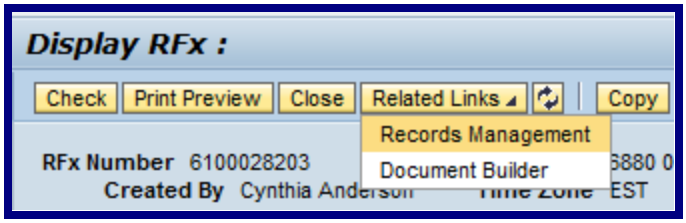
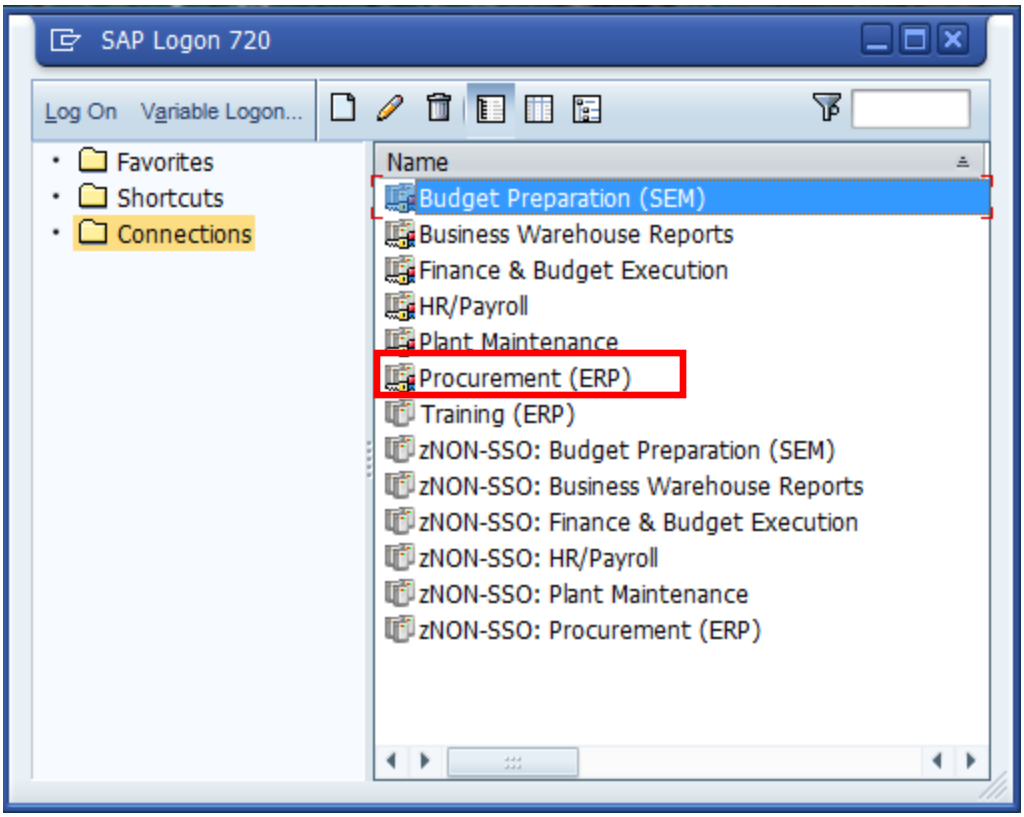
End User Procedure for Locating and Viewing a Purchase Order and Attachments in Records Management

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

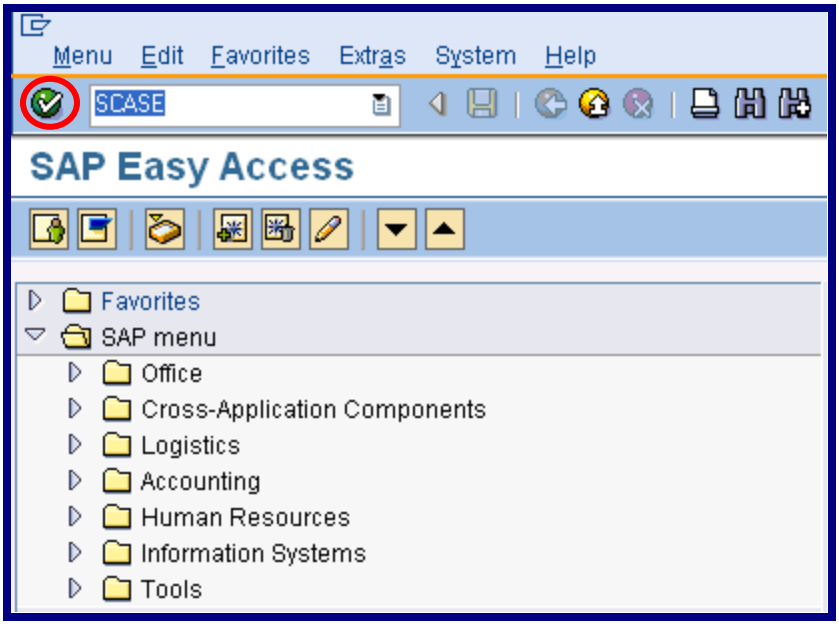
Records Management is accessible through the SAP Logon Pad and from any screen within a SRM Purchasing document.



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 field and select the ENTER (green circle with checkmark)

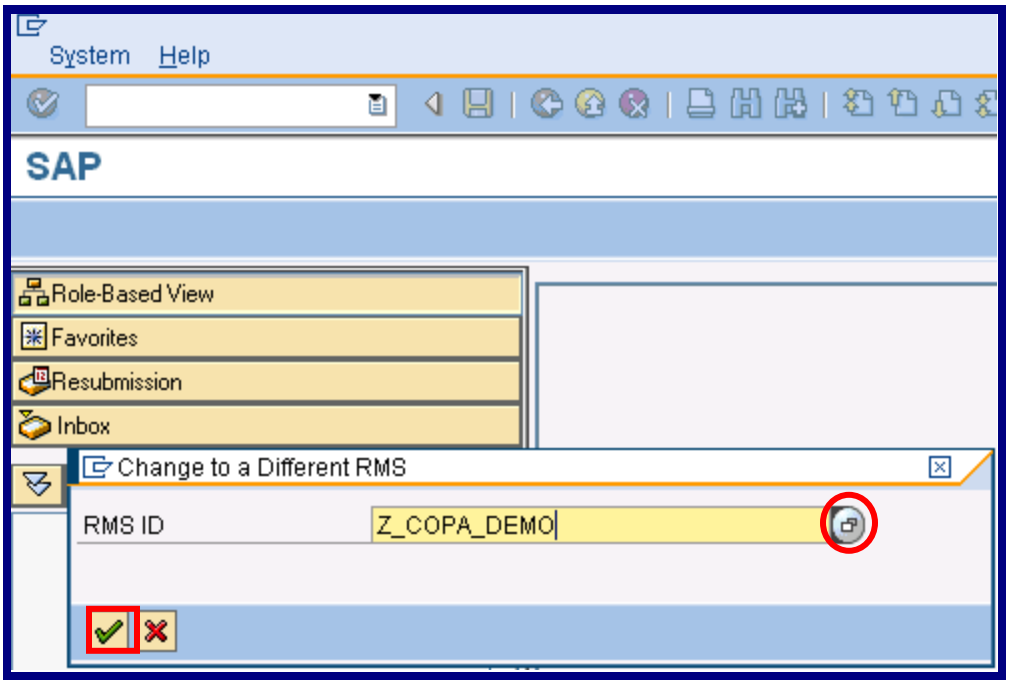


4. This is what a user will see and complete upon *initial* access to ***"SCASE."*** For the first *initial* log in a "Change to a different RMS" dialog box will appear.

   a. Select the RMS ID match code (round circle with 2 pieces of paper)

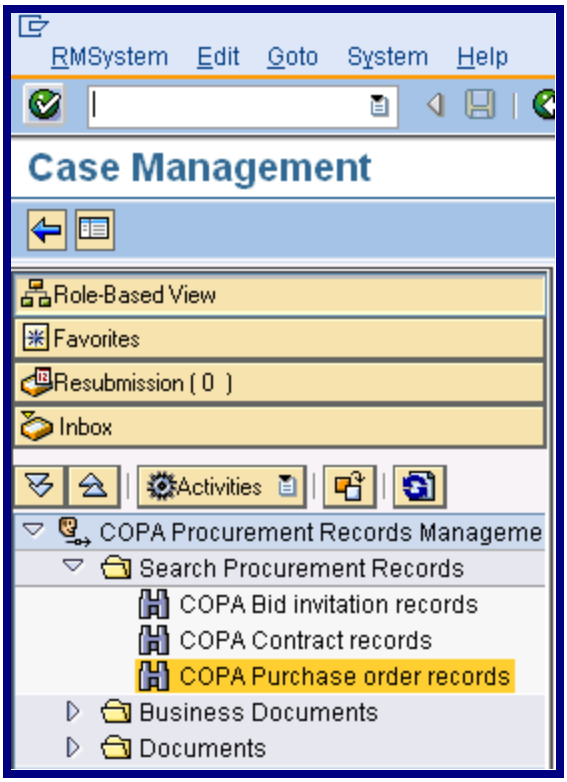
   b. Select the COPA Procurement Records Management and select COPY (green checkmark)

   c. RMS ID information will populate into field and select CONTINUE (Enter) green checkmark to expand the **Records Organizer** menu



