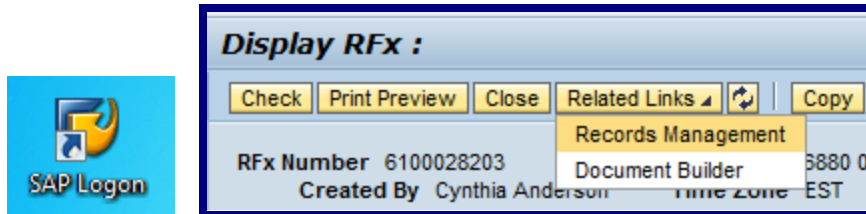


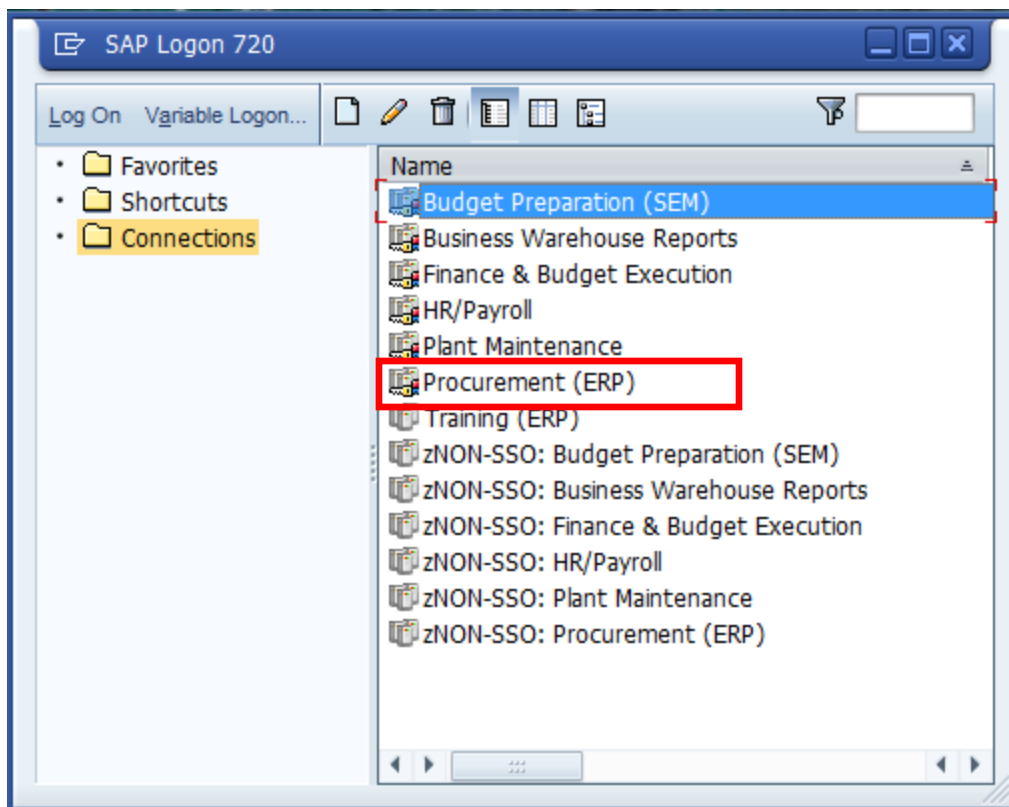
## End User Procedure for Locating and Viewing a Contract and Attachments in Records Management

This end-user procedure will take you through the steps to search for and display a contract record in Records Management.

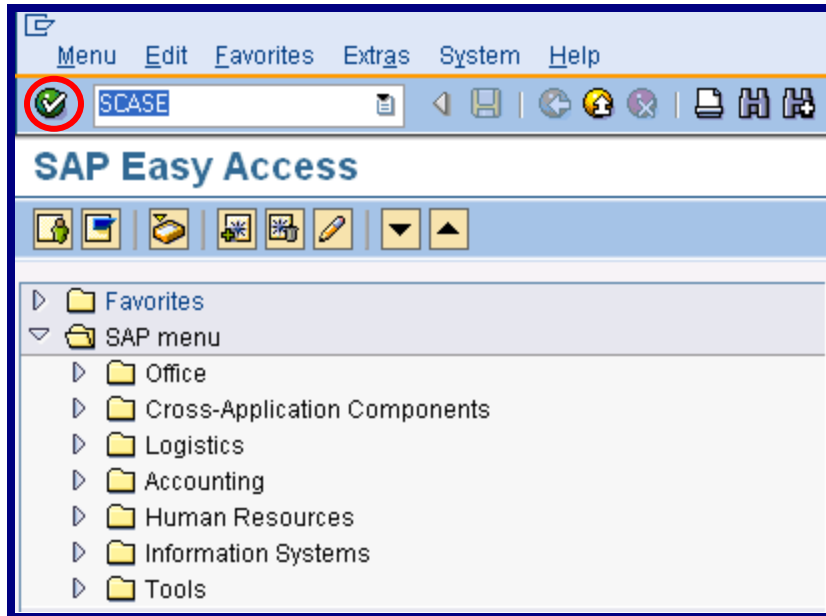
Records Management is accessible through the SAP Logon and from any screen within a SRM Purchasing document.



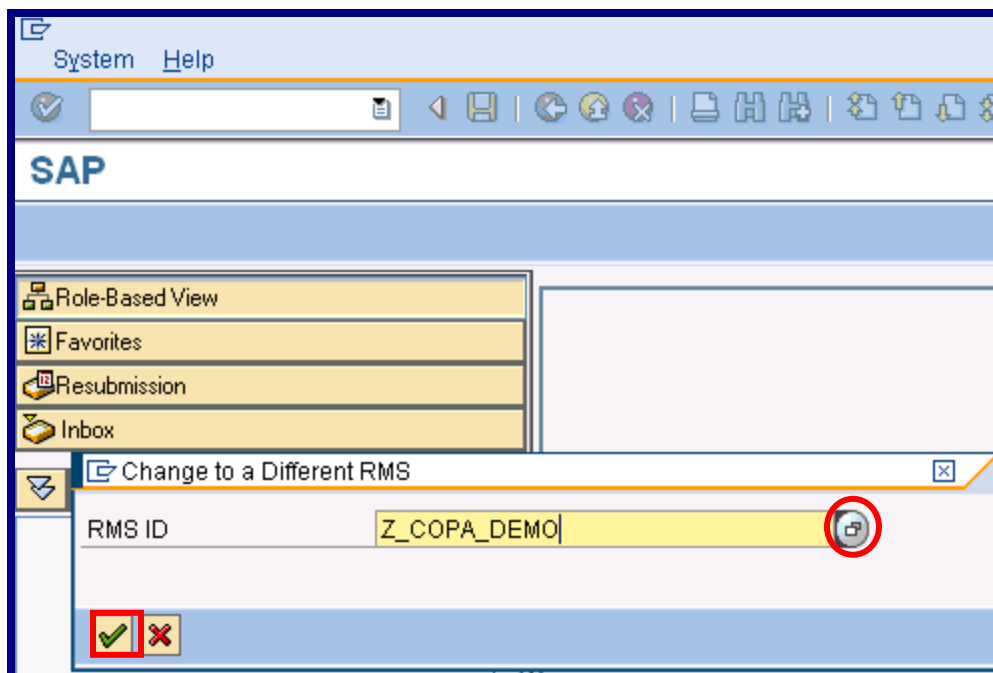
1. Sign onto the SAP Logon System by selecting and double-clicking on the SAP Logon icon on your desktop
2. When the SAP Logon 720 dialog box appears, select, and open the “Procurement” description



