



SAP Records Management



Rev. April 2015



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

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





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?

- **Display Only**, 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

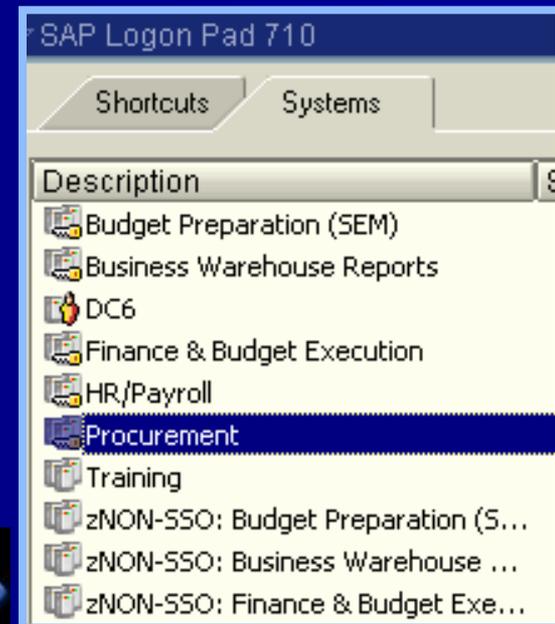
Accessing Records Management via SAP

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

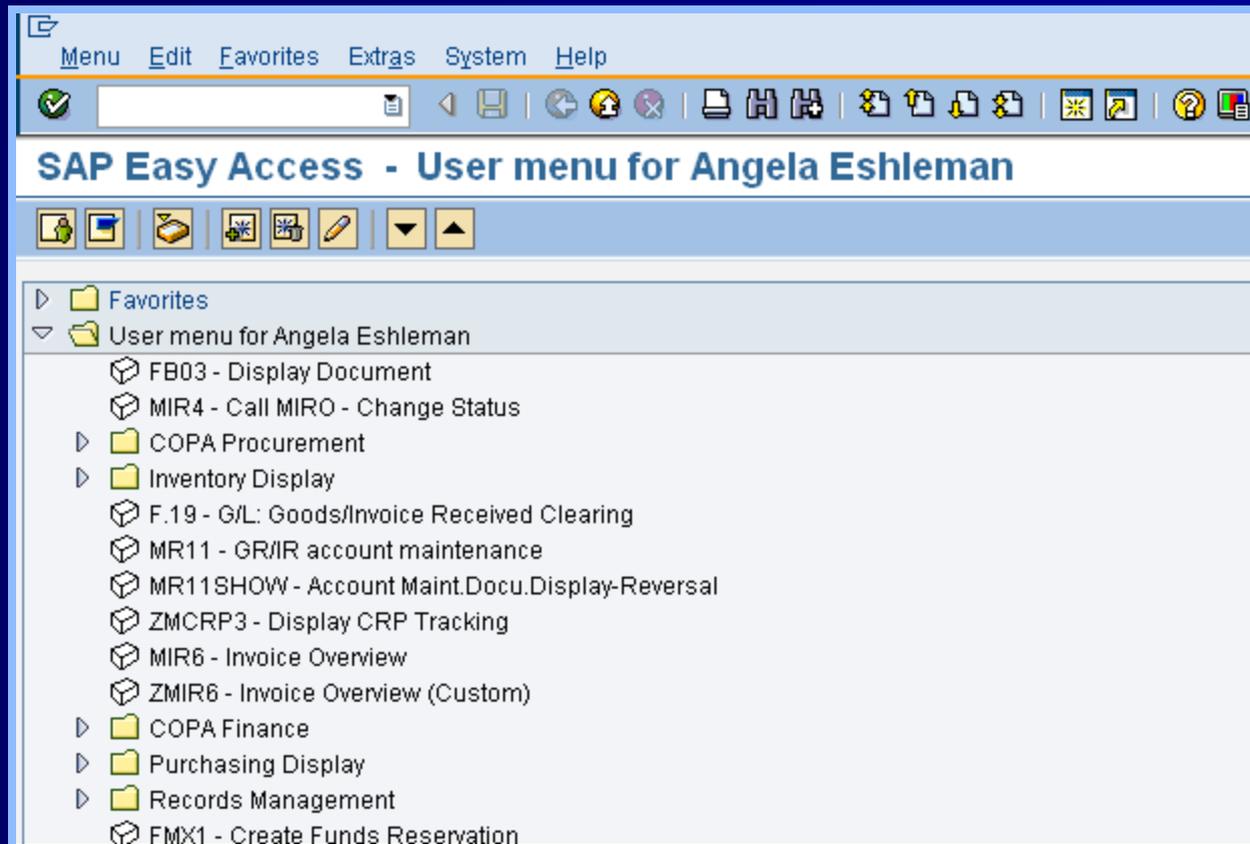
Select the **Procurement** option to continue



Getting Started

Accessing Records Management via SAP (cont'd)

Your individual SAP Procurement User menu will display:



Getting Started

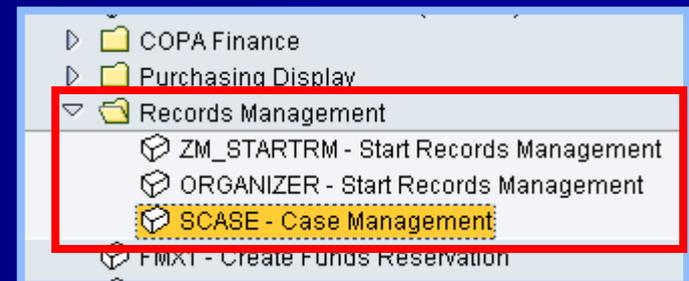
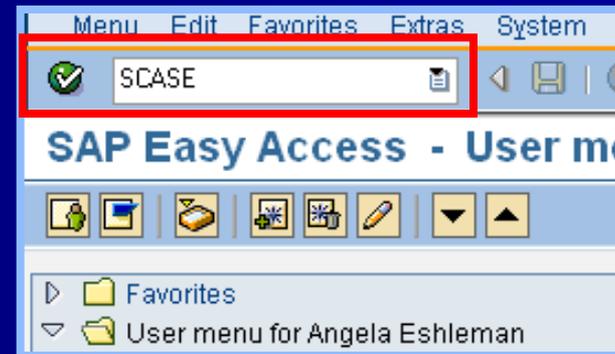
Accessing Records Management via SAP (cont'd)

