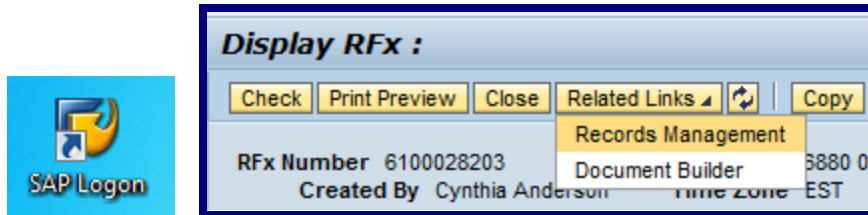


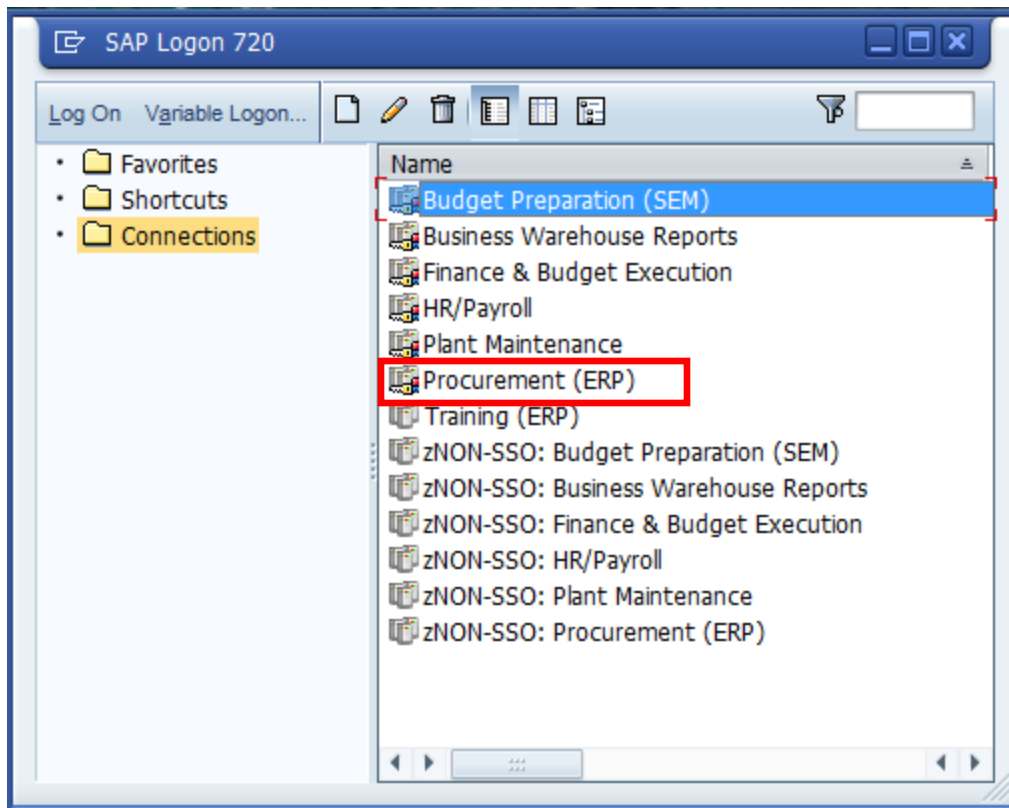
## End User Procedure for Locating and Viewing a Bid Invitation and Attachments in Records Management

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

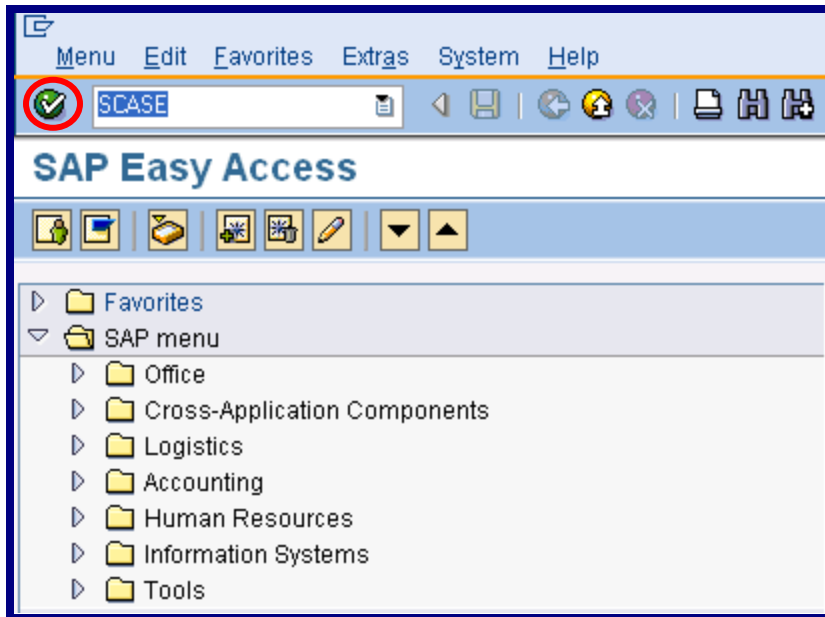
Records Management is accessible through the SAP Logon and from any screen within an SRM Purchasing document.



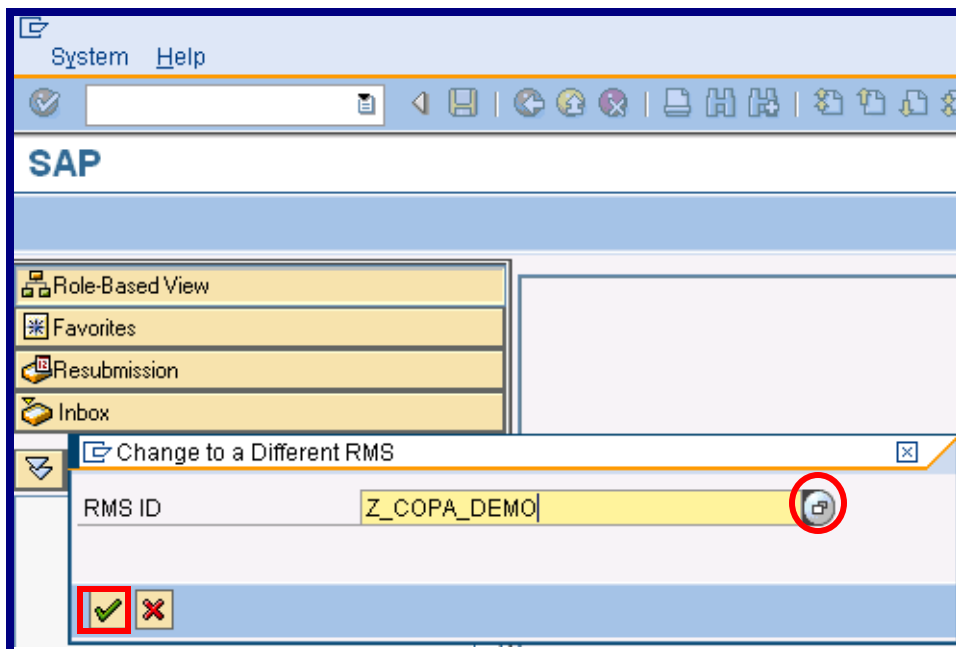
1. Sign onto the SAP Logon System by selecting and double-clicking on the SAP Logon icon on your desktop
2. When the SAP Logon 720 dialog box appears, select, and open the "Procurement" description



