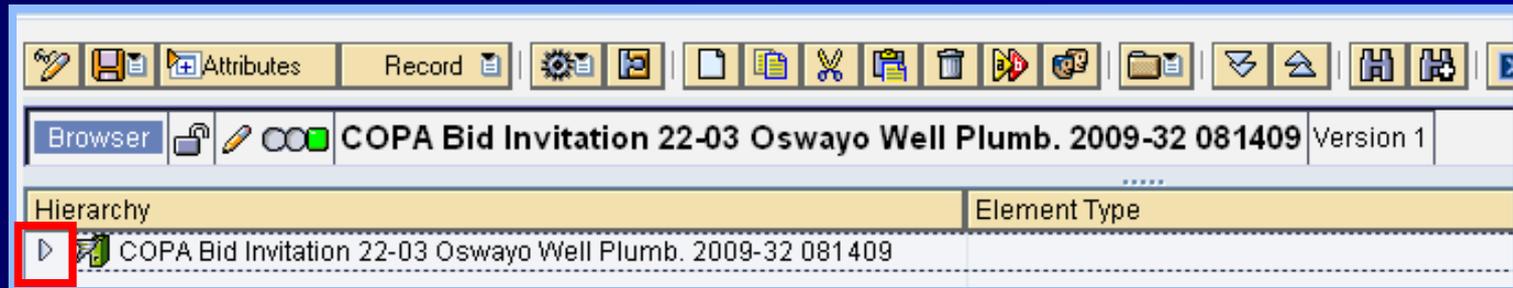


Displaying Records

Levels in a Record Structure

Record structure levels are identified under the **Hierarchy** column in the Records Browser.

Level 1, identified by the Go To Record  icon, is the record entry itself. In order to see the elements in Level 1, it must be expanded by selecting the Expand  icon.



Displaying Records

Levels in a Record Structure (cont'd)

When Level 1 is expanded, the elements of Level 2 are revealed. Most Level 2 elements are classified by “types” which are identified in the Element Type column. These types, which include COPA Bid Invitation, SRM Quotation, and COPA Related PO Records, explain what the element is.

Hierarchy	Element Type
▼ COPA Bid Invitation 22-03 Oswayo Well Plumb. 2009-32 081409	
COPA Bid Invitation 22-03 Oswayo Well Plumb. 2009-32 081409	COPA Bid Invitation
● SNAPSHOTS FOR SRM SYSTEM	COPA Read-only documents (ArchiveLink)
● SNAPSHOTS FOR SRM SYSTEM	COPA Read-only documents (ArchiveLink)
✉ 22-03 Oswayo Well Plumb. 2009-32 081409	SRM Quotation
✉ 22-03 Oswayo Well Plumb. 2009-32 081409	SRM Quotation
📁 Related PO Records	COPA Related PO Records
▶ 📁 COPA Document Attachments Folder	
▶ 📁 Additional Documents Folder	
▶ 📁 Notes and Working Papers Folder	
▶ 📁 Protests	



Displaying Records

Levels in a Record Structure (cont'd)

The other kind of Level 2 element is a folder. All record structures have the standard folders “COPA Document Attachments”, “Additional Documents”, and “Notes and Working Papers”. The Bid Invitation record structure has an additional folder entitled “Protests”.

Hierarchy	Element Type
▼ COPA Bid Invitation 22-03 Oswayo Well Plumb. 2009-32 081409	
▶ COPA Bid Invitation 22-03 Oswayo Well Plumb. 2009-32 081409	COPA Bid Invitation
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only documents (ArchiveLink)
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only documents (ArchiveLink)
▶ 22-03 Oswayo Well Plumb. 2009-32 081409	SRM Quotation
▶ 22-03 Oswayo Well Plumb. 2009-32 081409	SRM Quotation
▶ Related PO Records	COPA Related PO Records
▶ COPA Document Attachments Folder	
▶ Additional Documents Folder	
▶ Notes and Working Papers Folder	
▶ Protests	



Displaying Records

Levels in a Record Structure (cont'd)

In order to view the Level 3 elements within the Level 2 folders, select the Expand  icon as shown below:

Hierarchy	Element Type
COPA Bid Invitation 22-03 Oswayo Well Plumb. 2009-32 081409	COPA Bid Invitation
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only documents (ArchiveLink)
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only documents (ArchiveLink)
22-03 Oswayo Well Plumb. 2009-32 081409	SRM Quotation
22-03 Oswayo Well Plumb. 2009-32 081409	SRM Quotation
Related PO Records	COPA Related PO Records
COPA Document Attachments Folder	
COPA Attachment Pipe fittings 6100013028.pdf	COPA Attachment
COPA Attachment Responses Report	COPA Attachment
COPA Attachment Reviewers checklist report	COPA Attachment
COPA Attachment Document	COPA Attachment
COPA Attachment State of Manufacture Chart.doc	COPA Attachment
Additional Documents Folder	
Notes and Working Papers Folder	
Protests	

Note that in order for a folder name to display in the record, it must contain at least one item. In other words, an empty folder will not be listed in the browser.



Displaying Records

Levels in a Record Structure (cont'd)

There are two Level 3 element types: COPA Attachment, and COPA Manual Documents.

A **COPA Attachment** element type was attached in SRM to the procurement document and replicated to Records Management. COPA Attachments are “read-only”.

A **COPA Manual Document** element type is a document which was attached manually to the procurement record in Records Management. These documents may be edited and/or deleted.



Displaying Records

Folders

- Each folder is intended to contain specific items due to the “visibility” which is assigned at the folder level. Here are brief descriptions of each folder and examples of their respective contents:
 - **COPA Document Attachments Folder**: This folder contains the files which were uploaded as attachments in SRM. Examples of content include Lobbying Certification forms, Terms & Conditions, Specifications, and Statement of Work.



Displaying Records

Folders (cont'd)

- **Additional Documents Folder**: This folder contains any files which were not attached to the SRM procurement document and were uploaded manually by someone with the Records Management User role. These files would be considered an official part of the procurement (bid, contract, purchase order). Examples of content include Award/Selection Letter, Liquidated Damages Assessments, and Warranty information.



Displaying Records

Folders (cont'd)

- **Notes and Working Papers Folder**: This folder contains any files which were uploaded manually by someone with the Records Management User role. These files would contain supporting documentation and are not considered to be an official part of the procurement (bid, contract, purchase order). Examples of content include Internal COPA communications regarding the procurement, Legal Advice, Reviews and/or Approvals, contract progress meeting minutes, and unsuccessful bids.



Displaying Records

Folders (cont'd)

- **Protests Folder**: This folder contains any files which were uploaded manually by someone with the Records Management User role. These files would contain any documentation pertaining to a solicitation award protest. Examples of content include bid protest letters and the written determinations in response to the bid protest letters, and debriefing information.



Displaying Records

Visibility of Record Elements

As discussed, and as you have seen in the previous slides, each record structure displays a column entitled **Visibility**.

The Visibility column identifies which roles may view the element. If you have the **Display Only** role, only the elements which you have permission to view will be visible to you.

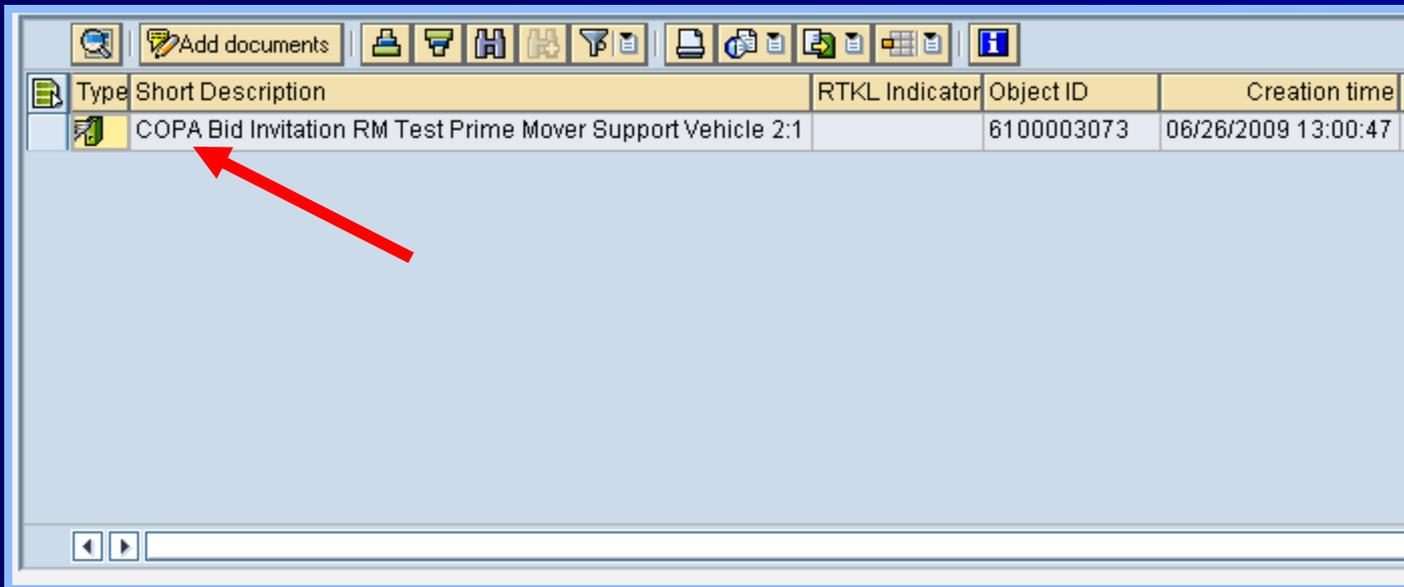
Hierarchy	Element Type	Visibility
COPA Bid Invitation 15, Revenue 1099s		
COPA Bid Invitation 15, Revenue 1099	COPA Bid Invitation	All Roles
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only doc...	All Roles
15, Revenue 1099s	SRM Quotation	All Roles
15, Revenue 1099s	SRM Quotation	All Roles
15, Revenue 1099s	SRM Quotation	All Roles
Related PO Records	COPA Related PO Re.	All Roles
COPA Document Attachments Folder		All Roles
Additional Documents Folder		All Roles
Notes and Working Papers Folder		Record Management User / SRM: IES Purchasing Support
Protests		Record Management User / SRM: IES Purchasing Support



Displaying Records

Opening the Record

Let's take a look at a sample record. To open it, we must double-click on it.



The screenshot shows a software interface with a table of records. The table has five columns: Type, Short Description, RTKL Indicator, Object ID, and Creation time. The first record is highlighted, and a red arrow points to it.

Type	Short Description	RTKL Indicator	Object ID	Creation time
	COPA Bid Invitation RM Test Prime Mover Support Vehicle 2:1		6100003073	06/26/2009 13:00:47



Displaying Records

Displaying the Record

The elements are displayed for review and the folders may be expanded to reveal their contents.

Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼ COPA Bid Invitation RM Test Prime Mo			P00490812 / 06/29/2009...	
COPA Bid Invitation RM Test Prime	COPA Bid Invitation	All Roles	SRMRFCSRV / 06/26/20...	19
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/26/20...	27
RM Test Prime Mover Support Vehi	SRM Quotation	All Roles	SRMRFCSRV / 06/26/20...	24
Related CTR Records	COPA Related CTR Rec...	All Roles	SRMRFCSRV / 06/26/20...	21
▶ COPA Document Attachments Folc		All Roles		1
▶ Additional Documents Folder		All Roles		3
▶ Notes and Working Papers Folder				33