3. On the SAP Easy Access screen type **"SCASE"** in the blank Transaction field and select the ENTER (green circle with checkmark)

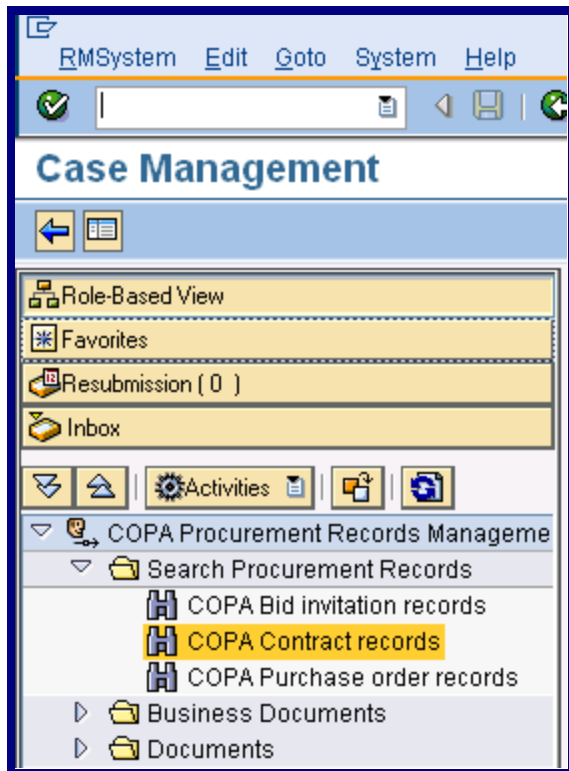


4. This is what a user will see and complete upon *initial* access to **"SCASE."** For the first *initial* log in a "Change to a different RMS" dialog box will appear.
  - a. Select the RMS ID match code (round circle with 2 pieces of paper)
  - b. Select the COPA Procurement Records Management and select COPY (green checkmark)
  - c. RMS ID information will populate into field and select CONTINUE (Enter) green checkmark to expand the **Records Organizer** menu



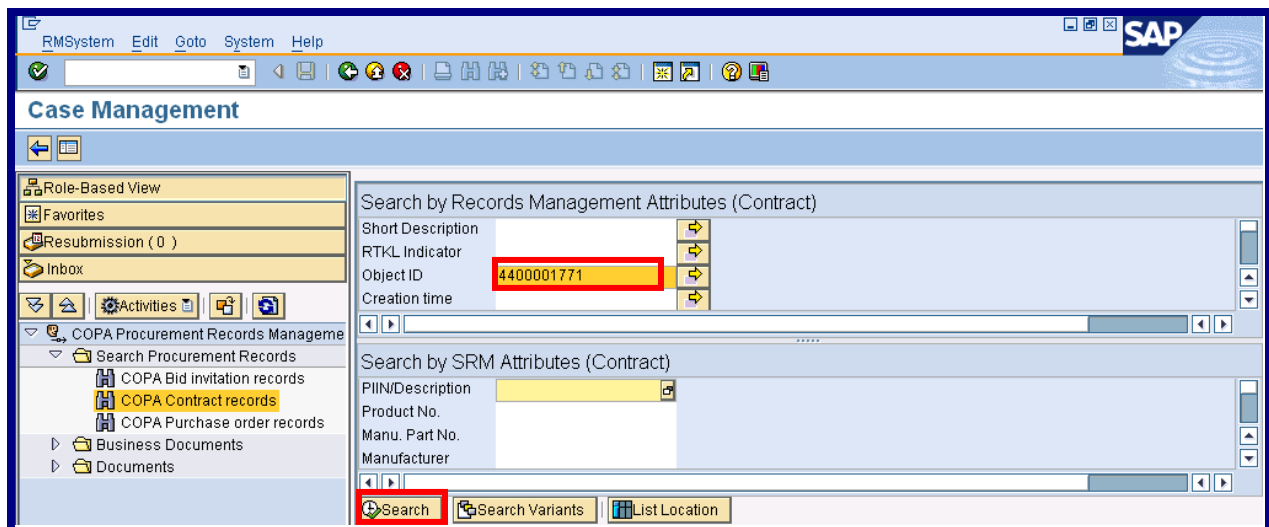
5. In the **Records Organizer**, select and open *Search Procurement Records*.

a. Select COPA Contract records



6. Under *Search by Records Management Attributes (Contract)*, scroll down to locate the **Object ID** field

a. Enter your contract number (ex. 4400001771) in the field and select the **SEARCH** button.



- When the search results display, verify that it is the correct contract and double-click to open the Record

Search by Records Management Attributes (Contract)

Short Description

RTKL Indicator

Object ID 4400001771

Creation time

Search by SRM Attributes (Contract)

PIIN/Description

Product No.

Manu. Part No.

Manufacturer

Search Search Variants List Location

Add documents

Type	Short Description	RTKL Indicator	Object ID	Creation time	Time of change
	COPA Contract RM Parole Violator Transport 2:3Contr		4400001771	06/26/2009 17:16:27	07/21/2009 14:3

- In the *Records Browser*, locate and open the SRM Contract document by double-clicking on COPA Contract. You are within the **Display Mode** in the RECORDS BROWSER (eye glass) icon.

Attributes Record

Browser COPA Contract RM Parole Violator Transport 2:3Contr Version 1

Short Description COPA Contract RM Parole Viol...