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

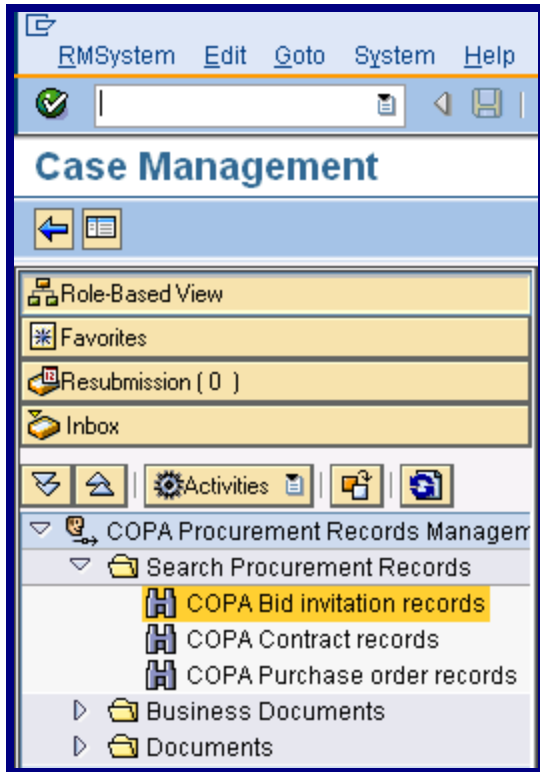


4. This is what a user will see and complete upon *initial* access to **"SCASE."** For the first *initial* log in a "Change to a different RMS" dialog box will appear.
  - a. Select the RMS ID match code (round circle with 2 pieces of paper)
  - b. Select the COPA Procurement Records Management and select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



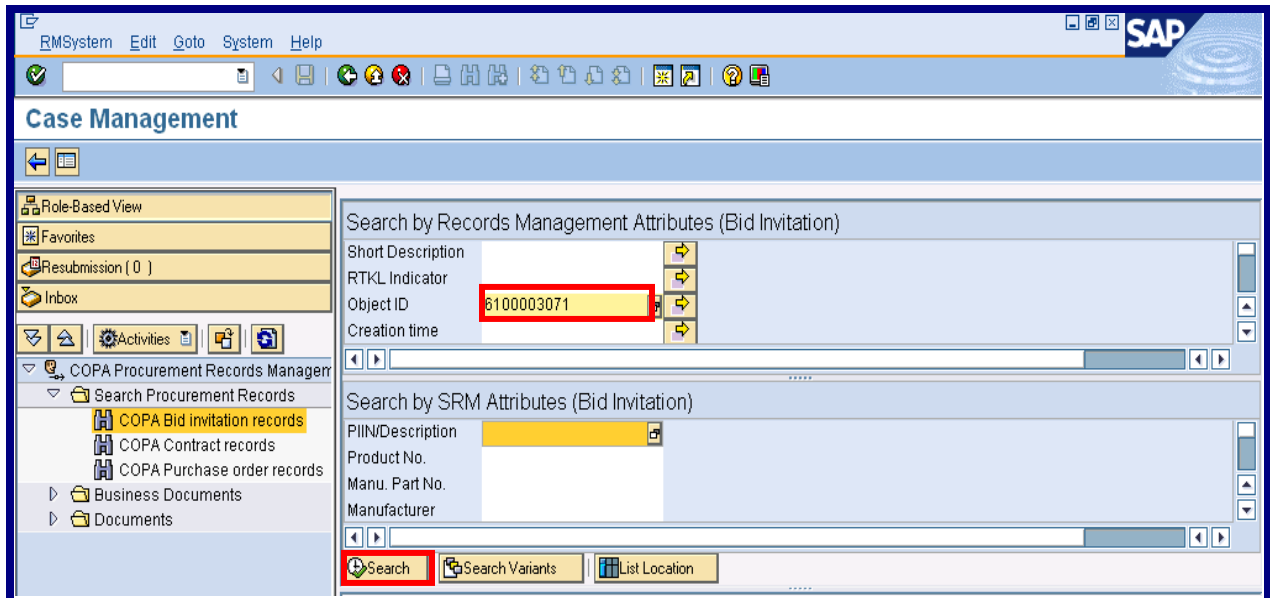
5. In the **Records Organizer**, select and open *Search Procurement Records*

a. Select COPA Bid Invitation records

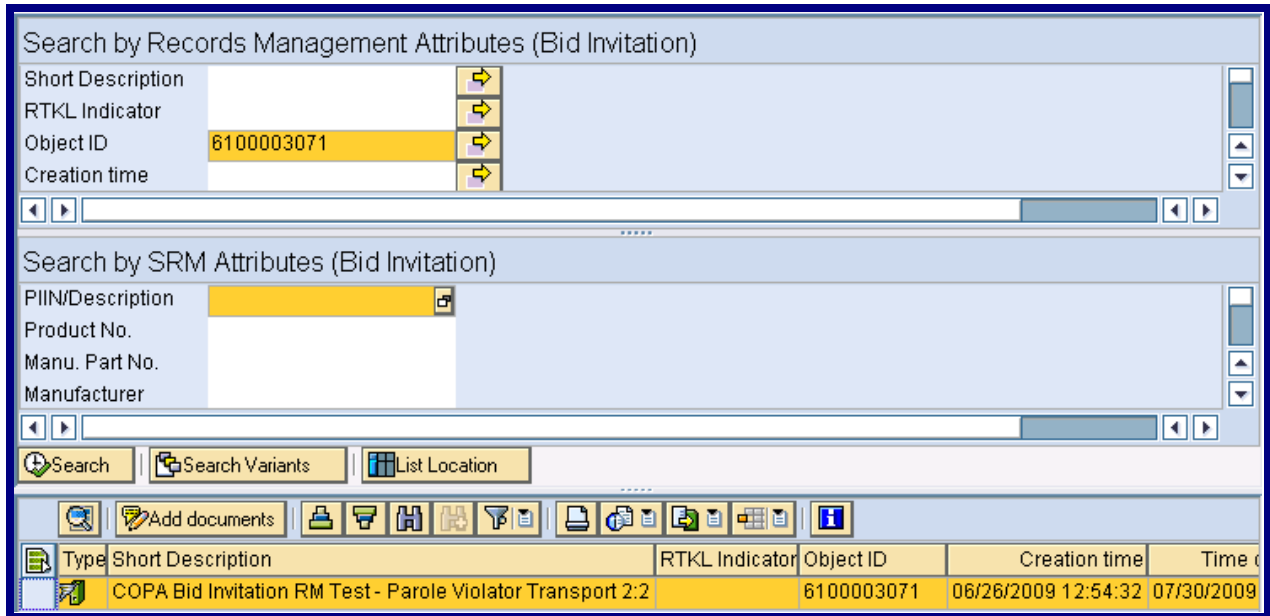


6. Under *Search by Records Management Attributes (Bid Invitation)*, scroll down to locate the **Object ID** field

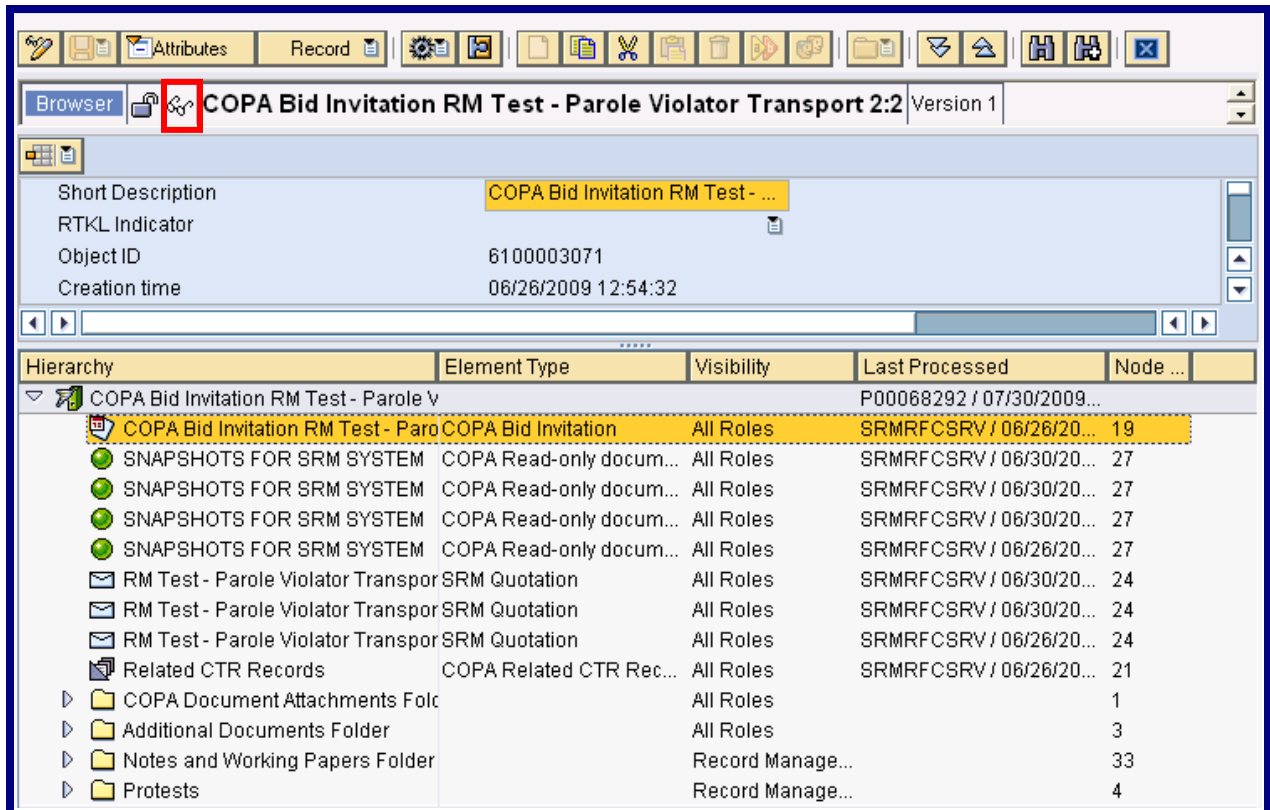
a. Enter your bid invitation number (ex. 6100003071) in the field and select the **SEARCH** button