Displaying Records

Displaying a Level 2 Element

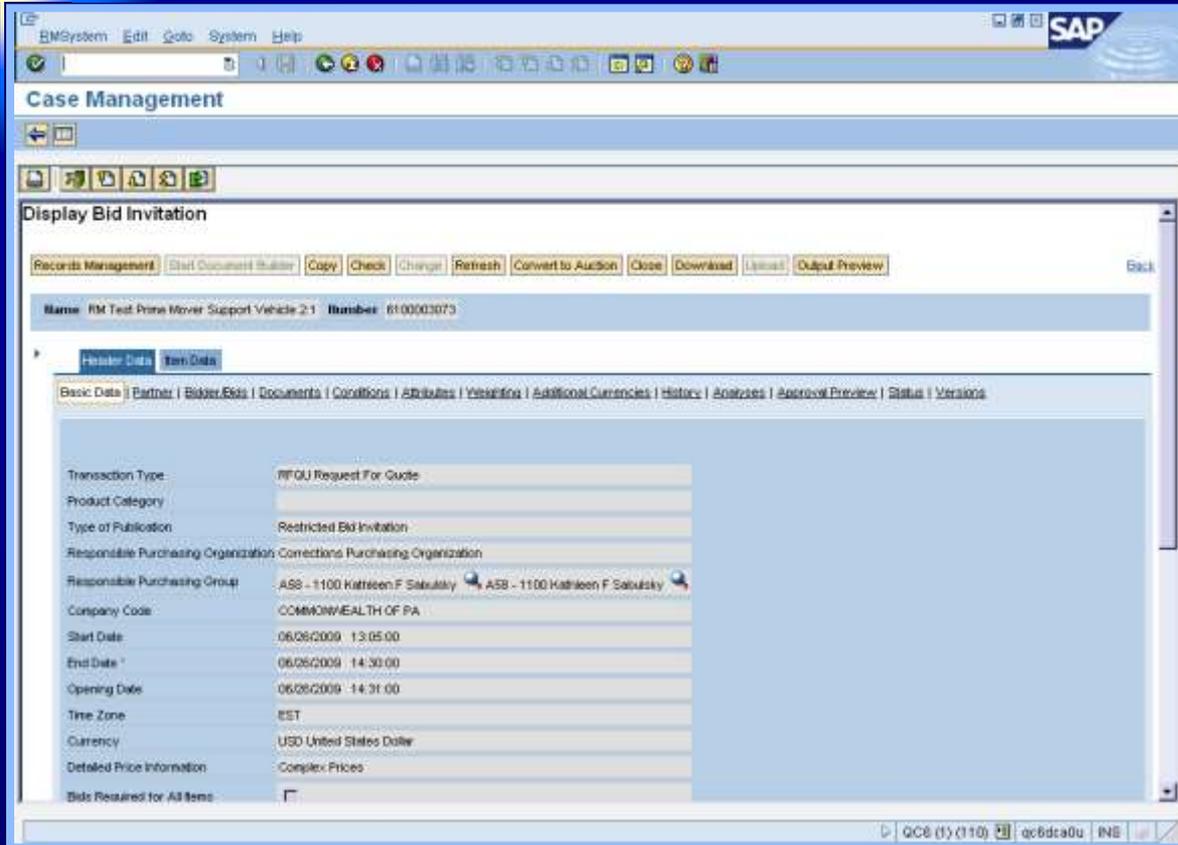
Now we're going to select the Bid Invitation and double-click to open it.

Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼ COPA Bid Invitation RM Test Prime Mo			P00490812 / 06/29/2009...	
📄 COPA Bid Invitation RM Test Prime	COPA Bid Invitation	All Roles	SRMRFCSRV / 06/26/20...	19
🟢 SNAPSOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/26/20...	27
✉ RM Test Prime Mover Support Vehi	SRM Quotation	All Roles	SRMRFCSRV / 06/26/20...	24
📁 Related CTR Records	COPA Related CTR Rec...	All Roles	SRMRFCSRV / 06/26/20...	21
▶ 📁 COPA Document Attachments Fole		All Roles		1
▶ 📁 Additional Documents Folder		All Roles		3
▶ 📁 Notes and Working Papers Folder				33



Displaying Records

Displaying a Level 2 Element (cont'd)



The screenshot displays the SAP Case Management interface. The main window is titled "Display Bid Invitation" and shows a record for "RM Test Prime Mover Support Vehicle 2-1" with number "6100003073". The interface includes a menu bar with options like "Records Management", "Start Document Builder", "Copy", "Check", "Change", "Refresh", "Convert to Auction", "Close", "Download", "Upload", and "Output Preview". Below the menu, there are tabs for "Header Data" and "Item Data". The "Header Data" tab is active, showing a table of key-value pairs for the bid invitation.

Field	Value
Transaction Type	RFQ Request For Quote
Product Category	
Type of Publication	Restricted Bid Invitation
Responsible Purchasing Organization	Corrections Purchasing Organization
Responsible Purchasing Group	ASS - 1100 Kathleen F Sabulsky
Company Code	COMMONWEALTH OF PA
Start Date	06/05/2009 13:05:00
End Date	06/05/2009 14:30:00
Opening Date	06/05/2009 14:31:00
Time Zone	EST
Currency	USD United States Dollar
Detailed Price Information	Complex Prices
Bids Required for All Items	<input type="checkbox"/>

When the element type is a contract, purchase order, or solicitation, it will open in SRM *within the Records Management browser window.*



Displaying Records

Displaying a Level 2 Element (cont'd)

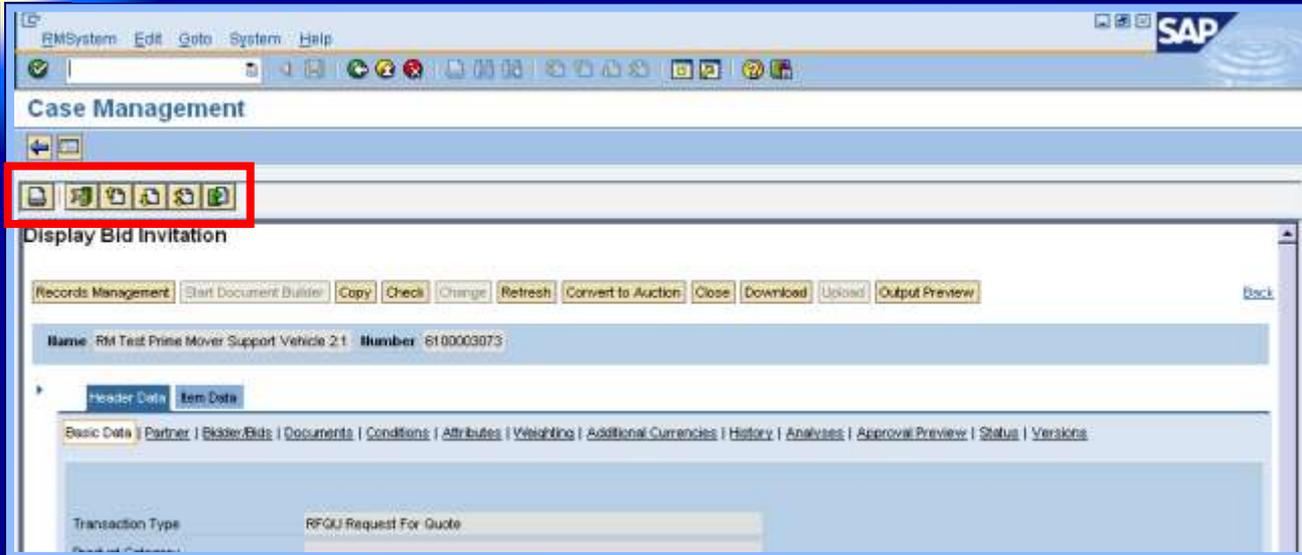
Full SRM functionality *may* exist while the document is open in Records Management.

DO NOT make any changes, deletions, etc. at this time
– remain in display mode; **always log into SRM in order to edit the document.**



Displaying Records

Displaying a Level 2 Element (cont'd)



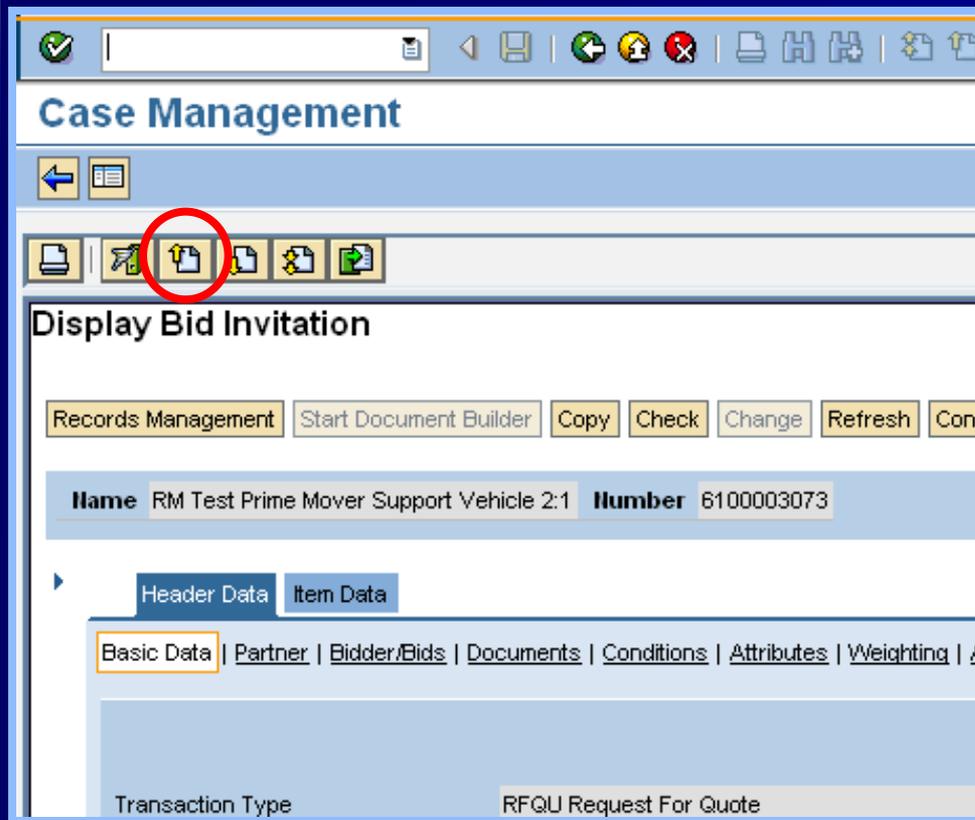
Note the command buttons above the display window

These buttons serve as navigation tools to access SRM documents related to the one currently open (such as a Shopping Cart, or follow-on contract, Purchase Order, etc.)



Displaying Records

Displaying a Level 2 Element (cont'd)

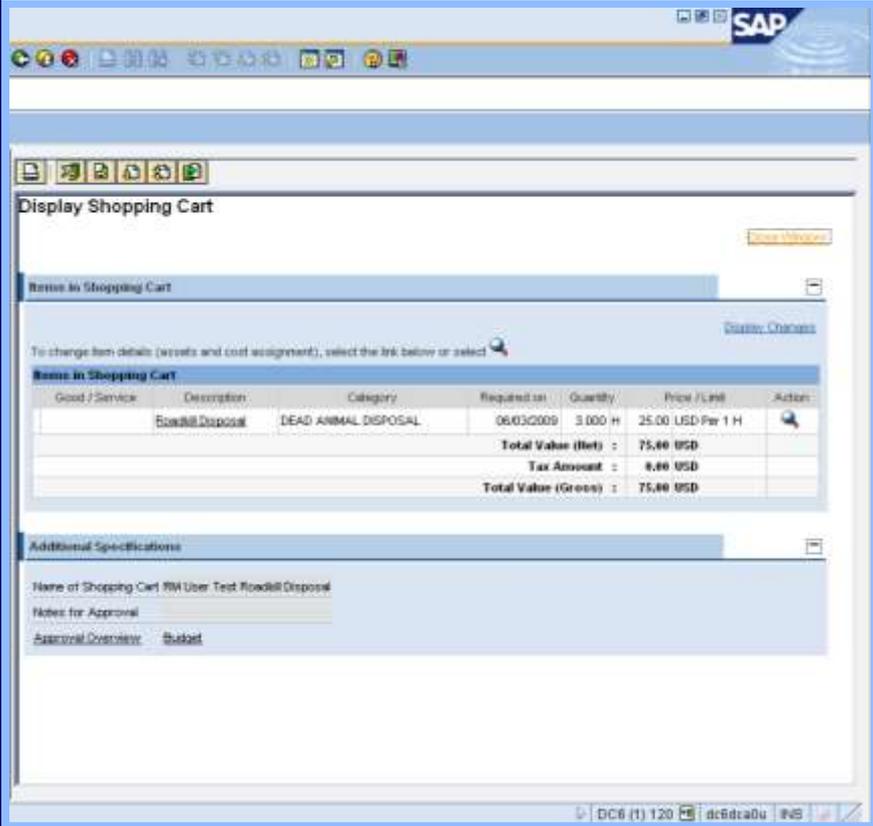


For example, if the currently displayed SRM document originated from a shopping cart, it can be viewed by selecting the Related COPA Shopping Cart icon



Displaying Records

Displaying a Level 2 Element (cont'd)



The screenshot shows the SAP 'Display Shopping Cart' interface. The title bar includes the SAP logo. Below the title bar, there are several icons for navigation and actions. The main content area is titled 'Display Shopping Cart' and contains a 'Items in Shopping Cart' section. This section includes a table with columns for 'Good / Service', 'Description', 'Category', 'Required at', 'Quantity', 'Price / Unit', and 'Action'. The table contains one row for 'Roadkill Disposal' with a quantity of 3,000 H and a price of 25.00 USD Per 1 H. Below the table, there are summary rows for 'Total Value (Net)', 'Tax Amount', and 'Total Value (Gross)'. The 'Additional Specifications' section below the table contains fields for 'Name of Shopping Cart', 'Notes for Approval', and 'Approval Overview'.

