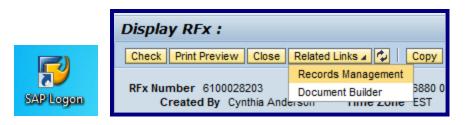
End User Procedure for Locating and Viewing a Contract and Attachments in Records Management

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

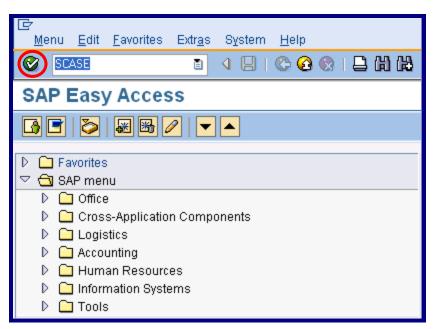
Records Management is accessible through the SAP Logon and from any screen within a SRM Purchasing document.



- 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

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Log On Variable Logon	/ Î 🛛 🖬 🖉 🛛 🖓	
 Favorites Shortcuts Connections 	Name Budget Preparation (SEM) Business Warehouse Reports Finance & Budget Execution HR/Payroll Plant Maintenance Procurement (ERP) Training (ERP) ZNON-SSO: Budget Preparation (SEM) ZNON-SSO: Business Warehouse Reports ZNON-SSO: Finance & Budget Execution ZNON-SSO: Finance & Budget Execution ZNON-SSO: HR/Payroll ZNON-SSO: Plant Maintenance NON-SSO: Procurement (ERP)	Ă
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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

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- 5. In the **Records Organizer**, select and open *Search Procurement Records*.
 - a. Select COPA Contract records

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- 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.

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Search Procurement Records	Search by SRM Attributes (Contract)								
🛱 COPA Contract records 🎁 COPA Purchase order records	PIIN/Description Product No. Manu. Part No.								
 Eusiness Documents Cuments 	Manufacturer								
	Search Variants								

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

Search by Reco	rds Management Attri	butes (Contra	act)				
Short Description		\$					
RTKL Indicator		\$					
Object ID	4400001771	₽					
Creation time		<u>\$</u>					-
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Search by SRM	Attributes (Contract)						
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🖹 Type Short Des	cription		RTKL Indicator Object ID	Crea	ation time	Time of	fcha
COPA Cor	itract RM Parole Violator Tra	insport 2:3Contr	440000177	1 06/26/2009	17:16:27	07/21/2009 1	14:3

8. 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.

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Browser 🔐 🚱 COPA Contract RM	Parole Violator Trans	port 2:3Contr	Version 1		-
Short Description	COPA Contract RM Pa	arole Viol			
RTKL Indicator		Ē			
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 Fold		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 popup 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.

2 7 2 2 2		
Contract Name RM Parole Viola Header Data Item Data	Start Document Builder Release Hold C Download Upload tor Transport 2:3Contr Number 440000177	
Transaction Type	Agency Contract	
Status	Released Complete	
Distribute Contract to Catalog		
Basic Contract	Г	
Currency *	United States Dollar	
Display Currency \ExRateDate		
Valid From	06/26/2009 To 06/25/2010	
Target ∀alue	1,500.00 USD	
Release Value	540.00 USD	
Payment Terms	NET 30	
Under/Overdelivery Tolerance	0.00 % /0.00 % 🧮 Unlimited	
Delivery Time	0 Days	
Incoterm	FOB Reconciliation	
Responsible Purchasing, Org. *	Corrections Purchasing Organization	-

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

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

	Hiera	archy	Element Type	Visibility	Last Processed	Node
1	7 🗖	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
	D	🕤 🗀 COPA Document Attachments Fold		All Roles		15
	D	🗀 Additional Documents Folder		All Roles		17
	D	🗋 Notes and Working Papers Folder		Record Manage		22

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

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Find		
in an	All using Agencies of the Commonwealth, Participating Political Subdivision, Authorities, Private Colleges and Universities Your SAP Vendor Number with us: 104274 Supplier Name/Address: XEROX CORPORATION 800 CARILLON PKWY ST PETERSBURG FL 33716-1102 US	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 Please Deliver To:
	Supplier Phone Number: 717-777-7777 Supplier Fax Number: 705-9112 Contract Name: RM Parole Violator Transport 2:3Contr	CORR CI Coal Township 1 Kelly Drive Harrisburg PA 17866-1020 US Payment Terms NET 30
\$	Solicitation No.: 6100003072 Supplier Bid or Proposal No. (if applicable): 6500002427 This contract is comprised of: The above referenced Solicita attached to this Contract or incorporated by reference.	Issuance Date: 06/26/2009 Solicitation Submission Date: 06/26/2009 ation, the Supplier's Bid or Proposal, and any documents
	Item Material/Service Qty	UOM Price Per Total

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



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 Fold		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 Dow	nload 🛛 🖂
Do you v	vant 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
	Dpen Save Cancel
☑ Al <u>w</u> a	ys ask before opening this type of file
0	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. <u>What's the risk?</u>

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.

	RFQ FOR <th BEST VAL</th 	is should be th	e RFQ Project NATION FOR	Title>		
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Order	Understanding the Problem					
	Contractor Prior Experience					
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	Qualifications					
\sim	Project Work Plan					
<u> </u>	Cost(\$ amount)					
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	Participation (amount and %)					
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18. Return to the Records Browser by selecting the BACK (F3) button.

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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 <u>should not</u> exceed 20-25 MB
 - c. Any documents which the user considers confidential should be passwordprotected **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.