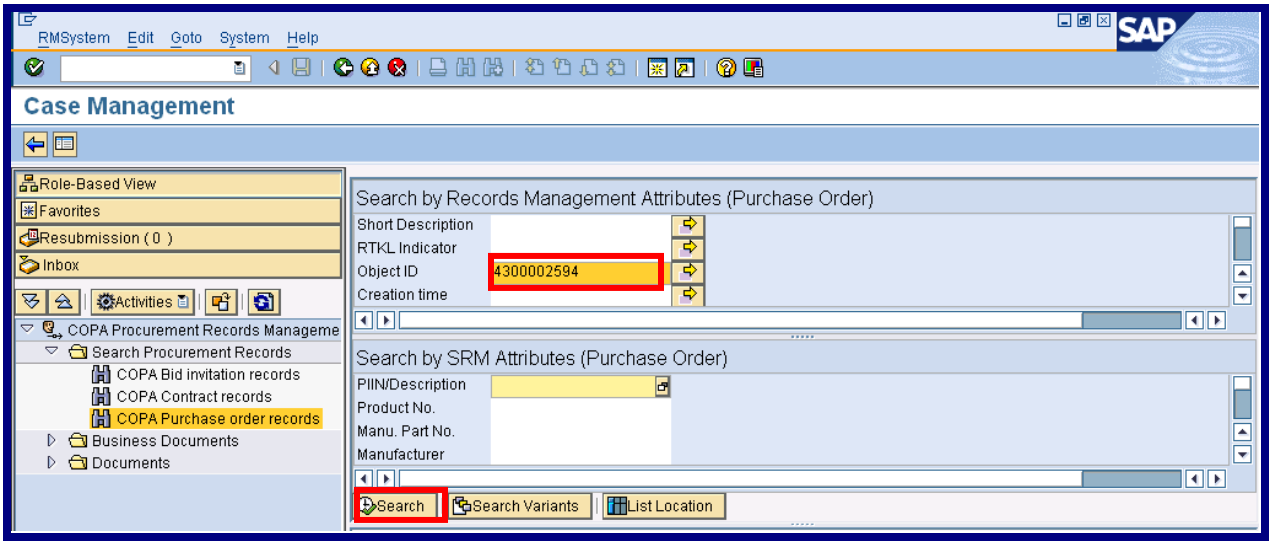
5. In the **Records Organizer**, select and open *Search Procurement Records*

    a. Select COPA Purchase Order records

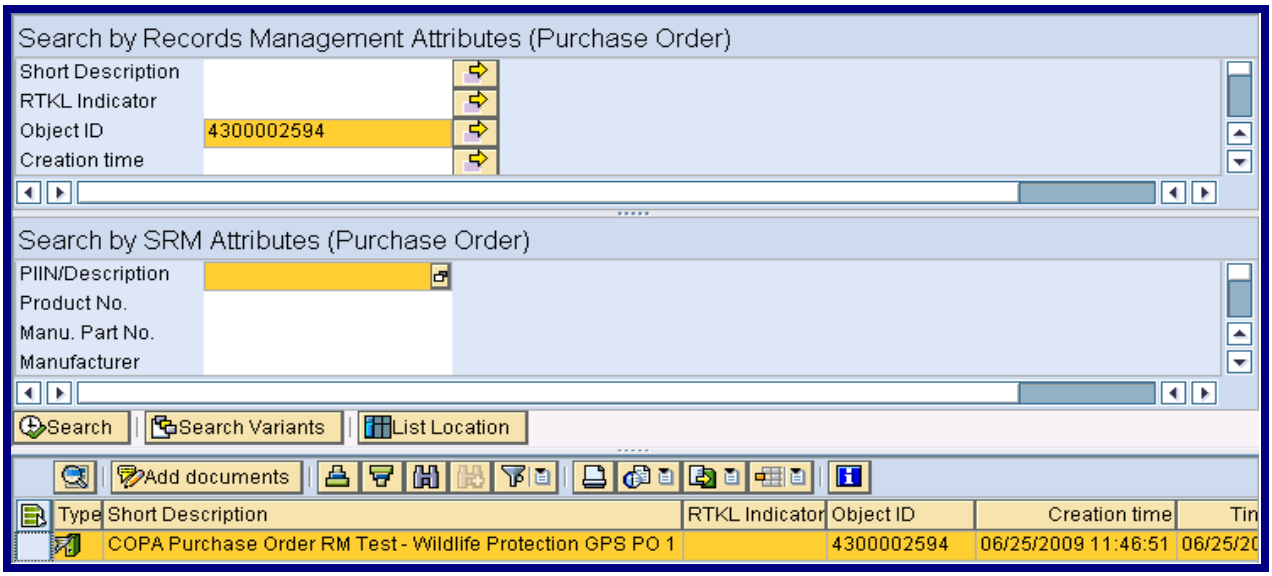


6. Under *Search by Records Management Attributes (Purchase Order)*, scroll down to locate the **Object ID** field

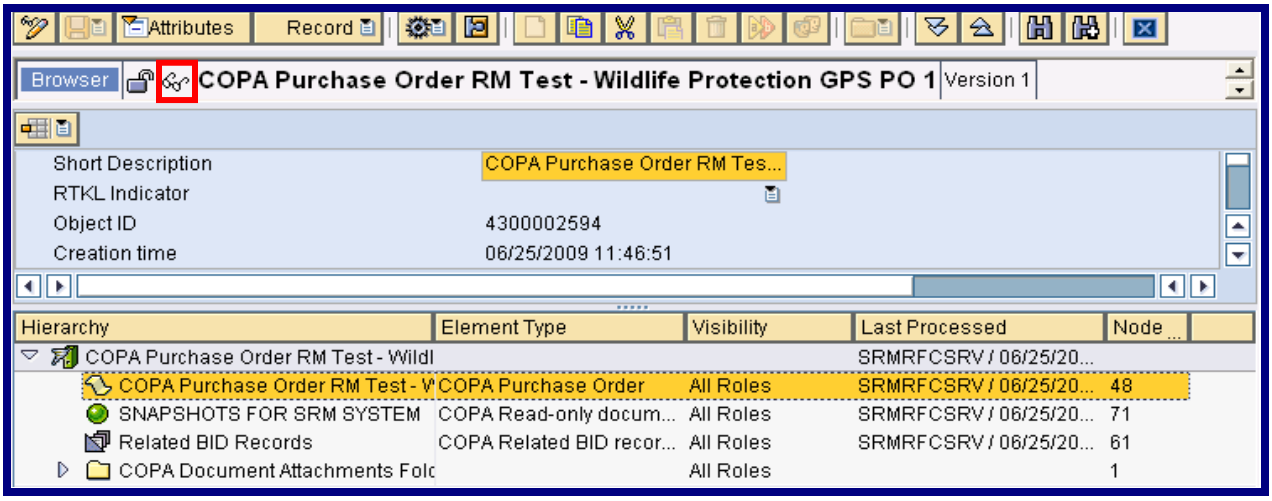
    a. Enter your purchase order number (ex. 4300002594) in the field and select the SEARCH button



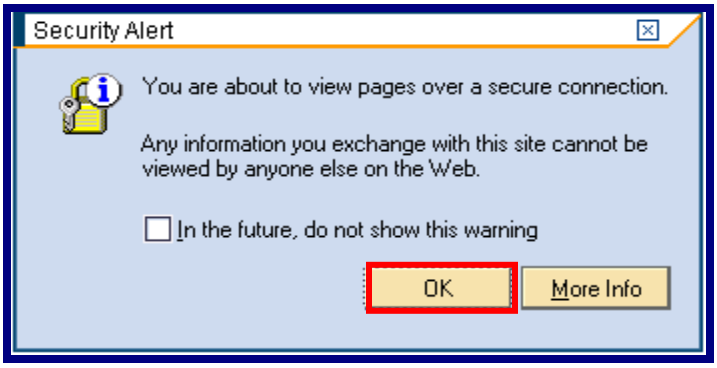
7. When the search results display, verify that it is the correct purchase order and double-click to open the Record