Good / Service	Description	Category	Required at	Quantity	Price / Unit	Action
Roadkill Disposal	DEAD ANIMAL DISPOSAL		06/03/2009	3 000 H	25.00 USD Per 1 H	
Total Value (Net) :						75.00 USD
Tax Amount :						4.00 USD
Total Value (Gross) :						79.00 USD

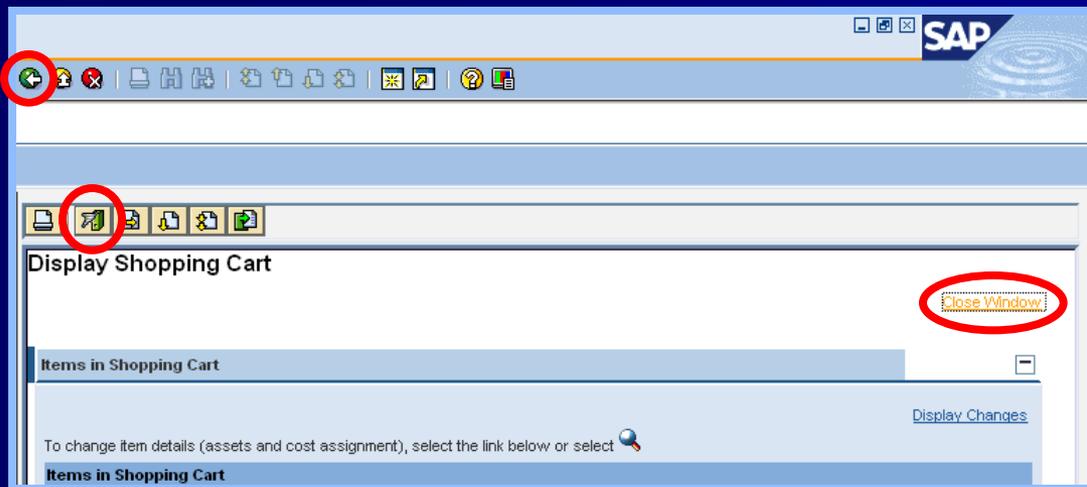
Now the shopping cart has opened for viewing.

The next slide will show a few options for navigating to other screens.



Displaying Records

Displaying a Level 2 Element (cont'd)



- Return to the previous screen by selecting the Back  icon on the SAP toolbar

- Return to the record by selecting the Go To Record  icon
- Do not use the Close Window  link or you will be forced to exit Records Management



Displaying Records

Displaying a Level 2 Element (cont'd)

Another element type is **COPA Read-Only Document**, which is a PDF file of the SRM document

Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼ COPA Bid Invitation RM Test - Whirlpool T			SRMRFCSRV / 06/30/2009 / 11...	
📄 COPA Bid Invitation RM Test - Whirlpo	COPA Bid Invitation	All Roles	SRMRFCSRV / 06/30/2009 / 11... 19	
🟢 SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11... 27	
🟢 SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11... 27	
🟢 SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11... 27	
🟢 SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11... 27	
✉ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11... 24	
✉ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11... 24	
✉ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11... 24	
▶ 📁 COPA Document Attachments Folder		All Roles		1



Displaying Records

Displaying a Level 2 Element (cont'd)

The screenshot shows a SAP browser window displaying a PDF document. The PDF content is a Request for Quote (RFQ) form for 'Whirlpool Tubs 3:1'. The form includes fields for Issuing Office, Supplier Name/Address, Return Bid by, and Procurement Contact. A red box highlights the Adobe PDF toolbar at the top of the document viewer.

		ORIGINAL RFQU - Request For Quote RM Test - Whirlpool Tubs 3:1		Page 1 of 4
RFQU Effective Date: 06/30/2009		Bid Invitation Number: 6100003091		
Issuing Office: Kathleen A SRM-RecMgt Commonwealth of Pennsylvania US		Supplier Name/Address: Your SAP Vendor Number with us: _____		
Please Return Quotation to: Commonwealth of Pennsylvania US		Type of Security furnished if required: <input type="checkbox"/> Certified bank cashier's check <input type="checkbox"/> Irrevocable letter of credit <input type="checkbox"/> Certificate of deposit <input type="checkbox"/> Other as specified by bid <input type="checkbox"/> Bond - If annual bond: What is the name of the principal on the bond?		Return Bid by: Bid Ending Date: 06/30/2009 Bid Ending Time: 14:30:00
Please Deliver To: CORR CI Coal Township 1 Kelly Drive Harrisburg PA 17866-1020 US		Procurement Contact: Buyer: Kathleen SRM-RecMgt Phone: Fax:		Expiration Date of Contract (if applicable) Delivery Date: See Items

This Request For Quotes (REQ) is composed of: Part I. General Information; Part II. Proposal Requirements; Part III. Evaluation
8.46 x 10.99 in

QC6 (1) (110) qc6dca0u INS

- The PDF file displays within the Adobe application and the standard editor functions are available
- Also, note that a different set of command buttons are located above the browser window



Displaying Records

Displaying a Level 2 Element (cont'd)

When the element type is an **SRM Quotation**, the rules for opening it are the same as in SRM: it may be opened only after the bid opening date and time have passed.

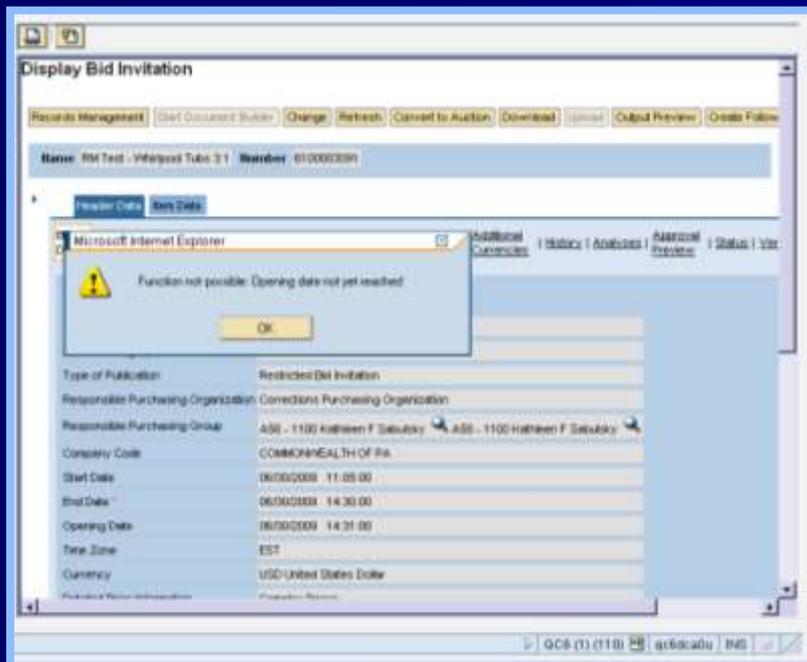
Hierarchy	Element Type	Visibility	Last Processed	Node
▼ COPA Bid Invitation RM Test - Whirlpool T			SRMRFCSRV / 06/30/2009 / 11...	
📁 COPA Bid Invitation RM Test - Whirlpo	COPA Bid Invitation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	19
🟢 SNAPSNOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11...	27
🟢 SNAPSNOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11...	27
🟢 SNAPSNOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11...	27
🟢 SNAPSNOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11...	27
✉ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	24
✉ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	24
✉ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	24
📁 COPA Document Attachments Folder		All Roles		1



Displaying Records

Displaying a Level 2 Element (cont'd)

If an attempt is made to open an **SRM Quotation** prior to the bid opening date and time, it will not be allowed and a message will display alerting you to the reason “Function not possible; Opening date not yet reached”:



Displaying Records

Displaying a Level 3 Element

- The capability appears to exist to make changes to Level 3 element types from within Records Management; however, the documents will always revert back to the original version.
 - **DO NOT** make any changes or deletions to COPA Attachments while in Records Management; **always log into SRM in order to edit/delete these documents.**



Displaying Records

Displaying a Level 3 Element (cont'd)

- The DISPLAY/CHANGE  icon toggles you from one mode to the other

- The indicator on the status bar changes each time the icon is selected



– Display 

– Change 

– Note that the SAVE icon becomes available when the status switches from Display  to Change 



Displaying Records

Displaying a Level 3 Element (cont'd)

The last element type that we're going to review is **COPA Attachment**

Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼ COPA Bid Invitation RM Test - Whirlpool Tuk			SRMRFCSRV / 06/30/2009 / 11...	
COPA Bid Invitation RM Test - Whirlpool	COPA Bid Invitation	All Roles	SRMRFCSRV / 06/30/2009 / 11... 19	
● SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11... 27	
● SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11... 27	
● SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11... 27	
● SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11... 27	
✉ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11... 24	
✉ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11... 24	
✉ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11... 24	
▼ COPA Document Attachments Folder		All Roles		1
COPA Attachment RM Testing State	COPA Attachment	All Roles	SRMRFCSRV / 06/30/2009 / 11... 2	



Displaying Records

Displaying a Level 3 Element (cont'd)

STATE-OF-MANUFACTURE-CHART

THIS FORM MUST BE COMPLETED AND RETURNED WITH THE BID

The Reciprocal Limitations Act 146 requires the Department to give Pennsylvania resident bidders a preference against a non-resident bidder from any state that gives or requires a preference to bidders from that state. The amount of preference shall be equal to the amount of preference applied by the state of the non-resident bidder. More information on this Act, or how to claim preference, can be obtained at our internet site at www.dgs.state.pa.us, by faxing a request to 717-787-0725, or by calling Vendor Services at 717-787-2199 or 4705.

All bidders must complete the following chart by listing the name of the manufacturer and the state (or foreign country) of manufacture for each item. If the item is domestically produced, the bidder must indicate the state in the United States where the item will be manufactured. This chart must be completed and submitted with the bid no later than two (2) business days after notification from the Department of General Services to furnish the information. Failure to complete this chart and provide the required information prior to the expiration of the second business day after notification shall result in the rejection of the bid.

ITEM NUMBER	NAME OF MANUFACTURER	STATE (OR FOREIGN COUNTRY) OF MANUFACTURE
*****	*****	*****
*****	*****	*****
*****	*****	*****
*****	*****	*****
*****	*****	*****
*****	*****	*****
*****	*****	*****
*****	*****	*****
*****	*****	*****
*****	*****	*****

- The Word file opens within the Office application
 - When in display mode, note the absence of the standard Word editor tools above the browser window





Manually Attaching Documents



MENU



Manually Attaching Documents

Attaching a Level 3 Element

Level 3 element types may be manually attached to an existing record. Once attached, these documents are accessed and displayed in the same manner as COPA attachments.

The Records Management User must be in Change mode in order to manually attach a document. MS Office application documents such as Word, Excel, and PowerPoint can be attached. Outlook e-mails may also be integrated into the Record, as well as PDF, .tif and .jpg documents.



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

The file size of an attached document should conform to the existing network guidelines; i.e., the total size of all attachments within a single Record should not exceed 20-25 MB.

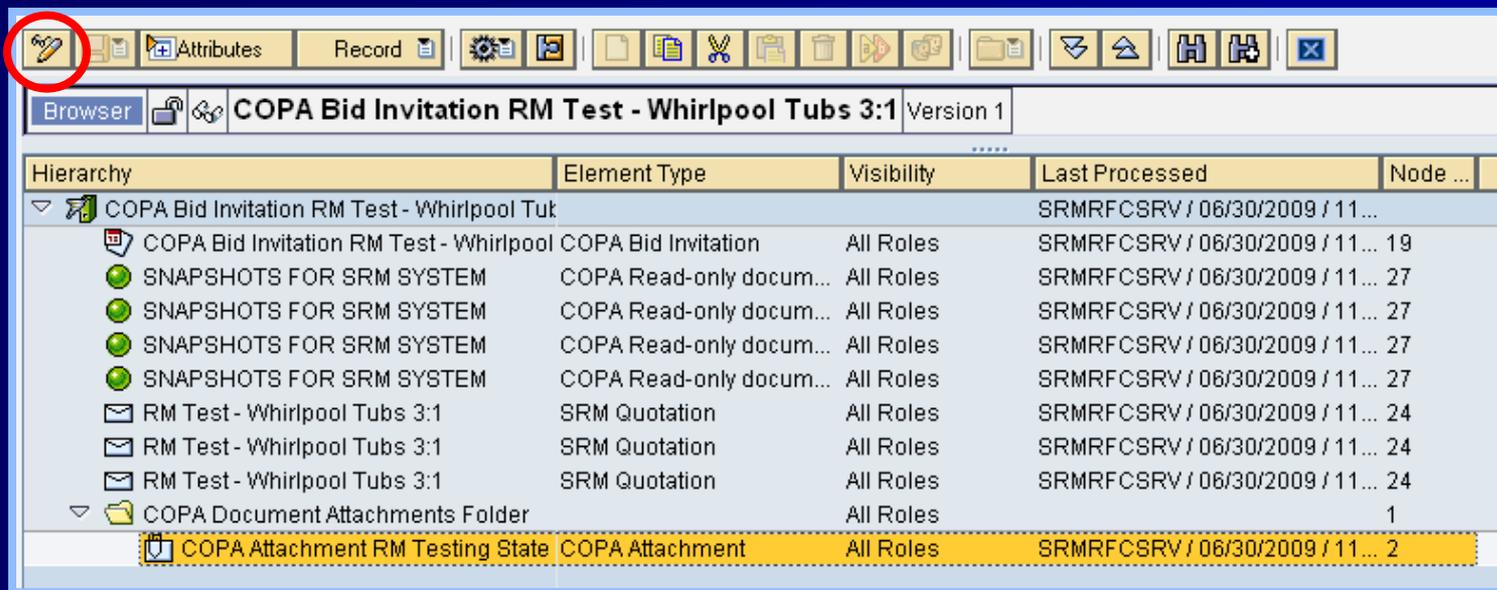
If you have any documents that you consider confidential, you should password-protect them prior to attaching them in Records Management.



