Information and Digital Technologies
February 15, 2008

IDT Purchasing Application
Main Menu

The IDT Purchasing Application allows IDT to track their division's purchasing and the entire Library's Hardware/Software purchasing, as well as provide reports. Records in this application are primarily added/modified by IDT Purchasing Coordinators (Carol Phillips and Sandy Neer).

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 **Purchasing Reports** for its requirements. This was done to prevent the accumulation of empty record containers in the Oracle tables.*

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

Purchasing Processing

These links support the creation, modification, and deletion of purchase requisitions and requisition lines in support of the IDT Purchasing Application.

Tip: Purchasing Processing requires MAINTLESS level security or above access. MAINTLESS can only Add and Modify. Requires MAINT level security or above to Delete.

A record in the IDT Purchasing Application is needed when preparing purchasing paperwork for Library Administration to authorize (See **Purchasing Reports** for information on the paperwork reports). A duplicate set of paperwork is kept in a blue Purchasing binder until the items are received. The blue binder will also have a current copy of the *Purch Req Log Report* (See **Purchasing Reports** for information on the paperwork reports). Information changes affecting the paperwork are recorded in the IDT Purchasing Application, as well as on the duplicate set and log report.

If the item being purchased has software associated with it, the duplicate set will be eventually stored in the Software files in LL-406. All other items will have their duplicate set stored in the LL-465 files, after the end of the fiscal year and all items are received. The LL-465 duplicate set of paperwork will be in the cabinet drawer marked Purchasing and filed in Fiscal Year/SR Number order.

The log will be updated and reprinted as needed to keep Library Administration updated on the progress of the orders, and retired at the end of the fiscal year. The end-of-the-year log will be filed with the duplicate set of purchasing paperwork in LL-465 file cabinet drawer marked Purchasing.

Add New Purch Req

This link on the application's Main Menu goes to the *Add IDT Purchase Requisitions* screen and is used to add a new record in the Oracle Purchasing tables, so it immediately creates an empty record container. This link is based on IDT Service Requests Application entries and requires a pre-existing SR to support the new purchase requisition record. The fields are:

SR - Requester - Problem Sub-Category	**Required**. Dropdown containing 3 fields from an existing SR for ID purposes.
Fiscal Year	**Required**. Dropdown of available Fiscal Years. Defaults to current Fiscal Year.

Requester	**Required**. Dropdown of available Library Customers.
Requesting Unit	**Required**. Dropdown of available Library Units.
Purchase Justification	**Required**. Text field; Reason for the purchase.
RUSH	Dropdown Yes/No Flag for Rush processing. Default is **No**.
Rush Justification	Text field; If the Flag above is Yes, then this field is required. Reason for the Rush.
Suggested Vendor	Dropdown of Vendors.
Funds	**Required**. Dropdown of available Fund accounts.

1. Since you may NOT know the items you are ordering yet for this SR created purchasing, you can click the **ADD** button. This will submit your information as a new Purchase Requisition record and return you to another new empty record container. Either chose/enter information for another Purchase Requisition or click the **CANCELADD** button to return to the IDT Purchasing Application Main Menu.

2. If you do NOT want to submit any information for the Purch Req, you can click the **CANCELADD** button to delete the current empty record container and return to the IDT Purchasing Application Main Menu.

   Tip: ***CANCELADD*** *is a process that deletes an empty record container and is very important to the health of the database's data.*

Modify/Delete an Existing Purch Req

This link on the application's Main Menu goes to the *Modify/Delete IDT Purchase Requisitions Lookup* screen, where the selection is by a dropdown of *SR - Requestor - Problem Sub-Category* **OR** you can enter a *Purchase Order Number* in the provided Text field. The selection is based on the IDT Service Requests Application entries and requires a pre-existing SR to support the existing purchase requisition record. The dropdown will only display SR's whose Problem Category equals "B. Eval/Purchase". The fields are:

SR – Requester - Problem Sub-Category	**Required**. Dropdown containing 3 fields from an existing SR for ID purposes.
Fiscal Year	**Required**. Dropdown of available Fiscal Years. Defaults to current Fiscal Year.
Requester	**Required**. Dropdown of available Library Customers.
Requesting Unit	**Required**. Dropdown of available Library Units.
Purchase Justification	**Required**. Text field; Reason for the purchase.
RUSH	Dropdown Yes/No Flag for Rush processing. Default is **No**.
Rush Justification	Text field; If the Flag above is **Yes**, then this field is

	required. Reason for the Rush.
Funds	**Required**. Dropdown of available Fund accounts.
SubTotal	**Display Only**. Default is 0.00. This is computed based on the Requisition Line Totals.
Shipping	Text field; Default is 0.00. Do NOT use commas or dollar signs.
Total Price	Text field; Default is 0.00. Do NOT use commas or dollar signs. This is computed based on the SubTotal and Shipping amounts. If the SubTotal has been left at default, then the Total Price can be entered manually.
Requisition Number	Text field; Format for current State Requisition is an 8-digit number beginning with 3, while Foundation Requisitions use F and a 2-digit number. Either number is followed by a slash, and the associated SR number (minus the slash in the fiscal year portion).
Sales Order Number	Text field; This is optional and can be left blank, as current purchasing has not forwarded that number through to IDT. Requisitions of old through Central Stores used this number field.
P.O. Number	Text field; Format for current State PO's is a 8 digit number usually beginning with 4, while Foundation PO's use P00 at the beginning.
Suggested Vendor	Dropdown of available Vendors. This is followed by a **Display Only** of the current choice's address/web url.
Contact Name	Dropdown of available Vendor Contacts. This will only contain those contacts associated with the current choice of Vendor. ***Tip:*** *If the Vendor is changed, you have to return again to this record to have the dropdown reflect the new Vendor's contacts.*
Quote Date	Date field; Use format MM/DD/YYYY. Date the quote was received from the Vendor or obtained from a web site/store.
Quote	Text field; Enter the ID number (if provided) of the Vendor's quote.
Specs Comments	Text field; Enter "See attached quote" and any other information that will assist Lisa Peters to complete the processing of the order for the Library.
IDT Reviewer	Dropdown of available IDT Customers; Default is the logged-in user. However, the dropdown will allow for a switch to whoever in IDT did the specs/obtained the quote for the order.
Unit	**Display Only.** Corresponds to the current chosen IDT Reviewer's Unit.
Receiving Comments	Text field; Enter description of use/ultimate location once item is received (i.e. For Media Center patron use.). This field is displayed in the Purch Req Log Report and is useful in reporting progress to management. Use this

