SAP® RECORDS MANAGEMENT
Welcome!
• In the public sector, records provide the legal documentation of a government’s actions, and they are evidence of its work. This training course will provide you with the information needed to locate and manage files containing SRM documents and their attachments in SAP Records Management.
This class is applicable to audiences with the following roles:

- **Administrator**
  - IES

- **Records Management User**
  - Individuals with procurement role

- **Display Only**
  - Comptroller, Auditors, Executive Staff, Bureau Directors (i.e., anyone with a purchasing display role)
Course Objectives
Course Objectives

• After successfully completing this course you will 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
  – Understand how to manually attach various document types to an existing record
Today’s Agenda
Today’s Agenda

• Records Management Overview
• Getting Started in Records Management
• Searching for Records
• Displaying Records
• Manually Attaching Documents to an Existing Record
• Hands-on Exercises
• Knowledge Check
SAP Records Management Overview
Records Management Overview

• SAP Records Management is a system for the electronic management of records
  – SRM documents and their attachments replicate in real-time (10 minute delay, max.) into Records Management
  – Other documents can be created and/or added manually to the Record (MS Office file types, PDFs)
  – Folders within Records Management are structured in a standardized, logical way
  – SAP Records Management is linked to SAP Business Workflow
  – Search functionality is available for all element types
Implementing SAP Records Management in COPA allows us to:

- View all electronic and paper records associated with SRM documents from a single location (a “360° view”)
- Standardize records retention and disposal on both SRM-generated and non-SRM-generated procurement documents
- Print, export, and/or e-mail any document associated with a record throughout its lifecycle
# Records Management Overview

<table>
<thead>
<tr>
<th>Function</th>
<th>Records Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation</td>
<td>Navigation through screens is simple</td>
</tr>
<tr>
<td></td>
<td>Double-clicking on the element allows for quick display</td>
</tr>
<tr>
<td>Record Structure</td>
<td>Hierarchy of folders and their contents are consistent across the different business object types (Solicitations, POs, Contracts)</td>
</tr>
<tr>
<td></td>
<td>Easy locating of documents and attachments</td>
</tr>
</tbody>
</table>
# Records Management Overview

<table>
<thead>
<tr>
<th>Function</th>
<th>Records Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Search is user-friendly</td>
</tr>
<tr>
<td></td>
<td>Both Records Management and SRM attribute fields are available for searching</td>
</tr>
<tr>
<td></td>
<td>Asterisks are allowed</td>
</tr>
<tr>
<td></td>
<td>Is not case sensitive</td>
</tr>
</tbody>
</table>
Records Management Overview

Record Structure - Contracts

- Link to Contract document in SRM
  - PDF copy (“snapshot”) of the SRM Contract
  - COPA Related (i.e., SRM) BID Records
  - COPA Related (i.e., SRM) PO Records

- COPA Document Attachments
  - MS Office Document, ex. Statement of Work
  - MS Office Document, ex. Specifications

- Additional Documents
  - MS Office Document, ex. Updated Commodity Specialist Change Letter
  - MS Office Document, ex. Additional Client References

- Notes and Working Papers
  - MS Office Document, ex. Meeting Minutes
  - MS Office Document, ex. Notes to file or E-Mails
Record Structure – Purchase Orders

- Link to Purchase Order document in SRM
  - PDF copy (“snapshot”) of the SRM PO
  - COPA Related (i.e., SRM) BID Records
  - COPA Related (i.e., SRM) Contract Records
  - Goods Receipt
  - Invoice Receipt

- COPA Document Attachments
  - MS Office Document, ex. Delivery Requirements/Instructions
  - MS Office Document, ex. Delivery Schedule

- Additional Documents
  - MS Office Document, ex. Updated Delivery Locations/Addresses
  - MS Office Document, ex. CRP Clearance Certificate

- Notes and Working Papers
  - MS Office Document, ex. Meeting Minutes
  - MS Office Document, ex. Notes to file or E-Mails
Record Structure – Bid Invitations