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

Before attempting to attach a document to a record, make sure that you are in *Change* mode. If you are not, select the DISPLAY/CHANGE icon to switch from *Display* to *Change*.



The screenshot shows a software interface with a toolbar at the top. A red circle highlights the 'Change' icon (a pencil) in the toolbar. Below the toolbar is a browser window titled 'COPA Bid Invitation RM Test - Whirlpool Tubs 3:1 Version 1'. The main area displays a table with the following columns: Hierarchy, Element Type, Visibility, Last Processed, and Node ...

Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼ COPA Bid Invitation RM Test - Whirlpool Tut			SRMRFCSRV / 06/30/2009 / 11...	
COPA Bid Invitation RM Test - Whirlpool	COPA Bid Invitation	All Roles	SRMRFCSRV / 06/30/2009 / 11... 19	
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11... 27	
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11... 27	
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11... 27	
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11... 27	
RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11... 24	
RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11... 24	
RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11... 24	
COPA Document Attachments Folder		All Roles		1
COPA Attachment RM Testing State	COPA Attachment	All Roles	SRMRFCSRV / 06/30/2009 / 11... 2	

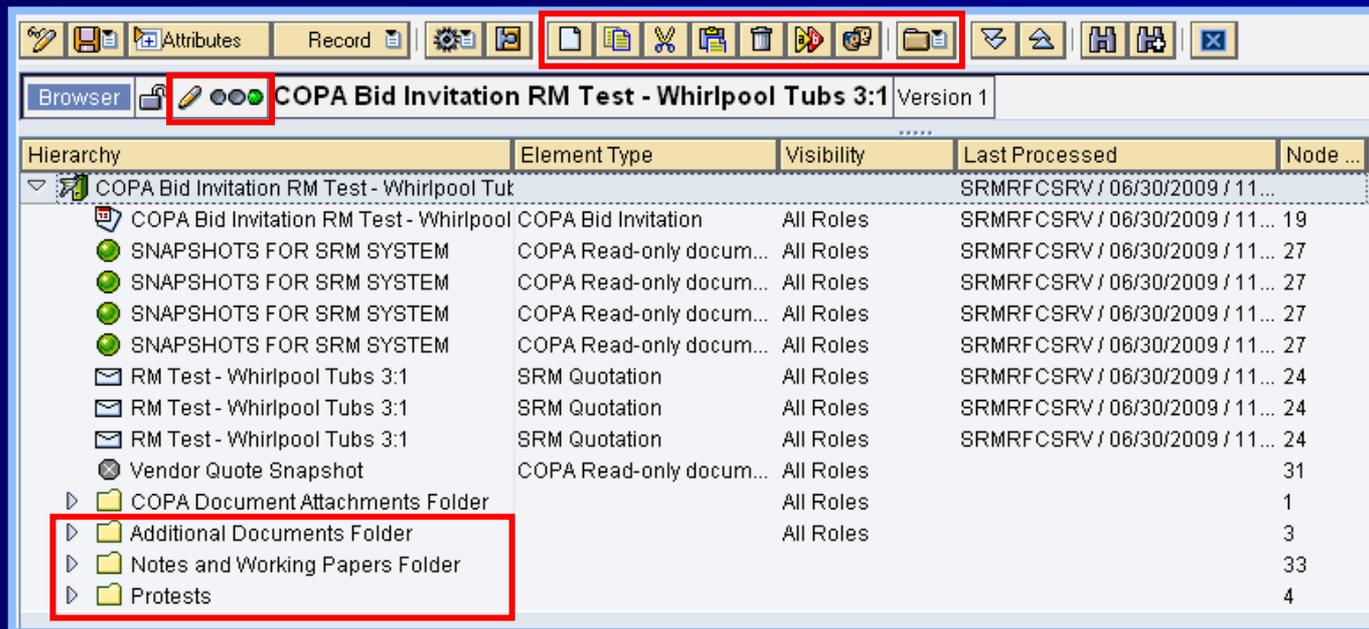


Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

Three new folders are now visible within the Record: Additional Documents, Notes and Working Papers, and Protests.

Also, notice that the status indicator reflects Change mode and additional icons are active.



The screenshot shows a software interface with a toolbar at the top containing icons for Attach, Copy, Paste, Delete, and other actions. Below the toolbar is a breadcrumb trail: "Browser" > "COPA Bid Invitation RM Test - Whirlpool Tubs 3:1" > "Version 1". The main area displays a table with columns: Hierarchy, Element Type, Visibility, Last Processed, and Node ...

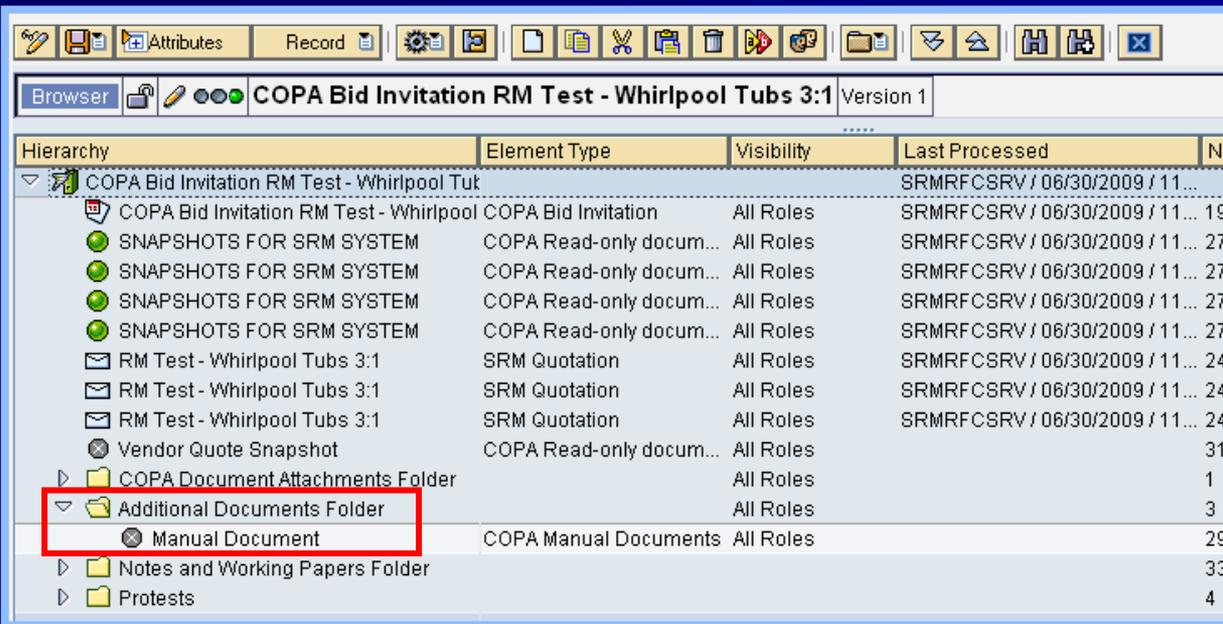
Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼ COPA Bid Invitation RM Test - Whirlpool Tut			SRMRFCSRV / 06/30/2009 / 11...	
▶ COPA Bid Invitation RM Test - Whirlpool	COPA Bid Invitation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	19
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11...	27
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11...	27
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11...	27
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11...	27
▶ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	24
▶ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	24
▶ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	24
▶ Vendor Quote Snapshot	COPA Read-only docum...	All Roles		31
▶ COPA Document Attachments Folder		All Roles		1
▶ Additional Documents Folder		All Roles		3
▶ Notes and Working Papers Folder				33
▶ Protests				4



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

- Expanding the new folder will reveal placeholders which are used to add an attachment



Hierarchy	Element Type	Visibility	Last Processed	No
COPIA Bid Invitation RM Test - Whirlpool Tuk			SRMRFCSRV / 06/30/2009 / 11...	
COPIA Bid Invitation RM Test - Whirlpool	COPIA Bid Invitation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	19
SNAPSHOTS FOR SRM SYSTEM	COPIA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11...	27
SNAPSHOTS FOR SRM SYSTEM	COPIA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11...	27
SNAPSHOTS FOR SRM SYSTEM	COPIA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11...	27
SNAPSHOTS FOR SRM SYSTEM	COPIA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11...	27
RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	24
RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	24
RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	24
Vendor Quote Snapshot	COPIA Read-only docum...	All Roles		31
COPIA Document Attachments Folder		All Roles		1
Additional Documents Folder		All Roles		3
Manual Document	COPIA Manual Documents	All Roles		29
Notes and Working Papers Folder				33
Protests				4

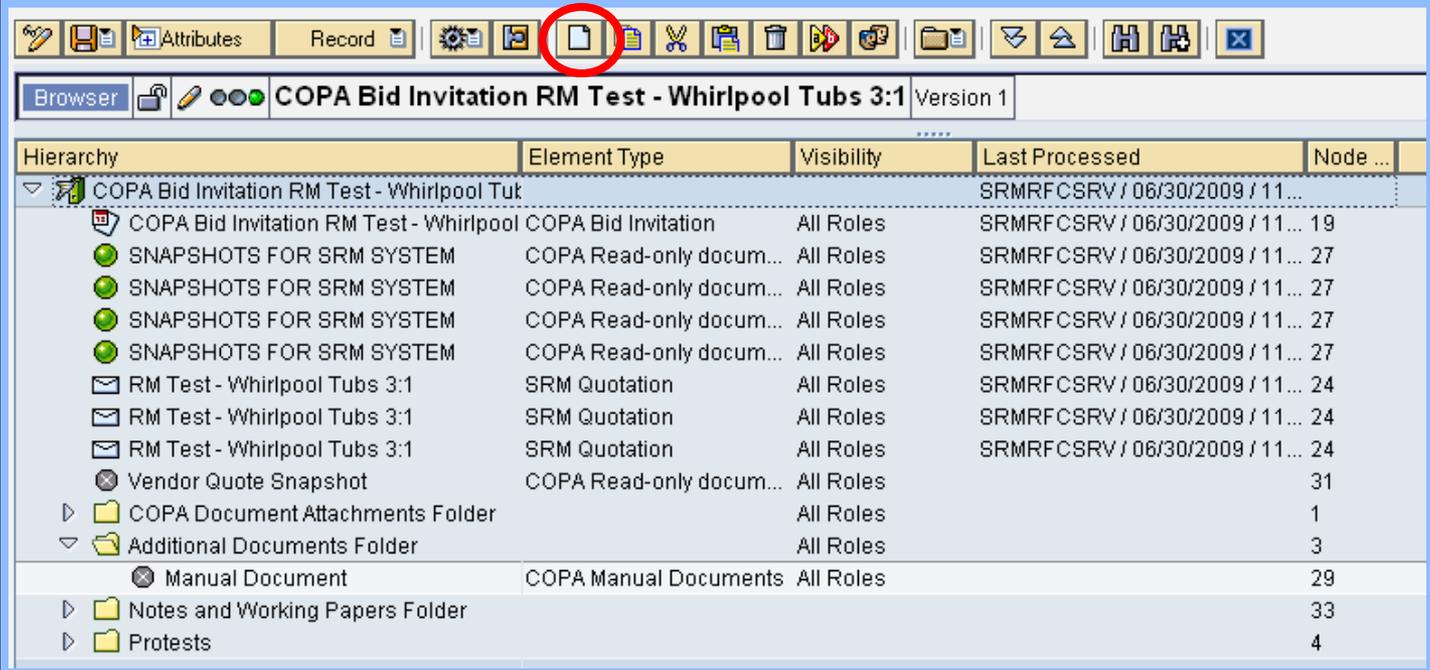
- Use the placeholders to attach documents from any of the previously mentioned applications



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

If you need to access additional placeholders within a folder, select the CREATE  icon



The screenshot shows a software interface with a toolbar at the top and a table below. The toolbar contains various icons, with a red circle highlighting the 'CREATE' icon (a document with a plus sign). The table below has the following columns: Hierarchy, Element Type, Visibility, Last Processed, and Node ...

