IDT Software Inventory Application
Main Menu
USER ACCESS ONLY

The IDT Software Inventory Application allows IDT to track and assign the Library's software licenses (including hardware/software combination licensing), track licenses owned by non-Library customers, log media/manual or warranty info checkouts to IDT technicians, and provide reports. The IDT Software Coordinator (Carol Phillips and Sandy Neer, Backup) is the primary maintainer of this application.

Tip: Data can be entered in Uppercase or Upper/lowercase, but all displays of Data are in Uppercase. Display exceptions are E-Mail Addresses and Web Addresses.

Tip: Field Labels that are preceded by an asterisk are required fields. Field Labels without asterisks are optional fields.

Tip: To exit from a screen, always use the screen's **Cancel or CANCELADD** button. There is only one instance where a browser's **BACK** button can be used to exit a screen in this application. See **Software Inventory Reports** for its requirements. This was done to prevent the accumulation of empty record containers in the Oracle tables.

Tip: When printing any IDT Software Inventory Application screen, use landscape orientation and 78% as the minimum options.

Software Inventory Reports

The links are used to provide information reports for Library management and IDT Software Coordinators (Carol Phillips, and Sandy Neer, backup), as well as for inquiries from and reports to other campus entities (IACC and MWSSLS, etc.).

Tip: Software Inventory Reports requires USER level security or above access.

*Tip: Any report with multiple criteria/report options will allow the browser's **BACK** button to be used between the actual report and the previous lookup screen to preserve the criteria/report used. This way minor changes in the criteria can be made without starting from scratch or a second report can be chosen using the same criteria. This is the only instance where a browser's **BACK** button can be used.*

Inventory Reports

This link on the application's Main Menu goes to the *Select Data for IDT Software Inventory Report Lookup* screen and offers 4 report choices. Click the radio button on the report you want to run, complete the criteria, and then click the **Select Options** button. Only one report can be run at a time. The reports are:

❖ **Report 1 – All Software Inventory Titles** (sorted by Title). Requires you to enter a word or exact phrase in the Title lookup field.

Tip: Report 1 and 4 are similar in style with only half of the record's fields displayed; just enough for quick checks.

❖ **Report 2 – Specific Software Inventory Title.** Requires a dropdown selection of Software Inventory Title - Version – Platform – Req Number.

Tip: Report 2 and 3 are similar in style with all of the record's fields displayed.

❖ **Report 3 – Specific Software Inventory Record Key.** Requires a dropdown selection of SW Key – Software Inventory Title.

*Tip: **Report 3 is the default**. Use this one for the mandatory file report and place it in the file folder for the matching SW Key.*

❖ **Report 4 – Series of Software Inventory Titles by Record Keys**. Requires you to enter:

- A series of SW Keys separated by commas,NO spaces
- OR two SW Keys separated by a semicolon for range

Lookup Report

This link on the application's Main Menu goes to the *IDT Software Inventory - Inventory Lookup Report* screen. Here you can select from the dropdown boxes or type in values to choose report criteria. More than one field can be selected except where text and dropdown represent the same field. Checking an adjacent checkbox will Negate the selection or data entered. The fields are as follows and some fields allow for an **OR** choice:

Req Number	Dropdown selection of Req Number, **OR** Type a Requisition Number in the associated field box.
Req Number – Req Line Number – Software Title	Dropdown selection of Req Number – Req Line Number – Software Title, **OR** type a Requisition Number and a Req Line Number in the associated field boxes.
PO Number	Dropdown selection of the PO Number, **OR** type a PO Number in the associated field box.
Status	Dropdown selection of the available Statuses *(See* **Support Files Reports** *for further explanation of other statuses).*
Type a single **Creation Date** in the associated field box.	**OR** type a series of dates separated by commas,NO spaces, **OR** type two dates separated by a semicolon for range in the associated field box.
Fiscal Year	Dropdown selection of the available Fiscal Year (YYYY-YYYY).
Modified By	Dropdown selection of the available modifiers.
Type a single **Date Modified By** in the associated field box.	**OR** type a series of dates separated by commas,NO spaces, **OR** type two dates separated by a semicolon for range in the associated field box.

Checking an adjacent checkbox will Negate the selection of data entered. Once you've entered the criteria, you can choose between the **Match Any Field Entered** button, or the **Match All Fields Entered** button to search the Inventory records and display the report.