	field to record Partial Delivery information.
Review Date	Date field; Use format MM/DD/YYYY. Date Reviewer assembled the order.
Filed Date	Date field; Use format MM/DD/YYYY. Date paperwork signed by a Director and given to Lisa Peters.
SWFlag	Dropdown Yes/No Flag for software-involved orders. Default is **No**. Select **Yes**, if order involves software packages or hardware with software.
Complete	Dropdown Yes/No Flag for the order being completely received. Default is **No**. Select **Yes**, when the order is fully received.
Completion Date	Date field; Use format MM/DD/YYYY. Date the last item for the order was received.

Once the data above is chosen/entered, you can click the appropriate button:

1. If you know the items you are ordering now, you can click the **Add Purch Req Line** button. The **Add Purch Req Line** button will display a Pop-Up *Add IDT Purchase Requisition Lines* screen with the following fields in a new empty record container:

Line Number	**Display Only.** Number given each Line Item.
Quantity	**Required.** Text field; Enter the number of the Line Item being requested.
UOM	**Required.** Dropdown of available Unit of Measures. Select the Unit of Measure used by the vendor for this item.
Part Number	**Required.** Text field; If Line Item does not have a Part Number, enter 0.
Line Description	**Required.** Text field; Description of Line Item.
Unit Price	**Required.** Text field; Default is 0.00. Do NOT use commas or dollar signs.

- Once the data above is entered, click the **ADDLOOP** button to submit the information as a new Purch Req Line record and return to another new empty record container. Now enter the information for a second line item, then click the **ADDLOOP** button again. Repeat this process until all line items are entered and submitted. When done, click the **CANCELADD** button to delete the current empty record container. This cancel will require you to click a displayed OK button to close the Pop-Up screen.

2. If you do NOT know the items you are ordering yet, you can click the **MODIFY** button. This will submit the changes to the Purchase Requisition record and return you to the previous Lookup screen. Either chose or enter

information for another Req to modify or click the **Cancel** button to return to the IDT Purchasing Application Main Menu.

OR

1. If you want to modify the items you are ordering, you can click the **Modify/Delete Purch Req Line** button. A Pop-Up screen with the following fields will be displayed (If the Req has more than one item, the display will be as a loop of items):

Req Number	**Display Only**. Displays current information associated with the Req Line.
Line Number	**Display Only**. Displays current information associated with the Req Line.
SR	**Display Only**. Displays current information associated with the Req Line.
Quantity	**Required**. Text field; Enter the number of the Line Item being requested.
UOM	**Required**. Dropdown of available Unit of Measures. Select the Unit of Measure used by the vendor for this item.
Part Number	**Required**. Text field; If line item does not have a Part Number, enter 0.
Line Description	**Required**. Text field; Description of Line Item.
Unit Price	**Required.** Text field; Default is 0.00. Do NOT use commas or dollar signs.
Line Total	**Display Only**. Total of Unit Price times Quantity.
Received Date	Date field; Use format MM/DD/YYYY. Date item received by IDT.
License Status	This is a notation for Software Licenses only. The dropdown choices are: NONE, CEA, CONTRACT, VP. (i.e. ASAP purchases are VP, Chancellor Office purchases are CEA)

Once the data above is entered/chosen, click the **MODIFY** or **MODIFYLOOP** button <u>(depends on the number of Req Lines associated with Req)</u> to submit the changes as a modified Purch Req Line item and move to next Purch Req Line item.

- ❖ If there is only 1 Req Line, **MODIFY** will submit the change , flash the "Data Modified" message, and move to a displayed **OK** button for a click to close the Pop-Up screen.

- ❖ Or if there is more than 1, enter the changes for the first line item and click the **MODIFYLOOP** button will submit the change, flash the "Data Modified" message, and move to the next item. If the presented item DOES NOT REQUIRE a change, click the **NEXTRECORD** button. This button will flash the "Process Next Record" message and move you to the next item in the loop without making any change (including Date Checked) to the previous item. Using the **MODIFYLOOP** or **NEXTRECORD** buttons on each record presented, until the message "All Selected Records Processed" appears, will complete a Modify Loop process. When the **MODIFYLOOP** process is done, it will require you to click a displayed **OK** button to close the Pop-Up screen.

- Any time during the **MODIFY** or **MODIFYLOOP** process, you can end the process by clicking the **Cancel** button to stop the process and close the Pop-Up screen.

There is an **Add Serial Numbers** button on the Pop-Up *Add IDT Purchase Requisition Line Serial Numbers* screen. ***Tip:*** *This is a legacy process that can be ignored at the present time.* The Add screen fields are below and the screen uses an **ADDLOOP** and a **CANCELADD** button process, as well as a displayed **OK** button to close the Pop-Up screen:

Req Number	**Display Only**. Displays current information associated with the Serial Number.
Line Number	**Display Only**. Displays current information associated with the Serial Number.
SR	**Display Only**. Displays current information associated with the Serial Number.
Line Description	**Display Only**. Description of Line Item
Software Title – SW Key	**Required**. Dropdown of existing Software Inventory records. Select the one being used to UPGRADE from.
Replacement Serial Number	**Required**. Text field; Enter the existing serial number being used to UPGRADE from.