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

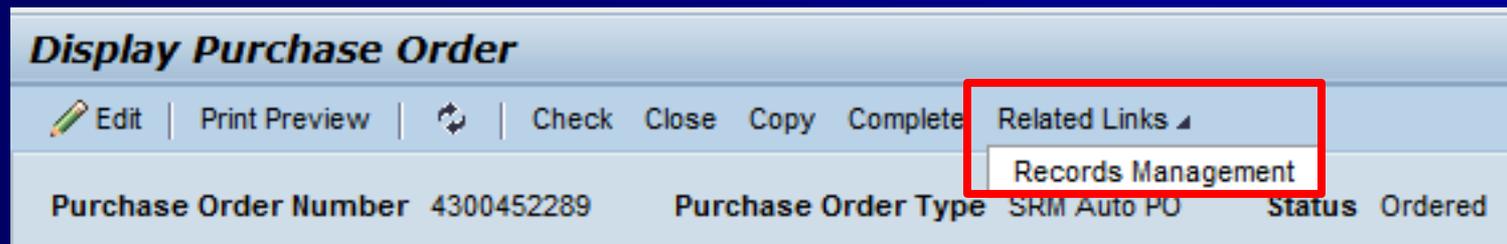


Getting Started

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



Display Purchase Order

Edit | Print Preview | Refresh | Check Close Copy Complete Related Links ▾

Records Management

Purchase Order Number 4300452289 Purchase Order Type SRM Auto PO Status Ordered



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 left sidebar shows a navigation tree with "COPA Procurement Records Management" expanded, containing "Search Procurement Records", "Business Documents", and "Documents". The main content area shows a record for "COPA Purchase Order 15 Vehicle, DEP (2) Ford Ranger XLT ext" with ID "4300190417". Below this is a table with the following data:

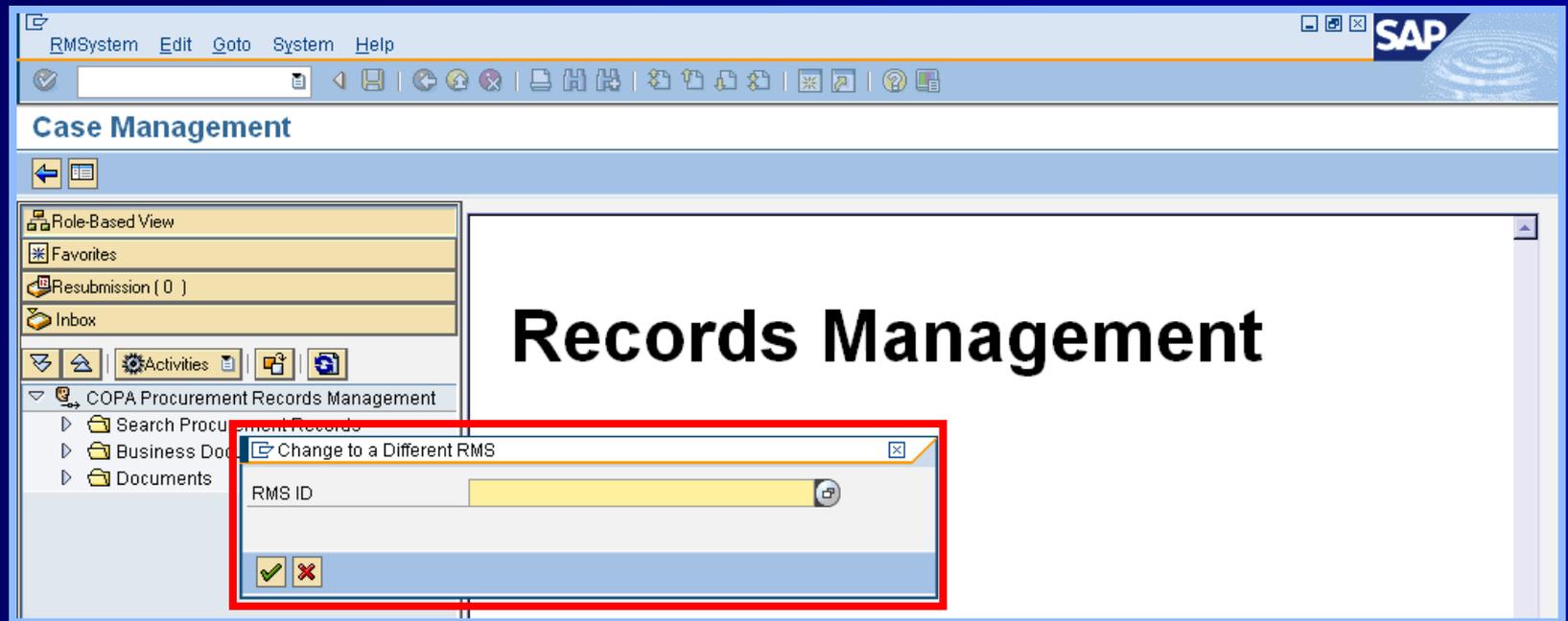
Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼ COPA Purchase Order 15 Vehicle, DEI			SRMRFC / 09/30/2009 / ...	
COPA Purchase Order 15 Vehicle, COPA Purchase Order	COPA Purchase Order	All Roles	SRMRFC / 09/30/2009 / ...	48
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFC / 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

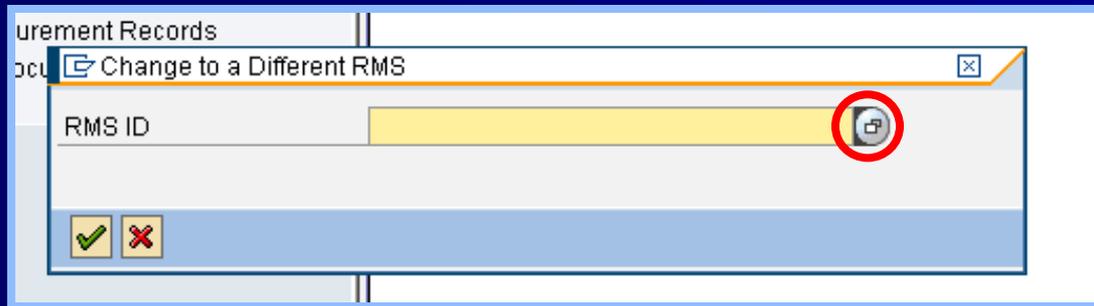
When you log into Records Management for the first time, you will be prompted to set the “RMS ID”