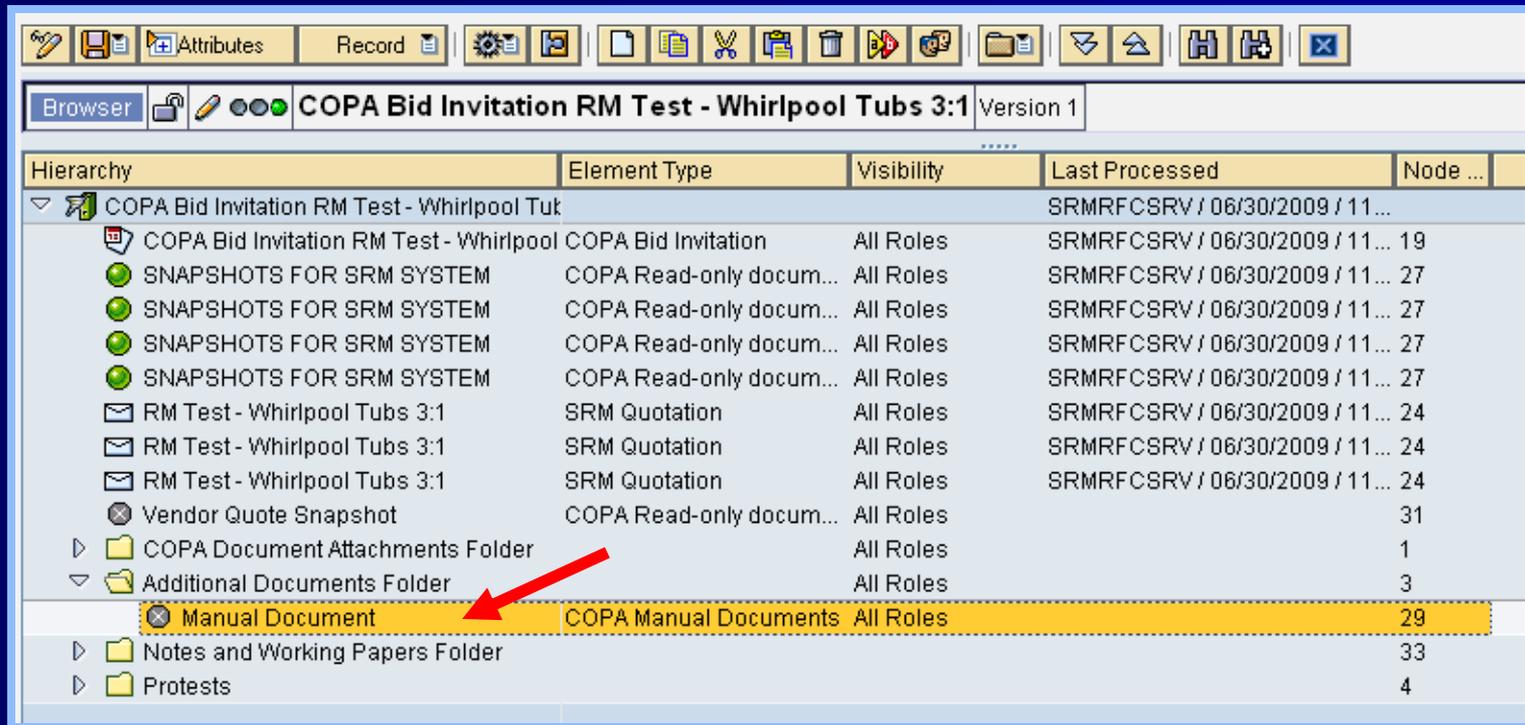
Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼ COPA Bid Invitation RM Test - Whirlpool Tub			SRMRFCRSV / 06/30/2009 / 11...	
▶ COPA Bid Invitation RM Test - Whirlpool	COPA Bid Invitation	All Roles	SRMRFCRSV / 06/30/2009 / 11... 19	
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCRSV / 06/30/2009 / 11... 27	
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCRSV / 06/30/2009 / 11... 27	
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCRSV / 06/30/2009 / 11... 27	
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCRSV / 06/30/2009 / 11... 27	
▶ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCRSV / 06/30/2009 / 11... 24	
▶ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCRSV / 06/30/2009 / 11... 24	
▶ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCRSV / 06/30/2009 / 11... 24	
▶ Vendor Quote Snapshot	COPA Read-only docum...	All Roles		31
▶ COPA Document Attachments Folder		All Roles		1
▶ Additional Documents Folder		All Roles		3
▶ Manual Document	COPA Manual Documents	All Roles		29
▶ Notes and Working Papers Folder				33
▶ Protests				4



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

In order to attach a document, first select the placeholder, then right-click on the mouse



The screenshot shows a software interface with a toolbar at the top and a table below. The table has columns for Hierarchy, Element Type, Visibility, Last Processed, and Node ... The 'Manual Document' entry is highlighted in yellow, and a red arrow points to it.

Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼ COPA Bid Invitation RM Test - Whirlpool Tub			SRMRFCRSV / 06/30/2009 / 11...	
▶ COPA Bid Invitation RM Test - Whirlpool	COPA Bid Invitation	All Roles	SRMRFCRSV / 06/30/2009 / 11... 19	
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCRSV / 06/30/2009 / 11... 27	
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCRSV / 06/30/2009 / 11... 27	
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCRSV / 06/30/2009 / 11... 27	
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCRSV / 06/30/2009 / 11... 27	
▶ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCRSV / 06/30/2009 / 11... 24	
▶ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCRSV / 06/30/2009 / 11... 24	
▶ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCRSV / 06/30/2009 / 11... 24	
▶ Vendor Quote Snapshot	COPA Read-only docum...	All Roles		31
▶ COPA Document Attachments Folder		All Roles		1
▶ Additional Documents Folder		All Roles		3
▶ Manual Document	COPA Manual Documents	All Roles		29
▶ Notes and Working Papers Folder				33
▶ Protests				4



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

Now choose **Activities**, then **Create**, on the menus that display after right-clicking the mouse

The screenshot shows a software interface with a table of elements and a context menu. The table has columns for Hierarchy, Element Type, Visibility, Last Processed, and Node ID. A context menu is open over the 'Manual Document' row, with 'Activities' and 'Create' highlighted.

Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼ COPA Bid Invitation RM Test - Whirlpool Tut			SRMRFCSRV / 06/30/2009 / 11...	
▶ COPA Bid Invitation RM Test - Whirlpool	COPA Bid Invitation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	19
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11...	27
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11...	27
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11...	27
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11...	27
▶ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	24
▶ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	24
▶ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	24
▶ Vendor Quote Snapshot	COPA Read-only docum...	All Roles		31
▶ COPA Document Attachments Folder		All Roles		1
▶ Additional Documents Folder		All Roles		3
▶ Manual Document	COPA Manual Documents	All Roles		29
▶ Notes and Working				33
▶ Protests				4

Context Menu:

- Activities
- Insert from Clipboard
- Delete
- Rename
- Determine Visibility
- Attributes for Node
- Create
- Find
- Information
- Where-Used List



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

The *Document Client : Create Document* opens in a new window:

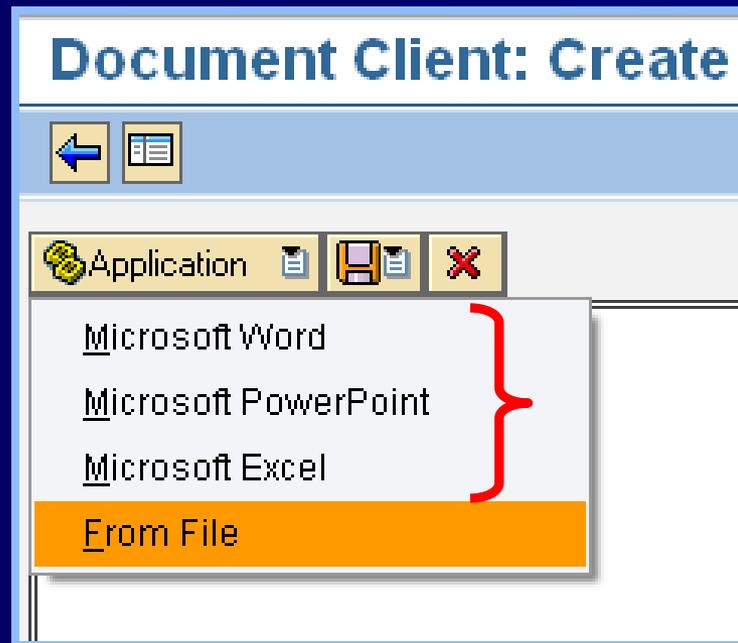


- Select the APPLICATION button to create a new document using MS Office software, as well as the option to upload an existing document



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

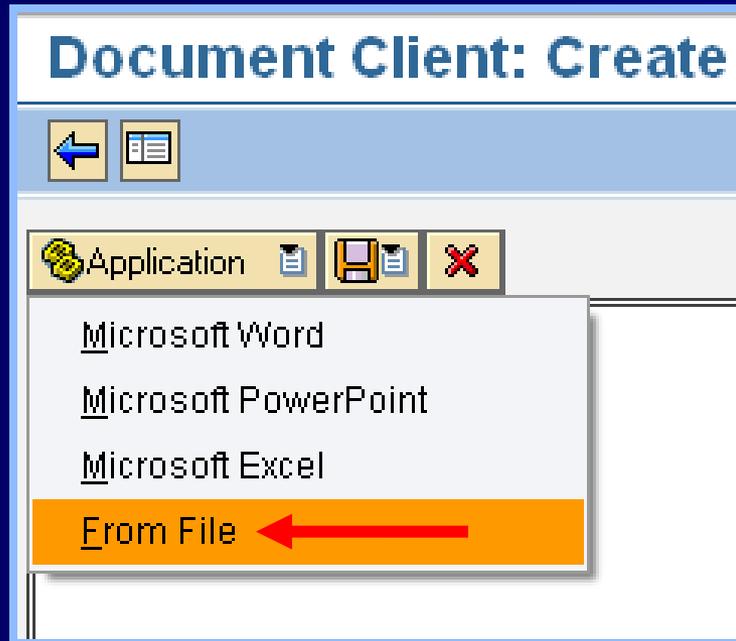


- The menu option to create documents in Microsoft Word, Excel, and Powerpoint is revealed
 - When selected, the appropriate editor will display in which you can create the document



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

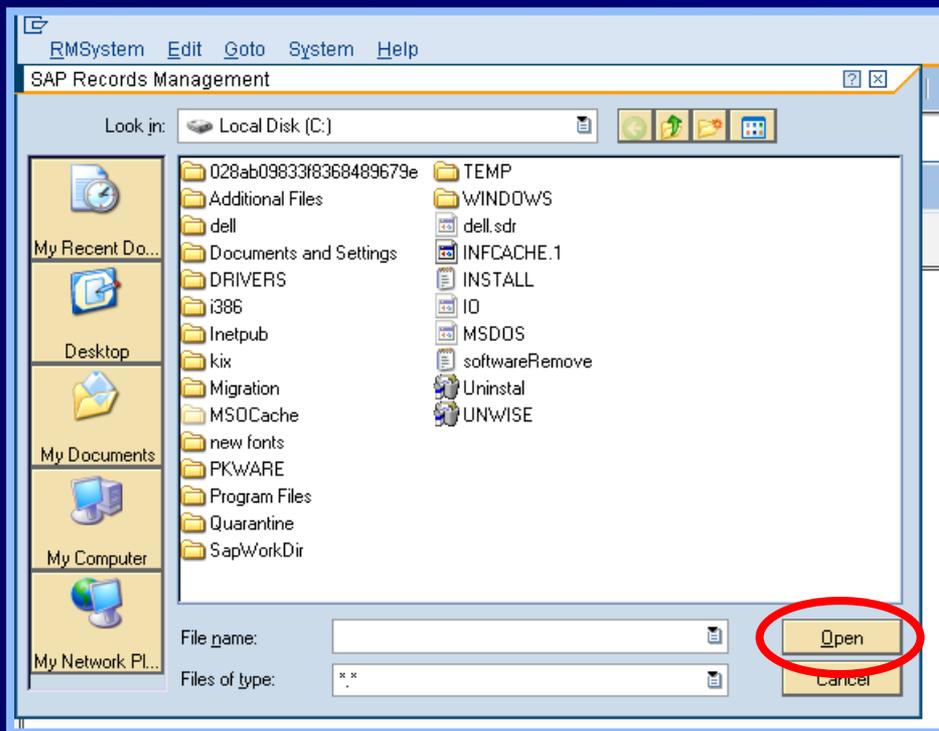


- Selecting the *From File* option allows you to search for and attach an existing document



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)



- When the *From File* option is chosen, a standard file selection box for your hard drive displays
 - Locate and select the appropriate attachment, then select the OPEN button



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

Document Client: Create Document

Create Attributes - [...]