2. If you have modified the Purchase Requisition record fields, you can click the **Modify** button. This will submit the changes to the Purchase Requisition record and return you to the previous Lookup screen. Either chose another Req from the dropdown or click the **Cancel** button to return to the Main Menu.

3. If you do NOT want to submit any changes, you can click the **Cancel** button to return you to the previous Lookup screen. Either chose another Req from the dropdown or click the **Cancel** button to return to the Main Menu.

Modify/Delete an Existing or Legacy Purch Req Line

This link on the application's Main Menu goes to a *Modify/Delete IDT Purchase Requisition Lines Lookup* screen, where the selection is either a loop thru the lines (Requisition Number – SR dropdown) or a single line (Requisition Number – Line Number – SR dropdown). While the screen fields are the same for both lookups, the difference is in the buttons. The Loop has a **MODIFYLOOP** button and the Single has a **MODIFY** button. The fields are:

Req Number	**Display Only.** Displays current information associated with the Req Line.
Line Number	**Display Only**. Displays current information associated with the Req Line.
SR	**Display Only**. Displays current information associated with the Req Line.
Quantity	**Required**. Text field; Enter the number of the Line Item being requested.
UOM	**Required**. Dropdown of available Unit of Measures. Select the Unit of Measure used by the vendor for this item.
Part Number	**Required**. Text field; If line item does not have a part number, enter 0.
Line Description	**Required.** Text field; Description of Line Item
Unit Price	**Required.** Text field; Default is 0.00. Do NOT use commas or dollar signs.
Line Total	**Display Only.** A computed total of Unit Price times Quantity.
Received Date	Date field; Use format MM/DD/YYYY. Date item received by IDT.
License Status	This is a notation for Software Licenses primarily. The dropdown choices are: NONE, CEA, CONTRACT, VP. (i.e. ASAP purchases are VP, Chancellor Office purchases are CEA)

- For the Loop - Once the data above is entered, click the **MODIFYLOOP** button to submit the information as a modified Purch Req Line item and move to next Purch Req Line item. Now enter the information for the second line item and click the **MODIFYLOOP** button again. If the presented item DOES NOT REQUIRE a change, click the **NEXTRECORD** button. This button will flash the "Process Next Record" message and move you to the next item in the loop without making any change (including Date Checked) to the previous item. Using the **MODIFYLOOP** or **NEXTRECORD** buttons on each record presented, until the message "All Selected

Records Processed" appears, will complete a Modify Loop process. When the **MODIFYLOOP** process is done, it will require you to click a displayed **OK** button to close the Pop-Up screen.

- For the Single - Once the data above is entered, click the **MODIFY** button to submit the information as a modified Purch Req Line record and return to the Lookup screen.

- Any time during the **MODIFY** or **MODIFYLOOP** process, you can end the process by clicking the **Cancel** button to stop the process and close the Pop-Up screen.

There is an **Add Serial Numbers** button on the Pop-Up *Add IDT Purchase Requisition Line Serial Numbers* screen. ***Tip:*** *This is a legacy process that can be ignored at the present time.* The Add screen fields are below and the screen uses an **ADDLOOP** and a **CANCELADD** button process, as well as a displayed **OK** button to close the Pop-Up screen:

Req Number	**Display Only**. Displays current information associated with the Serial Number.
Line Number	**Display Only**. Displays current information associated with the Serial Number.
SR	**Display Only**. Displays current information associated with the Serial Number.
Line Description	**Display Only**. Description of Line Item
Software Title – SW Key	**Required**. Dropdown of existing Software Inventory records. Select the one being used to UPGRADE from.
Replacement Serial Number	**Required**. Text field; Enter the existing serial number being used to UPGRADE from.

Modify/Delete an Existing Purch Req Line Serial Number

Tip: *This is a legacy process that can be ignored at the present time.*

This link on the application's Main Menu goes to *Modify IDT Purchase Requisition Line Serial Numbers Lookup* screen, where the selection is either a loop thru the lines (Requisition Number – Line Number – SR dropdown) or a single line (Req Number – Line Number – Title – Replacement SN dropdown). While the Modify screen fields are the same for both lookups, the difference is in the buttons. The Loop has a **MODIFYLOOP** button and the Single has a **MODIFY** button. The

MODIFYLOOP will require the **Cancel** button to end the loop process and return you to the Lookup screen. If the Purch Req only has 1 Req Line Serial Number record, the **MODIFY** button will automatically return you to the Lookup screen after submitting the changes.

Req Number	**Display Only**. Displays current information associated with the Serial Number.
Line Number	**Display Only**. Displays current information associated with the Serial Number.
SR	**Display Only**. Displays current information associated with the Serial Number.
Line Description	**Required**. Text field; Description of Line Item
Software Title – SW Key	**Required**. Dropdown of existing Software Inventory records. Select the one being used to UPGRADE from.
Replacement Serial Number	**Required**. Text field; Enter the existing serial number being used to UPGRADE from.

Add Legacy Purch Req

This link on the application's Main Menu goes to the *Add IDT Legacy Purchase Requisitions* screen and is used to add a new record in the Oracle Purchasing Table, so it immediately creates an empty record container.