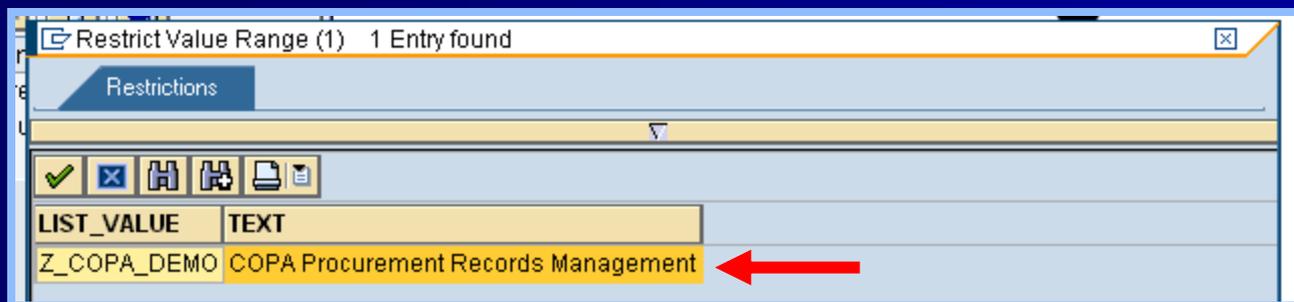
Getting Started

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



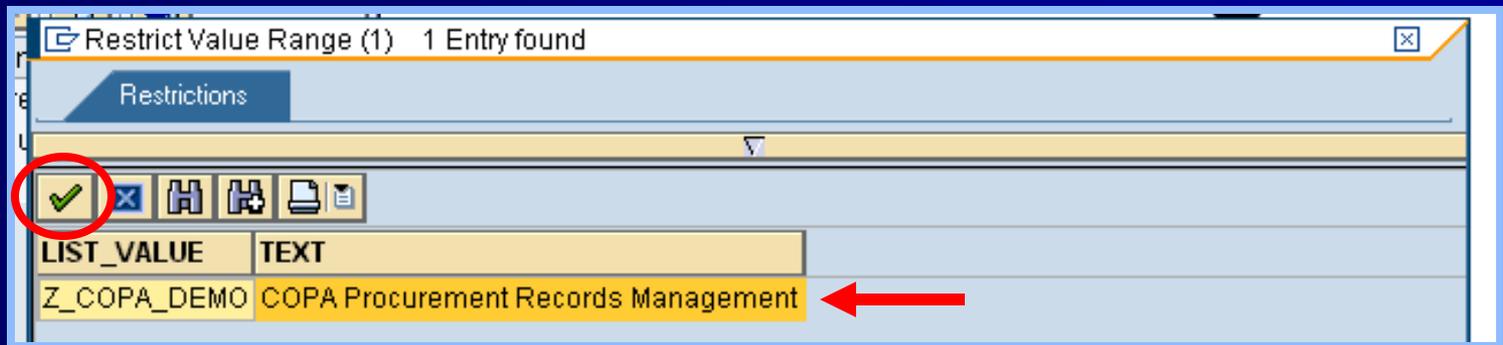
Only one value will display: **Z_COPA_DEMO**



Getting Started

Initial Login to Records Management (cont'd)

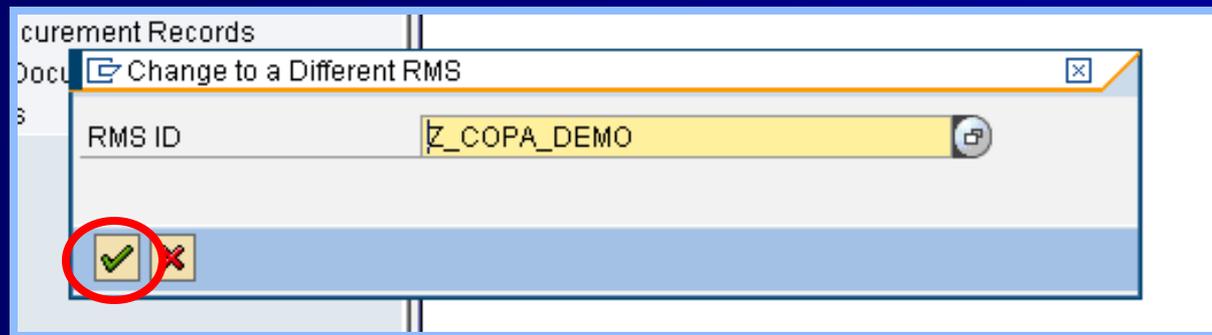
First, select the Z_COPA_DEMO value, then the CONTINUE  icon to pull it into the RMS ID box



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**

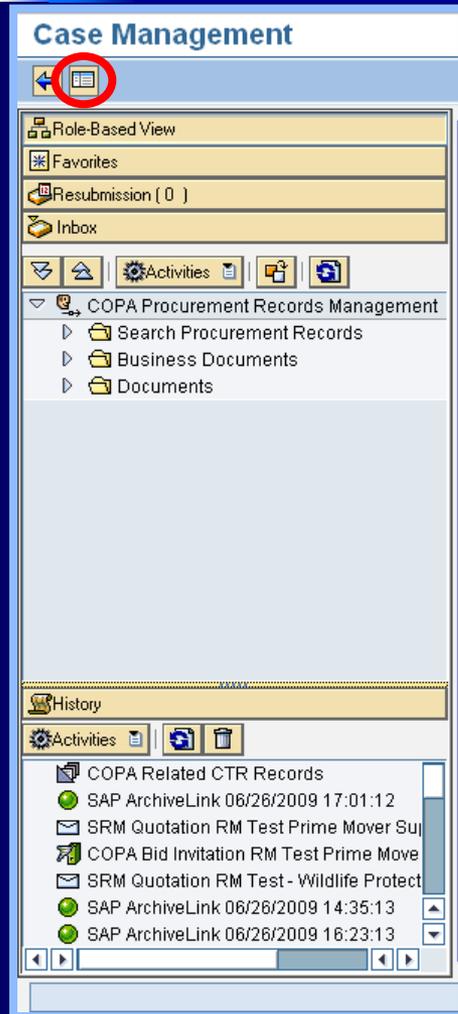


icon



Getting Started

The Records Organizer (cont'd)



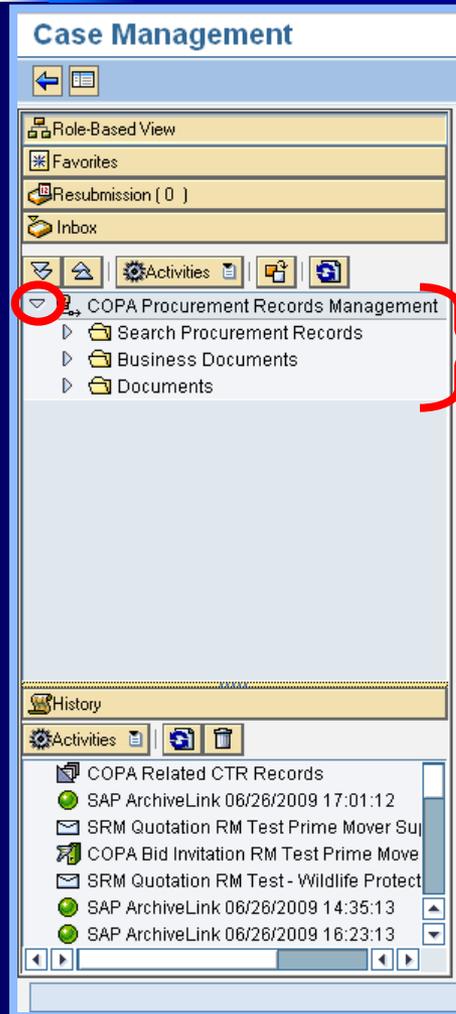
The **Hide/Show Organizer** icon is available at all times in the function toolbar