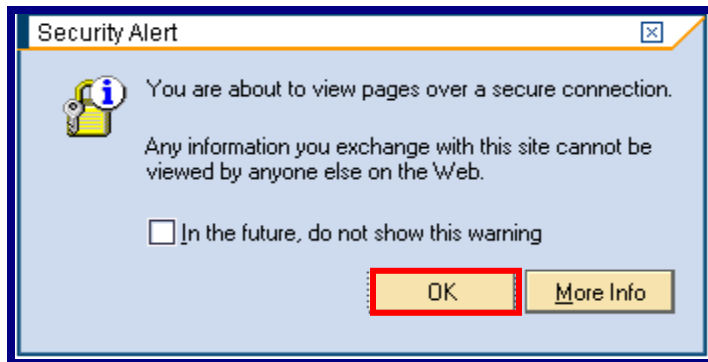
RTKL Indicator

Object ID 4400001771

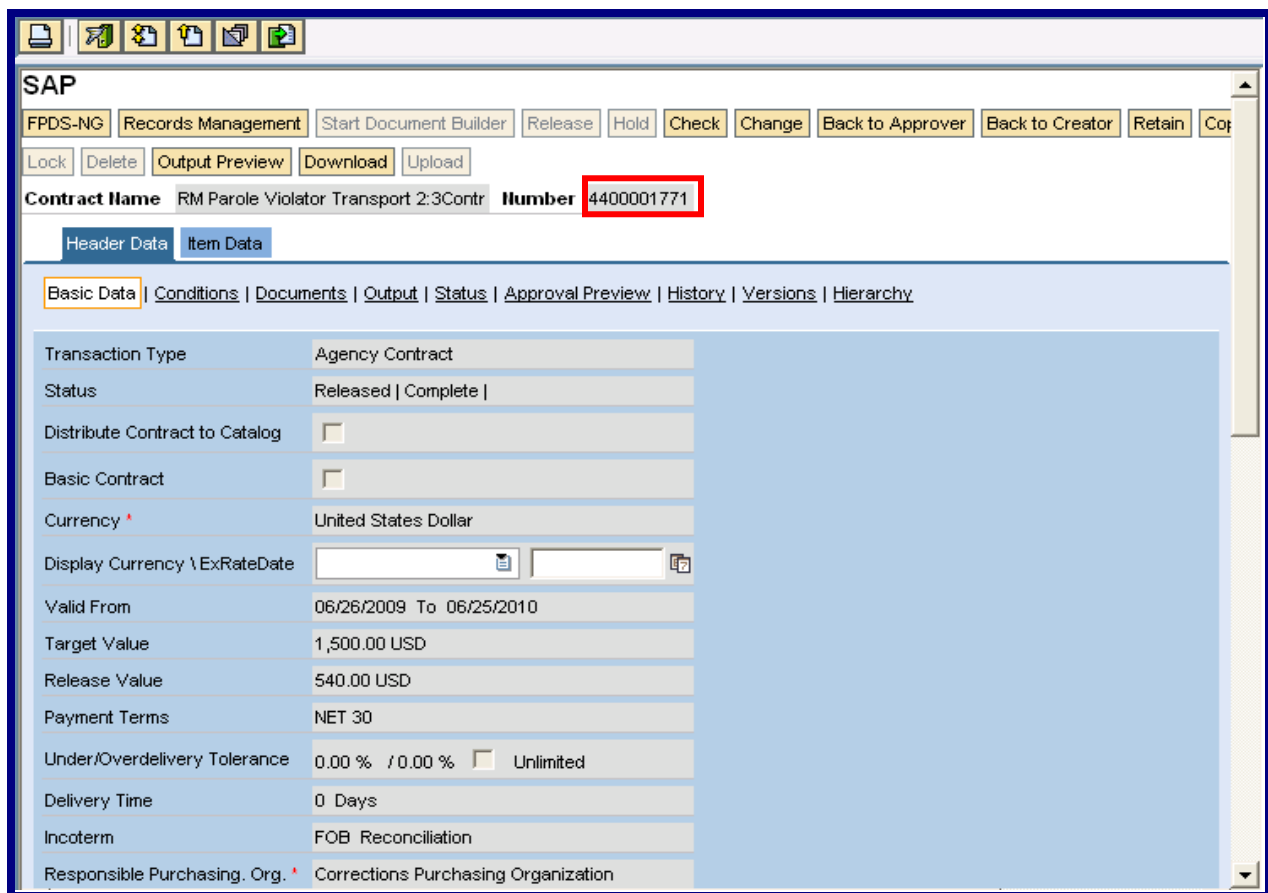
Creation time 06/26/2009 17:16:27

Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼ COPA Contract RM Parole Violator Tra			P00127019 / 07/21/2009...	
● COPA Contract RM Parole Violator	COPA Contract	All Roles	SRMRFCSRV / 06/26/20...	4
● SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/26/20...	13
● COPA Related BID records	COPA Related BID recor...	All Roles	SRMRFCSRV / 06/26/20...	7
● COPA Related PO Records	COPA Related PO Recor...	All Roles	SRMRFCSRV / 06/26/20...	8
▶ COPA Document Attachments Folc		All Roles		15
▶ Additional Documents Folder		All Roles		17
▶ Notes and Working Papers Folder		Record Manage...		22

9. When opening the COPA Contract record you will be prompted by a Security Alert pop-up box. Select the OK button.



10. You are able to view the Contract document in SRM. You are also able to view and/or open all text and attachments.



11. Return to the *Records Browser* by selecting the BACK (F3) button



12. If you want to view a PDF version of the Contract document, locate, double-click and open the Snapshot

Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼ COPA Contract RM Parole Violator Tra			P00127019 / 07/21/2009...	
COPA Contract RM Parole Violator COPA Contract		All Roles	SRMRFCSRV / 06/26/20...	4
<b>SNAPSHOTS FOR SRM SYSTEM</b>	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/26/20...	13
COPA Related BID records	COPA Related BID recor...	All Roles	SRMRFCSRV / 06/26/20...	7
COPA Related PO Records	COPA Related PO Recor...	All Roles	SRMRFCSRV / 06/26/20...	8
▶ COPA Document Attachments Fole		All Roles		15
▶ Additional Documents Folder		All Roles		17
▶ Notes and Working Papers Folder		Record Manage...		22

13. View, save, print or e-mail a copy of the Snapshot of the Contract

Page 1 of 2

**FULLY EXECUTED**  
**Contract Number: 4400001771**  
 Contract Effective Date: 06/26/2009  
 Valid From: 06/26/2009 To: 06/25/2010

**Purchasing Agent**  
 Name: Sabulsky Kathleen  
 Phone: 717-731-7134  
 Fax: 717-731-7008

**Your SAP Vendor Number with us: 104274**

**Supplier Name/Address:**  
 XEROX CORPORATION  
 800 CARILLON PKWY  
 ST PETERSBURG FL 33716-1102 US

**Supplier Phone Number:** 717-777-7777  
**Supplier Fax Number:** 705-9112

**Contract Name:**  
 RM Parole Violator Transport 2:3Contr

**Payment Terms**  
 NET 30

**Solicitation No.:** 6100003072      **Issuance Date:** 06/26/2009

**Supplier Bid or Proposal No. (if applicable):** 6500002427      **Solicitation Submission Date:** 06/26/2009

This contract is comprised of: The above referenced Solicitation, the Supplier's Bid or Proposal, and any documents attached to this Contract or incorporated by reference.

Item	Material/Service	Qty	UOM	Price	Per	Total
------	------------------	-----	-----	-------	-----	-------

14. Return to the *Records Browser* by selecting the BACK (F3) button

RMSystem Edit Goto System Help

Case Management


15. Expand the COPA Document Attachments Folder. Double-click and open any COPA Attachment you wish to view

Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼  COPA Contract RM Parole Violator Tra			P00127019 / 07/21/2009...	
COPA Contract RM Parole Violator	COPA Contract	All Roles	SRMRFCSRV / 06/26/20...	4
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/26/20...	13
COPA Related BID records	COPA Related BID recor...	All Roles	SRMRFCSRV / 06/26/20...	7
COPA Related PO Records	COPA Related PO Recor...	All Roles	SRMRFCSRV / 06/26/20...	8
▼  COPA Document Attachments Folc		All Roles		15
COPA Attachment RFQ evaluat	COPA Attachment	All Roles	SRMRFCSRV / 06/26/20...	16
COPA Attachment RM Testing f	COPA Attachment	All Roles	SRMRFCSRV / 06/26/20...	16
▶  Additional Documents Folder		All Roles		17
▶  Notes and Working Papers Folder		Record Manage...		22

16. When opening the COPA Attachment record, you will be prompted by a File Download pop-up box asking do you want to open or save this file. Select the OPEN button.


File Download

Do you want to open or save this file?

 Name: RFQ evaluation form Attachment\_C.doc  
 Type: Microsoft Office Word 97 - 2003 Document, 93.0 KB  
 From: qp2dca0u.state.pa.us

**Open** Save Cancel

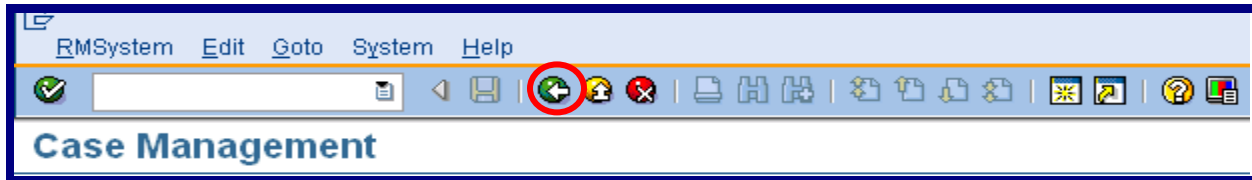
☒ Always ask before opening this type of file

 While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

17. When the COPA Attachment opens it will display the document to view. In this example, the COPA Attachment displayed is a Word document. The Word file opens within the Office application.