> *Tip: Clicking the **Match All Fields Entered** button with no criteria selections equals ALL records for the requested report.*

> *Tip: This lookup-based report is used primarily to locate a specific Software Inventory Title, when other reports have proven useless.*

Assignments Report

This link on the application's Main Menu goes to *the Select Data for IDT Software Inventory – Assignments Report Lookup* screen, and offers 6 report choices. Click the radio button on the report you want to run, and then click the **Select Options** button. Only one report can be run at a time. The reports are:

❖ **Report 1 – Specific Software Inventory Title.** Requires a dropdown selection of SW Key - Title - Version – Platform.

Tip: Report 1 is the default. Use this one for the file report, if the software came with Serial Numbers, and place it in the file folder for the matching SW Key.

❖ **Report 2 – Customer Software Assignments by Unit.** Requires a dropdown selection of Unit – SW Key.

❖ **Report 3 – Specific Customer Software Assignments.** Requires a dropdown selection of Customer.

❖ **Report 4 –Software Assigned to Specific Barcode.** Requires a dropdown selection of Inventory Barcode – Division Number - Customer.

❖ **Report 5 – Software Currently Assigned?** Requires a dropdown selection of Yes/No flag.

❖ **Report 6 – Software Assignment by Serial Number.** Requires you to enter a partial or full Serial Number as criteria.

Manuals Report

This link on the application's Main Menu goes to the *Select Data for IDT Software Inventory – Manuals Report Lookup* screen, and offers 4 report choices. Click the radio button on the report you want to run, and then click the **Select Options** button. Only one report can be run at a time. The reports are:

❖ **Report 1 – All Software Inventory Titles** (sorted by Title). Requires you to enter a word or exact phrase in the Title lookup field.

❖ **Report 2 – Specific Software Inventory Title.** Requires a dropdown selection of Software Inventory Titles- Version – Platform – Req Number.

❖ **Report 3 – Specific Software Inventory Record Key.** Requires a dropdown selection of SW Key – Software Inventory Title.

Tip: Report 3 is the default. Use this one for the file report, if the software came with Manuals, and place it in the file folder for the matching SW Key.

❖ **Report 4 – Series of Software Inventory Titles by Record Keys.** Requires you to enter:

- A series of SW Keys separated by commas,NO spaces
- OR two SW Keys separated by a semicolon for range

Media Report

This link on the application's Main Menu goes to the *Select Data for IDT Software Inventory – Media Report Lookup* screen and offers 4 report choices. Click the radio button on the report you want to run, and then click the **Select Options** button. Only one report can be run at a time. The reports are:

❖ **Report 1 – All Software Inventory Titles** (sorted by Title). Requires you to enter a word or exact phrase in the Title lookup field.

❖ **Report 2 – Specific Software Inventory Title.** Requires a dropdown selection of Software Inventory Titles- Version – Platform – Req Number.

❖ **Report 3 – Specific Software Inventory Record Key.** Requires a dropdown selection of SW Key – Software Inventory Title.

Tip: Report 3 is the default. Use this one for the file report, if the software came with Media, and place it in the file folder for the matching SW Key.

❖ **Report 4 – Series of Software Inventory Titles by Record Keys**. Requires you to enter:

- A series of SW Keys separated by commas,NO spaces
- OR two SW Keys separated by a semicolon for range

Other Items Report

This link on the application's Main Menu goes to the *Select Data for IDT Software Inventory – Other Items Report Lookup* screen, and offers 4 report choices. Click the radio button on the report you want to run, and then click the **Select Options** button. Only one report can be run at a time. The reports are:

❖ **Report 1 – All Software Inventory Titles** (sorted by Title). Requires you to enter a word or exact phrase in the Title lookup field.

❖ **Report 2 – Specific Software Inventory Title.** Requires a dropdown selection of Software Inventory Titles- Version – Platform – Req Number.

❖ **Report 3 – Specific Software Inventory Record Key**. Requires a dropdown selection of SW Key – Software Inventory Title.

Tip: Report 3 is the default. Use this one for the file report, if the software came with Other Items, and place it in the file folder for the matching SW Key.

❖ **Report 4 – Series of Software Inventory Titles by Record Keys.** Requires you to enter:

- A series of SW Keys separated by commas,NO spaces
- OR two SW Keys separated by a semicolon for range