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



Getting Started

The Records Organizer (cont'd)



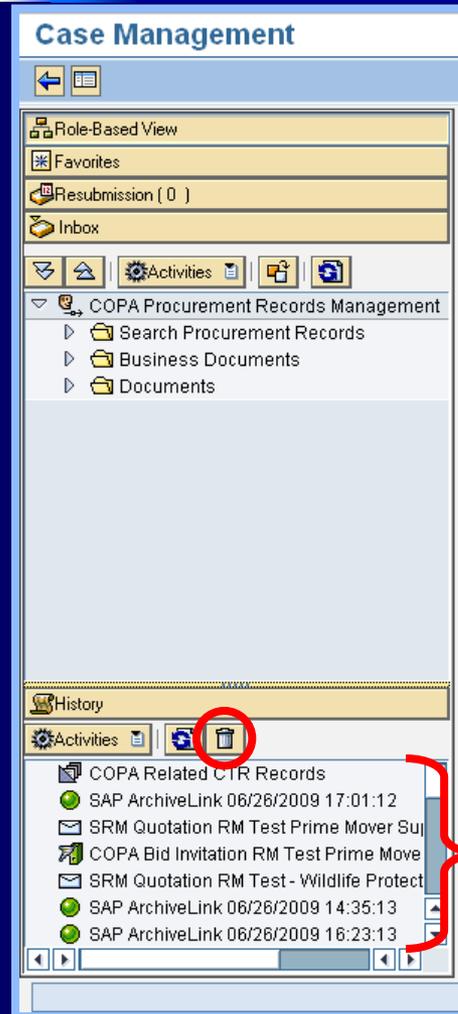
To begin accessing procurement records, you must expand your role “COPA Procurement Records Management” to display the three available folders:

- 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



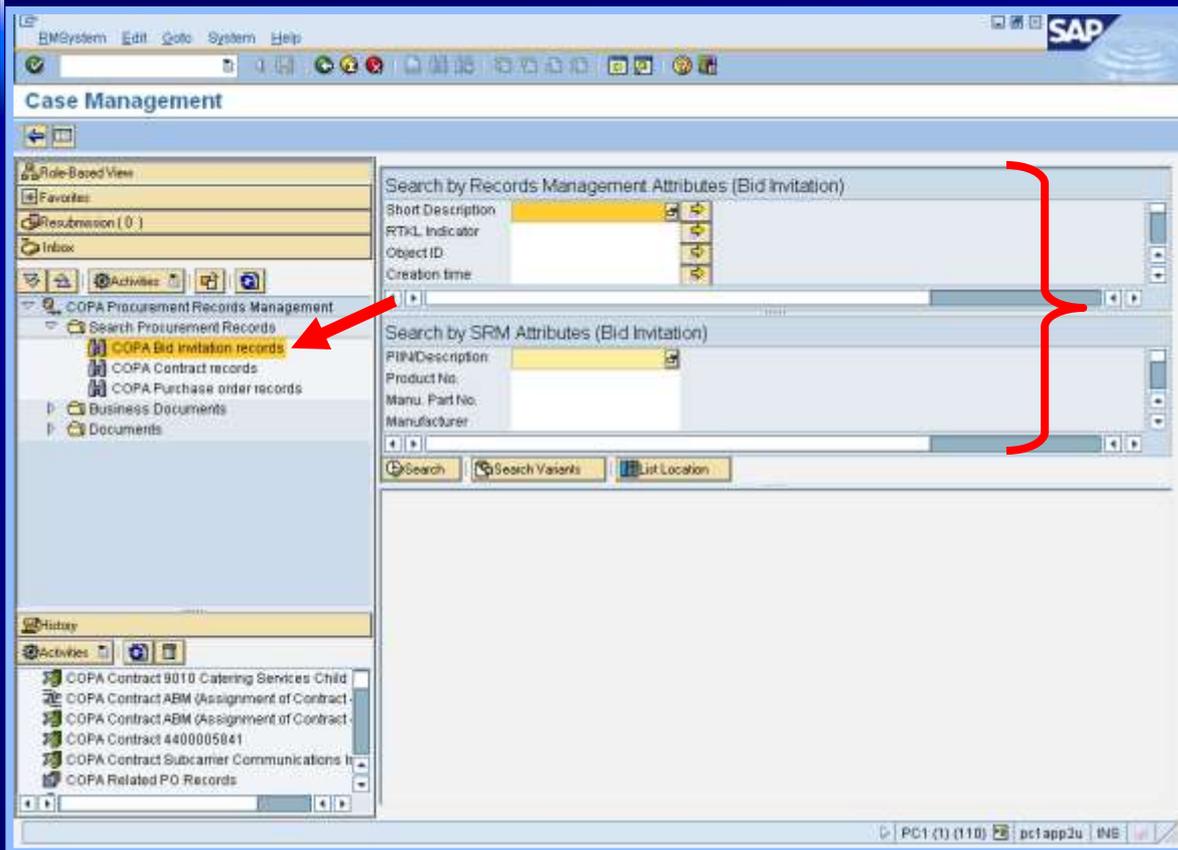
After expanding the **Procurement Records** folder, you have the choice to search within three different COPA Business Object types

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
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

QC6 (1) (110) qc6dca0u INS

- 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.

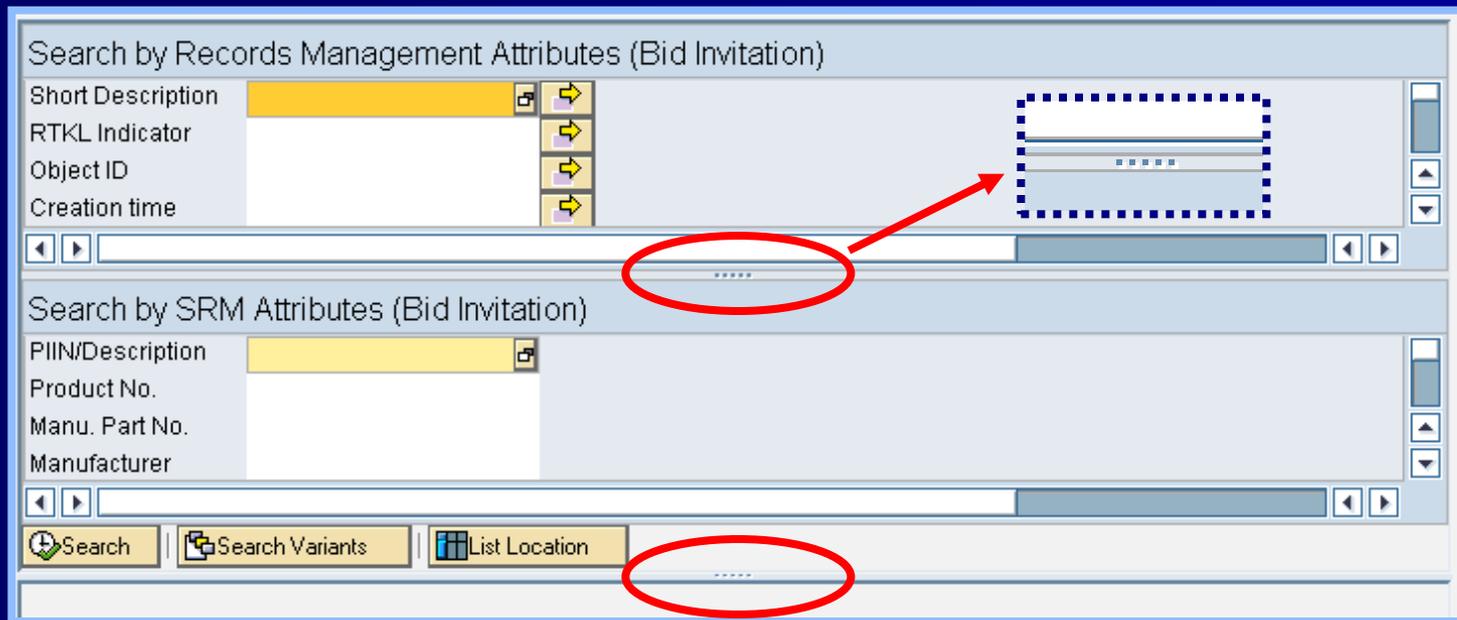
The fields for the criteria, referred to as “attributes” in Records Management, varies between the two areas.