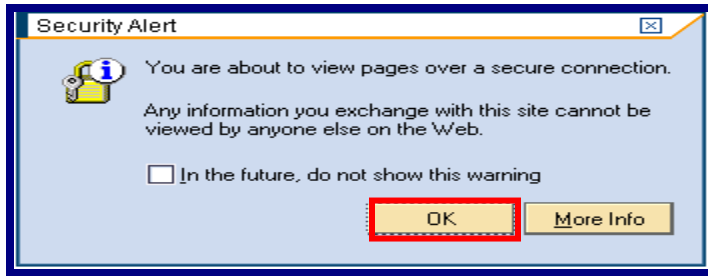
- When the search results display, verify that it is the correct bid invitation and double-click to open the Record



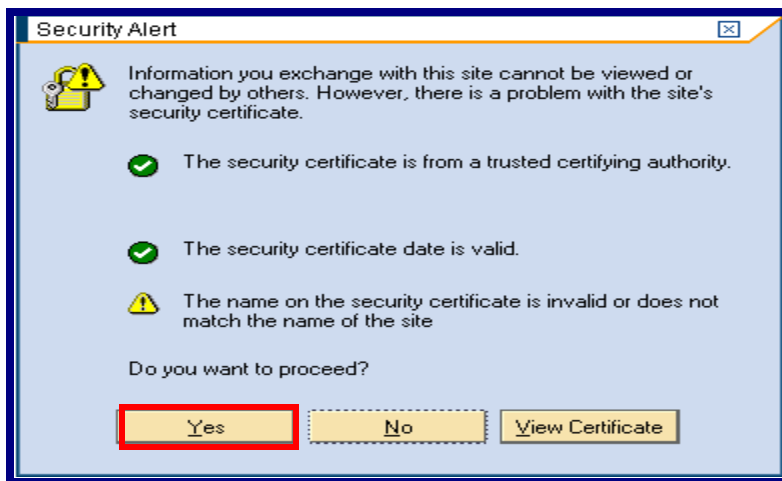
- In the *Records Browser*, locate and open the SRM Bid Invitation document by double-clicking on COPA Bid Invitation. You are within the **Display Mode** in the RECORDS BROWSER (eye glass icon).



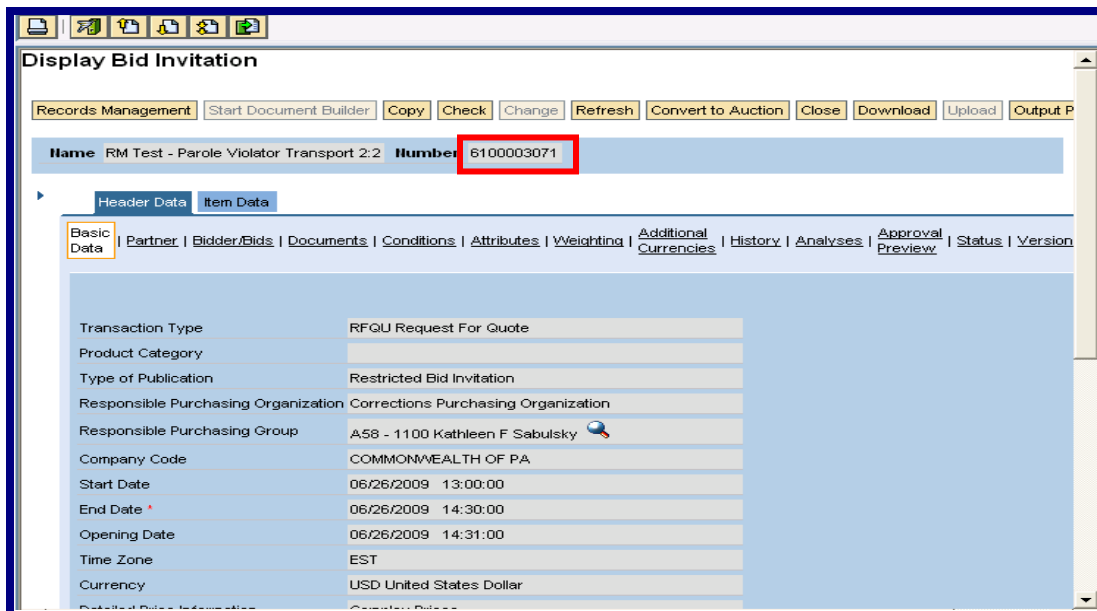
- When opening the COPA Bid Invitation record you will be prompted by a Security Alert pop-up box. Select the OK button.



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



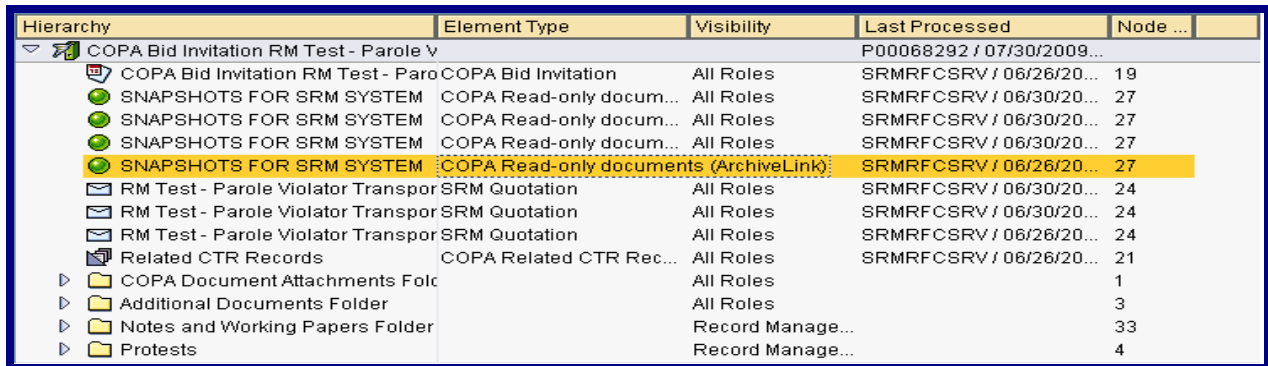
- You are able to view the Bid Invitation document in SRM. You are also able to view and/or open all text and attachments.