This link is NOT based on IDT Service Requests Application NOR requires a pre-existing SR to support the new purchase requisition record. This link was done to accommodate the Legacy purchasing from the FileMaker version of the IDT Service Request Application. The fields are:

SR	**Required**. Text field; Enter corresponding FileMaker SR Number with a "/" in the fiscal year portion of the number (i.e. 05/060761)
Fiscal Year	**Required**. Dropdown of available Fiscal Years. Defaults to current Fiscal Year.
Requester	**Required**. Dropdown of available Library Customers.
Requesting Unit	**Required**. Dropdown of available Library Units.
Purchase Justification	**Required**. Text field; Reason for the purchase.
RUSH	Dropdown Yes/No Flag for Rush processing. Default is **No**.
Rush Justification	Text field; If the Flag above is **Yes**, then this field is required. Reason for the Rush.
Funds	**Required**. Dropdown of available Fund accounts.
SubTotal	**Display Only.** Default is 0.00. This is computed based on the Requisition Line Totals.
Shipping	Text field; Default is 0.00. Do NOT use commas or dollar signs.
Total Price	Text field; Default is 0.00. Do NOT use commas or dollar

	signs. If the SubTotal has been left at default, then the Total Price can be entered manually.
Requisition Number	Text field; Format for current State Requisition is an 8 digit number beginning with 3, while Foundation Requisitions use F and a 2 digit number. Both kinds are followed by a slash and the associated SR number (minus the slash in the fiscal year portion).
Sales Order Number	Text field; This is optional and can be left blank, as current purchasing has not forwarded that number through to IDT. Requisitions of old through Central Stores used this number field.
P.O. Number	Text field; Format for current State PO's is a 8 digit number usually beginning with 4, while Foundation PO's use P00 at the beginning.
Suggested Vendor	Dropdown of available Vendors
Quote Date	Date field; Use format MM/DD/YYYY. Date the quote was received from the Vendor or obtained from a web site/store.
Quote	Text field; Enter the ID number (if provided) of the Vendor's quote.
Specs Comments	Text field; Enter "See attached quote" and any other information that will assist Lisa Peters to complete the processing of the order for the Library.
IDT Reviewer	Dropdown of available IDT Customers; Default is the logged-in user. However, the dropdown will allow for a switch to whoever in IDT did the specs/obtained the quote for the order.
Unit	**Display Only.** Corresponds to the IDT Reviewer's Unit.
Receiving Comments	Text field; Enter description of use/ultimate location once item is received (i.e. For Media Center patron use.). This field is displayed in the Purch Req Log Report.
Review Date	Date field; Use format MM/DD/YYYY. Date Reviewer assembled the order.
Filed Date	Date field; Use format MM/DD/YYYY. Date paperwork signed by a Director and given to Lisa Peters.
Complete	Dropdown Yes/No Flag for completed orders. Default is **No**.
SWFlag	Dropdown Yes/No Flag for software involved orders. Select **Yes**, if order involves software packages or hardware with software.

Once the data above is chosen/entered, click the appropriate button:

1. If you know the items you are ordering now, you can click the **Add Purch Req Line** button. The **Add Purch Req Line** button will display a Pop-Up *Add IDT Purchase Requisition Lines* screen with the following fields in a new empty record container:

Line Number	**Display Only.** Number given each Line Item.
Quantity	**Required.** Text field; Enter the number of the Line Item being requested.
UOM	**Required.** Dropdown of available Unit of Measures. Select the Unit of Measure used by the vendor for this item.
Part Number	**Required.** Text field; If Line Item does not have a Part Number, enter 0.
Line Description	**Required.** Text field; Description of Line Item.
Unit Price	**Required.** Text field; Default is 0.00. Do NOT use commas or dollar signs.

- ❖ Once the data above is entered, click the **ADDLOOP** button to submit the information as a new Purch Req Line record and return to another new empty record container. Now enter the information for a second line item, then click the **ADDLOOP** button again. Repeat this process until all line items are entered and submitted. When done, click the **CANCELADD** button to delete the current empty record container. This cancel will require you to click a displayed OK button to close the Pop-Up screen.

2. If you do NOT know the items you are ordering yet, you can click the **ADD** button. This will submit your information as a new Purchase Requisition record and return you to another new empty record container. Either chose/enter information for another Purchase Requisition or click the **CANCELADD** button to return to the IDT Purchasing Application Main Menu.

3. If you do NOT want to submit any information for the Purch Req, you can click the **CANCELADD** button to delete the current empty record container and return to the IDT Purchasing Application Main Menu.

*Tip: **CANCELADD** is a process that deletes an empty record container and is very important to the health of the database's data.*

Modify/Delete a Legacy Purch Req

This link on the application's Main Menu goes to the *Modify IDT Legacy Purchase Requisitions Lookup* screen, where the selection is by SR – FY/FY – Req Number dropdown or by entering a Purchase Order Number. The fields are based on the legacy FileMaker Service Requests purchasing records.

SR	**Required**. Text field; Enter corresponding FileMaker SR Number with a "/" in the fiscal year portion of the number (i.e. 05/060761)
Fiscal Year	**Required**. Dropdown of available Fiscal Years. Defaults

	to current Fiscal Year.
Requester	**Required**. Dropdown of available Library Customers.
Requesting Unit	**Required**. Dropdown of available Library Units.
Purchase Justification	**Required**. Text field; Reason for the purchase.
RUSH	Dropdown Yes/No flag for Rush processing. Default is **No**.
Rush Justification	Text field; If the flag above is **Yes**, then this field is required. Reason for the Rush.
Funds	**Required**. Dropdown of available Fund accounts.
SubTotal	**Display Only.** Default is 0.00. This is computed based on the Requisition Line Totals.
Shipping	Text field; Default is 0.00. Do NOT use commas or dollar signs.
Total Price	Text field; Default is 0.00. Do NOT use commas or dollar signs. This is computed based on the SubTotal and Shipping amounts. If the SubTotal has been left at default, then the Total Price can be entered manually.
Requisition Number	Text field; Format for current State Requisition is an 8-digit number beginning with 3, while Foundation Requisitions use F and a 2-digit number. Either number is followed by a slash, and the associated SR number (minus the slash in the fiscal year portion).
Sales Order Number	Text field; This is optional and can be left blank, as current purchasing has not forwarded that number through to IDT. Requisitions of old through Central Stores used this number field.
P.O. Number	Text field; Format for current State PO's is a 8-digit number usually beginning with 4, while Foundation PO's use P00 at the beginning.
Suggested Vendor	Dropdown of available Vendors. This is followed by a **Display Only** of the current choice's address/web url.
Contact Name	Dropdown of available Vendor Contacts. This will only contain those contacts associated with the current choice of Vendor. ***Tip:*** *If the Vendor is changed, you have to return again to this record to have the dropdown reflect the new Vendor's contacts.*
Quote Date	Date field; Use format MM/DD/YYYY. Date the quote was received from the Vendor or obtained from a web site/store.
Quote	Text field; Enter the ID number (if provided) of the Vendor's quote.
Specs Comments	Text field; Enter "See attached quote" and any other information that will assist Lisa Peters to complete the processing of the order for the Library.
IDT Reviewer	Dropdown of available IDT Customers; Default is the logged-in user. However, the dropdown will allow for a