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"/>		

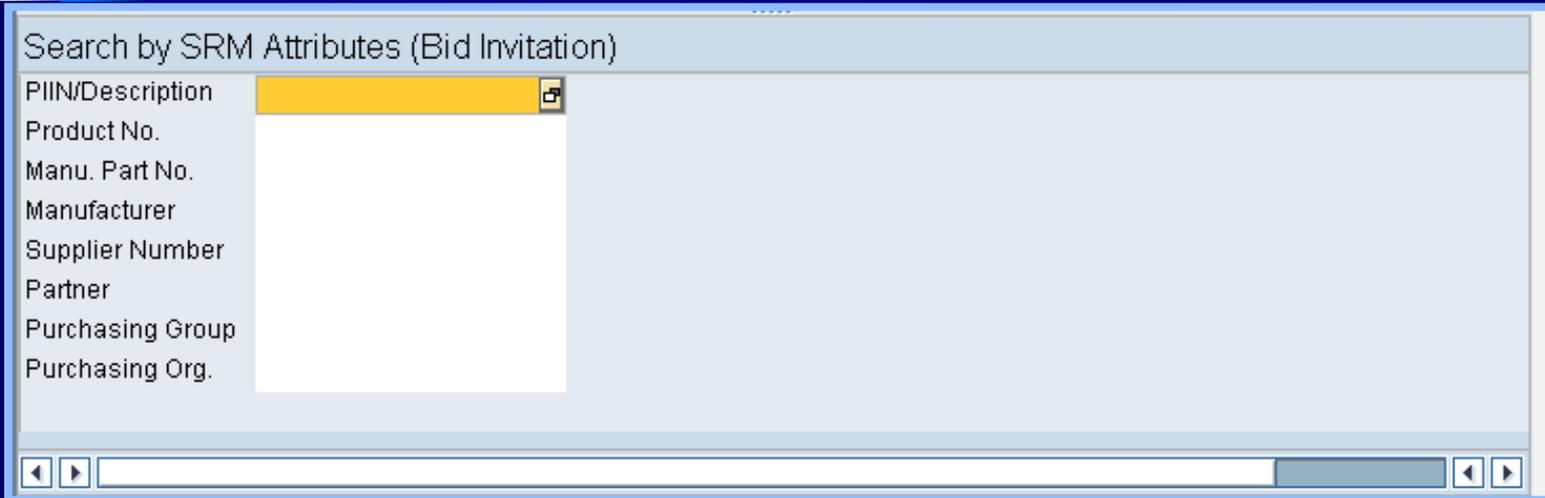
Restrict Hits to Current Versions ...

- 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)

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

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', printing, and other actions.

A table displays the search results:

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 shows the SAP Records Browser interface. The top section, labeled [Attributes window], displays the record title "COPA Bid Invitation RM Test Prime Mover Support Vehicle 2:1" and its version "Version 2". Below this, a table lists attributes such as Object ID (6100003073), Creation time (06/26/2008 13:00:47), and Language (EN).

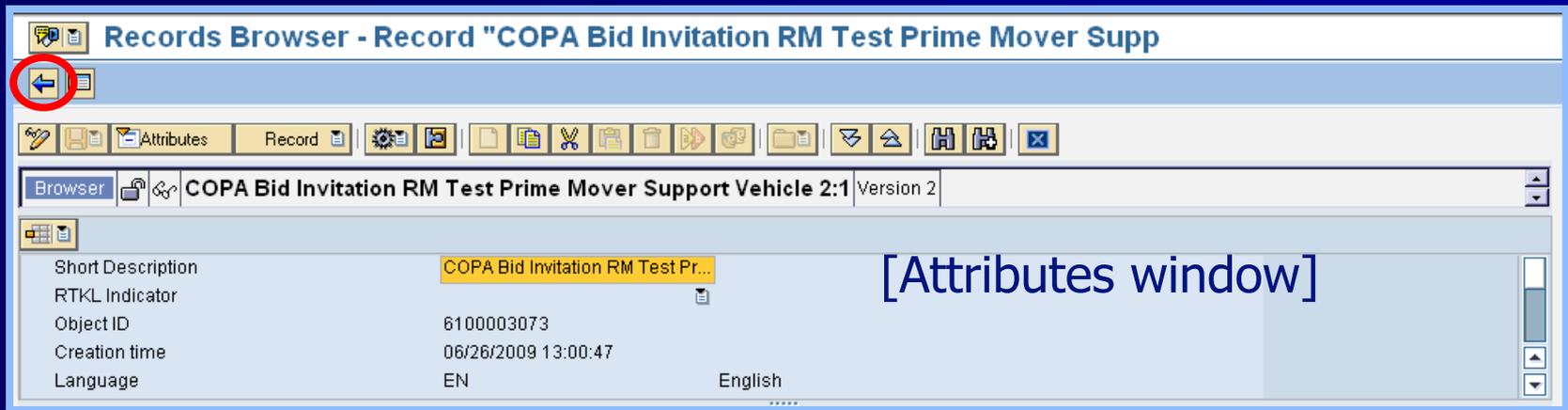
The bottom section, labeled [Browser window], contains a table with the following columns: Hierarchy, Element Type, Visibility, Last Processed, and Node. The table lists various record elements and their associated metadata.

Hierarchy	Element Type	Visibility	Last Processed	Node
COPA Bid Invitation RM Test Prime Mover Support Vehicle 2:1	COPA Bid Invitation	All Roles	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 / 06/26/2009 / 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	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



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.