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



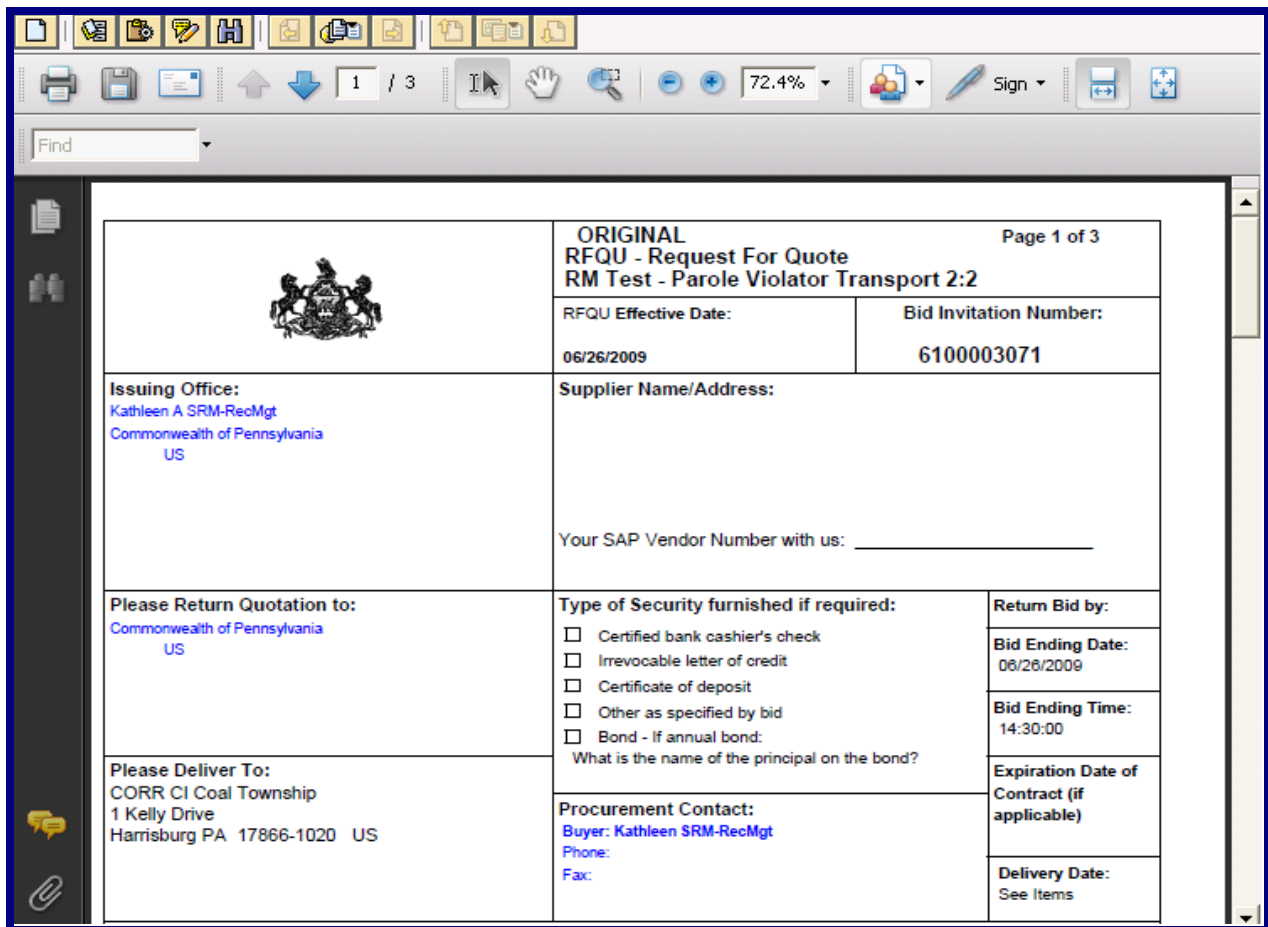
13. If you want to view a PDF version of the Bid Invitation document, locate, double-click and open the Snapshot



The image shows a table representing the hierarchy of records in the RMSystem. The table has five columns: Hierarchy, Element Type, Visibility, Last Processed, and Node ... The rows include various record types such as 'COPA Bid Invitation', 'SNAPSHOTS FOR SRM SYSTEM', and 'SRM Quotation'.

Hierarchy	Element Type	Visibility	Last Processed	Node ...
COPIA Bid Invitation RM Test - Parole v			P00068292 / 07/30/2009...	
COPIA Bid Invitation RM Test - Parole v	COPIA Bid Invitation	All Roles	SRMRFCSRV / 06/26/20...	19
SNAPSHOTS FOR SRM SYSTEM	COPIA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
SNAPSHOTS FOR SRM SYSTEM	COPIA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
SNAPSHOTS FOR SRM SYSTEM	COPIA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
SNAPSHOTS FOR SRM SYSTEM	COPIA Read-only documents (ArchiveLink):		SRMRFCSRV / 06/26/20...	27
RM Test - Parole Violator Transpor	SRM Quotation	All Roles	SRMRFCSRV / 06/30/20...	24
RM Test - Parole Violator Transpor	SRM Quotation	All Roles	SRMRFCSRV / 06/30/20...	24
RM Test - Parole Violator Transpor	SRM Quotation	All Roles	SRMRFCSRV / 06/26/20...	24
Related CTR Records	COPIA Related CTR Rec...	All Roles	SRMRFCSRV / 06/26/20...	21
COPIA Document Attachments Folt		All Roles		1
Additional Documents Folder		All Roles		3
Notes and Working Papers Folder		Record Manage...		33
Protests		Record Manage...		4

14. View, save, print, or email a copy of the snapshot of the Bid Invitation



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

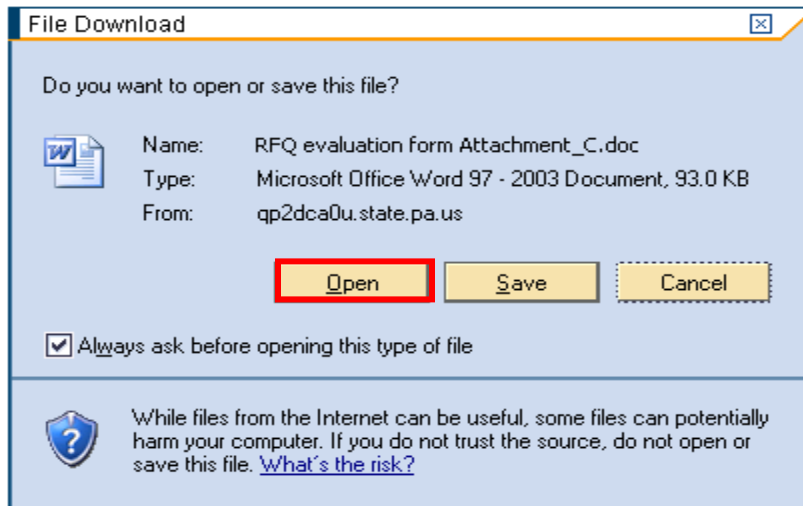


16. Expand the COPA Document Attachments Folder

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

Hierarchy	Element Type	Visibility	Last Processed	Node ...
▼ COPA Bid Invitation RM Test - Parole v			P00068292 / 07/30/2009...	
▶ COPA Bid Invitation RM Test - ParoCOPA Bid Invitation	COPA Bid Invitation	All Roles	SRMRFCSRV / 06/26/20...	19
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/30/20...	27
▶ SNAPSHOTS FOR SRM SYSTEM	COPA Read-only docum...	All Roles	SRMRFCSRV / 06/26/20...	27
▶ RM Test - Parole Violator Transpor	SRM Quotation	All Roles	SRMRFCSRV / 06/30/20...	24
▶ RM Test - Parole Violator Transpor	SRM Quotation	All Roles	SRMRFCSRV / 06/30/20...	24
▶ RM Test - Parole Violator Transpor	SRM Quotation	All Roles	SRMRFCSRV / 06/26/20...	24
▶ Vendor Quote Snapshot	COPA Read-only docum...	All Roles		31
▶ Related CTR Records	COPA Related CTR Rec...	All Roles	SRMRFCSRV / 06/26/20...	21
▼ COPA Document Attachments Folc		All Roles		1
▶ COPA Attachment RM Testing	COPA Attachment	All Roles	SRMRFCSRV / 06/26/20...	2
▶ Additional Documents Folder		All Roles		3
▶ Notes and Working Papers Folder		Record Manage...		33
▶ Protests		Record Manage...		4

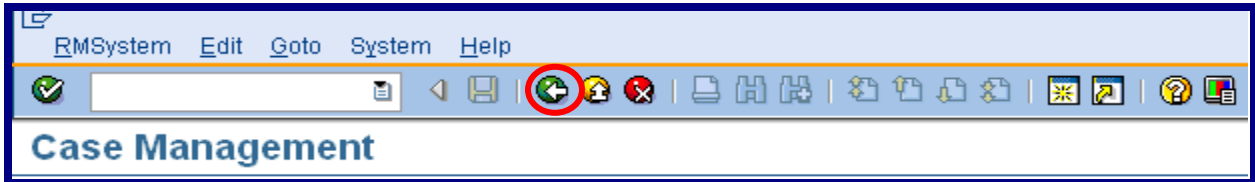
17. When opening the COPA Attachment record, you will be prompted by a File Download pop-up box asking do you want to open or save this file. Select the OPEN button.