Short Description	[...]	
Unique ID	06-30-2009 1	
Language	EN	English
Creation time	06/30/2009 14:22:37	
Created by	P00490812	Kathleen SRM-RecMgt
Time of change		
Last changed by		
Version	1	
Expiry Date		
Keyword (1)		
Keyword (2)		
Author (in MS Document)	aeshleman	
Document Template		
Version of Original Document		
ID of Original Document		
Check-Out Path on Desktop (1)		
Model that Was Used to Create Document		
As Copy of		
Attribute Values Last Changed	06/30/2009 14:22:48	
Attribute Values Last Changed by	P00490812	Kathleen SRM-RecMgt
User Who Checked Out the Document		
Do Not Archive Document	No	
File Plan Position (1)		
File Plan Position (2)		
SRM_DOC_PDF_FORM		
Storage Identification		

The *Create Attributes* dialog box displays, where you will enter an attribute “value” for the document, such as a title or description of the content



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

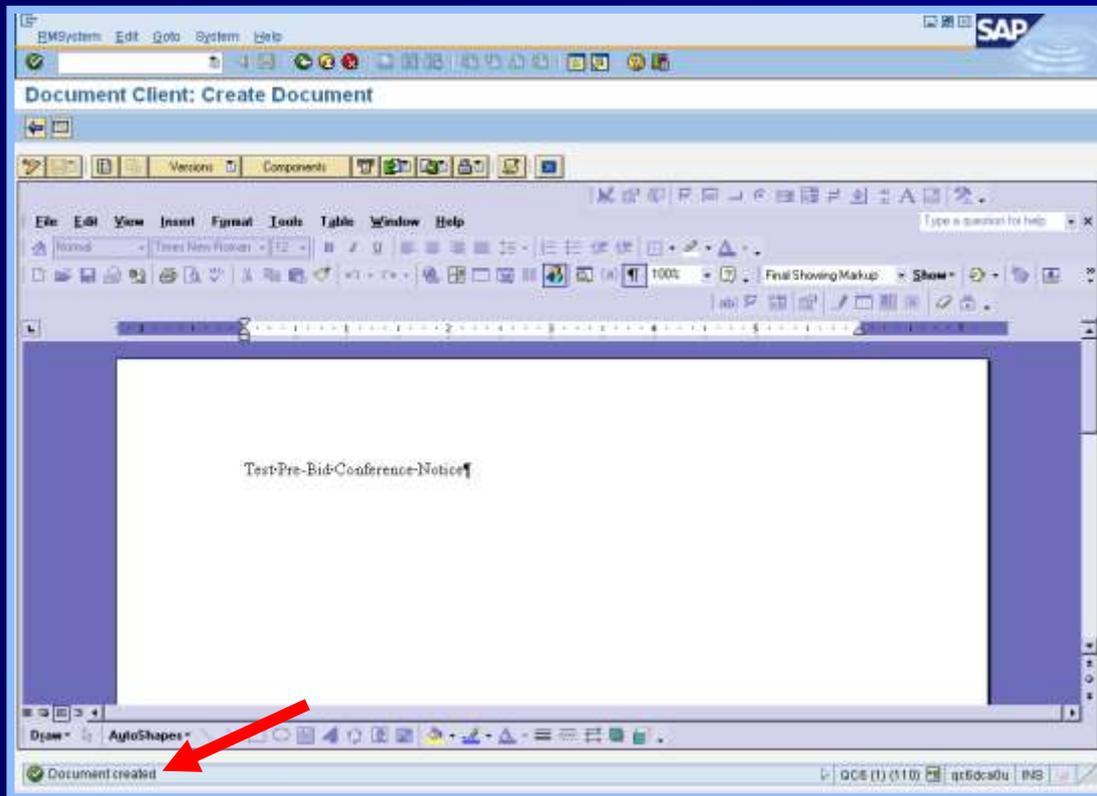
Short Description	[...]	
Unique ID	06-30-2009 1	
Language	EN	English
Creation time	06/30/2009 14:22:37	
Created by	P00490812	Kathleen SRM-RecMgt
Time of change		
Last changed by		
Version	1	
Expiry Date		
Keyword (1)		
Keyword (2)		
Author (in MS Document)	aeshleman	
Document Template		
Version of Original Document		
ID of Original Document		
Check-Out Path on Desktop (1)		
Model that Was Used to Create Document		
As Copy of		
Attribute Values Last Changed	06/30/2009 14:22:48	
Attribute Values Last Changed by	P00490812	Kathleen SRM-RecMgt
User Who Checked Out the Document		
Do Not Archive Document	No	
File Plan Position (1)		
File Plan Position (2)		
SRM_DOC_PDF_FORM		
Storage Identification		

- The Records Management System requires that *attributes* be assigned to all attachments
 - We will cover more about attributes and how to create them at the end of this section



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

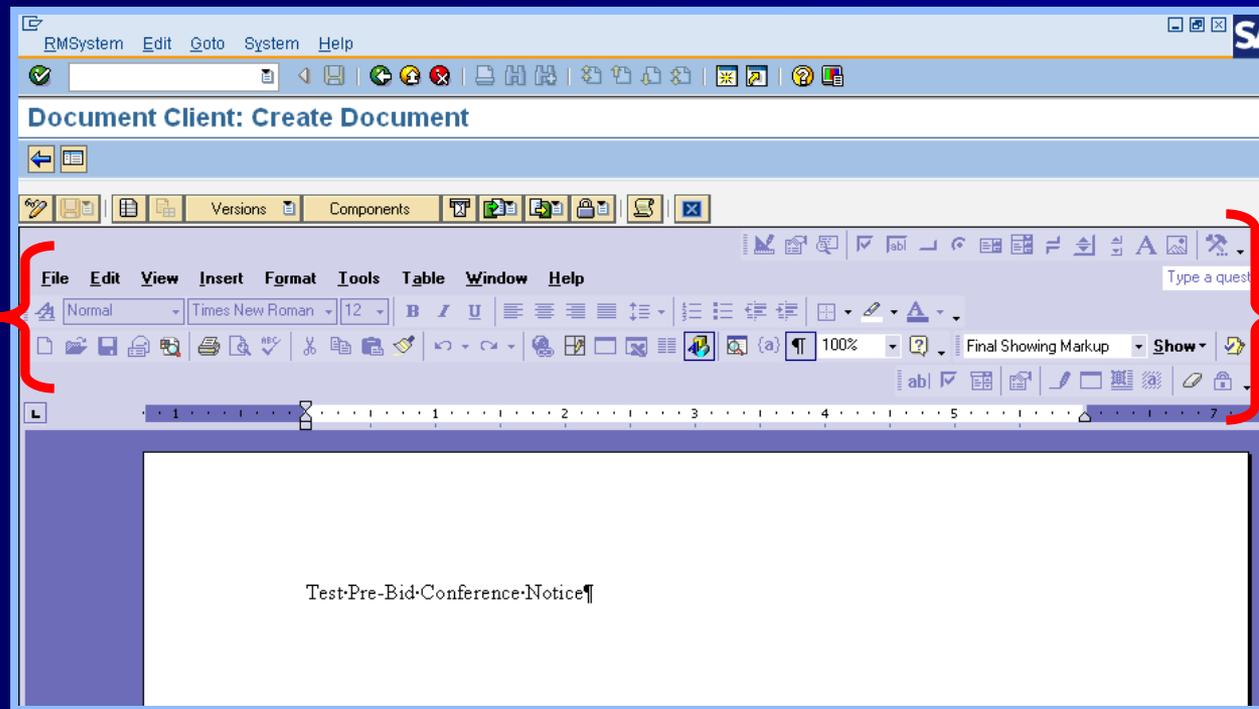


After the attributes are entered, the selected file document is created (e.g. attached) and opens within its source application (in this example, Word) within the browser window



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)



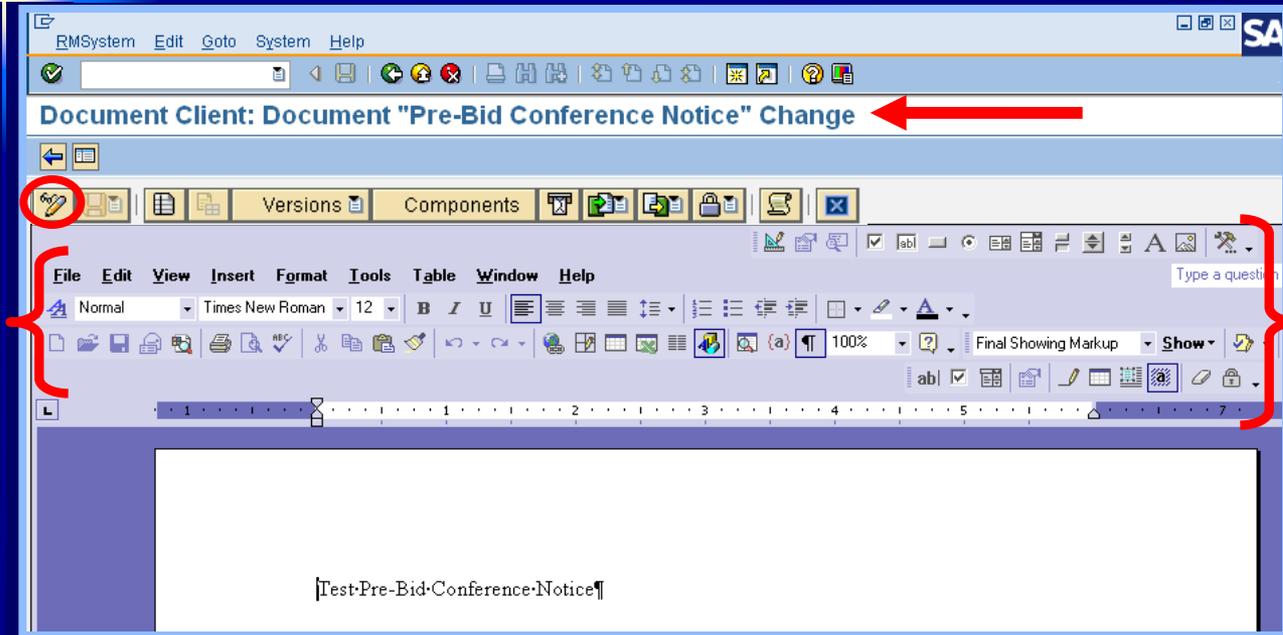
Notice that the full functionality of the Word application exists while in Records Management

However, the functions are disabled (grayed-out) here within the attached document because we are in *Display* mode



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)



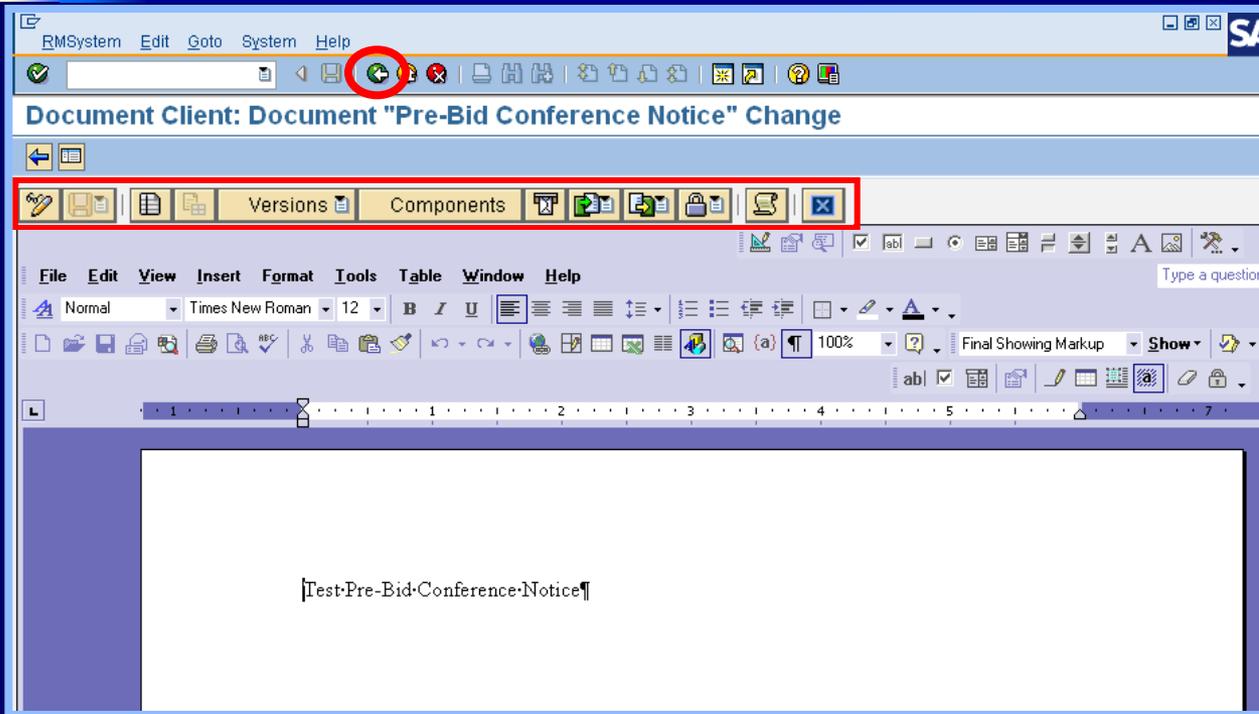
- Switch to Change mode by selecting the DISPLAY/CHANGE icon 

- The Word editor tools are now activated
- Also notice that the Document title becomes visible and the Change status is denoted



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)



- Return to the Record by selecting the BACK button on the SAP menu

- Notice that additional icons and buttons with functions related to the document attachment are available as well above the Word editor tools



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

The newly added attachment is e-filed (also referred to as 'checked in') under the Additional Documents Folder, with the Element Type **COPA Manual Documents**

The screenshot shows a software interface with a toolbar at the top and a table below. The table has columns for Hierarchy, Element Type, Visibility, Last Processed, and Node ID. A red arrow points to the 'Pre-Bid Conference Notice' entry under the 'Additional Documents Folder'.