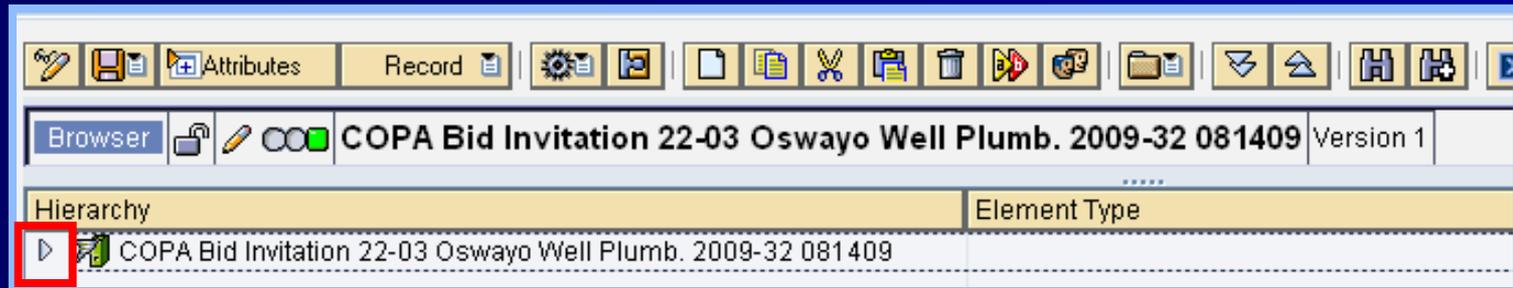


Displaying Records

Levels in a Record Structure

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

Level 1, identified by the GoTo 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.

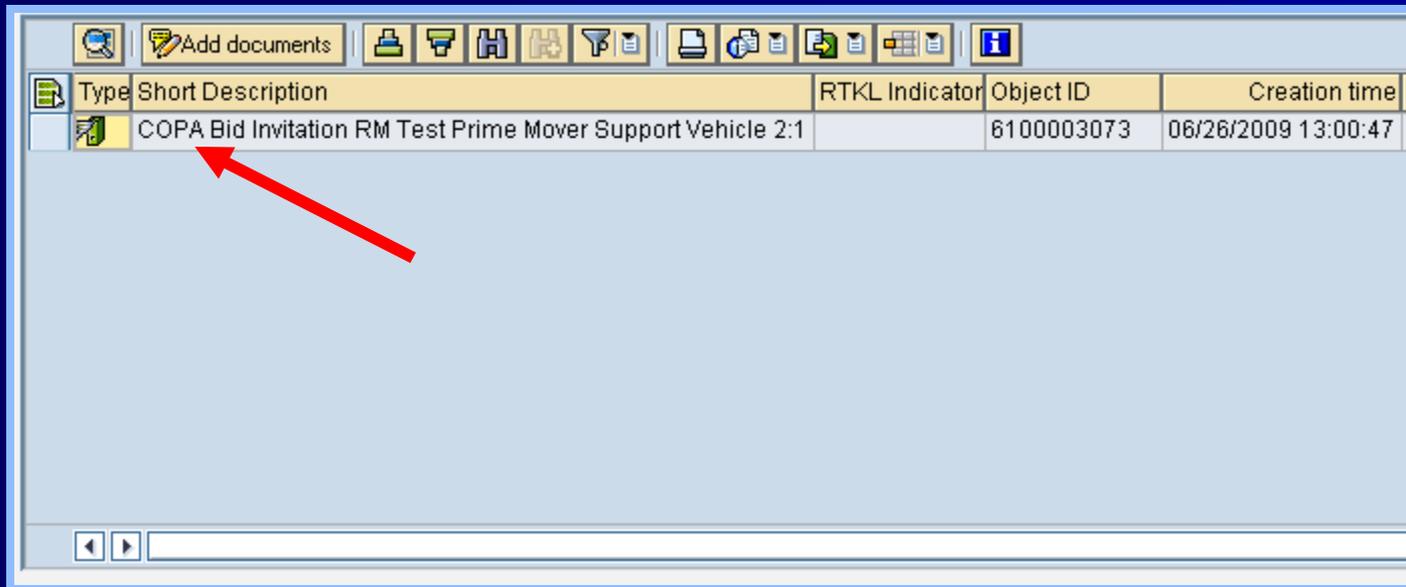
Hierarchy	Element Type	Visibility
COPA Bid Invitation 15, Revenue 1099s		
COPA Bid Invitation 15, Revenue 1099	COPA Bid Invitation	All Roles
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only doc...	All Roles
15, Revenue 1099s	SRM Quotation	All Roles
15, Revenue 1099s	SRM Quotation	All Roles
15, Revenue 1099s	SRM 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 row contains the following data: a small icon in the Type column, 'COPA Bid Invitation RM Test Prime Mover Support Vehicle 2:1' in the Short Description column, an empty cell in the RTKL Indicator column, '6100003073' in the Object ID column, and '06/26/2009 13:00:47' in the Creation time column. A red arrow points to the first record.

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 an 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
🟢 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 Fole		All Roles		1
▶ 📁 Additional Documents Folder		All Roles		3
▶ 📁 Notes and Working Papers Folder				33



Displaying Records

Displaying an Element (cont'd)

Display RFX :

Check | Post Preview | Close | Related Links | Copy | Responses and Awards | Convert to Auction

RFX Number: 6100032188 | Smart Number: Forms - Supplement 3 | Type: Invitation For Bid | Status: Published | Created On: 12/11/2014 11:00:45 | Created By: Kevin Reichard
Time Zone: EST | Number of Suppliers: 5 | Number of Items: 2 | Version Number: 4 | Version Type: Active Version | External Version Number: 3

RFX Information | Bidders | Items | Roles and Attachments | Conditions | Approval | Tracking

RFX Parameters | Questions | Notes and Attachments | Conditions

Identification

Smart Number: Forms - Supplement 3
 Smart Number is External
RFX Type: Invitation For Bid
Bid Description: Forms - Supplement 3
Publication Type: Public RFX

Event Parameters

Detailed Price Information: Price with Conditions
Follow-On Document: Contract
Bidder Can Change RFX Responses:
Allow Multiple RFX Responses for Each Company:
Scenario Award/Contract

Organization

Purchasing Organization: CORP Purchasing Organization
Purchasing Group: YTS-1504-008 BOPMAT [Show Masters](#)

Dates

Start Date: 12/15/2014 12:00:00
Submission Deadline: 01/14/2015 12:00:00
Opening Date: 01/14/2015 12:01:00

Change does NOT require approval:

Partners and Delivery Information

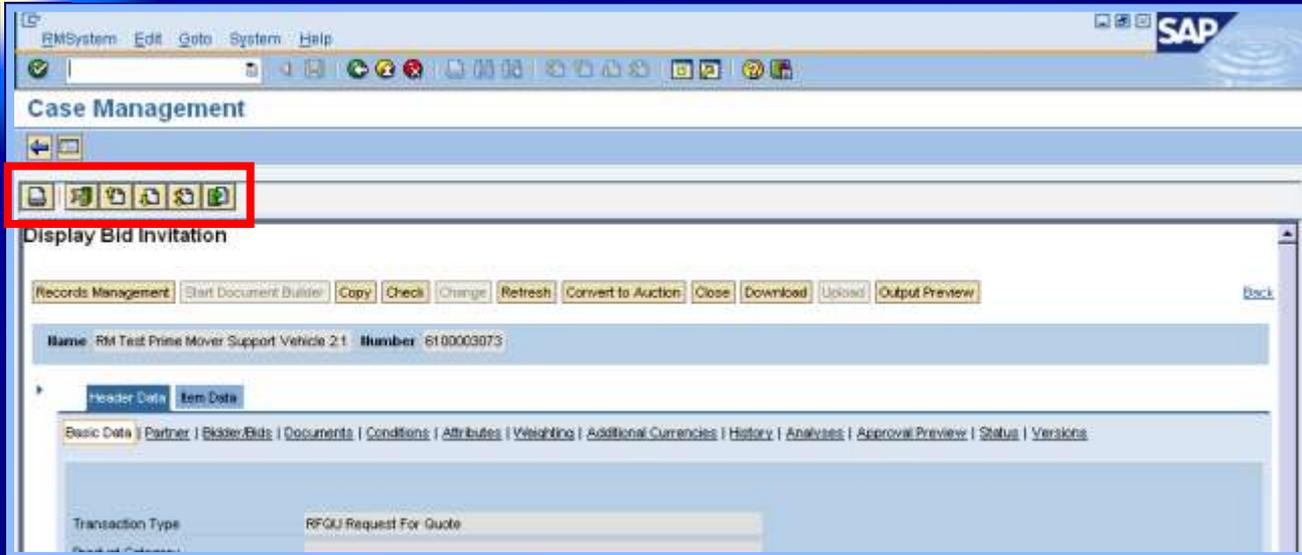
Function	Number	Name	Phone Number
• Requester	042794	Kevin Reichard	
• Responsible Employee	042794	Kevin Reichard	

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 an Element (cont'd)



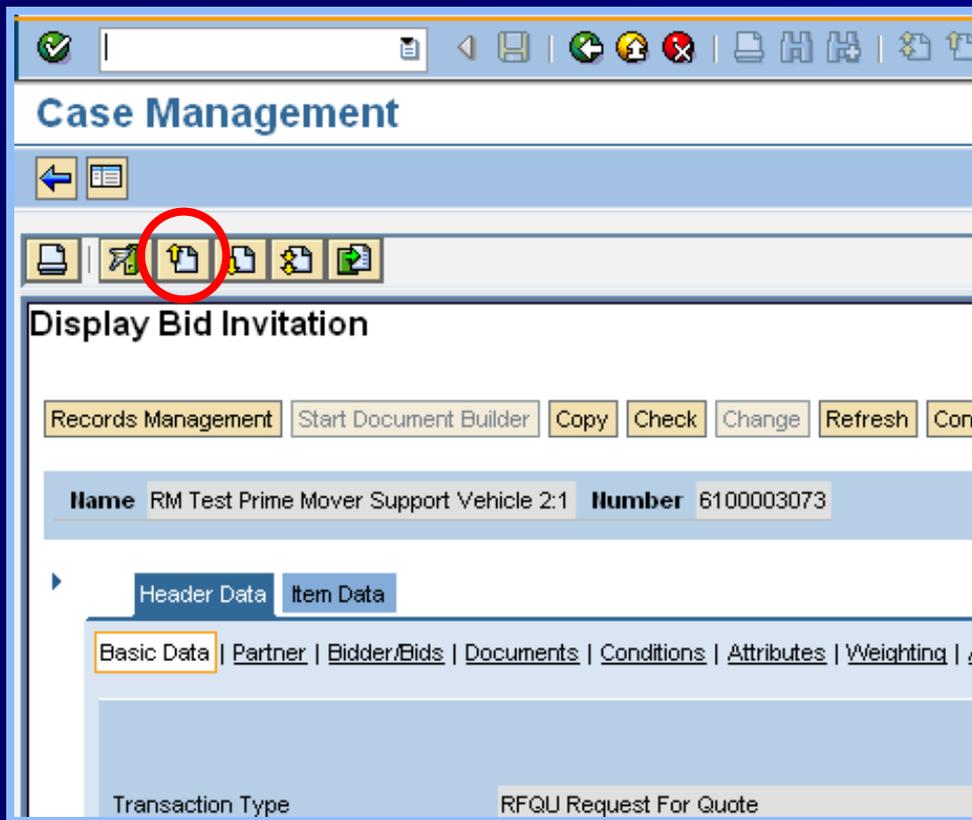
Note the command buttons above the display window

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 an Element (cont'd)

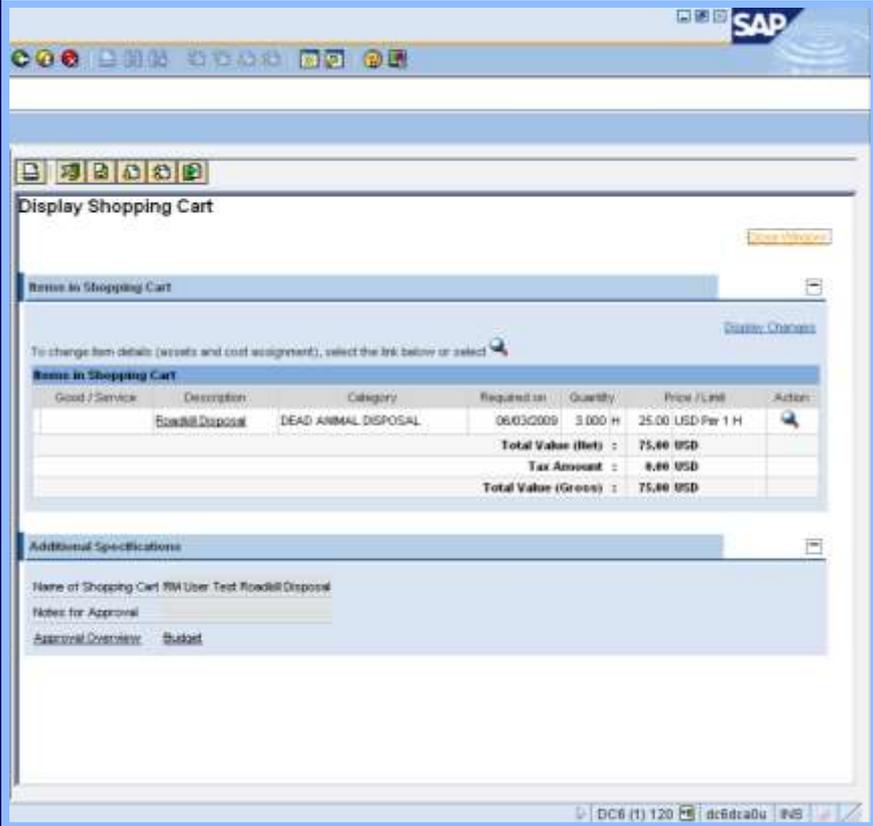


For example, if the currently displayed SRM document originated from a shopping cart, it can be viewed by selecting the Related COPA Shopping Cart icon