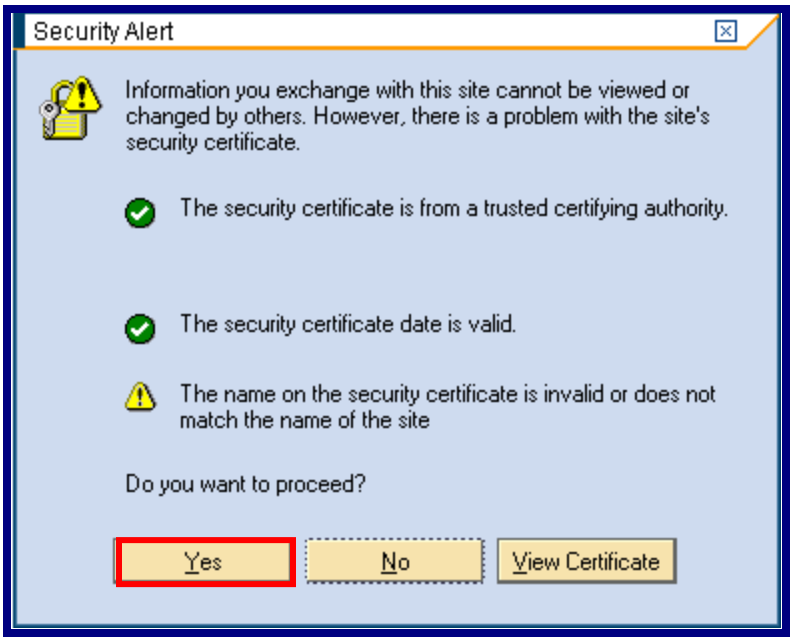
8. In the *Records Browser*, locate and open the SRM Purchase Order document by double-clicking on COPA Purchase Order. You are within the **Display Mode** in the RECORDS BROWSER (eye glass) icon.



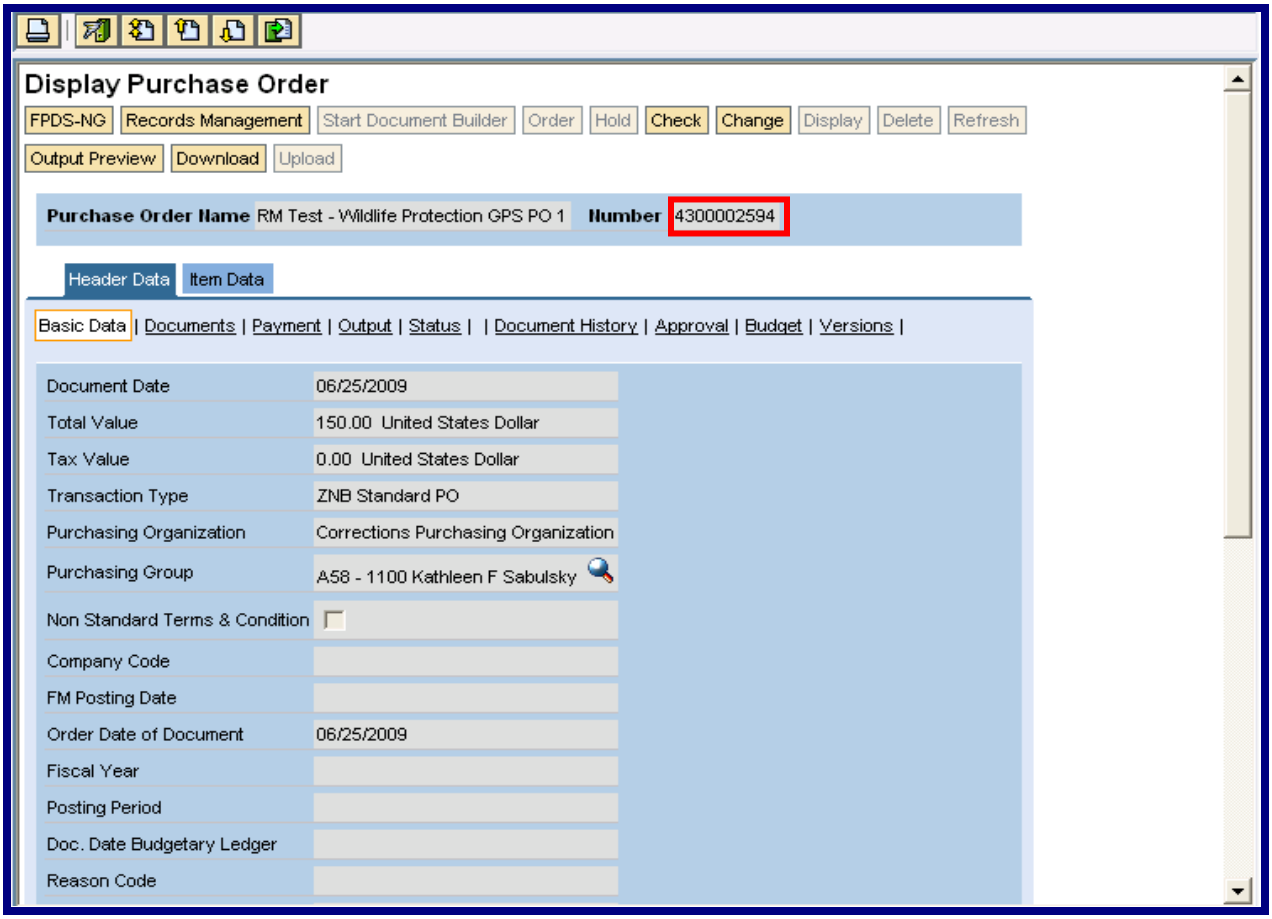
9. When opening the COPA Purchase Order record you will be prompted by a Security Alert pop-up box. Select the OK button.



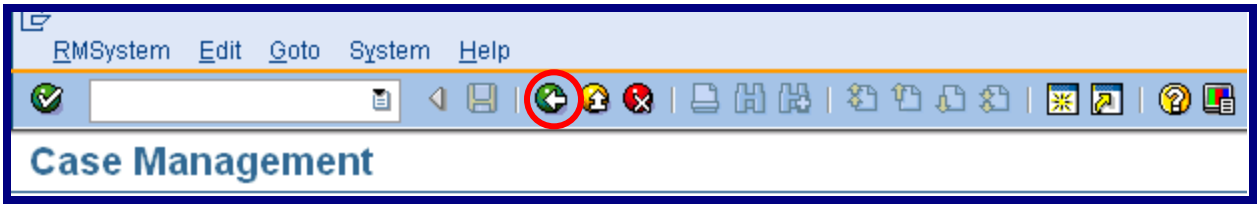
10. A second Security Alert pop-up box will ask do you want to proceed. Select the YES button.



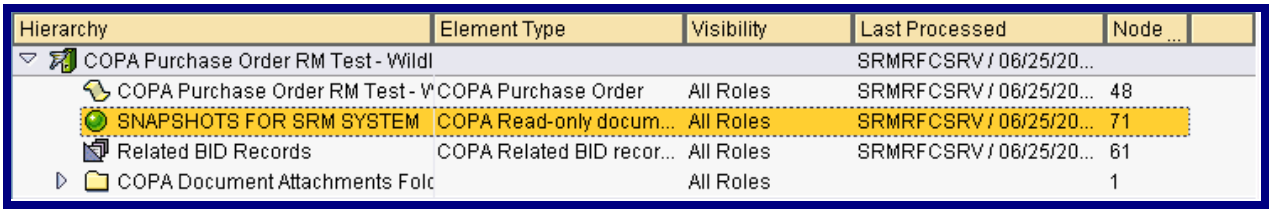
11. You are able to view the Purchase Order document in SRM. You are also able to view and/or open all text and attachments.