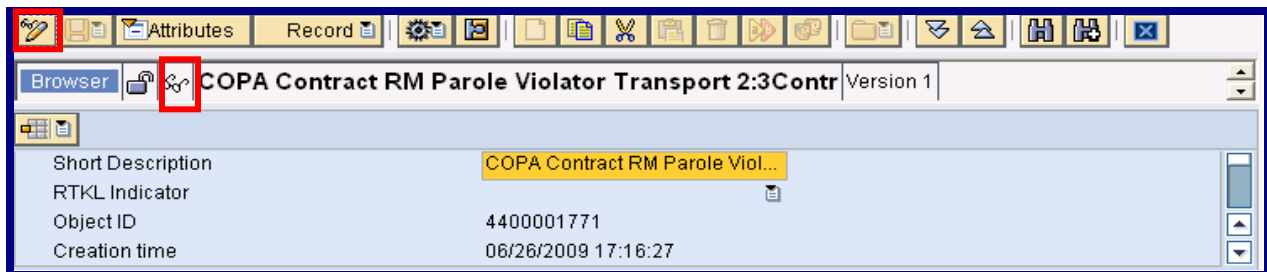
[illegible]

18. Return to the *Records Browser* by selecting the BACK (F3) button.

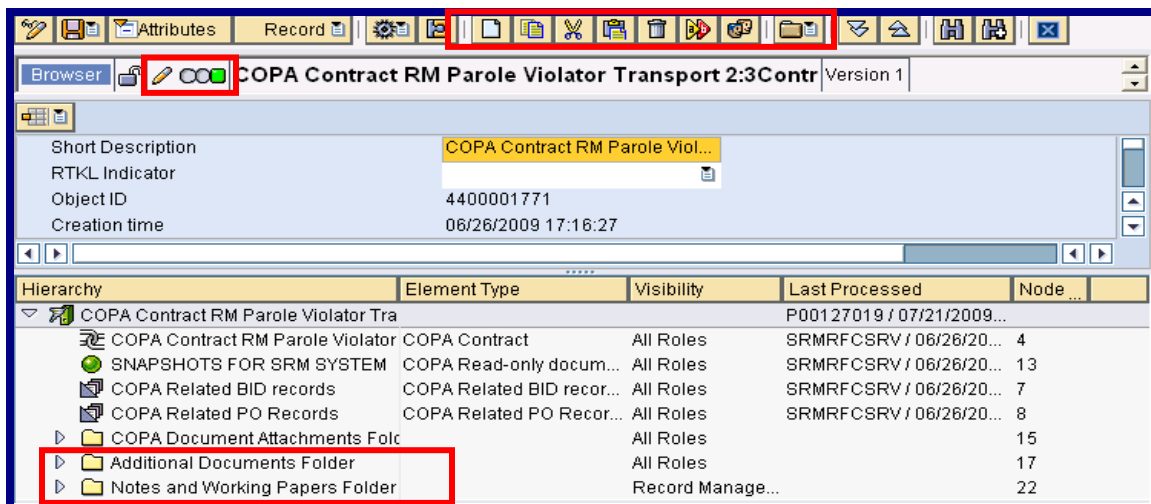


### Manually Attaching a Document

1. The user must be in **Change Mode** in order to manually attach a document
  - a. Microsoft (MS) Office application documents can be attached: Word, Excel, PowerPoint, and Visio. Outlook e-mails can be integrated into the Record, as well as PDF documents.
  - b. The total size of all attachments within a single record **should not** exceed 20-25 MB
  - c. Any documents which the user considers confidential should be password-protected **prior** to being attached in Records Management
2. In the *Records Browser* go from DISPLAY (eye glass) icon to **Change Mode** by selecting the DISPLAY/CHANGE (eye glasses with pencil) icon to add an attachment

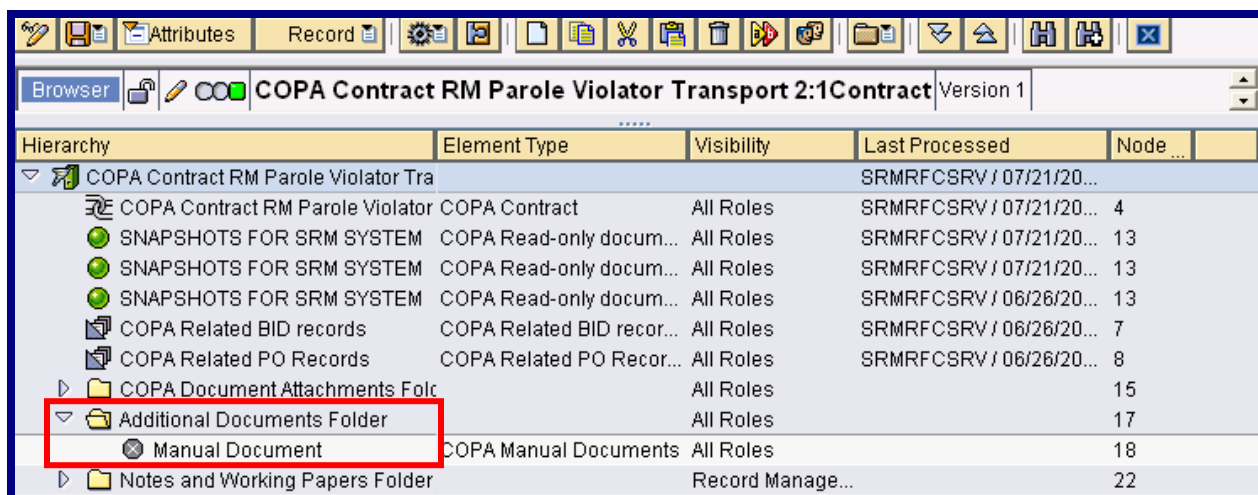


3. In the **Change Mode**, new folders have been added to the record content: *Additional Documents and Notes and Working Papers*. Also, note that the STATUS INDICATOR (pencil with lights) icon reflects **Change Mode** and additional icons are now active.