	switch to whoever in IDT did the specs/obtained the quote for the order.
Unit	**Display Only.** Corresponds to the IDT Reviewer's Unit.
Receiving Comments	Text field; Enter description of use/ultimate location once item is received (i.e. For Media Center patron use.). This field is displayed in the Purch Req Log Report. Use this field to record Partial Delivery information.
Review Date	Date field; Use format MM/DD/YYYY. Date Reviewer assembled the order.
Filed Date	Date field; Use format MM/DD/YYYY. Date paperwork signed by a Director and given to Lisa Peters.
SWFlag	Dropdown Yes/No Flag for software involved orders. Default is **No**. Select **Yes**, if order involves software packages or hardware with software.
Complete	Dropdown Yes/No Flag for the order being completely received. Default is **No**. Select **Yes**, when the order is fully received.
Completion Date	Date field; Use format MM/DD/YYYY. Date the last item for the order was received.

Once the data above is modified, you can click the appropriate button:

1. If you know the items you are ordering now, you can click the **Add Purch Req Line** button. This will bring up a Pop-Up screen for the Req Line fields (*See instructions above for the **Add Purch Req Line** button under **Add Legacy Purch Req**).*

2. If you want to modify the items you are ordering, you can click the **Modify/Delete Purch Req Line** button. A Pop-Up screen with the following fields will be displayed (If the Req has more than one item, the display will be as a loop of items):

Req Number	**Display Only**. Displays current information associated with the Req Line.
Line Number	**Display Only**. Displays current information associated with the Req Line.
SR	**Display Only**. Displays current information associated with the Req Line.
Quantity	**Required**. Text field; Enter the number of the Line Item being requested.
UOM	**Required**. Dropdown of available Unit of Measures. Select the Unit of Measure used by the vendor for this item.
Part Number	**Required**. Text field; If line item does not have a Part Number, enter 0.
Line Description	**Required**. Text field; Description of Line Item.

Unit Price	**Required.** Text field; Default is 0.00. Do NOT use commas or dollar signs.
Line Total	**Display Only**. Total of Unit Price times Quantity.
Received Date	Date field; Use format MM/DD/YYYY. Date item received by IDT.
License Status	This is a notation for Software Licenses primarily. The dropdown choices are: NONE, CEA, CONTRACT, VP. (i.e. ASAP purchases are VP, Chancellor Office purchases are CEA)

Once the data above is entered/chosen, click the **MODIFY** or **MODIFYLOOP** button <u>(depends on the number of Req Lines associated with Req)</u> to submit the changes as a modified Purch Req Line item and move to next Purch Req Line item.

- ❖ If there is only 1 Req Line, **MODIFY** will submit the change , flash the "Data Modified" message, and move to a displayed **OK** button for a click to close the Pop-Up screen.

- ❖ Or if there is more than 1, enter the changes for the first line item and click the **MODIFYLOOP** button will submit the change, flash the "Data Modified" message, and move to the next item. If the presented item <u>DOES NOT REQUIRE</u> a change, click the **NEXTRECORD** button. This button will flash the "Process Next Record" message and move you to the next item in the loop without making any change (including Date Checked) to the previous item. Using the **MODIFYLOOP** or **NEXTRECORD** buttons on each record presented, until the message "All Selected Records Processed" appears, will complete a Modify Loop process. When the **MODIFYLOOP** process is done, it will require you to click a displayed **OK** button to close the Pop-Up screen.

- ❖ Any time during the **MODIFY** or **MODIFYLOOP** process, you can end the process by clicking the **Cancel** button to stop the process and close the Pop-Up screen.

There is an **Add Serial Numbers** button on the Pop-Up *Add IDT Purchase Requisition Line Serial Numbers* screen (See instructions for this under **Modify/Delete an Existing Purch Req**). ***Tip:*** *<u>This is a legacy process that can be ignored at the present time.</u>*

3. If you have modified the Purchase Requisition record fields, you can click the **Modify** button. This will submit the changes to the Purchase Requisition record and return you to the previous Lookup screen. Either chose another Req from the dropdown or click the **Cancel** button to return to the Main Menu.

4. If you do NOT want to submit any changes, you can click the **Cancel** button to return you to the previous Lookup screen. Either chose another Req from the dropdown or click the **Cancel** button to return to the Main Menu.

Purchasing Reports

The IDT Purchasing Application reports are used to provide information for Library management, Lisa Peters and IDT Purchasing Coordinators (Carol Phillips, Sandy Neer).