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.



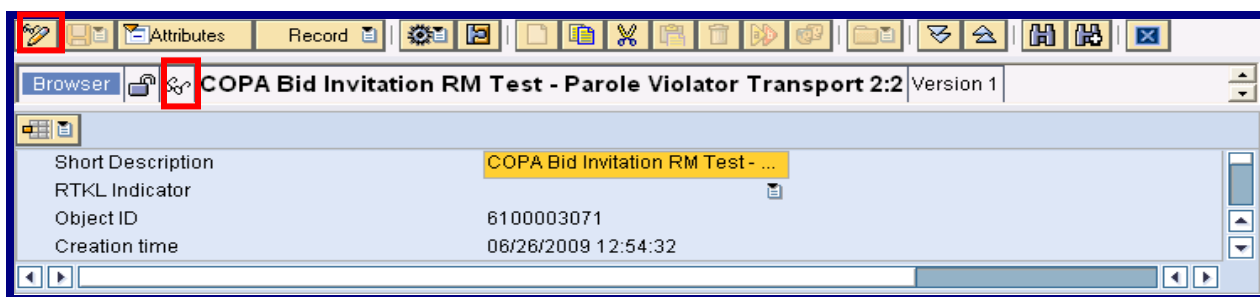
19. Return to the *Records Browser* by selecting the BACK (F3) button



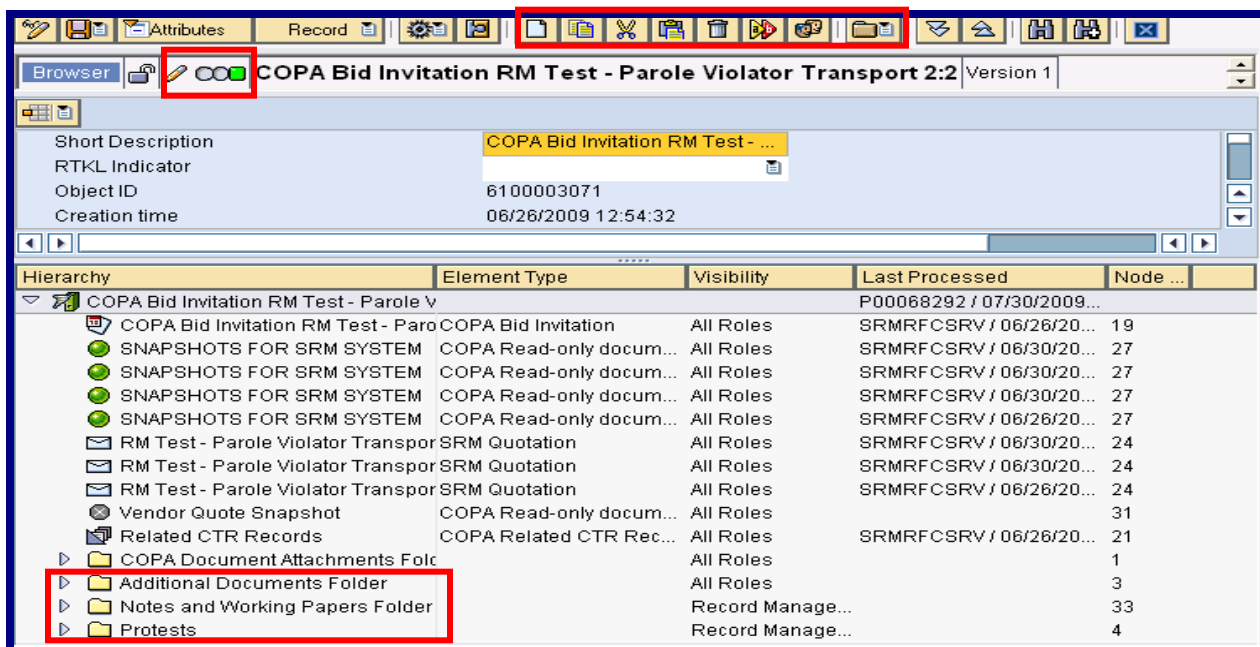


## Manually Attaching a Document

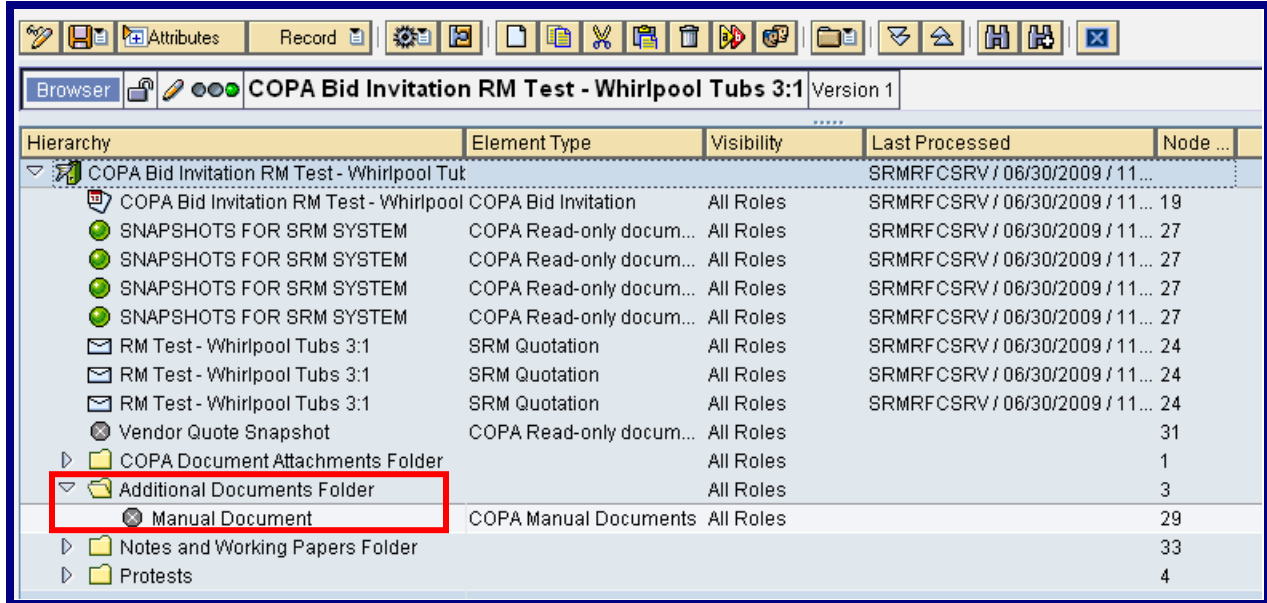
1. The user must be in **Change Mode** in order to manually attach a document
  - a. Microsoft (MS) Office application documents such as: Word, Excel, PowerPoint, and Visio, can be attached. Outlook emails can be integrated into the Record, as well as PDF documents.
  - b. The total size of all attachments 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 the DISPLAY (eye glass) icon to the **Change Mode** by selecting the DISPLAY/CHANGE (eye glasses with pencil) icon to add an attachment