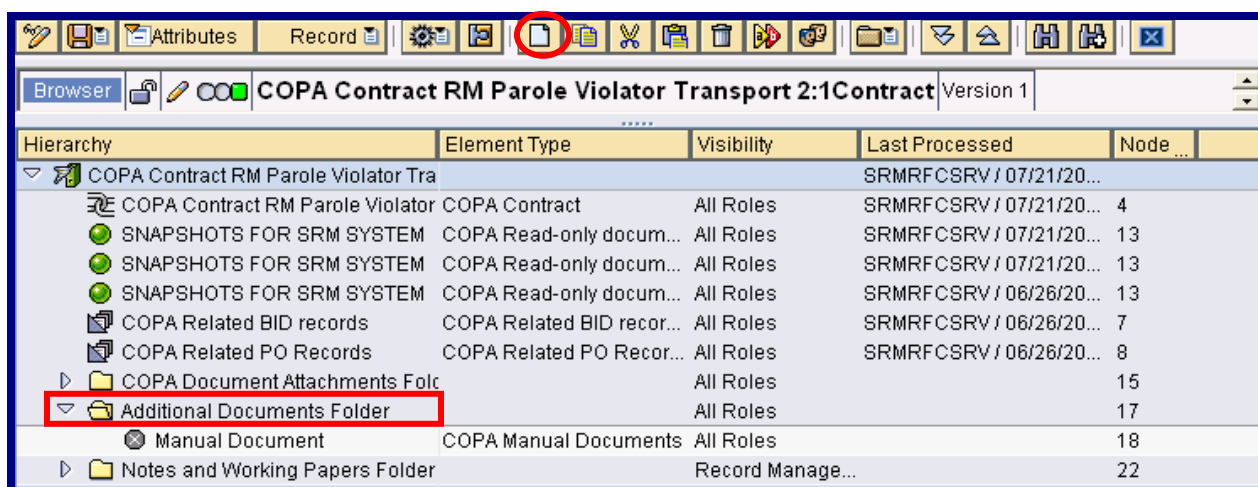




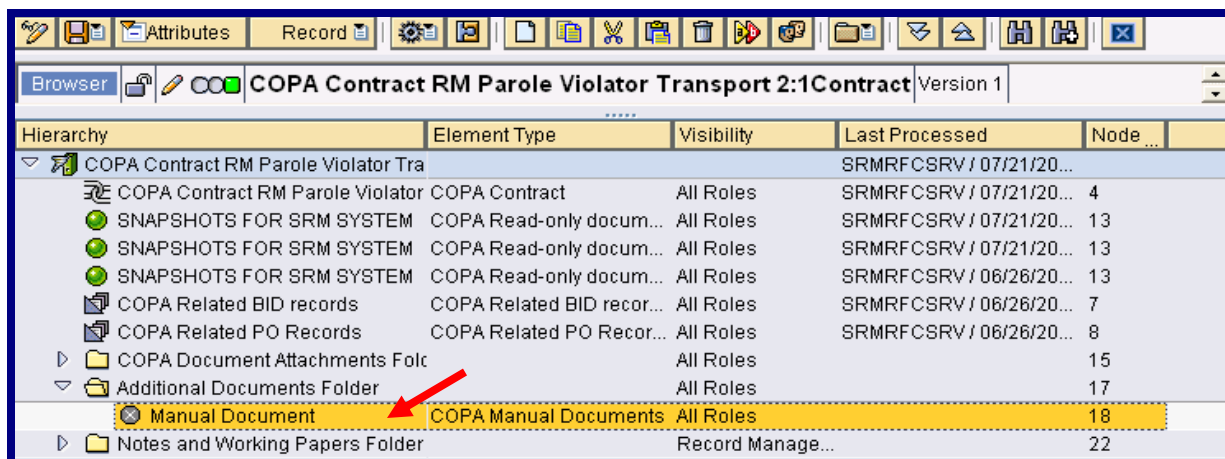
- Expanding the new folders (ex. *Additional Documents Folder*) will reveal placeholders for new attachments. Any of the previously mentioned applications Word, Excel, PowerPoint, and Visio may be attached using the placeholders.



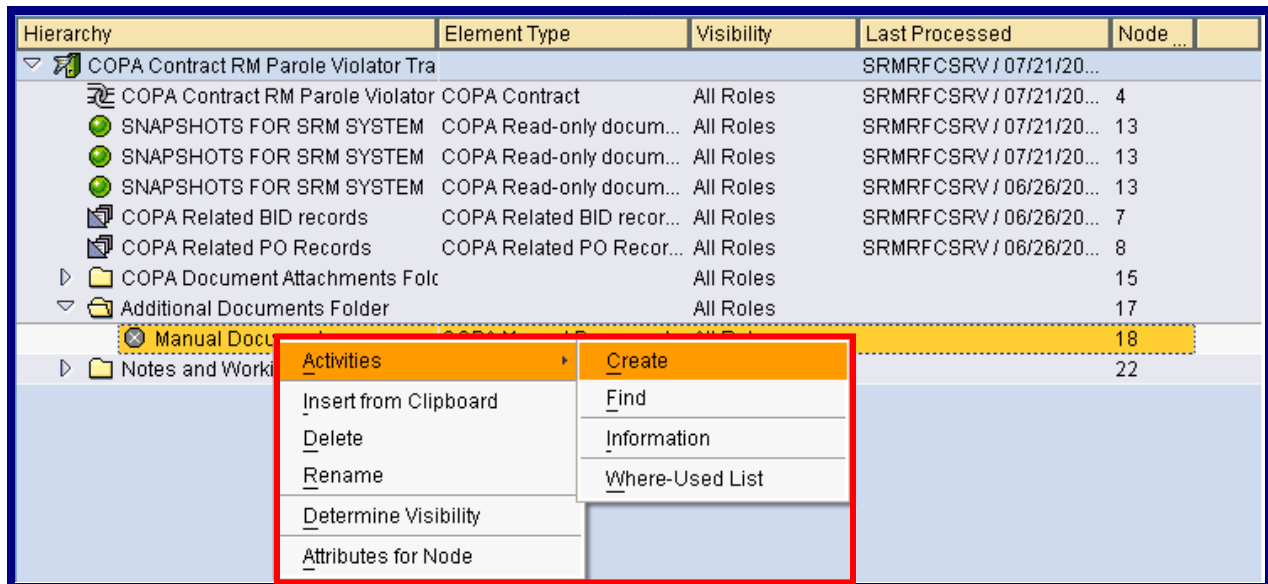
- To access additional placeholders, highlight Additional Documents Folder and select the CREATE icon



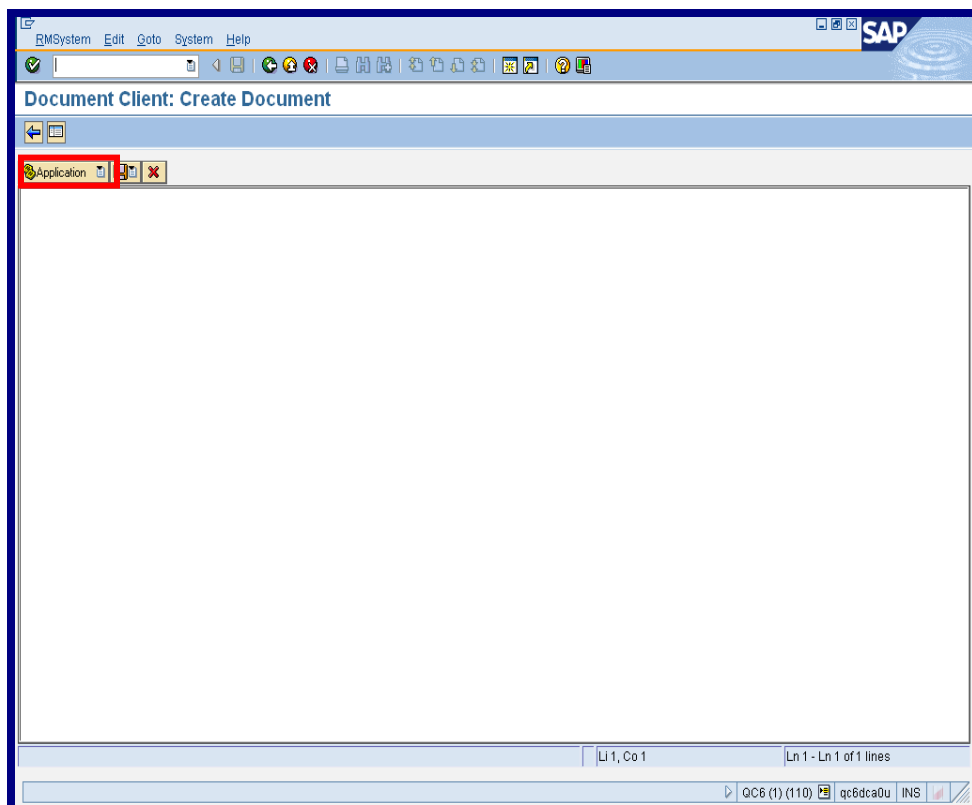
- Select the document placeholder, then right-click on the mouse