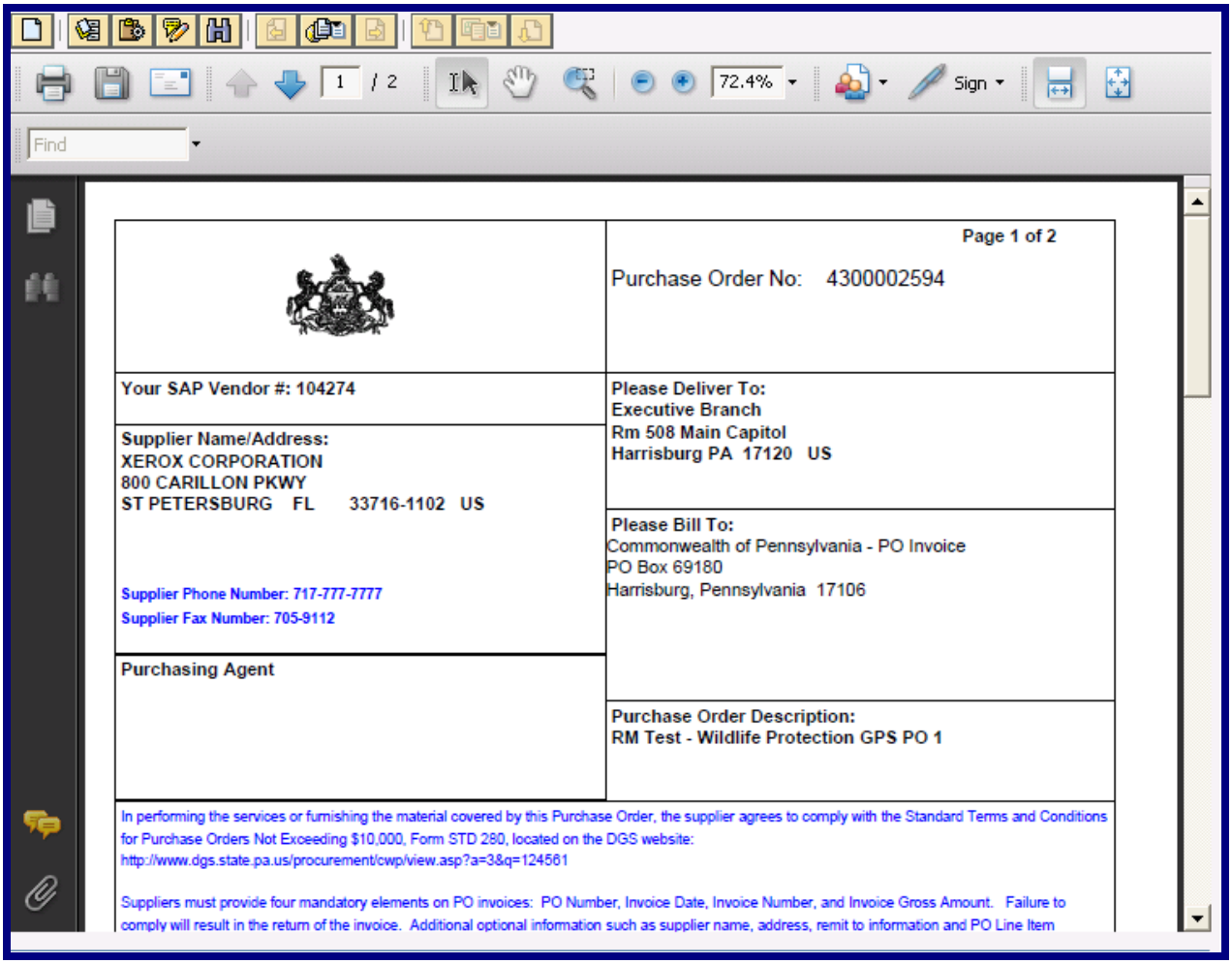
12. Return to the *Records Browser* by selecting the BACK (F3) button



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



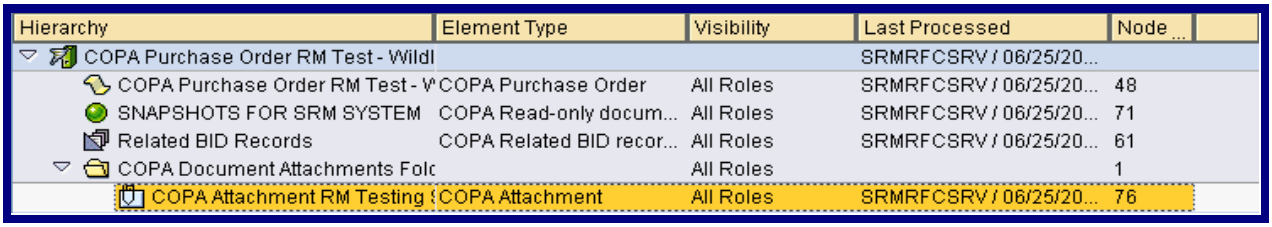
14. View, save, print or e-mail a copy of the Snapshot of the Purchase Order



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

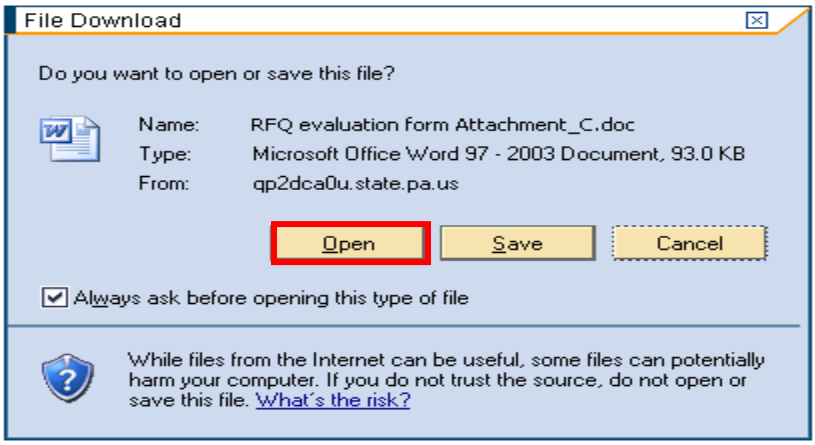
16. Expand the COPA Document Attachments Folder

a. Double-click and open any COPA Attachment you wish to view.

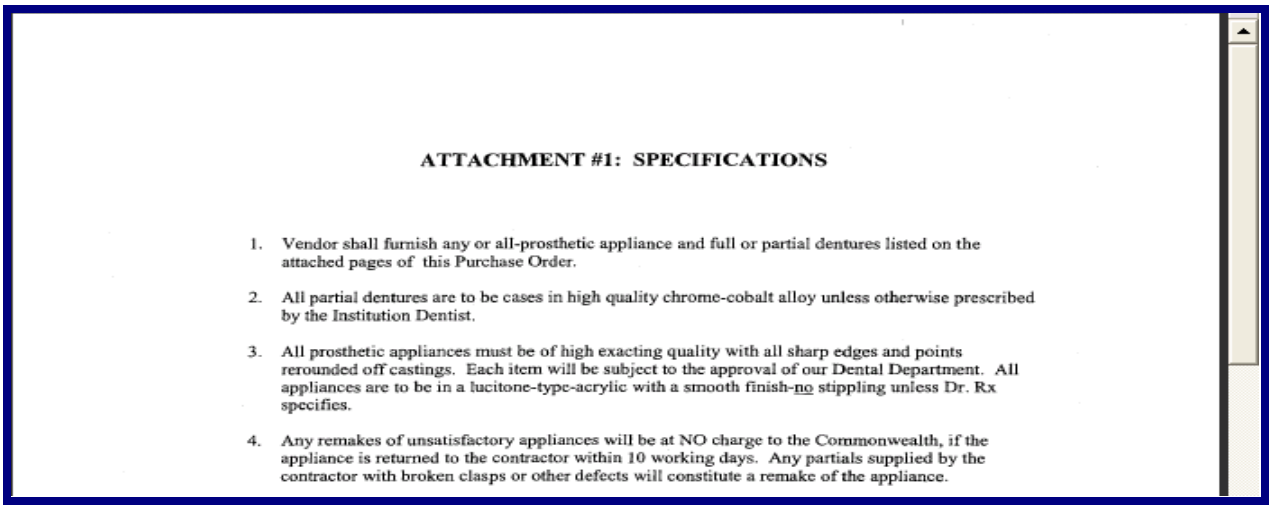


Hierarchy	Element Type	Visibility	Last Processed	Node ...
COPA Purchase Order RM Test - Wildl			SRMRFCSRV / 06/25/20...	
COPA Purchase Order RM Test - W	COPA Purchase Order	All Roles	SRMRFCSRV / 06/25/20...	48
SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/25/20...	71
Related BID Records	COPA Related BID recor...	All Roles	SRMRFCSRV / 06/25/20...	61
COPA Document Attachments Folc		All Roles		1
COPA Attachment RM Testing (	COPA Attachment	All Roles	SRMRFCSRV / 06/25/20...	76

17. 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.



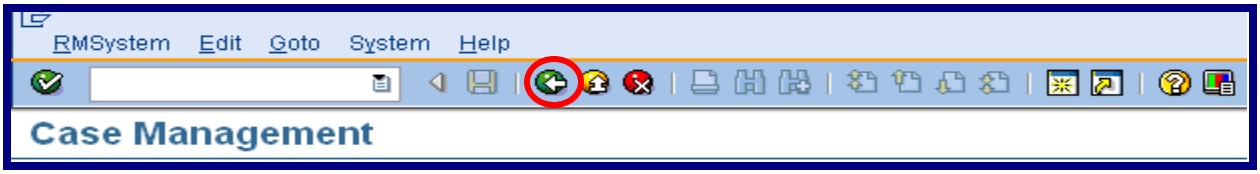
18. When the COPA Attachment opens it will display the document to view. In this example the COPA Attachment displayed is a Word document. The Word file opens within the Office application.



ATTACHMENT #1: SPECIFICATIONS

1. Vendor shall furnish any or all-prosthetic appliance and full or partial dentures listed on the attached pages of this Purchase Order.
2. All partial dentures are to be cases in high quality chrome-cobalt alloy unless otherwise prescribed by the Institution Dentist.
3. All prosthetic appliances must be of high exacting quality with all sharp edges and points rerounded off castings. Each item will be subject to the approval of our Dental Department. All appliances are to be in a lucitone-type-acrylic with a smooth finish-no stippling unless Dr. Rx specifies.
4. Any remakes of unsatisfactory appliances will be at NO charge to the Commonwealth, if the appliance is returned to the contractor within 10 working days. Any partials supplied by the contractor with broken clasps or other defects will constitute a remake of the appliance.