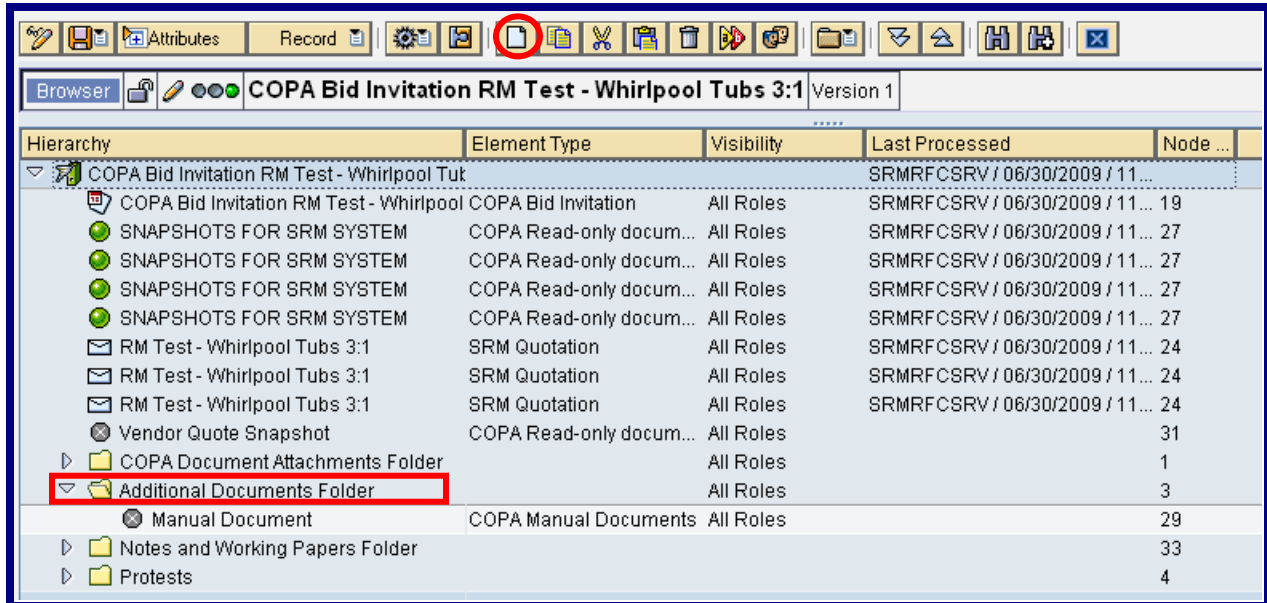
3. In the **Change Mode**, three new folders have been added to the record content: *Additional Documents, Notes and Working Papers, and Protests*. Also, note that the STATUS INDICATOR (pencil with lights) icon reflects the **Change Mode** and additional icons are now active.



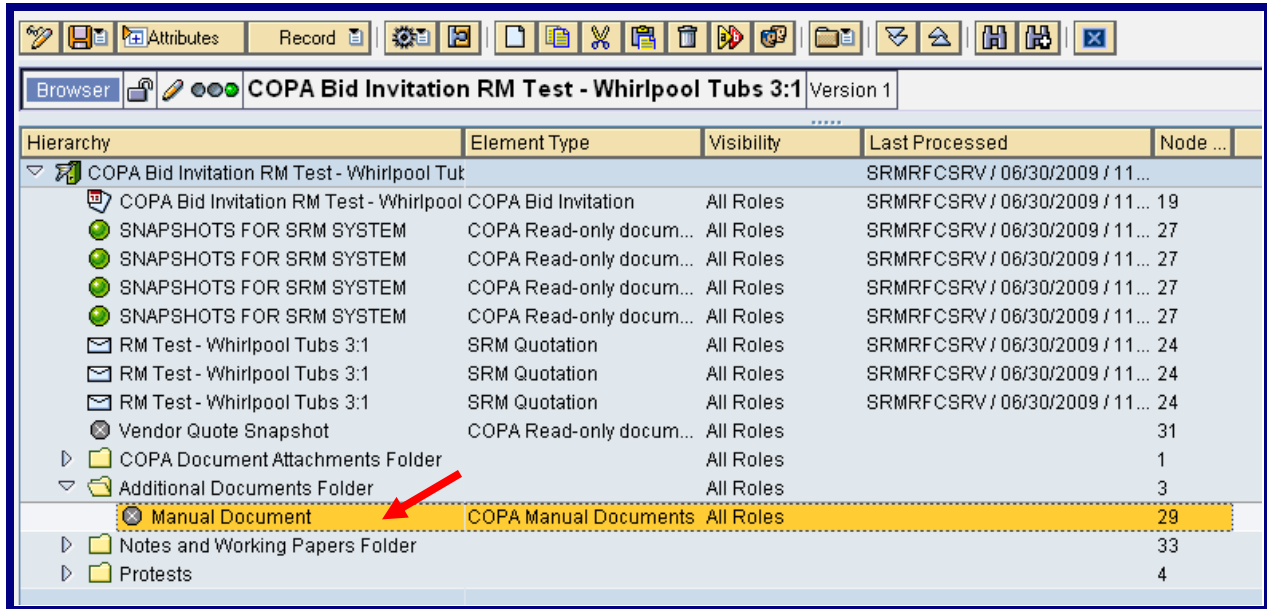
- Expanding the new folders (ex. *Additional Documents Folder*) will reveal placeholders for new attachments. Any of the previously mentioned applications such as: Word, Excel, PowerPoint, and Visio, may be attached using the placeholders.



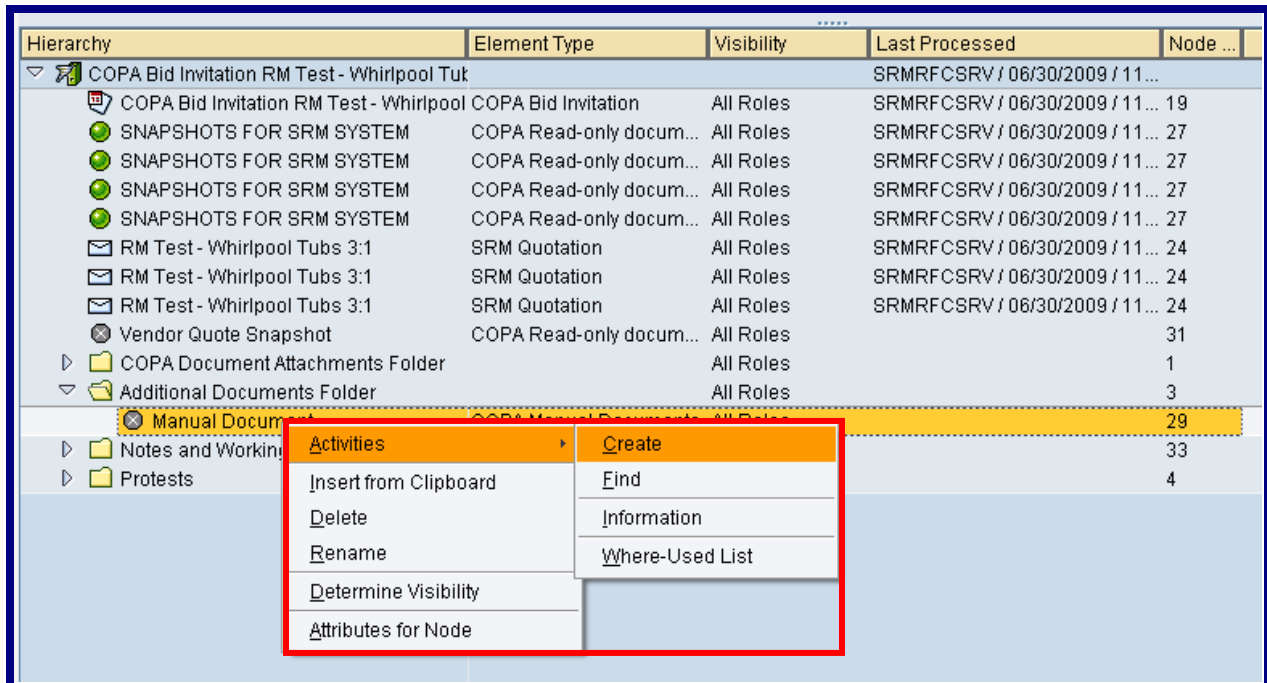
- To access additional placeholders, highlight **Additional Documents Folder** and select the **CREATE** icon