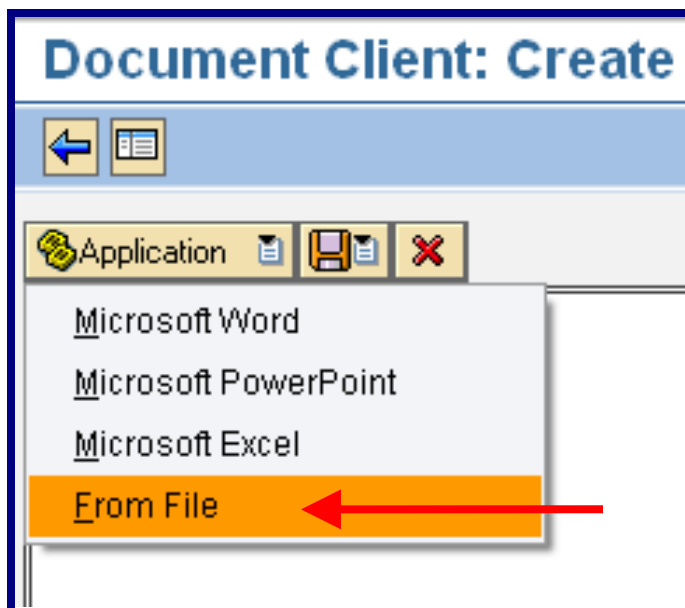
7. Choose **Activities**, then **Create**, on the menus that display after right-clicking the mouse



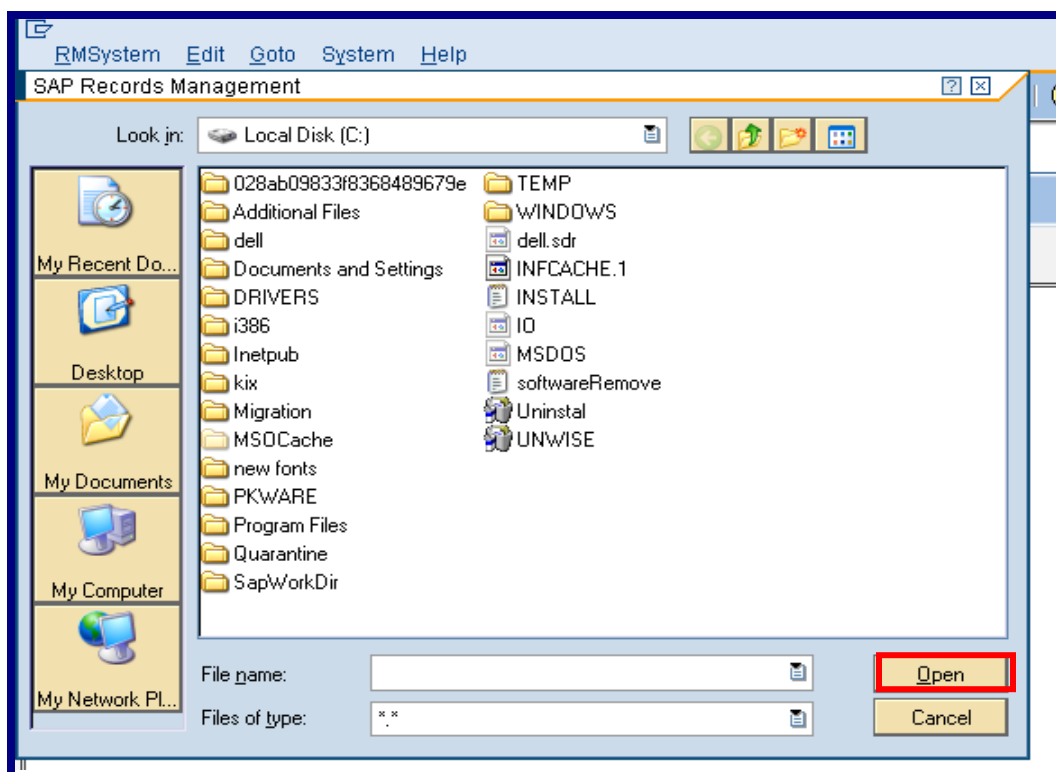
8. A blank screen displays within the current window. Select the drop down arrow on the APPLICATION button to reveal a list of MS Office software, as well as the option to create *From File*.



9. Microsoft Word, Excel, and PowerPoint documents can be created by selecting that option. The appropriate editor will display for you to create the document.
  - a. Selecting the *From File* option allows you to search for and attach an existing document

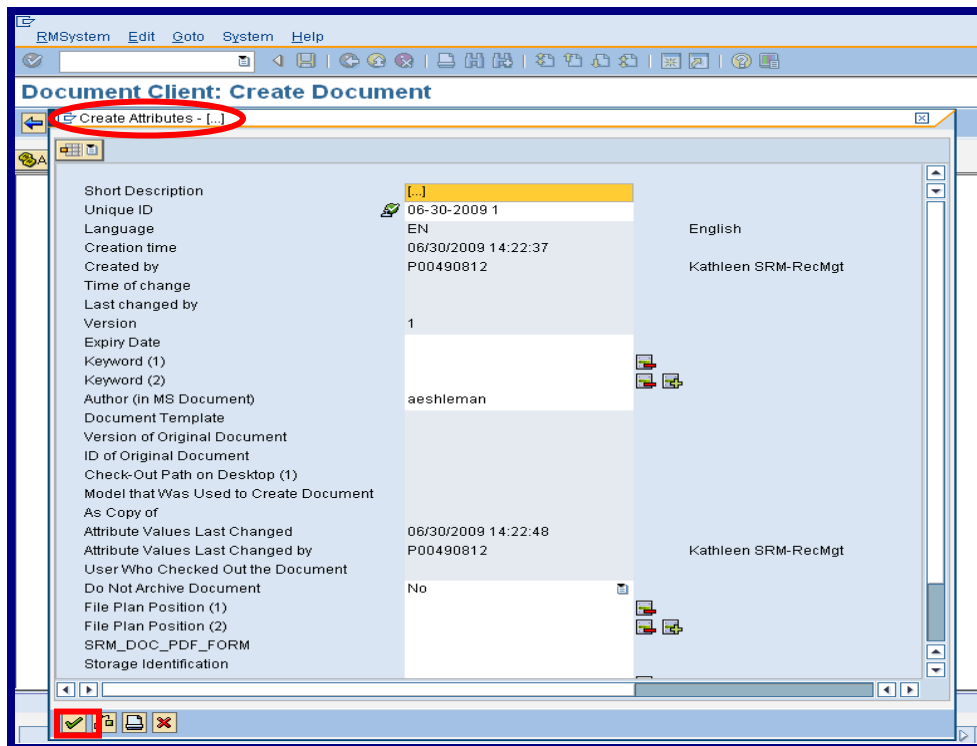


10. A standard file selection box for your hard drive is displayed. Locate and select the appropriate attachment.
  - a. Select the OPEN button