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Object ID	4400001771						
Creation time	06/26/2009 17:16:27			•			
Hierarchy	Element Type	Visibility	Last Processed	Node			
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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 Fold		All Roles		15			
Additional Documents Folder		All Roles		17			
D D Notes and Working Papers Folder		Record Manage		22			

4. 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.

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■ 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 Fol		All Roles		15			
🗢 Ġ Additional Documents Folder		All Roles		17			
🕲 Manual Document	COPA Manual Documents	All Roles		18			
D D Notes and Working Papers Folder		Record Manage		22			

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

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Hierarchy	Element Type	Visibility	Last Processed	Node				
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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				
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🗢 🔁 Additional Documents Folder		All Roles		17				
💿 Manual Document	COPA Manual Documents	All Roles		18				
D D Notes and Working Papers Folder		Record Manage		22				

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

🎾 🗐 🎦 Attributes 🛛 Record 🖥 🕻 🀲								
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Hierarchy	Element Type	Visibility	Last Processed	Node				
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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 Fol	[All Roles		15				
🗢 🔁 Additional Documents Folder		All Roles		17				
🔕 Manual Document 🦰	COPA Manual Documents	All Roles		18				
D D Notes and Working Papers Folder		Record Manage		22				

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

Hierarchy		Element Type		Visibility	Last Processed	Node
🗢 🚀 COPA Contract RM P	arole Violator Tra				SRMRFCSRV/07/21/20	
RE COPA Contract R	M Parole Violator	COPA Contract		All Roles	SRMRFCSRV/07/21/20	4
🥥 SNAPSHOTS FO	R SRM SYSTEM	COPA Read-or	ily docum	All Roles	SRMRFCSRV/07/21/20	13
SNAPSHOTS FOL SNAPSHOTS FOL	R SRM SYSTEM	COPA Read-on	ily docum	All Roles	SRMRFCSRV/07/21/20	13
SNAPSHOTS FOL SNAPSHOTS FOL	R SRM SYSTEM	COPA Read-or	ily docum	All Roles	SRMRFCSRV/06/26/20	13
🖾 COPA Related BI	D records	COPA Related	BID recor	All Roles	SRMRFCSRV/06/26/20	7
🖾 COPA Related PC	D Records	COPA Related	PO Recor	All Roles	SRMRFCSRV/06/26/20	8
👂 🗀 COPA Document	Attachments Fol	:		All Roles		15
🗢 🗢 🔂 Additional Docum	nents Folder			All Roles		17
🔕 Manual Docu						18
👂 🗋 Notes and Worki	Activities	•	<u>C</u> reate			22
	Insert from Cli	pboard	<u>F</u> ind			
	Delete		Informati	on		
	<u>R</u> ename		Where-U	Ised List		
	<u>D</u> etermine Vis	ibility				
	<u>Attributes for N</u>	lode				

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*.

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- 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

Document Client: Create
4
⊗Application
Microsoft Word
Microsoft PowerPoint
Microsoft Excel
<u>F</u> rom File

10. A standard file selection box for your hard drive is displayed. Locate and select the appropriate attachment.

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Bab09833f8368489679e ditional Files L cuments and Settings IVERS 6 tpub gration OCache w fonts WARE igram Files arantine pW/orkDir	TEMP WINDOWS dell.sdr INFCACHE.1 INSTALL INSTALL MSDOS SoftwareRemove Uninstal		
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a. Select the OPEN button

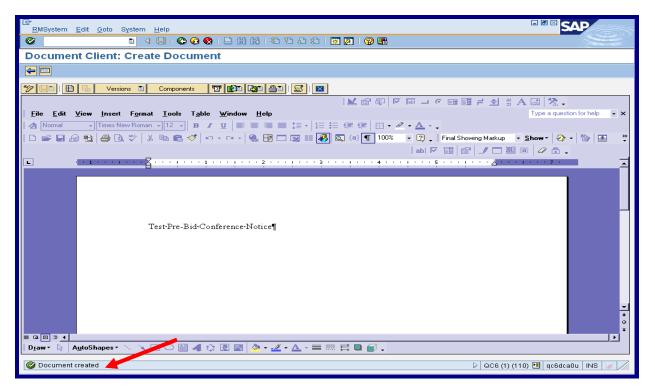
11. The *Create Attributes* dialog box is displayed, enter a name in the Short Description field

RMSystem Edit <u>G</u> oto System Help) C C C C C C C C C C C C C C C C C C C	〕 \$〕 ₩ 2 19 4	
ocument Client: Create Docu	ment		
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Unique ID	🔊 💭 🔊 🖉 🖉 🖉		
	EN EN	English	
Language Creation time	06/30/2009 14:22:37	English	
		Kethleen ORM Rection	
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			

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.

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Do	Document Client: Document "Pre-Bid Conference Notice" Change	
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	abl 🗹 🖬 😭 🍠 🥅 🌌	·
L		7 .
	Test-Pre-Bid-Conference-Notice¶	

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

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Ca	se Ma	nag	eme	nt											

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.

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🖾 COPA Related PO Records	COPA Related PO Recor	All Roles	SRMRFCSRV/06/26/20	8					
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💿 Manual Document 🛛 🖌	COPA Manual Documents	All Roles		18					
📺 Pre-Bid Conference Notice	COPA Manual Documents	All Roles	P00068292/09/23/2009	18					
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16. Select the SAVE icon, then Save from the drop-down menu

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	🔕 Manual Document		COPA Manual Documents	All Roles		18				
	🛅 Pre-Bid Conference Noti	ce	COPA Manual Documents	All Roles	P00068292/09/23/2009	18				
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17. The indicator is now green, showing that the update to the Record has been saved.

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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					
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Pre-Bid Conference Notice	COPA Manual Documents	All Roles	P00068292/09/23/2009	18					
D D 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.