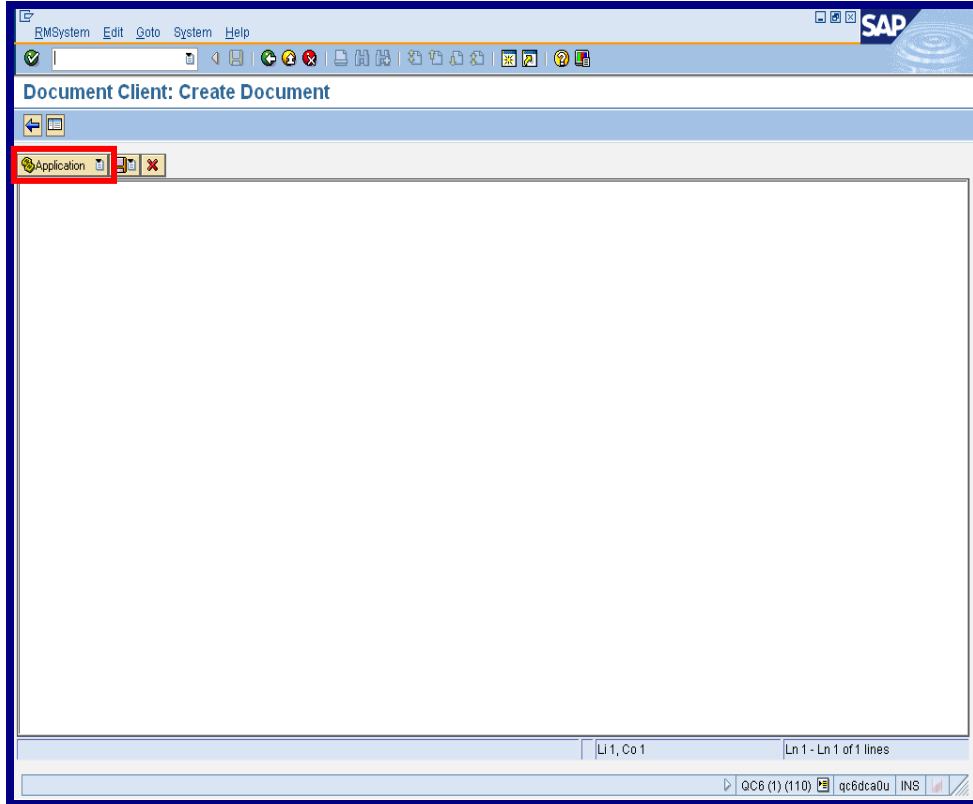
6. Select the document placeholder, then right-click on the mouse



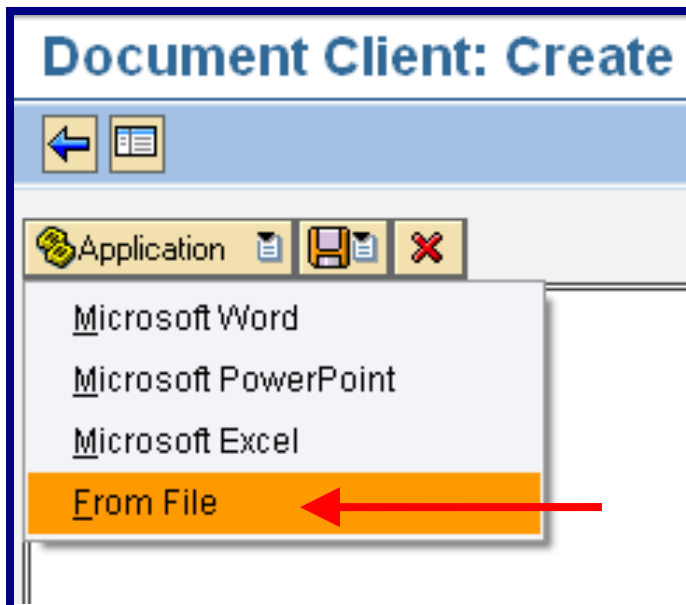
7. Choose **Activities**, then **Create**, on the menus that display after right-clicking the mouse



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*.

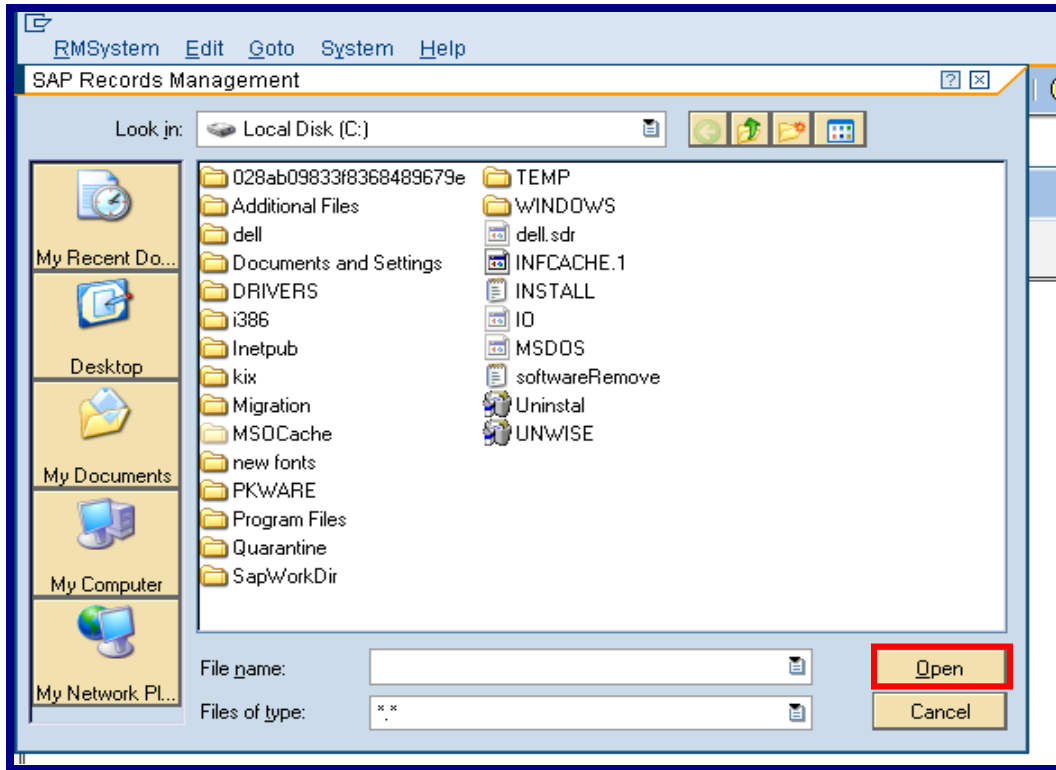


9. MS Word, Excel, and PowerPoint documents can be created by selecting that option. The appropriate editor will display for you to create the document.
  - a. Selecting the *From File* option allows you to search for and attach an existing document



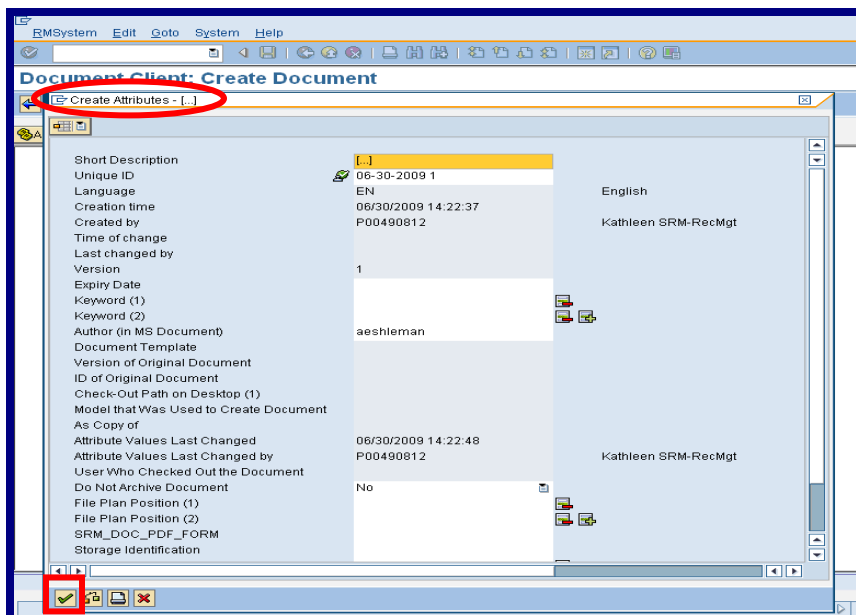
10. A standard file selection box for your hard drive is displayed. Locate and select the appropriate attachment.