> ***Tip:*** *Access to Purchasing Reports requires USER level security or above.*
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> ***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.*

Purch Count Reports

This link on the application's Main Menu goes to the *Select Data for IDT Purchase Requisitions - Purchase Count Reports Lookup* screen for the selection of a report. There are 3 Count reports based on the Problem Sub-Category of the originating SR:

- **Report 1 – All Purchase Requisitions** (sorted) **by Problem Sub-Category**

Tip: ***Report 1 is the default****.*

- **Report 2 – Purchase Req** (sorted) **by Problem Sub-Categories for a Specific Fiscal Year** (with dropdown of Fiscal Years)

- **Report 3 – Purchase Req** (sorted) **by Problem Sub-Categories** and
  - A single Filed Date
  - A series of Filed Dates separated by commas,NO spaces
  - OR two Filed Dates separated by a semicolon for range

There are also 6 Count reports based on the Fund Account used by the Requisition:

- **Report 4 – All Purchase Requisitions** (sorted) **by Fund Accoun**t

- **Report 5 – Purchase Req** (sorted) **by Fund Account for a Specific Fiscal Year** (with dropdown of Fiscal Years).

- **Report 6 – Purchase Req** (sorted) **by Fund Account** and
  - A single Filed Date
  - A series of Filed Dates separated by commas,NO spaces
  - OR two Filed Dates separated by a semicolon for range

- **Report 7 – All Purchase Requisitions** (sorted) **by Specific Fund Account** (with dropdown of Fund Accounts)

- **Report 8 – Purchase Req** (sorted) **by Specific Fund Account for a Specific Fiscal Year** (with dropdowns of Fund Accounts and Fiscal Years)

- **Report 9 – Purchase Req** (sorted) **by Specific Fund Account** and enter:
  - A single Filed Date
  - A series of Filed Dates separated by commas,NO spaces
  - OR two Filed Dates separated by a semicolon for range

Purch Req Forms

This link on the application's Main Menu goes to the *IDT Purchase Requisitions - Purchase Forms Report Lookup* screen and offers 3 dropdown choices to ID the correct Purch Req you need to print. The choices are:

- **Req Number – FY/FY – Customer**
- **Sales Order Number - FY/FY – Customer**
- **PO Number - FY/FY – Customer**

Then click the radio button on the report you want to run. Only one report can be run at a time. The reports are:

- **Internal IDT Purchase Requisition Report**
- **Unit Hardware/Software Purchase Request**

Both of these reports comprise the purchasing paperwork that IDT provides Library Purchasing.

> ***Tip:*** *When printing Purch Req Forms for Lisa Peters, use landscape orientation and 90% as the minimum options. Also to provide our duplicate set, use 2 copies and page 1 to 1 as additional options.*

> ***Tip:*** *When assembling the paperwork for management/Peters, put the reports in this order: Unit Hardware/Software Purchase Request, Internal IDT Purchase Requisition Report, Quote, and any vendor info. For our duplicate set, put the Internal IDT Purchase Requisition Report on top and draw a colored line under the SR Number.*

Tip: *Authorization is obtained from Jon Cawthorne or Mark Lester (backup) at the current time.*

Purch Req Status

This link on the application's Main Menu goes to the *IDT Purchase Requisitions - Status Report Lookup* screen and offers 3 dropdown choices to ID the correct Purch Req you need to view or print. The choices are:

- **Req Number – FY/FY – Customer**
- **Sales Order Number - FY/FY – Customer**
- **PO Number - FY/FY – Customer**

Then click the **GO** button to obtain the report. This report is a quick look at a single IDT Purchase Requisition and includes Line information.

Purch Req Log

This link on the application's Main Menu goes to the *Select Data for IDT Purchase Requisitions - Log Report Lookup* screen and offers 5 report choices. Click the radio button on the report you want to run, then click the **Select Options** button. Only one report can be run at a time. The reports are:

- **Report 1 – All Purchase Requisitions** (sorted by SR)

Tip: Report 1 is the default*.*

- **Report 2 – Specific Fiscal Year** (sorted by SR with dropdown of Fiscal Years)

- **Report 3 – Specific SR Number** (with dropdown of SR Numbers)

- **Report 4 – Purchase Req Completed** (sorted by SR with dropdown of Yes/No Complete Flag)

Tip: *A copy of report 4 for un-received Purchase Req's is run at least once a month and placed at the front of the blue Binder kept on Phillips' desk. As Req's are received, the report is marked with updated information and used for data entry for the next version of the report.*

- **Report 5 – Purchase Req** (sorted by SR) and enter
    - A single Completion Date
    - A series of Completion Dates separated by commas,NO spaces
    - OR two Completion Dates separated by a semicolon for range

Purch Req Line Log

This link on the application's Main Menu goes to the *Select Data for IDT Purchase Requisitions - Req Line Log Report Lookup* screen and offers 5 report choices. Click the radio button on the report you want to run, then click the **Select Options** button. Only one report can be run at a time. The reports are:

- **Report 1 – All Purchase Requisitions** (sorted by SR)

Tip: ***Report 1 is the default****.*

- **Report 2 – Specific Fiscal Yea**r (sorted by SR with dropdown of Fiscal Years)

- **Report 3 – Specific SR Number** (with dropdown of SR Numbers)

- **Report 4 – Purchase Req Completed** (sorted by SR with dropdown of Yes/No Complete Flag)

- **Report 5 – Purchase Req** (sorted by SR) and enter
    - A single Completion Date
    - A series of Completion Dates separated by commas,NO spaces
    - OR two Completion Dates separated by a semicolon for range

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Support Files Processing

These links support the creation, modification, and deletion of the information in the necessary dropdown lists in support of the IDT Purchasing Application.

Tip: *Support Files Processing requires MAINT Level security or above access.*

Fund Accounts - Add

This link on the application's Main Menu goes to the *Add Information to IDT Purchasing – Fund Accounts* screen and opens to a new empty record container. The field is:

Fund Accounts Name	**Required**. Text field; Enter a name that is agreed to by Library management for equivalent Oracle accounts charged by our orders.