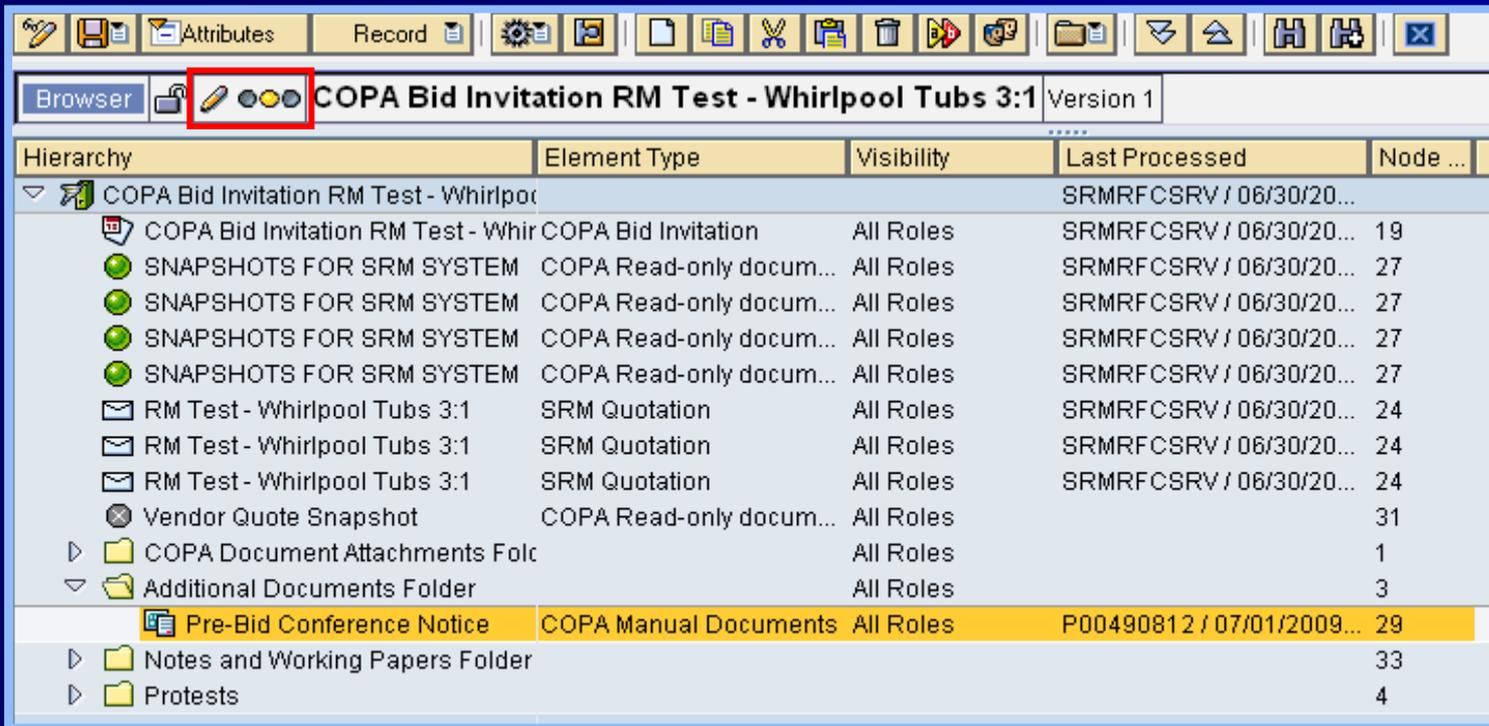
Hierarchy	Element Type	Visibility	Last Processed	Node ...
COPIA Bid Invitation RM Test - Whirlpoc			SRMRFCSRV / 06/30/20...	
COPIA Bid Invitation RM Test - Whir	COPIA Bid Invitation	All Roles	SRMRFCSRV / 06/30/20...	19
SNAPSHOTS FOR SRM SYSTEM	COPIA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
SNAPSHOTS FOR SRM SYSTEM	COPIA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
SNAPSHOTS FOR SRM SYSTEM	COPIA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
SNAPSHOTS FOR SRM SYSTEM	COPIA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/20...	24
RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/20...	24
RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/20...	24
Vendor Quote Snapshot	COPIA Read-only docum...	All Roles		31
COPIA Document Attachments Folc		All Roles		1
Additional Documents Folder		All Roles		3
Pre-Bid Conference Notice	COPIA Manual Documents	All Roles	P00490812 / 07/01/2009...	29
Notes and Working Papers Folder				33
Protests				4



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

The Change mode status indicator has switched to yellow, which means that the newly added attachment has not been saved to the Record yet



Hierarchy	Element Type	Visibility	Last Processed	Node ...
COPIA Bid Invitation RM Test - Whirlpoc			SRMRFCSRV / 06/30/20...	
COPIA Bid Invitation RM Test - Whir	COPIA Bid Invitation	All Roles	SRMRFCSRV / 06/30/20...	19
SNAPSHOTS FOR SRM SYSTEM	COPIA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
SNAPSHOTS FOR SRM SYSTEM	COPIA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
SNAPSHOTS FOR SRM SYSTEM	COPIA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
SNAPSHOTS FOR SRM SYSTEM	COPIA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/20...	24
RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/20...	24
RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/20...	24
Vendor Quote Snapshot	COPIA Read-only docum...	All Roles		31
COPIA Document Attachments Folc		All Roles		1
Additional Documents Folder		All Roles		3
Pre-Bid Conference Notice	COPIA Manual Documents	All Roles	P00490812 / 07/01/2009...	29
Notes and Working Papers Folder				33
Protests				4



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

Now we're going to select the SAVE icon, and then the Save option from the drop-down menu

Element Type	Visibility	Last Processed	Node
COPA Bid Invitation	All Roles	SRMRFCSRV / 06/30/20...	19
COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
SRM Quotation	All Roles	SRMRFCSRV / 06/30/20...	24
SRM Quotation	All Roles	SRMRFCSRV / 06/30/20...	24
SRM Quotation	All Roles	SRMRFCSRV / 06/30/20...	24
COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	31
	All Roles		1
	All Roles		3
COPA Manual Documents	All Roles	P00490812 / 07/01/2009...	29
			33
			4



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

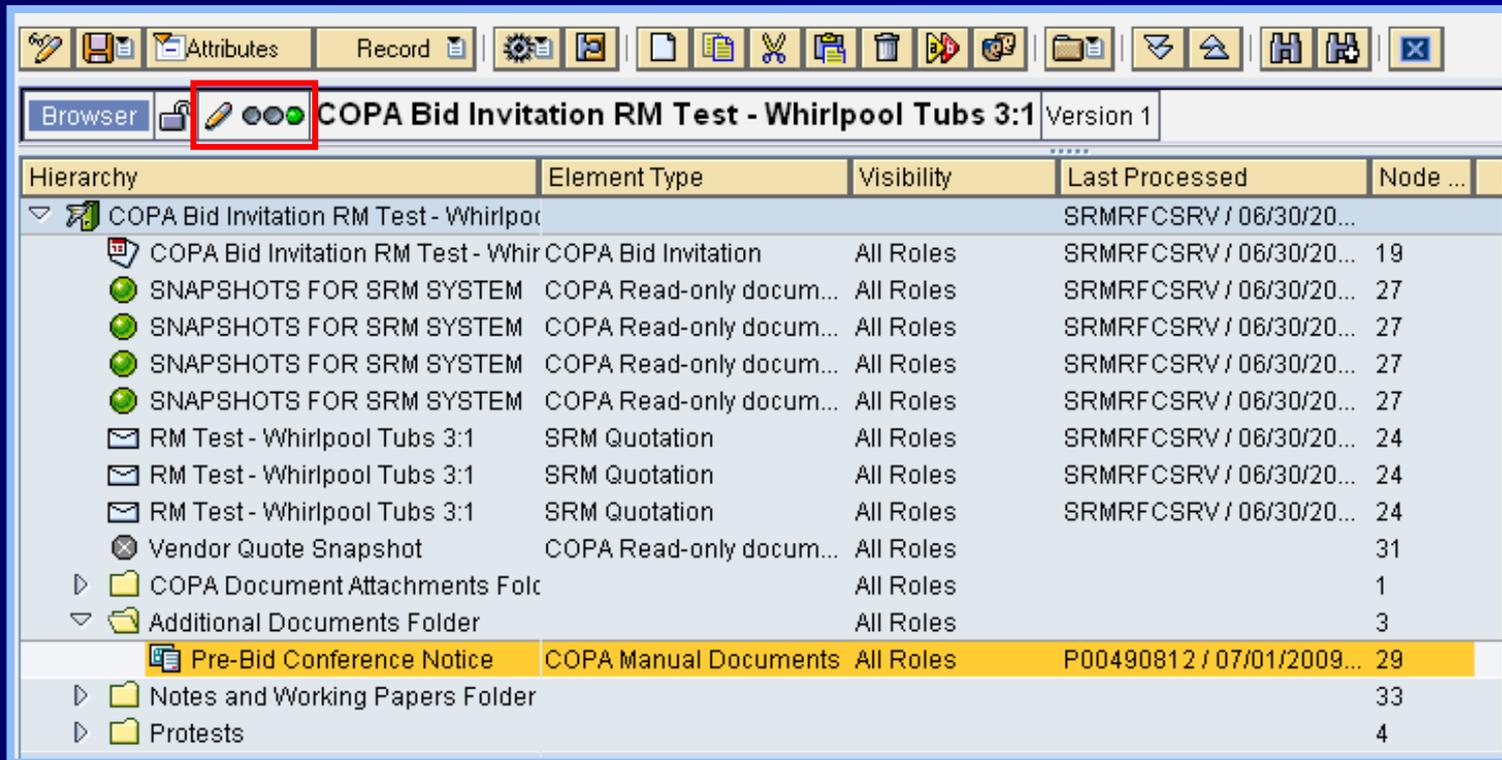
SPECIAL NOTE: Refer to the *Records Management Policy* for instructions regarding the changing and versioning of COPA Manual Documents within the Records Management folders



Manually Attaching Documents

Attaching a Level 3 Element (cont'd)

The status indicator switches to green, showing that the update to the Record has been saved



Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼ COPA Bid Invitation RM Test - Whirlpool			SRMRFCSRV / 06/30/20...	
▶ COPA Bid Invitation RM Test - Whir	COPA Bid Invitation	All Roles	SRMRFCSRV / 06/30/20...	19
▶ SNAPSOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
▶ SNAPSOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
▶ SNAPSOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
▶ SNAPSOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
▶ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/20...	24
▶ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/20...	24
▶ RM Test - Whirlpool Tubs 3:1	SRM Quotation	All Roles	SRMRFCSRV / 06/30/20...	24
▶ Vendor Quote Snapshot	COPA Read-only docum...	All Roles		31
▶ COPA Document Attachments Folc		All Roles		1
▶ Additional Documents Folder		All Roles		3
▶ Pre-Bid Conference Notice	COPA Manual Documents	All Roles	P00490812 / 07/01/2009...	29
▶ Notes and Working Papers Folder				33
▶ Protests				4