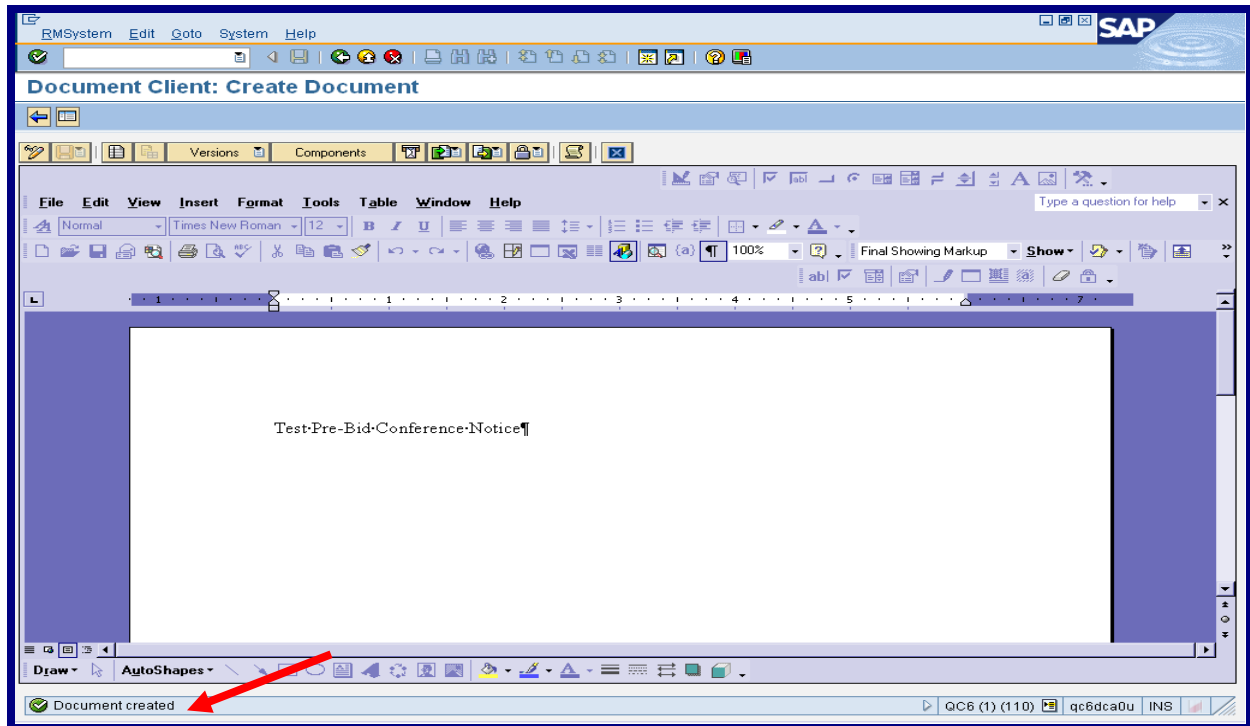
11. The *Create Attributes* dialog box is displayed, enter a name in the Short Description field

a. Select the ENTER icon

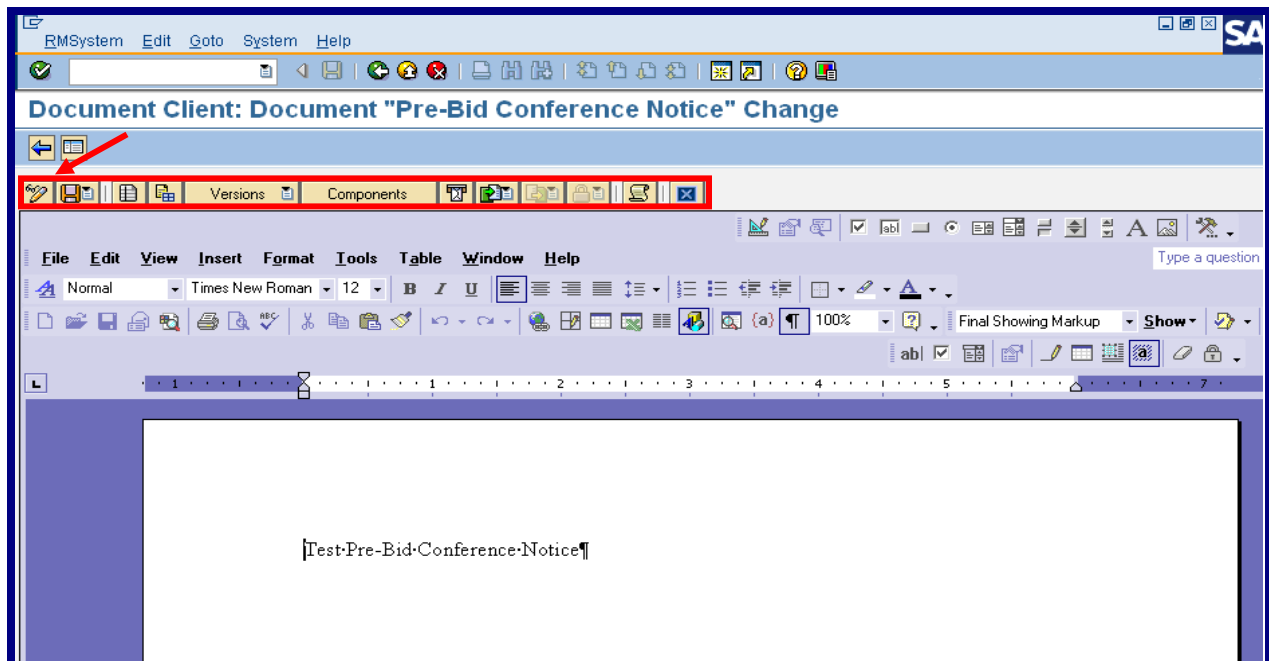


12. The selected file document is created and opens (in this example as Word) within the browser window

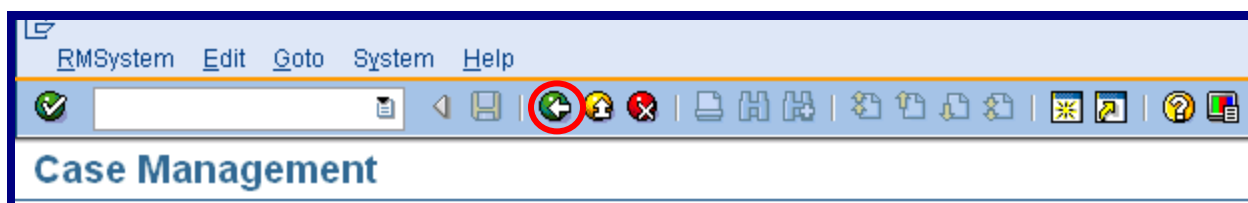
*Note that while full functionality of the Word application exists while in **Change Mode** within Records Management, it is disabled while in **Display Mode** within the newly attached document.*