a. Select the OPEN button



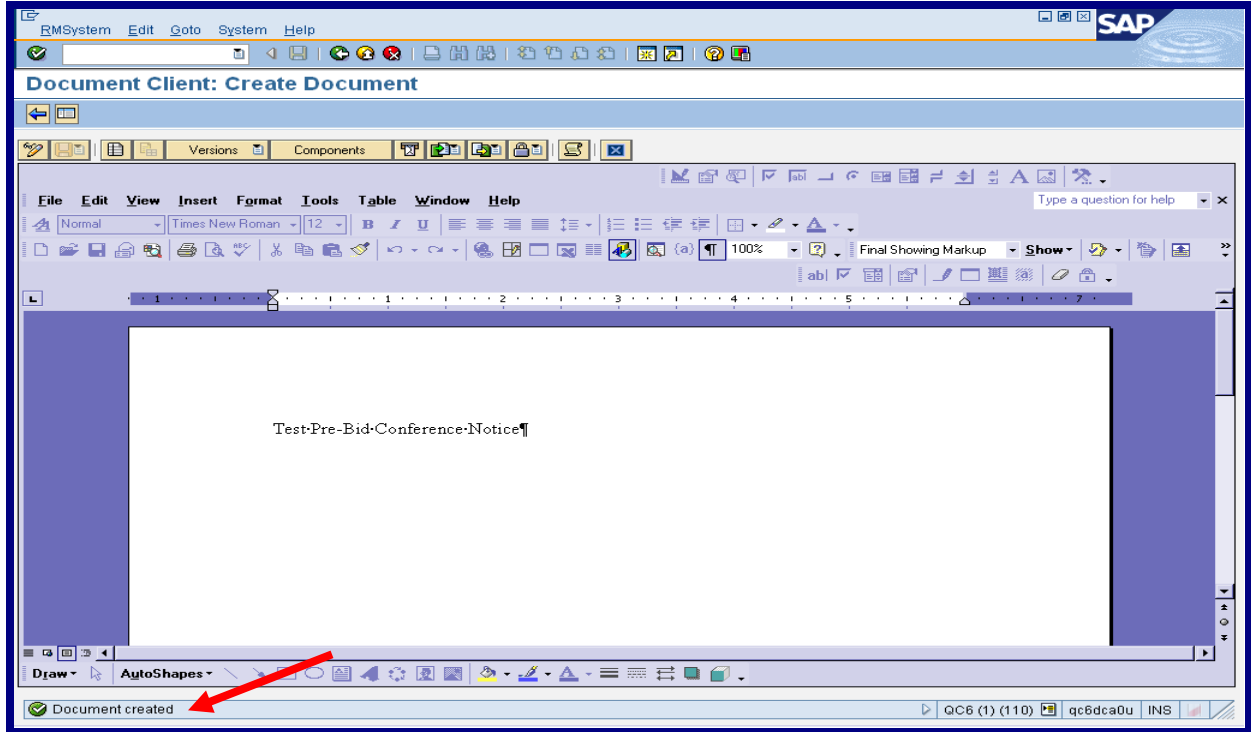
11. The *Create Attributes* dialog box is displayed, enter a name in the Short Description field

a. Select the ENTER icon

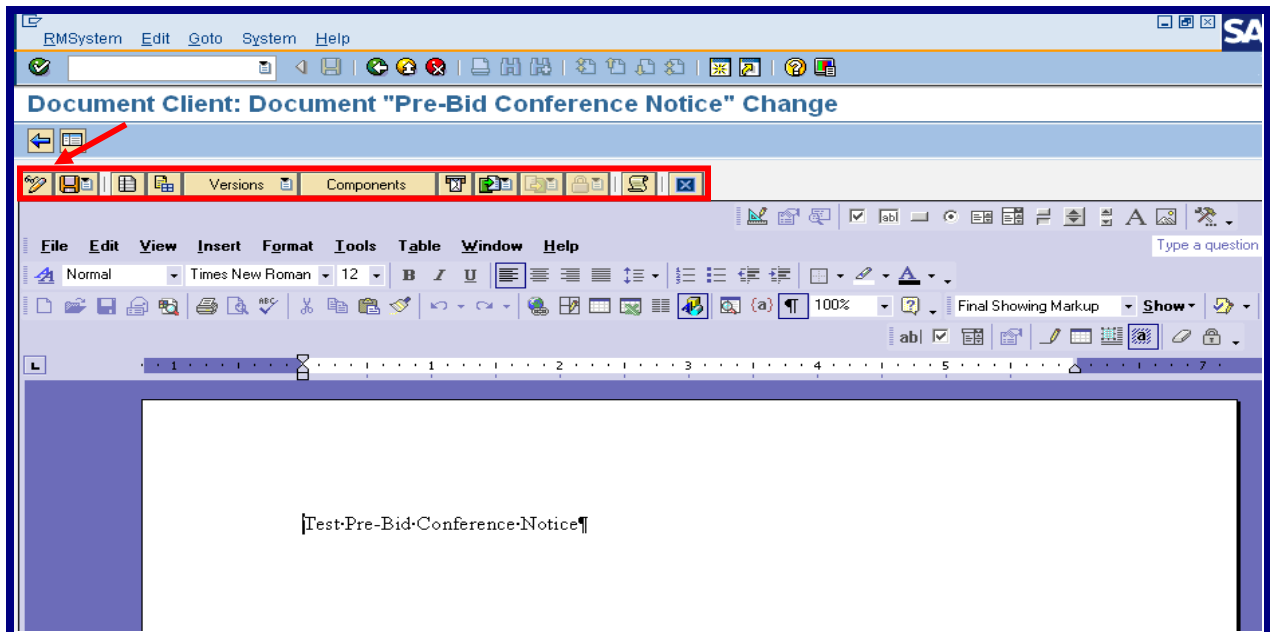


12. The selected file document is created and opens (in this example a Word) within the browser window.

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.

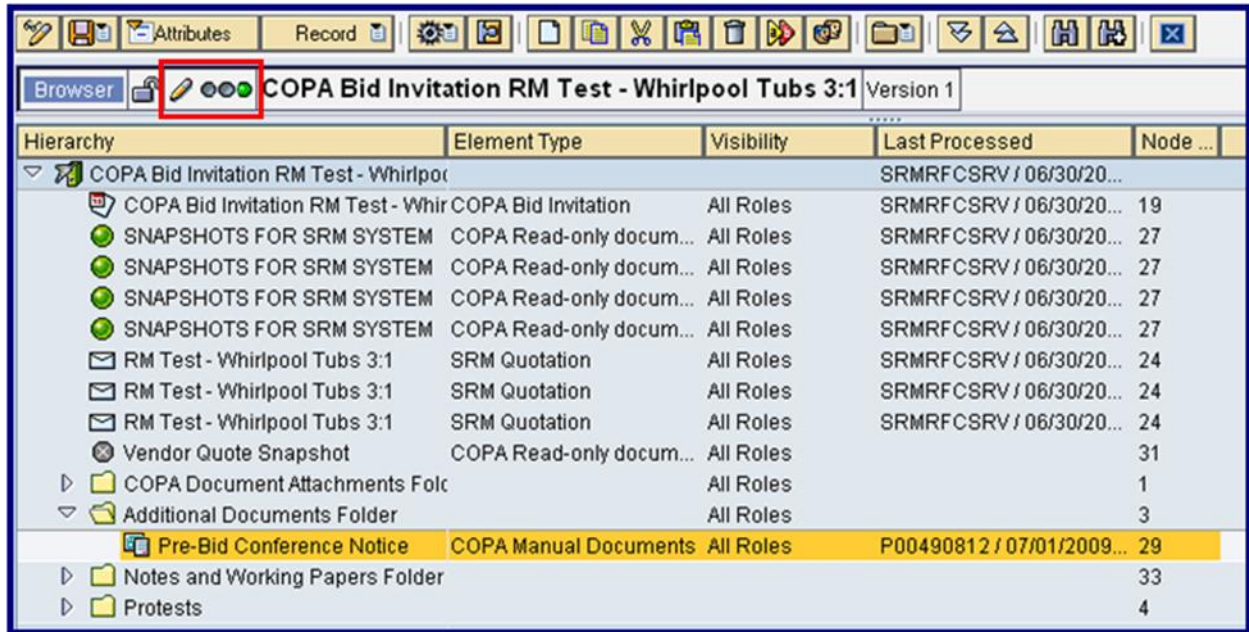


13. In order to activate the Word editor tools; the **DISPLAY/CHANGE** icon must be selected. Additional icons and buttons with functions related to document attachment are available as well.





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.