Displaying Records

Displaying an Element (cont'd)



The screenshot shows the SAP 'Display Shopping Cart' interface. At the top, there's a title bar with the SAP logo and window controls. Below that, a toolbar contains several icons. The main content area is titled 'Display Shopping Cart' and includes a 'Close Shopping Cart' button. A section titled 'Items in Shopping Cart' contains a table with columns for 'Good / Service', 'Description', 'Category', 'Required at', 'Quantity', 'Price / Unit', and 'Action'. The table lists one item: 'Roadkill Disposal' with a quantity of 3,000 H and a price of 25.00 USD Per 1 H. Below the table, summary statistics are shown: 'Total Value (Net) : 75,00 USD', 'Tax Amount : 4,00 USD', and 'Total Value (Gross) : 79,00 USD'. An 'Additional Specifications' section is also visible, containing 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

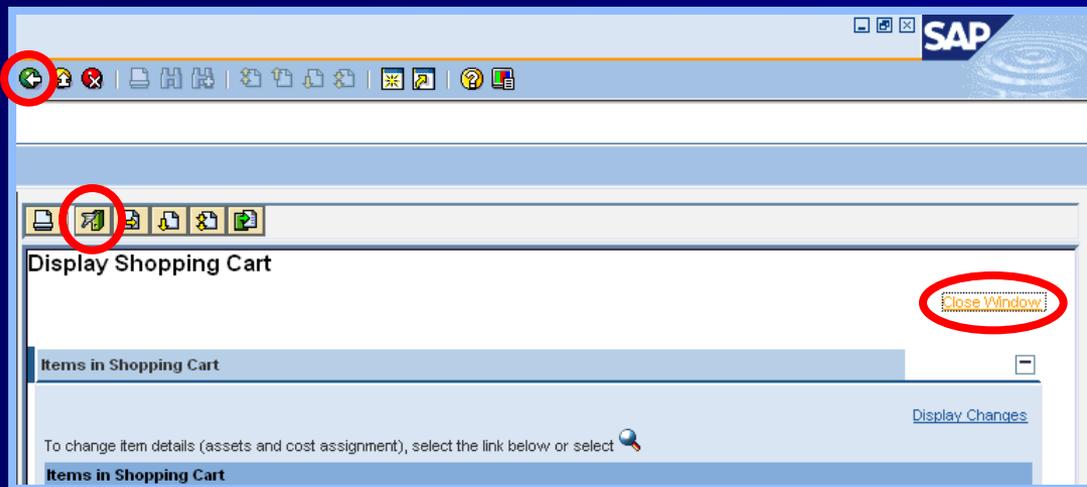
Now the shopping cart has opened for viewing.

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



Displaying Records

Displaying an 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 an 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	
🟢 SNAPSHOT FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11... 27	
🟢 SNAPSHOT FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11... 27	
🟢 SNAPSHOT FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/2009 / 11... 27	
🟢 SNAPSHOT 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 an Element (cont'd)

The screenshot shows a SAP browser window displaying a PDF document. The Adobe Reader toolbar is highlighted with a red box, showing various editing and navigation tools. The PDF content is a Request for Quote (RFQ) form for 'Whirlpool Tubs 3:1'. The form includes the following information:

		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 (RFQ) is composed of: Part I. General Information; Part II. Proposal Requirements; Part III. Evaluation

- 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 an 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.

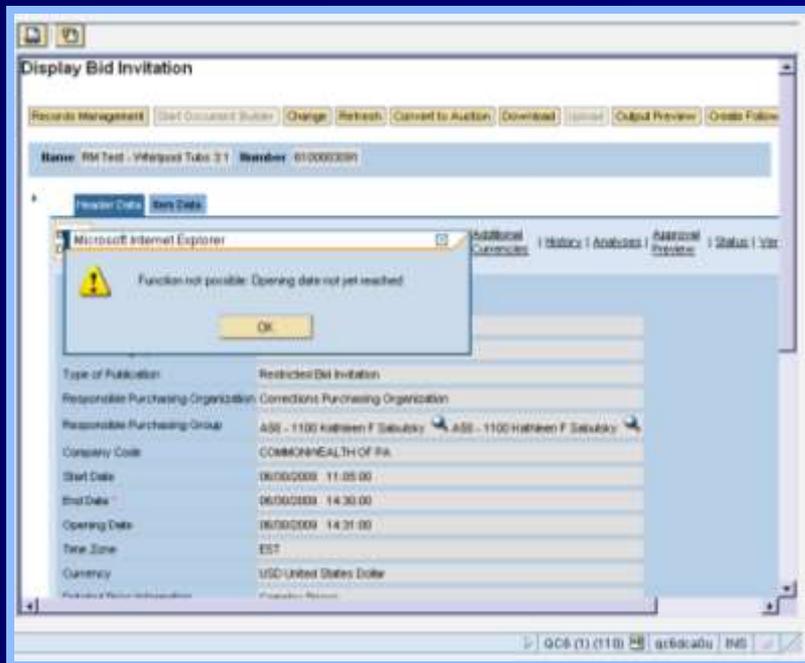
Hierarchy	Element Type	Visibility	Last Processed	Node
▼ COPA Bid Invitation RM Test - Whirlpool T			SRMRFCSRV / 06/30/2009 / 11...	
📁 COPA Bid Invitation RM Test - Whirlpo	COPA Bid Invitation	All Roles	SRMRFCSRV / 06/30/2009 / 11...	19
🟢 SNAPSNOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 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 an 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 an 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 an Element (cont'd)

STATE-OF-MANUFACTURE-CHART

THIS FORM MUST BE COMPLETED AND RETURNED WITH THE BID

The Reciprocal Limitations Act of 1964 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

- Similarly, an Excel, PowerPoint, or Outlook file would open within their respective applications



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



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

1. 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

2. SRM Documents can be displayed at any time in Records Management:
 - a. True
 - b. False



Knowledge Checks

3. Records Management can be accessed from SRM:

- a. True
- b. False



Knowledge Checks

4. How many levels of elements are in Records Management ?

a. 2

b. 3

c. 4

d. 5



Knowledge Checks

5. 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



Thank you for taking the SAP Records Management web-based training course.

If you have successfully passed the SAP Records Management web-based training course, congratulations!

If you have not achieved the passing score of 80% which is required to receive credit for completion of the course, you may re-enroll in the course at any time to take it again.



Survey

Select the link below to complete an online survey.

<https://www.surveymonkey.com/s/ZHD93Q3>





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!