- Link to Bid Invitation document in SRM
  - PDF copy (“snapshot”) of the SRM Bid Invitation
  - Link to Vendor Quotation in SRM
  - COPA Related (i.e., SRM) Contract Records
  - COPA Related (i.e., SRM) PO Records

- COPA Document Attachments
  - MS Office Document, ex. Statement of Work
  - MS Office Document, ex. Manufacturing Specifications

- Additional Documents
  - MS Office Document, ex. Updated Pre-Bid Conference Questions
  - MS Office Document, ex. Revised Schedule

- Notes and Working Papers
  - MS Office Document, ex. Meeting Minutes
  - MS Office Document, ex. Notes to file or E-Mails

- Protests
  - MS Office Document, ex. Protest Letter
Example of the record model – standardized file folder structure
Getting Started in Records Management
Getting Started in RM

Logging On

Records Management is accessible through the SAP Logon pad

and

from any screen within a SRM Purchasing document
Logging On

Select the *Procurement* role

Expand the *Records Management* folder and 

Double-click *Case Management* to select
Getting Started in RM

Logging On

Or

Enter Transaction Code **SCASE** in the transaction code field and select enter.
Logging On

This is what a user will see and complete upon *initial* access to SCASE.

Select enter to expand the **Records Organizer** menu.
In the Records Organizer, users can expand the Search Procurement Records folder to locate a record, or choose a recently accessed record from within History.
Accessing Records Management

Upon expansion of the Search Procurement Records folder, users have the option to search within three different COPA Business Object types.
Getting Started in RM

Accessing Records Management

- Selection is made by double or right-clicking on the desired business object type.
- Following selection, two “Search by” windows display.
Accessing Records Management

- Search criteria can be entered in either section

- Results list will display in the area below the search windows
# Getting Started in RM

## Browser Icons and Buttons

<table>
<thead>
<tr>
<th>![Attributes]</th>
<th><strong>Command Buttons</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• The buttons contain text that indicates what command will be performed</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>![Record]</th>
<th><strong>Action Icons</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• One example is the <strong>DISPLAY/CHANGE</strong> icon, used to switch the user between display and change modes</td>
</tr>
<tr>
<td></td>
<td>• Another example shown here is the <strong>COPY TO CLIPBOARD</strong> icon</td>
</tr>
<tr>
<td></td>
<td>• Note that some icons will be grayed-out (inactive), when the user is in display mode or has not selected an element</td>
</tr>
</tbody>
</table>
## Browser Buttons and Icons

<table>
<thead>
<tr>
<th>Buttons and Icons with context menus</th>
</tr>
</thead>
<tbody>
<tr>
<td>• When the menu portion of the button/icon is selected, further options are available for selection</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Buttons and Icons within selected elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Each time an element is opened, additional command buttons and icons will be available for selection</td>
</tr>
<tr>
<td>• When selected, the user is able to navigate and/or perform specific functions</td>
</tr>
</tbody>
</table>
Getting Started in RM

Navigation Tips

• Records Management provides users with multiple ways to navigate and arrive at the same location

• For example, while viewing a purchase order in SRM, you can return to the record by selecting either:
  – the BACK icon on SAP’s browser bar
  – the GoTo Record icon in the shopping cart display
Searching for Records
Search Windows

- Search by Records Management Attributes
  - Numerous attribute fields related to Records Management are available for entering values for searching

- Search by SRM Attributes
  - Eight attributes related to the SRM record are available for entering search values
Search Windows

- Expand/reduce the search window by selecting the bottom handle and moving it up or down
Searching for Records

Records Management Attributes Content

[Image of a search interface with options for searching by Short Description, RTKL Indicator, Object ID, Creation time, Time of change, Last changed by, Unique ID, and Full Text Search. Restrictions for hits and current versions are also shown.]
Searching for Records

SRM Attributes Content

Search by SRM Attributes (Bid Invitation)

- PIIN/Description
- Product No.
- Manu. Part No.
- Manufacturer
- Supplier Number
- Partner
- Purchasing Group
- Purchasing Org.
Saving a Search Query

- Searches that are executed regularly using the same entries can be saved in Records Management.