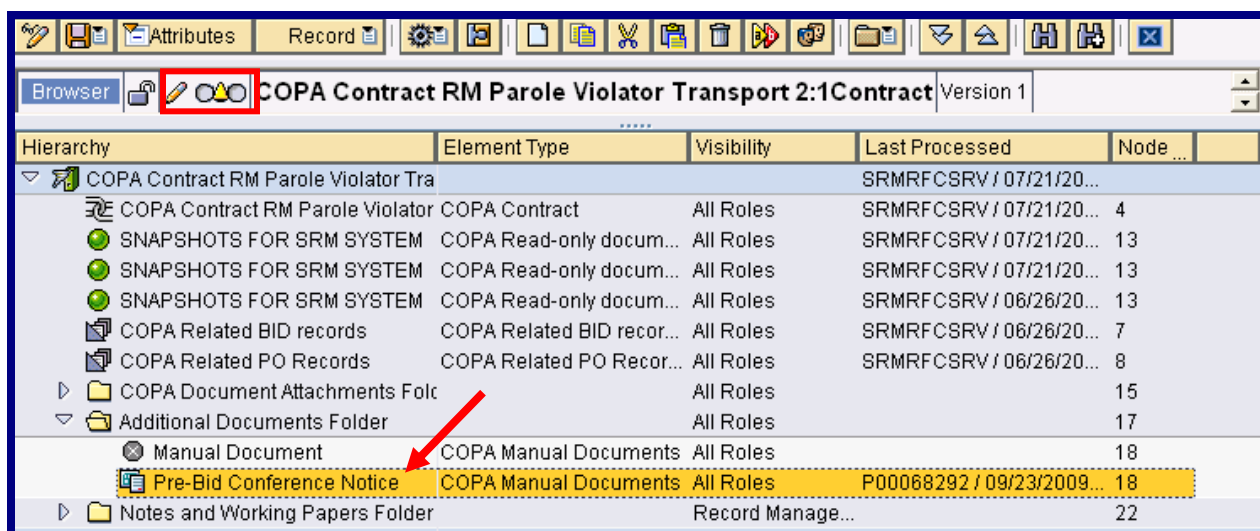
13. In order to activate the Word editor tools; the **DISPLAY/CHANGE** icon must be selected. Additional icons and buttons with functions related to document attachment are available as well.



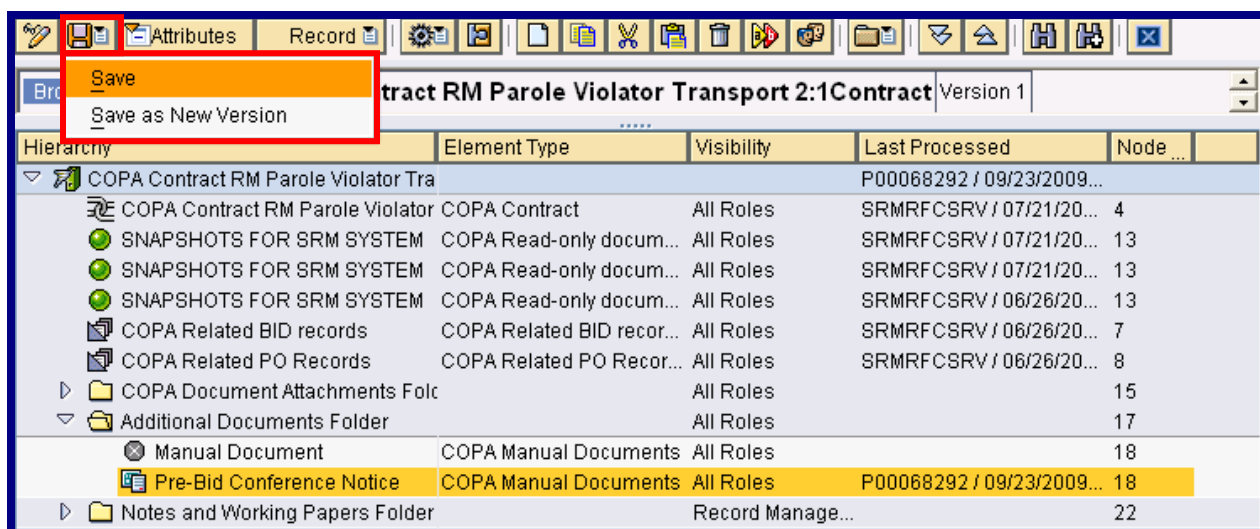
14. Return to the *Records Browser* by selecting the BACK (F3) button



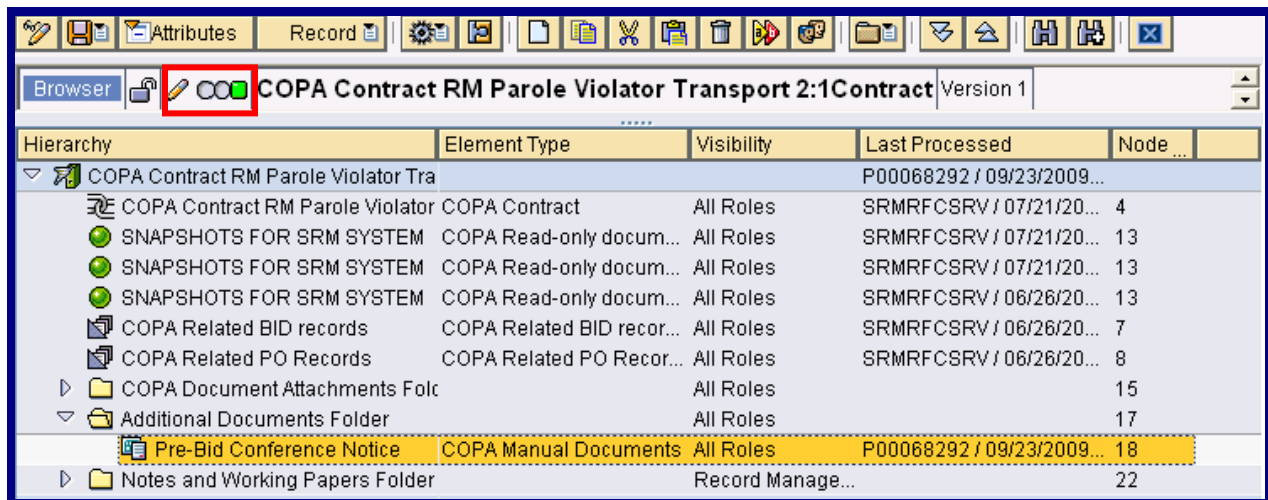
15. The newly added attachment is e-filed under the *Additional Documents Folder* with the Element Type "COPA Manual Document." The **Change Mode** status indicator has switched to yellow, meaning that the newly added attachment has not yet been saved to the Record.



16. Select the SAVE icon, then Save from the drop-down menu



17. The indicator is now green, showing that the update to the Record has been saved.



Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼ COPA Contract RM Parole Violator Tra			P00068292 / 09/23/2009...	
COPA Contract RM Parole Violator	COPA Contract	All Roles	SRMRFCSRV / 07/21/20...	4
● SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 07/21/20...	13
● SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 07/21/20...	13
● SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/26/20...	13
COPA Related BID records	COPA Related BID recor...	All Roles	SRMRFCSRV / 06/26/20...	7
COPA Related PO Records	COPA Related PO Recor...	All Roles	SRMRFCSRV / 06/26/20...	8
▶ COPA Document Attachments Folc		All Roles		15
▼ Additional Documents Folder		All Roles		17
Pre-Bid Conference Notice	COPA Manual Documents	All Roles	P00068292 / 09/23/2009...	18
▶ Notes and Working Papers Folder		Record Manage...		22

18. To exit Records Management, select the blue EXIT icon . To exit SAP, select the blue

EXIT icon  at the top of the page.

This concludes Locating and Viewing a Bid Invitation and Attachments in Records Management end-user procedure.