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



Manually Attaching a Document

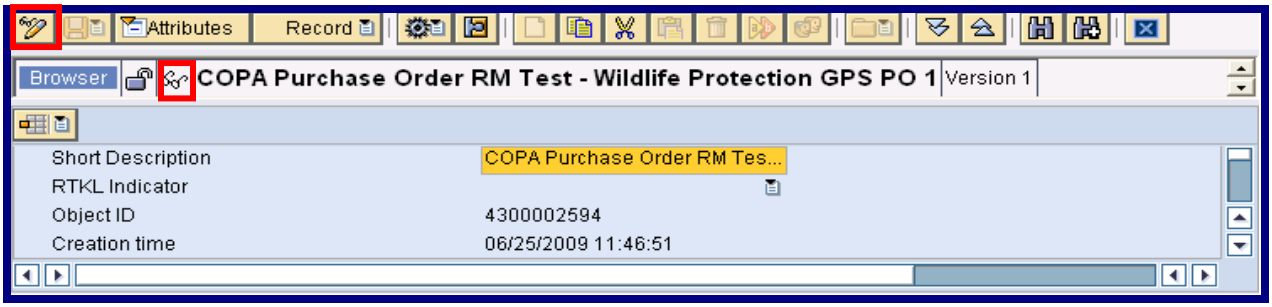
1. The user must be in **Change Mode** in order to manually attach a document

    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

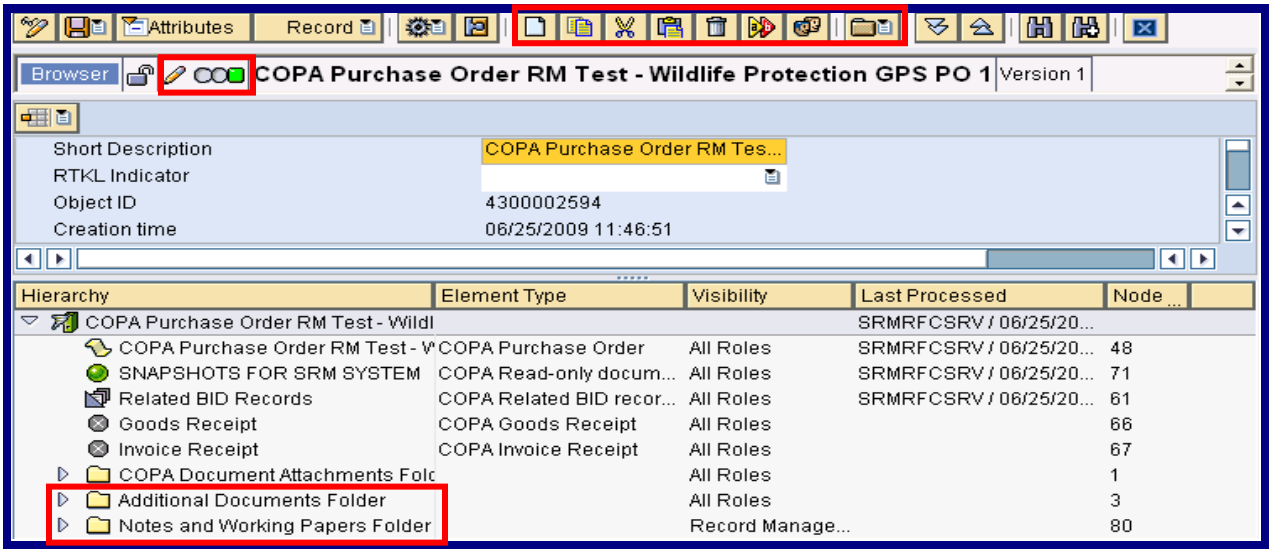
    b. The total size of all attachments within a single record **should not** exceed 20-25 MB

    c. Any documents which the user considers confidential should be password-protected **prior** to being attached in Records Management

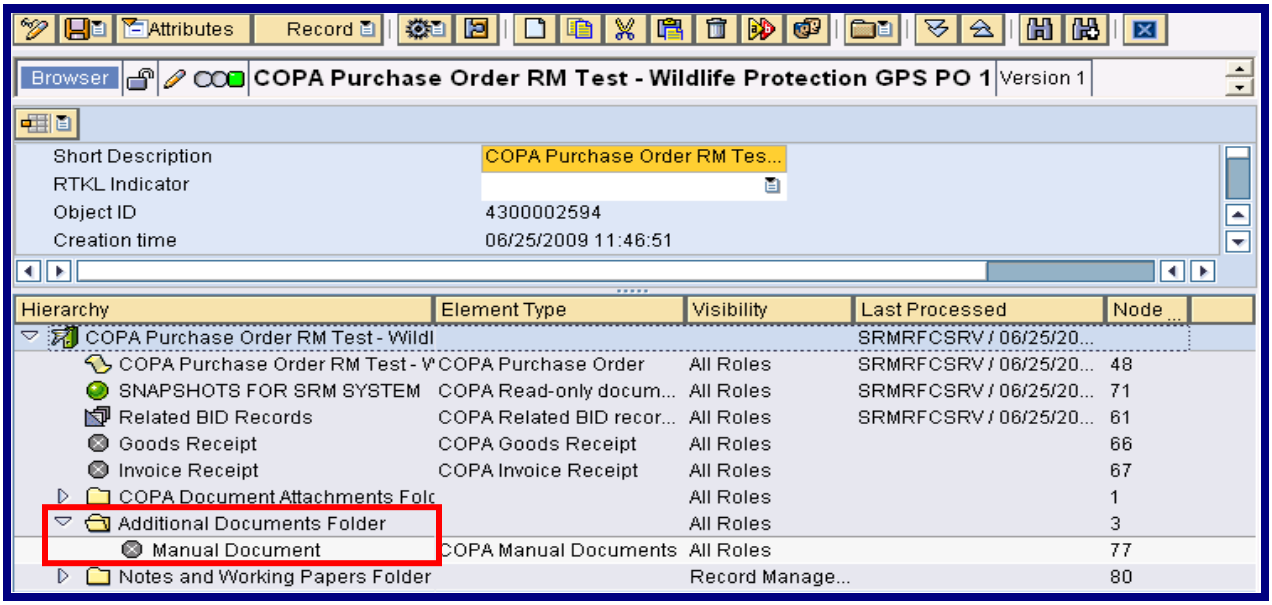
2. In the *Records Browser* go from DISPLAY (eye glass) icon to **Change Mode** by selecting the DISPLAY/CHANGE (eye glasses with pencil) icon to add an attachment



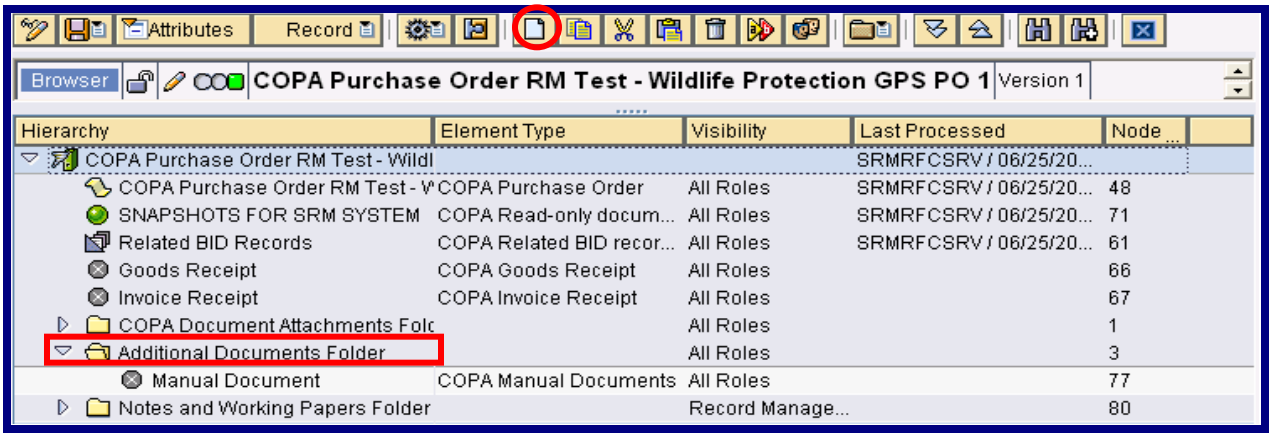
3. In the **Change Mode,** new folders have been added to the record content: *Additional Documents and Notes and Working Papers.* Also, note that the STATUS INDICATOR (pencil with lights) icon reflects **Change Mode** and additional icons are now active.