- Save the search query by selecting the SAVE icon.
  - Each search query is saved on an individual level, so that only you have access to it.
  - Select a saved search query from the selection list.
  - To execute a new search query, select the empty field from the list.
Initiating the Search

- Enter a value in the appropriate attribute field
  - Asterisks may be used along with a partial value to broaden the search (ex. 610000*)
- Select the SEARCH button
Understanding Search Results

- The results list displays in the tab page
- To view the contents of a record, simply double-click on the selected document
- An example of a results list is shown on the next slide
Understanding Search Results

- To make additional room for the results list, you can choose the icon to hide/redisplay the Organizer
  - The icon is available in the function toolbar in every Records Management tool
Understanding Search Results

To make additional room for the elements in the browser window, select the REDUCE ATTRIBUTES button to collapse the attributes window.

To display multiple elements in sequence, without closing the elements in between, use the ← and → icons to navigate through the open elements.
### Understanding Search Results

<table>
<thead>
<tr>
<th>Level</th>
<th>Hierarchy</th>
<th>Element Type</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>• Record Entry</td>
<td>• N/A</td>
<td>• N/A</td>
<td>• COPA Bid Invitation 15 Automobiles, 4 Wheel Drive</td>
</tr>
<tr>
<td>2</td>
<td>• SRM Documents</td>
<td>• COPA Bid Invitation</td>
<td>• Bid Invitation Document</td>
<td>• 15 Automobiles, 4 Wheel Drive</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• SRM Quotation</td>
<td>• Vendor’s Quotation</td>
<td>• 15 Automobiles, 4 Wheel Drive</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• COPA Read-Only Documents</td>
<td>• PDF version of SRM document</td>
<td>• Snapshots for SRM System</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• etc</td>
<td>• etc</td>
<td>• etc</td>
</tr>
<tr>
<td></td>
<td>• Folders that group together elements</td>
<td>• COPA Read-Only Documents</td>
<td>• Folder that contains SRM attachments</td>
<td>• COPA Document Attachments</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• N/A</td>
<td>• Folder that contains documents attached manually</td>
<td>• Additional documents</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• etc</td>
<td>• etc</td>
<td>• Notes and Working Papers</td>
</tr>
<tr>
<td>3</td>
<td>• Corresponding element types under folder</td>
<td>• COPA Attachment (Read Only)</td>
<td>• Individual files attached to an SRM documents which passed through to Records Management</td>
<td>• COPA Attachment Specifications for Bid Invitation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• COPA Manual Documents</td>
<td>• Individual files which are manually attached to a record in Records Management</td>
<td>• Pre-Proposal Agenda</td>
</tr>
</tbody>
</table>
Understanding Search Results