Once the data above is entered, click the appropriate button:

1. The **ADD** button will submit the information as a new Fund Accounts record and return you to another new empty record container.

If you do NOT want to add a new Fund Accounts record, clicking the **CANCELADD** button will delete the current empty record container and return you to the IDT Purchasing Application Main Menu.

> ***Tip:*** ***CANCELADD*** *is a process that deletes an empty record container and is very important to the health of the database's data.*

Fund Accounts – Modify/Delete

This link on the application's Main Menu goes to the *Modify/Delete Lookup Information to IDT Purchasing – Fund Accounts* screen, and allows a selection from a dropdown of the available Fund Accounts. After making a selection, click the **Go** button. This moves to another screen, where a change or a deletion can be made. The field is:

Fund Accounts Name	**Required**. Text field; Enter a name that is agreed to by Library management for equivalent Oracle accounts charged by our orders.

Once the data is modified, click the **MODIFY** button. This will submit your information as a changed Fund Accounts record and return you to the Lookup screen. You can either chose another record or click the **Cancel** button to return to the IDT Purchasing Application Main Menu.

If you want to delete the chosen record instead, clicking the **DELETE** button will delete the record and return you to the Lookup screen. Or clicking the **Cancel** button will also return you to the Lookup screen, if neither is desired.

License Status - Add

This link moves straight to the *Add Information to IDT Purchasing License Status* screen and opens to a new empty record container. The field is:

License Status Name	**Required**. Text field; Enter a name that hold meaning for what may be governing the purchase of the License.

Once the data above is entered, click the appropriate button:

1. The **ADD** button will submit the information as a new License Status record and return you to another new empty record container.

If you do NOT want to add a new License Status record, clicking the **CANCELADD** button will delete the current empty record container and return you to the IDT Purchasing Application Main Menu.

> ***Tip:*** ***CANCELADD*** *is a process that deletes an empty record container and is very important to the health of the database's data.*

License Status – Modify/Delete

This link on the application's Main Menu goes to the *Modify/Delete Lookup Information to IDT Purchasing – License Status* screen, and allows a selection from a dropdown of the available License Status. After making a selection, click the **Go** button. This moves to another screen, where a change or a deletion can be made. The field is:

License Status Name	**Required**. Text field; Enter a name that hold meaning for what may be governing the purchase of the License.

Once the data is modified, click the **MODIFY** button. This will submit your information as a changed License Status record and return you to the Lookup screen. You can either chose another record or click the **Cancel** button to return to the IDT Purchasing Application Main Menu.

If you want to delete the chosen record instead, clicking the **DELETE** button will delete the record and return you to the Lookup screen. Or clicking the **Cancel** button will also return you to the Lookup screen, if neither is desired.

Owning Org Codes - Add

> ***Tip:*** *While this originates in the Shared Data Application, there is full access here with MAINT level security or above access.* ***NOTE:*** *Possible use in Purchasing Processing in the future, as a similar field is in the Oracle Financials database that Library Purchasing uses.*

This link on the application's Main Menu goes to the *Add Information to Shared Data – Owning Org Codes* screen and opens to a new empty record container. The fields are:

Org Code	**Required**. Text field; Enter a unique owning org code; supplied by MMO.
Description	**Required**. Text field; Enter a corresponding description of the Org Code; supplied by MMO.

Once the data above is entered, click the appropriate button:

1. The **ADD** button will submit the information as a new Owning Org Codes record and return you to another new empty record container.

If you <u>do NOT want</u> to add a new Owning Org Codes record, clicking the **CANCELADD** button will delete the current empty record container and return you to the Shared Data Application Main Menu.

Tip: ***CANCELADD*** *is a process that deletes an empty record container and is very important to the health of the database's data.*

Owning Org Codes – Modify/Delete

Tip: While this originates in the Shared Data Application, there is full access here with MAINT level security or above access. ***NOTE:*** *Possible use in Purchasing Processing in the future, as a similar field is in the Oracle Financials database that Library Purchasing uses.*

This link on the application's Main Menu goes to the *Modify/Delete Information to Shared Data – Owning Org Codes* screen, and allows a selection from a dropdown of the Owning Org Codes. After making a selection, click the **GO** button. This moves to a second screen, where a change or a deletion can be made. The fields are:

Org Code	**Required**. Text field; Enter a unique owning org code; supplied by MMO.
Description	**Required**. Text field; Enter a corresponding description of the Org Code; supplied by MMO.

Once the data is modified, click the **MODIFY** button. This will submit your information as a changed Owning Org Codes record and return you to the Lookup screen. You can either chose another record or click the **Cancel** button to return to the Shared Data Application Main Menu.

If you want to delete the chosen record instead, clicking the **DELETE** button will delete the record and return you to the Lookup screen. Or clicking the **Cancel** button will also return you to the Lookup screen, if neither is desired.

States – Add

This link on the application's Main Menu goes to the *Add Information to Shared Data - States* screen and opens to a new empty record container. The fields are:

2 Character State Code	**Required**. Text field; Enter the 2 character postal code for the State or foreign country.
Full State Name	**Required**. Text field; Enter the full name for the State or foreign country.

Once the data above is entered, click the appropriate button:

1. The **ADD** button will submit the information as a new States record and return you to another new empty record container.

If you do NOT want to add a new States record, clicking the **CANCELADD** button will delete the current empty record container and return you to the IDT Purchasing Application Main Menu.

> ***Tip:*** ***CANCELADD*** *is a process that deletes an empty record container and is very important to the health of the database's data.*

States – Modify/Delete

This link on the application's Main Menu goes to the *Modify/Delete Lookup Information to Shared Data - States* screen, and allows a selection from a dropdown of the available States. After making a selection, click the **Go** button. This moves to another screen, where a change or a deletion can be made. The fields are:

2 Character State Code	**Required**. Text field; Enter the 2 character postal code for the State or foreign country.
Full State Name	**Required**. Text field; Enter the full name for the State or foreign country.