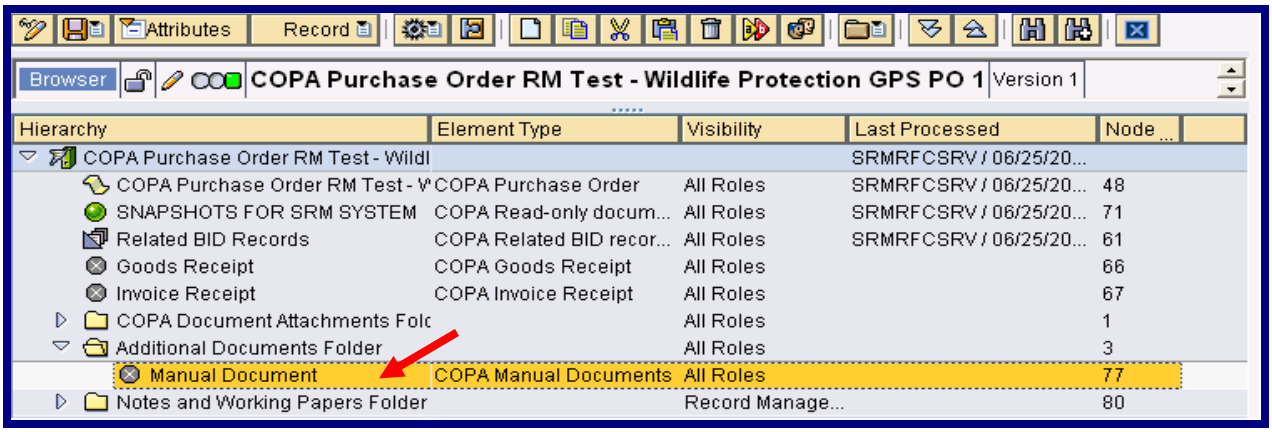
4. Expanding the new folders (ex. *Additional Documents Folder)* will reveal placeholders for new attachments. Any of the previously mentioned applications Word, Excel, PowerPoint, and Visio may be attached using the placeholders.



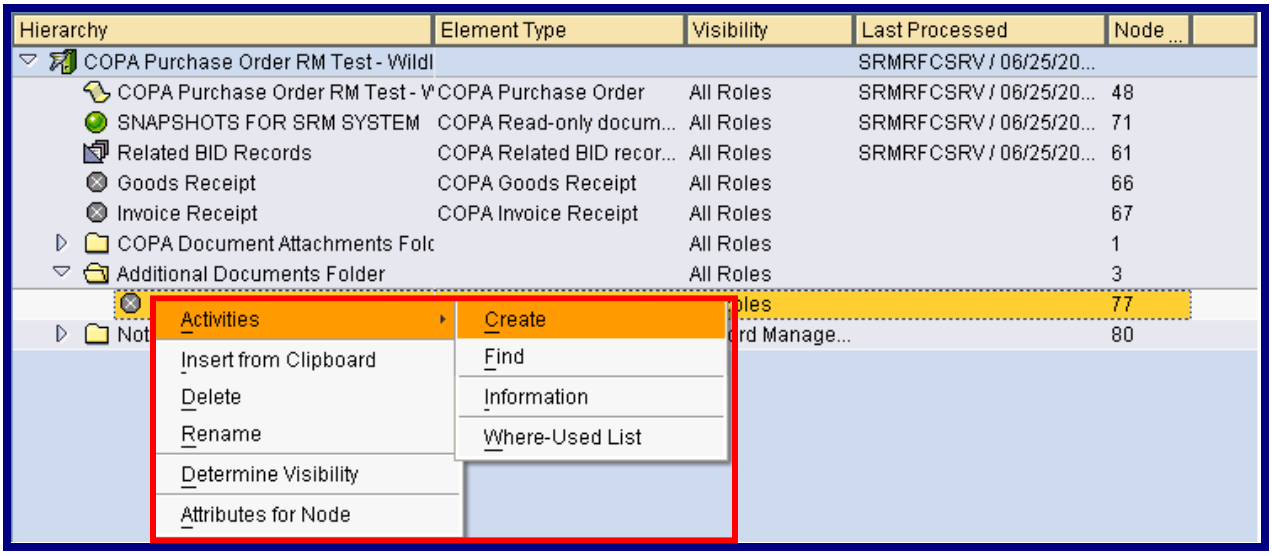
5. To access additional placeholders, highlight Additional Documents Folder and select the CREATE icon



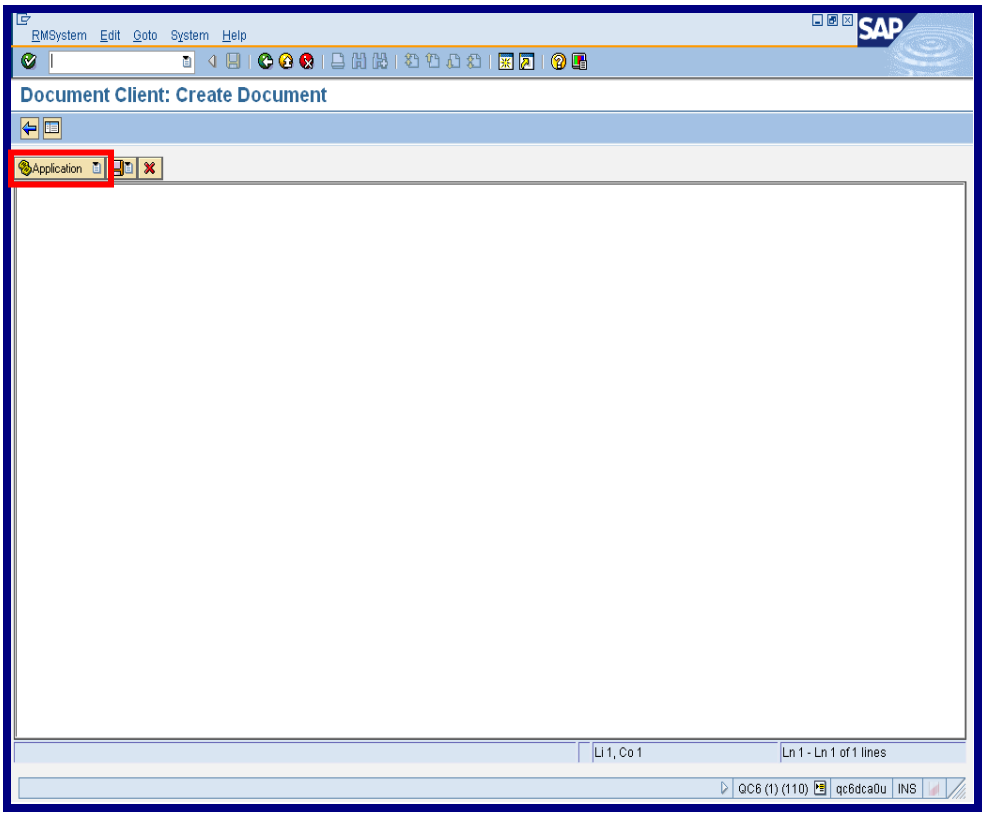
6. Select the document placeholder, then right-click on the mouse



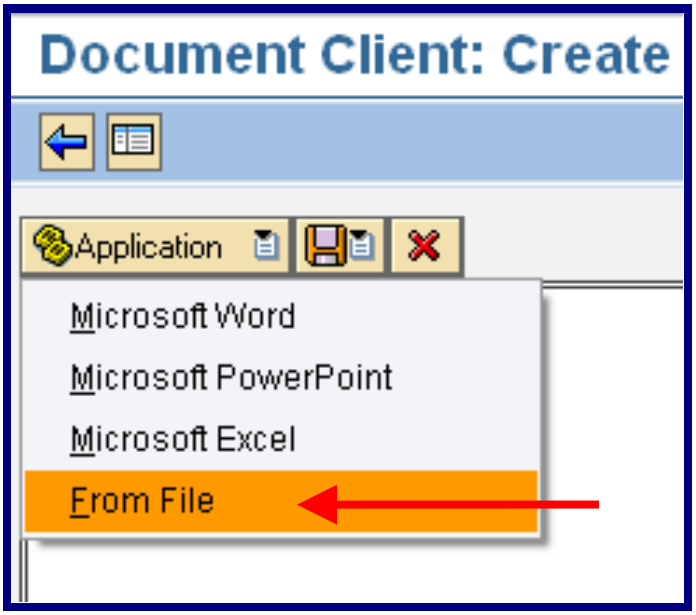
7. Choose **Activities**, then **Create**, on the menus that display after right-clicking the mouse