<table>
<thead>
<tr>
<th>Hierarchy</th>
<th>Element Type</th>
<th>Visibility</th>
<th>Last Processed</th>
</tr>
</thead>
<tbody>
<tr>
<td>COPA Bid Invitation RM Test Prime Mover Support Vehicle 2.1</td>
<td>COPA Bid Invitation</td>
<td>All Roles</td>
<td>P004900612 / 04/03/2003 / 14:24:16</td>
</tr>
<tr>
<td>SNAPSHOTS FOR SRM SYSTEM</td>
<td>COPA Read-only documents (Archive)</td>
<td>All Roles</td>
<td>SRMFCSRV / 03/20/2009 / 13:09:24</td>
</tr>
<tr>
<td>SNAPSHOTS FOR SRM SYSTEM</td>
<td>COPA Read-only documents (Archive)</td>
<td>All Roles</td>
<td>SRMFCSRV / 03/30/2008 / 10:09:22</td>
</tr>
<tr>
<td>SNAPSHOTS FOR SRM SYSTEM</td>
<td>COPA Read-only documents (Archive)</td>
<td>All Roles</td>
<td>SRMFCSRV / 03/30/2008 / 10:09:37</td>
</tr>
<tr>
<td>SNAPSHOTS FOR SRM SYSTEM</td>
<td>COPA Read-only documents (Archive)</td>
<td>All Roles</td>
<td>SRMFCSRV / 03/20/2009 / 13:03:10</td>
</tr>
<tr>
<td>RM Test Prime Mover Support Vehicle 2.1</td>
<td>SRM Quotation</td>
<td>All Roles</td>
<td>SRMFCSRV / 03/08/2009 / 10:09:23</td>
</tr>
<tr>
<td>RM Test Prime Mover Support Vehicle 2.1</td>
<td>SRM Quotation</td>
<td>All Roles</td>
<td>SRMFCSRV / 03/08/2009 / 10:09:20</td>
</tr>
<tr>
<td>RM Test Prime Mover Support Vehicle 2.1</td>
<td>SRM Quotation</td>
<td>All Roles</td>
<td>SRMFCSRV / 03/08/2009 / 13:51:12</td>
</tr>
<tr>
<td>Related CTR Records</td>
<td>COPA Related CTR Records</td>
<td>All Roles</td>
<td>SRMFCSRV / 06/28/2009 / 13:00:47</td>
</tr>
<tr>
<td>COPA Document Attachments Folder</td>
<td>COPA Attachment</td>
<td>All Roles</td>
<td>SRMFCSRV / 06/28/2009 / 13:00:47</td>
</tr>
<tr>
<td>Additional Documents Folder</td>
<td>COPA Attachment</td>
<td>All Roles</td>
<td>SRMFCSRV / 06/28/2009 / 13:00:47</td>
</tr>
<tr>
<td>Overview</td>
<td>COPA Manual Documents</td>
<td>All Roles</td>
<td>P00448680 / 07/14/2009 / 14:44:07</td>
</tr>
<tr>
<td>Change to Bid Invitation</td>
<td>COPA Manual Documents</td>
<td>All Roles</td>
<td>P00448680 / 07/14/2009 / 14:45:37</td>
</tr>
<tr>
<td>Notes and Working Papers Folder</td>
<td>Record Management Use</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- In addition to the Hierarchy and Element Type columns, Visibility and Last Processed are shown
  - Visibility allows the user to know which roles are able to view the element; note that visibility at the folder level overrides the visibility at the document level
  - Last Processed displays when the element was last processed, and by whom
Displaying Records
Opening a Record

- Double-click on the record to open it in the browser window
Displaying Records

Displaying a Record

- All elements in the record are displayed for review
- Expand the folders to view their contents by selecting the icon
- Note that empty folders will not be visible in display mode
Displaying Records

Displaying an Element – Level 2

- Select the desired element and double-click to open
When the element type is a COPA Business Object (Contract, Purchase Order, Solicitation), it will open in SRM within the browser window.
Displaying Records

Displaying an Element – Level 2

- Full SRM functionality may exist while the document is open in Records Management.

- **DO NOT** make any changes, deletions, etc. at this time - remain in display mode; always log into SRM in order to edit the document.
Displaying an Element – Level 2

• Note the command buttons above the browser window
  – They serve as navigation tools to access SRM documents related to the one currently open (such as a Shopping Cart, follow-on Contract, PO, etc.)
Displaying an Element – Level 2

- If the currently displayed SRM document originated from a Shopping Cart, it can be viewed by selecting the Related COPA Shopping Cart icon.
Displaying an Element – Level 2

- Return to the previous document by selecting the BACK button on the SAP toolbar.
- Return to the record by selecting the GOTO RECORD button.
- Do not use the CLOSE WINDOW link or you will be knocked out of Records Management.
Displaying an Element – Level 2

- If an SRM document is selected for display but is not allowed to be viewed, the message on the next slide will result.