Manually Attaching Documents

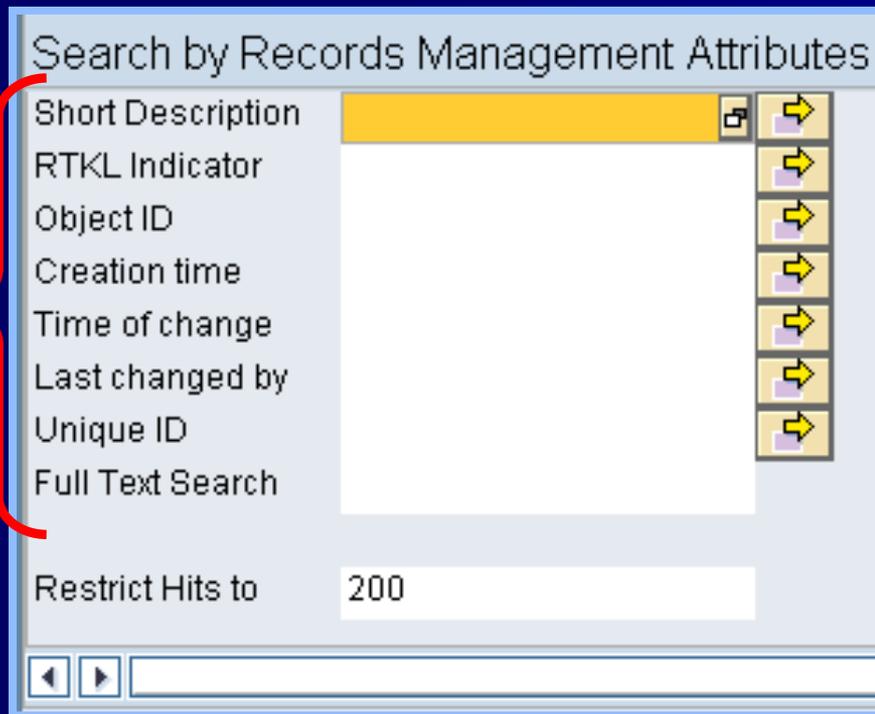
Attributes

- ❖ An attribute provides you with information on a Records Management document
- ❖ There are two types of attribute:
 - **Displayable attribute**, where the system assigns the attribute values automatically (for example, *Created By*, *Last Changed By*, etc.)
 - **Maintainable attribute**, where you can enter attribute values (for example, *Short Description*, etc.), and they can be changed at any time



Manually Attaching Documents

Attributes (cont'd)



Earlier in the course, in Searching for Records, we learned about searching for records by *Records Management Attributes*

Now we'll cover how to create those attributes to be used when conducting a search



Manually Attaching Documents

Attributes (cont'd)

The screenshot shows a 'Create Attributes' dialog box with the following attributes and values:

Short Description	[...]	
Unique ID	06-30-2009 1	
Language	EN	English
Creation time	06/30/2009 14:22:37	
Created by	P00490812	Kathleen SRM-RecMgt
Time of change		
Last changed by		
Version	1	
Expiry Date		
Keyword (1)		
Keyword (2)		
Author (in MS Document)	aeshleman	
Document Template		
Version of Original Document		
ID of Original Document		
Check-Out Path on Desktop (1)		
Model that Was Used to Create Document		
As Copy of		
Attribute Values Last Changed	06/30/2009 14:22:48	
Attribute Values Last Changed by	P00490812	Kathleen SRM-RecMgt
User Who Checked Out the Document		
Do Not Archive Document	No	
File Plan Position (1)		
File Plan Position (2)		
SRM_DOC_PDF_FORM		
Storage Identification		

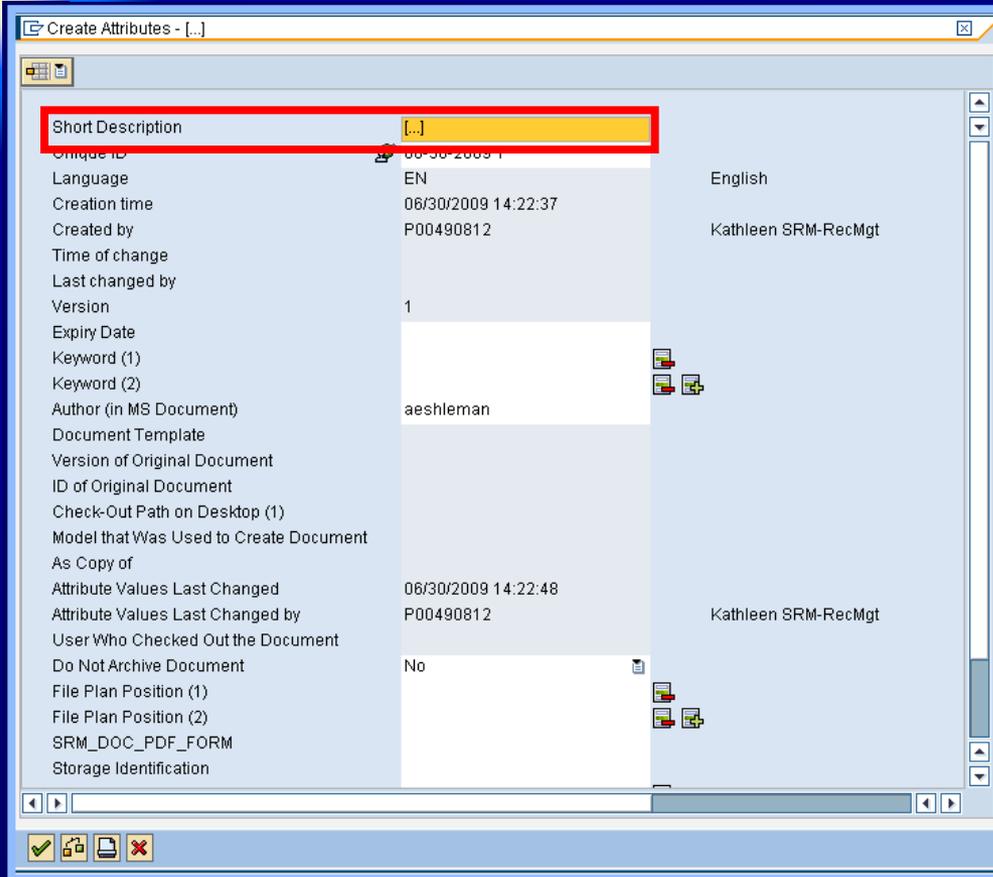
Red brackets in the original image group the following fields: Unique ID, Language, Author (in MS Document), and Do Not Archive Document.

Maintainable Attributes are recognizable by the open data entry fields, showing as white areas on the screen



Manually Attaching Documents

Attributes (cont'd)



Attribute Name	Value
Short Description	[...]
Unique ID	06-30-2009-1
Language	EN English
Creation time	06/30/2009 14:22:37
Created by	P00490812 Kathleen SRM-RecMgt
Time of change	
Last changed by	
Version	1
Expiry Date	
Keyword (1)	
Keyword (2)	
Author (in MS Document)	aeshleman
Document Template	
Version of Original Document	
ID of Original Document	
Check-Out Path on Desktop (1)	
Model that Was Used to Create Document	
As Copy of	
Attribute Values Last Changed	06/30/2009 14:22:48
Attribute Values Last Changed by	P00490812 Kathleen SRM-RecMgt
User Who Checked Out the Document	
Do Not Archive Document	No
File Plan Position (1)	
File Plan Position (2)	
SRM_DOC_PDF_FORM	
Storage Identification	

One *Maintainable Attribute* field, Short Description, is designated as **mandatory** for entry; all others are optional



Manually Attaching Documents

Attributes (cont'd)

The screenshot shows a 'Create Attributes' dialog box with a list of attributes on the left and their corresponding values on the right. The values are grouped into two sections by red brackets. The first section includes 'Language' (English), 'Created by' (Kathleen SRM-RecMgt), and 'Version' (1). The second section includes 'Author (in MS Document)' (aeshleman), 'Attribute Values Last Changed' (06/30/2009 14:22:48), and 'Attribute Values Last Changed by' (Kathleen SRM-RecMgt). Gray-shaded fields are present for 'Language', 'Created by', 'Version', 'Author (in MS Document)', 'Attribute Values Last Changed', and 'Attribute Values Last Changed by'. There are also icons for attaching documents next to the 'Keyword (1)', 'Keyword (2)', and 'File Plan Position (1)' fields.

Attribute	Value
Short Description	[...]
Unique ID	06-30-2009 1
Language	English
Creation time	06/30/2009 14:22:37
Created by	P00490812
Time of change	
Last changed by	
Version	1
Expiry Date	
Keyword (1)	
Keyword (2)	
Author (in MS Document)	aeshleman
Document Template	
Version of Original Document	
ID of Original Document	
Check-Out Path on Desktop (1)	
Model that Was Used to Create Document	
As Copy of	
Attribute Values Last Changed	06/30/2009 14:22:48
Attribute Values Last Changed by	P00490812
User Who Checked Out the Document	
Do Not Archive Document	No
File Plan Position (1)	
File Plan Position (2)	
SRM_DOC_PDF_FORM	
Storage Identification	

Displayable Attributes are pre-populated and recognizable by the gray-shaded fields



Manually Attaching Documents

Creating an Attribute

The screenshot shows a 'Create Attributes' dialog box with a list of attributes on the left and their values on the right. The 'Short Description' attribute is highlighted with a red box and contains the text 'Pre-Bid Conference Notice'. Other attributes include Unique ID, Language, Creation time, Created by, Time of change, Last changed by, Version, Expiry Date, Keyword (1), Keyword (2), Author (in MS Document), Document Template, Version of Original Document, ID of Original Document, Check-Out Path on Desktop (1), Model that Was Used to Create Document, As Copy of, Attribute Values Last Changed, Attribute Values Last Changed by, User Who Checked Out the Document, Do Not Archive Document, File Plan Position (1), File Plan Position (2), SRM_DOC_PDF_FORM, and Storage Identification.

Attribute	Value
Short Description	Pre-Bid Conference Notice
Unique ID	06-30-2009 1
Language	EN English
Creation time	06/30/2009 14:22:37
Created by	P00490812 Kathleen SRM-RecMgt
Time of change	
Last changed by	
Version	1
Expiry Date	
Keyword (1)	
Keyword (2)	
Author (in MS Document)	aeshleman
Document Template	
Version of Original Document	
ID of Original Document	
Check-Out Path on Desktop (1)	
Model that Was Used to Create Document	
As Copy of	
Attribute Values Last Changed	06/30/2009 14:22:48
Attribute Values Last Changed by	P00490812 Kathleen SRM-RecMgt
User Who Checked Out the Document	
Do Not Archive Document	No
File Plan Position (1)	
File Plan Position (2)	
SRM_DOC_PDF_FORM	
Storage Identification	

- Complete the *Short Description* field, along with any additional fields as desired



Manually Attaching Documents

Creating an Attribute (cont'd)

The screenshot shows a 'Create Attributes' dialog box with a form for 'Pre-Bid Conference Notice'. The form contains the following fields and values:

Short Description	Pre-Bid Conference Notice
Unique ID	06-30-2009 1
Language	EN
Creation time	06/30/2009 14:22:37
Created by	P00490812
Time of change	
Last changed by	
Version	1
Expiry Date	
Keyword (1)	
Keyword (2)	
Author (in MS Document)	aeshleman
Document Template	
Version of Original Document	
ID of Original Document	
Check-Out Path on Desktop (1)	
Model that Was Used to Create Document	
As Copy of	
Attribute Values Last Changed	06/30/2009 14:22:48
Attribute Values Last Changed by	P00490812
User Who Checked Out the Document	
Do Not Archive Document	No
File Plan Position (1)	
File Plan Position (2)	
SRM_DOC_PDF_FORM	
Storage Identification	

The 'ENTER' icon (a green checkmark) is circled in red in the bottom-left corner of the dialog box.

- Now select the ENTER  icon to return to the Document Client and the displayed attachment



Summary

Thank you for completing the SAP Records Management course. You are now able to:

- Access Records Management and understand screen navigation
- Understand how to search for and locate records
- Understand how to open records and view documents and attachments
- Understand how to manually attach various document types to an existing record



Summary

Now let's take a minute to test your knowledge with the following Knowledge Check questions.

Select the NEXT button to continue.





Knowledge Checks



MENU



Knowledge Checks

SAP Records Management is being implemented to:

- a. Standardize records retention and disposal of all procurement documents
- b. Replace the document attachment functionality in SRM
- c. Provide a location to store procurement documents for compliance with right-to-know
- d. None of the above
- e. All of the above



Knowledge Checks

SRM Documents can be displayed at any time in Records Management:

- a. True
- b. False



Knowledge Checks

Records Management can be accessed from SRM:

- a. True
- b. False



Knowledge Checks

How many levels of elements are in Records Management ?

- a. 2
- b. 3
- c. 4
- d. 5



Knowledge Checks

Which of the following roles have access to SAP Records Management ?

- a. Administrator
- b. Records Management User
- c. Display Only
- d. All of the above



Survey

Select the link below to complete an online survey.

<https://www.surveymonkey.com/s/CHJ7F9J>





You will receive credit for completing this course within 24 hours. Please select the "Log Off" button in the lower right corner to close this course.



Thank you!