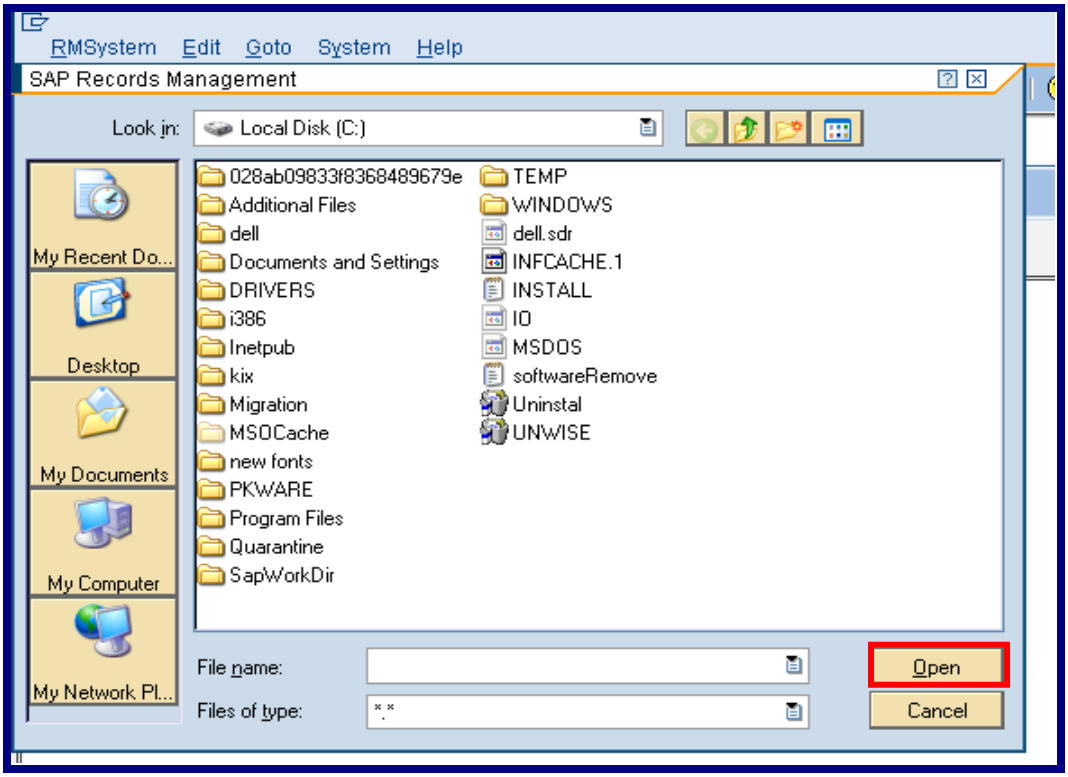
8. A blank screen displays within the current window. Select the drop down arrow on the APPLICATION button to reveal a list of MS Office software, as well as the option to create *From File.*



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

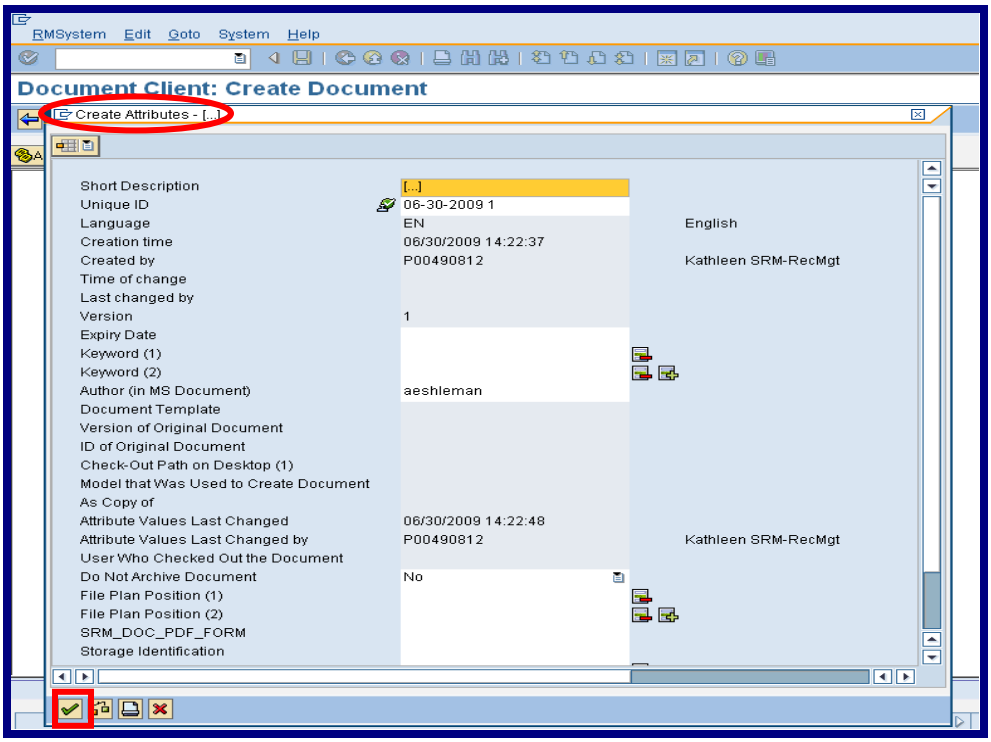


10. A standard file selection box for your hard drive is displayed. Locate and select the appropriate attachment, then select the OPEN button.



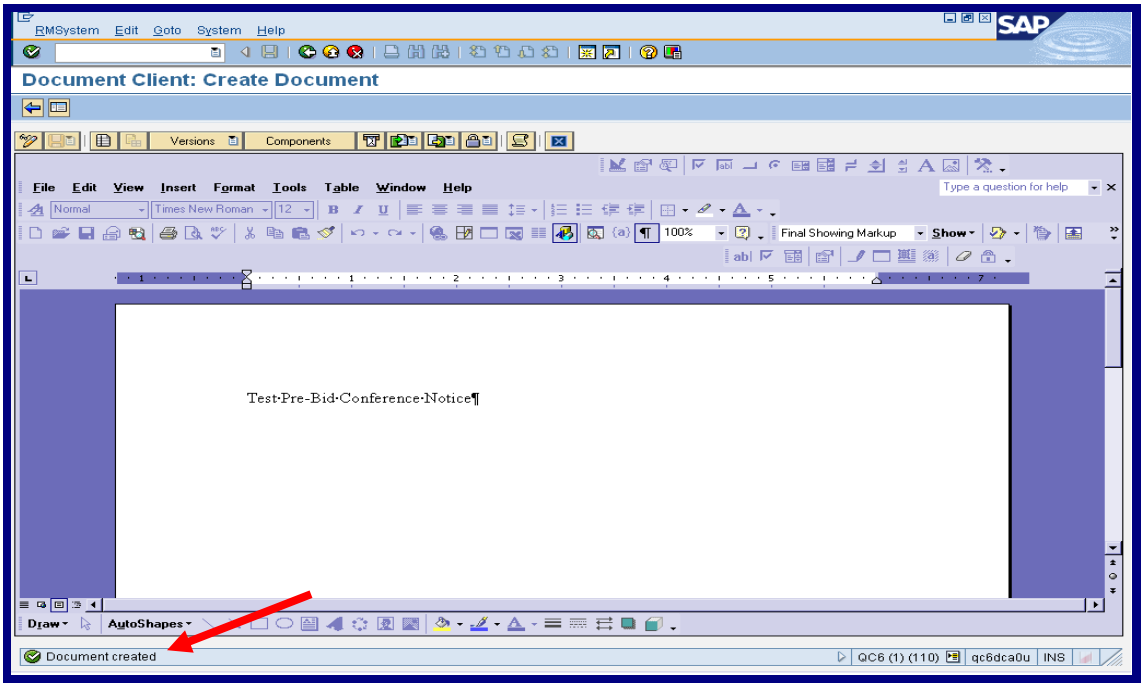
11. The *Create Attributes* dialog box is displayed, enter a name in the Short Description field