<table>
<thead>
<tr>
<th>Hierarchy</th>
<th>Element Type</th>
<th>Visibility</th>
<th>Last Processed</th>
<th>Node...</th>
</tr>
</thead>
<tbody>
<tr>
<td>COPA Bid Invitation RM Test - Whirlpool T</td>
<td>COPA Bid Invitation</td>
<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11...</td>
<td>19</td>
</tr>
<tr>
<td>SNAPSHOTS FOR SRM SYSTEM</td>
<td>COPA Read-only document</td>
<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11...</td>
<td>27</td>
</tr>
<tr>
<td>COPA Document Attachments Folder</td>
<td>SRM Quotation</td>
<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11...</td>
<td>24</td>
</tr>
</tbody>
</table>
In this instance, the message displays because we are not allowed to view the quote(s) yet.
**Displaying an Element – Level 2**

- Another element type is COPA Read-Only Document, which is a PDF file of the SRM document

<table>
<thead>
<tr>
<th>Hierarchy</th>
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<th>Node</th>
</tr>
</thead>
<tbody>
<tr>
<td>COPA Bid Invitation RM Test - Whirlpool T</td>
<td>COPA Bid Invitation</td>
<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11...</td>
<td></td>
</tr>
<tr>
<td>COPA Bid Invitation RM Test - Whirlpool</td>
<td>COPA Read-only document</td>
<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11...</td>
<td>19</td>
</tr>
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<td>SNAPSHOTs FOR SRM SYSTEM</td>
<td>COPA Read-only document</td>
<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11...</td>
<td>27</td>
</tr>
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<td>SNAPSHOTs FOR SRM SYSTEM</td>
<td>COPA Read-only document</td>
<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11...</td>
<td>27</td>
</tr>
<tr>
<td>SNAPSHOTs FOR SRM SYSTEM</td>
<td>COPA Read-only document</td>
<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11...</td>
<td>27</td>
</tr>
<tr>
<td>SNAPSHOTs FOR SRM SYSTEM</td>
<td>COPA Read-only document</td>
<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11...</td>
<td>27</td>
</tr>
<tr>
<td>RM Test - Whirlpool Tubs 3:1</td>
<td>SRM Quotation</td>
<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11...</td>
<td>24</td>
</tr>
<tr>
<td>RM Test - Whirlpool Tubs 3:1</td>
<td>SRM Quotation</td>
<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11...</td>
<td>24</td>
</tr>
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<td>RM Test - Whirlpool Tubs 3:1</td>
<td>SRM Quotation</td>
<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11...</td>
<td>24</td>
</tr>
<tr>
<td>COPA Document Attachments Folder</td>
<td>SRM Quotation</td>
<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11...</td>
<td>1</td>
</tr>
</tbody>
</table>
Displaying an Element – Level 2

- 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 an Element – Level 3

- Level 3 element types are accessed and displayed in the same manner as those in Level 2.
- The capability appears to exist to make changes to Level 3 element types from within Records Management; however, the documents will always revert back to the original version.
  - **DO NOT** make any changes or deletions to COPA Attachments while in Records Management; **always log into SRM in order to edit/delete these documents**.
Displaying an Element – Level 3

• The DISPLAY/CHANGE icon toggles the user from one mode to the other

• The indicator on the status bar changes each time the icon is selected
  – Display
  – Change

– Note that the SAVE icon becomes available when the status switches from Display to Change
Displaying an Element – Level 3

<table>
<thead>
<tr>
<th>Hierarchy</th>
<th>Element Type</th>
<th>Visibility</th>
<th>Last Processed</th>
<th>Node...</th>
</tr>
</thead>
<tbody>
<tr>
<td>COPA Bid Invitation RM Test - Whirlpool Tut</td>
<td>COPA Bid Invitation</td>
<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11... 19</td>
<td></td>
</tr>
<tr>
<td>SNAPSHOT FOR SRM SYSTEM</td>
<td>COPA Read-only document</td>
<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11... 27</td>
<td></td>
</tr>
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<tr>
<td>RM Test - Whirlpool Tubs 3:1</td>
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<tr>
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<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11... 24</td>
<td></td>
</tr>
<tr>
<td>COPA Document Attachments Folder</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COPA Attachment RM Testing State</td>
<td>COPA Attachment</td>
<td>All Roles</td>
<td>SRMRFCSRV / 06/30/2009 / 11... 2</td>
<td></td>
</tr>
</tbody>
</table>
Displaying an Element – Level 3