    a. Select the ENTER icon

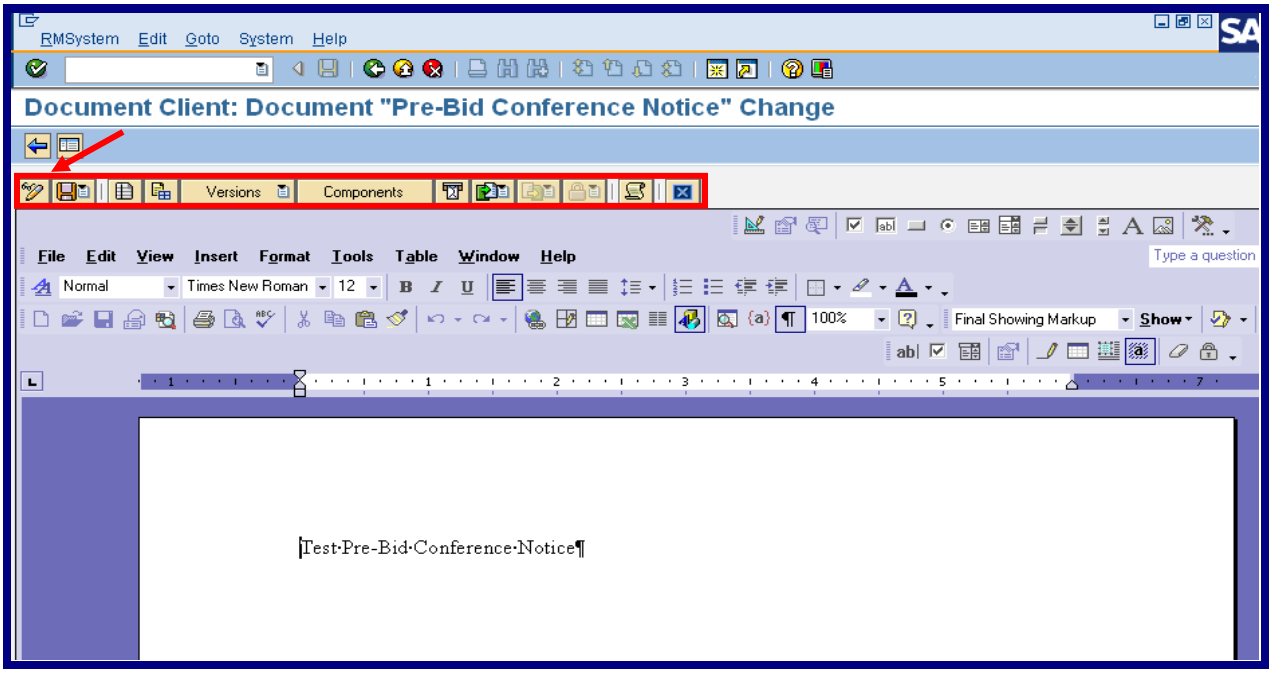


12. The selected file document is created and opens (in this example as Word) within the *browser window*.

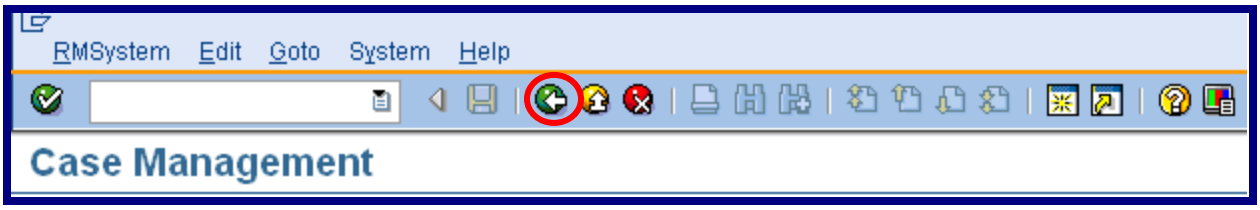
Note that while full functionality of the Word application exists while in ***Change Mode*** *within Records Management, it is disabled while in* ***Display Mode*** *within the newly attached document.*



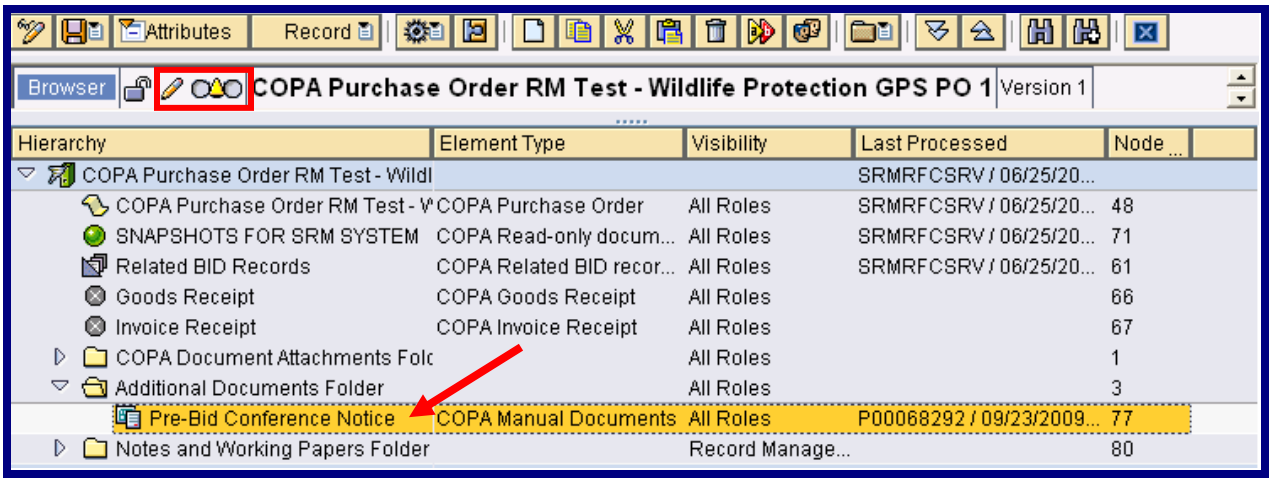
13. In order to activate the Word editor tools; the **DISPLAY/CHANGE** icon must be selected. Additional icons and buttons with functions related to document attachment are available as well.



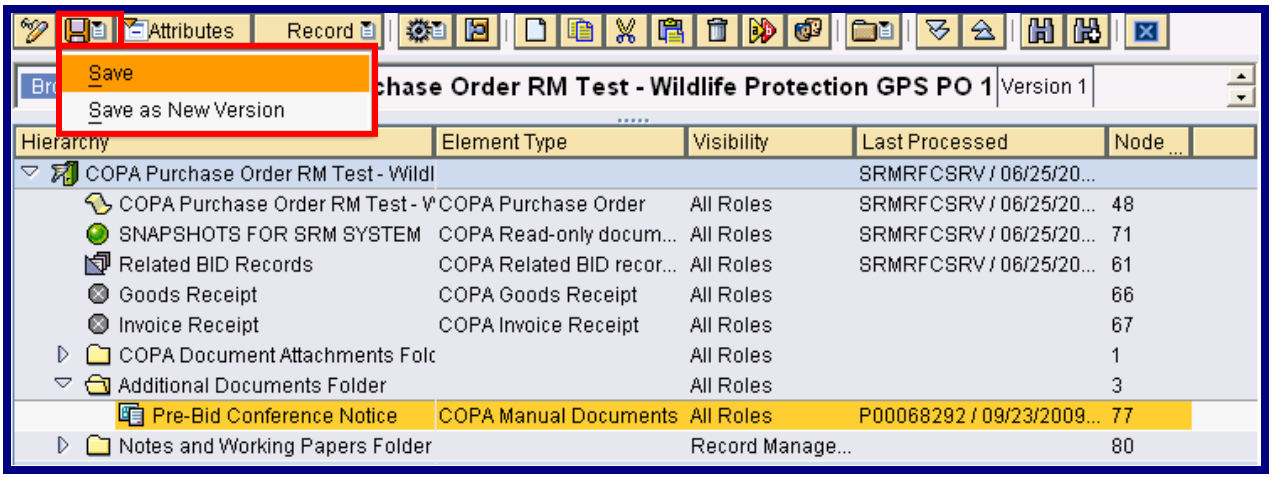
14. Return to the *Records Browser* by selecting the BACK (F3) button



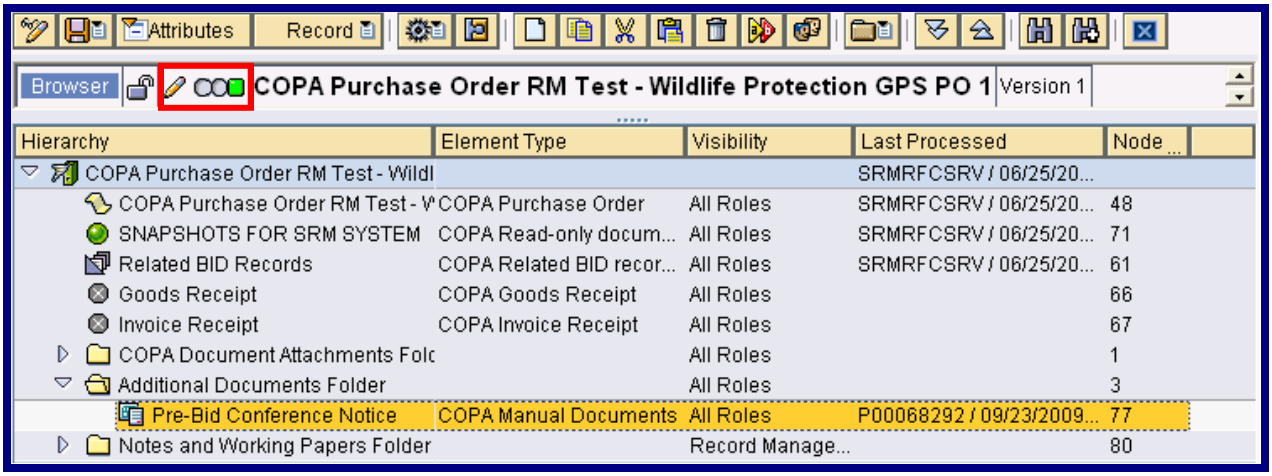
15. The newly added attachment is e-filed under the *Additional Documents Folder* with the Element Type "COPA Manual Document." The **Change Mode** status indicator has switched to yellow, meaning that the newly added attachment has not yet been saved to the Record.



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



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.