- The Word file opens within the Office application
  - When in display mode, note the absence of the standard Word editor tools above the browser window
Manually Attaching Documents to an Existing Record
Attaching an Element – Level 3

• Level 3 element types may be manually attached to an existing record
  – Once attached, the documents are accessed and displayed in the same manner as COPA Attachments

• The user must be in Change mode in order to manually attach a document
  – 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
Attaching an Element – Level 3

• The file size of an attached document should conform to the current network guidelines; i.e., the total size of all attachments within a single record should not exceed 20-25 MB

• Any documents which the user considers confidential should be password-protected prior to being attached in Records Management
Attaching an Element – Level 3

- First, select the DISPLAY/CHANGE icon to switch to change mode
Attaching an Element – Level 3

- Three new folders have been added to the record content: Additional Documents, Notes and Working Papers, and Protests.
- Also, note that the status indicator reflects Change mode and additional icons are now active.
Attaching Documents to a Record

Attaching an Element – Level 3

- Expanding the new folders will reveal placeholders for new attachments
  - Any of the previously mentioned applications may be attached using the placeholders
Attaching an Element – Level 3

To access additional placeholders, select the CREATE icon.
Attaching Documents to a Record

Attaching an Element – Level 3

- Select the document placeholders, then right-click on the mouse
Attaching an Element – Level 3

- Choose **Activities**, then **Create**, on the menus that display after right-clicking the mouse
Attaching Documents to a Record

Attaching an Element – Level 3

- A blank screen displays within the current window:
  - Selecting the menu icon on the APPLICATION button will reveal a list of MS Office software, as well as the option to create From File.
Attaching Documents to a Record

Attaching an Element – Level 3

- 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.
Attaching Documents to a Record

Attaching an Element – Level 3

- A standard file selection box for your hard drive is displayed.
- Locate and select the appropriate attachment, then the OPEN button.
The Create Attributes dialog box is displayed, in which you will enter attribute values for the document.

We will cover how to create attributes on an upcoming slide.
The selected file document is created and opens in it’s source application (in this case, Word) within the browser window.
• Note that full functionality of the Word application exists while in Change Mode in Records Management, but is disabled while in Display mode within the newly attached document.
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.

Selecting the BACK button in the SAP menu returns you to the Record.
Attaching an Element – Level 3

• **NOTE:** Refer to *The Electronic Procurement Records Management Policy* regarding the changing and/or versioning of COPA Manual Documents within Records Management
Attaching an Element – Level 3

- The newly added attachment is e-filed (aka ‘checked in’) under the Additional Documents folder with the Element Type “COPA Manual Documents”
Attaching Documents to a Record

Attaching an Element – Level 3

The Change mode status indicator has switched to yellow, meaning that the newly added attachment has not yet been saved to the Record.
Attaching an Element – Level 3

- Select the SAVE icon, then Save from the menu
Attaching an Element – Level 3

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

- Attributes provide you with information on a Records Management document

- There are two types of attribute:
  - **Displayable attributes** – The system assigns the attribute values automatically (for example, *Created By*, *Last Changed By*, etc.)
  - **Maintainable attributes** – The user can enter attribute values (for example, *Short Description*, etc.), and they can be changed at any time
Earlier in the course in Searching for Records, we learned about searching for records by Records Management Attributes.

Next we will cover how to create those attributes to be used when conducting a search.
Creating Attributes

- **Maintainable Attributes** are recognizable by the open data entry fields
  - The first field in Maintainable Attributes, **Short Description**, has been designated for mandatory entry

- **Displayable Attributes** are pre-populated and the field is shaded gray
Creating Attributes

- Complete the Short Description field
  - Complete any additional fields as desired
- Select the ENTER icon when finished

Creating Attributes
Exercises
Questions and Answers
Knowledge Checks
Knowledge Check

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 Check

SRM Documents can be displayed at any time in Records Management

a. True
b. False
Knowledge Check

Records Management can be accessed from SRM

a. True

b. False
Knowledge Check

How many levels of elements are in Records Management?

a. 2
b. 3
c. 4
d. 5
Knowledge Check

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!