Once the data is modified, click the **MODIFY** button. This will submit your information as a changed States record and return you to the Lookup screen. You can either chose another record or click the **Cancel** button to return to the IDT Purchasing Application Main Menu.

If you want to delete the chosen record instead, clicking the **DELETE** button will delete the record and return you to the Lookup screen. Or clicking the **Cancel** button will also return you to the Lookup screen, if neither is desired.

Unit of Measure - Add

This link on the application's Main Menu goes to the *Add Information to IDT Purchasing - Unit Of Measure* screen and opens to a new empty record container. The field is:

Measure Name	**Required**. Text field; Enter the name of the Unit of Measure. Use standard abbreviations whenever possible.

Once the data above is entered, click the appropriate button:

1. The **ADD** button will submit the information as a new Unit of Measure record and return you to another new empty record container.

If you do NOT want to add a new Unit of Measure record, clicking the **CANCELADD** button will delete the current empty record container and return you to the IDT Purchasing Application Main Menu.

Tip: ***CANCELADD*** *is a process that deletes an empty record container and is very important to the health of the database's data.*

Unit of Measure - Modify

This link on the application's Main Menu goes to the *Modify/Delete Lookup Information to IDT Purchasing – Unit Of Measure* screen, and allows a selection from a dropdown of the available Unit of Measures. After making a selection, click the **Go** button. This moves to another screen, where a change or a deletion can be made. The field is:

Measure Name	**Required**. Text field; Enter the name of the Unit of Measure. Use standard abbreviations whenever possible.

Once the data is modified, click the **MODIFY** button. This will submit your information as a changed Unit of Measure record and return you to the Lookup screen. You can either chose another record or click the **Cancel** button to return to the IDT Purchasing Application Main Menu.

If you want to delete the chosen record instead, clicking the **DELETE** button will delete the record and return you to the Lookup screen. Or clicking the **Cancel** button will also return you to the Lookup screen, if neither is desired.

Vendor – Add

Tip: *The Vendor support processing/reports can be reached from both the IDT Purchasing Application and the IDT Hardware Inventory Application with MAINT level security access.*

This link on the application's Main Menu goes to the *Add Information to IDT Purchasing – Vendors* screen and opens to a new empty record container. The fields are:

Vendor Name	**Required**. Text field; Enter the Vendor's Name. Do NOT use commas or periods (i.e., INC.) in the text.
Products	Optional. Text field; Enter primary type of products or brand name of product. Separate products with commas.
Address Line 1	Text field; Enter primary address information. Do NOT use commas or periods (i.e., ST.) in the text.
Address Line 2	Text field; Enter additional address information. Do NOT use commas or periods (i.e., ATTN.) in the text.
City	Text field; Enter the City name
State	Dropdown of available States. Select the State (or foreign country) needed.
Zip Code	Text field; Enter the postal Zip Code

Country	Text field; Defaults to USA, but can be changed if foreign country.
Web Site	Text field; Enter URL in lower case include the html coding necessary to open a new window when the URL is clicked. I.E. <A HREF="http://www.apple.com/support/" **target="_blank"**> http://www.apple.com/support</A>
Vendor Comments	Optional. Text field; Enter any additional comments about the Vendor.
Modified-By	Dropdown of available modifiers; Defaults to login user.
Date Created	**Display Only.** Date field; Today's Date in format MM/DD/YYYY.

Once the data above is entered, click the appropriate button:

1. The **ADD** button will submit the information as a new Vendor record and return you to another new empty record container.

If you do NOT want to add a new Vendor record, clicking the **CANCELADD** button will delete the current empty record container and return you to the IDT Purchasing Application Main Menu.

OPTIONAL Vendor Contact Add - If you also have Contact information for this Vendor, click the **ADD CONTACT** button in the lower right of the screen. This will add the Vendor record and move you to an empty record container for Vendor Contact with the Vendor Name chosen from the Vendor record you just added. On this *Add Information to IDT Purchasing - Vendor Contacts* screen, you can complete the remaining fields of *Contact Name, Phone Number, Fax Number, E-Mail Address, and Modified-By,* and click the **ADD** button to add the Vendor Contact. The process returns to another empty record container for Vendor Contact. Here you can either chose/enter information for another Vendor Contact, or click the **CANCELADD** button to return to the IDT Purchasing Application Main Menu.

> ***Tip:*** ***CANCELADD*** *is a process that deletes an empty record container and is very important to the health of the database's data.*

Vendor – Modify/Delete

> ***Tip:*** *The Vendor support processing/reports can be reached from both the IDT Purchasing Application and the IDT Hardware Inventory Application with MAINT level security access.*

This link on the application's Main Menu goes to the *Modify/Delete Lookup Information to IDT Purchasing – Vendors* screen, and allows a selection from a dropdown of the available Vendors.

After making a selection, click the **Go** button. This moves to another screen, where a change or a deletion can be made. The fields are:

Vendor Name	**Required**. Text field; Enter the Vendor's Name. Do NOT use commas or periods (i.e. , INC.) in the text.
Products	Optional. Text field; Enter primary type of products or brand name of product. Separate products with commas.
Address Line 1	Text field; Enter primary address information. Do NOT use commas or periods (i.e. ST.) in the text.
Address Line 2	Text field; Enter additional address information. Do NOT use commas or periods (i.e., ATTN.) in the text.
City	Text field; Enter the City name
State	Dropdown of available States. Select the State (or foreign country) needed.
Zip Code	Text field; Enter the postal Zip Code
Country	Text field; Defaults to USA, but can be changed if foreign country.
Web Site	Text field; Enter URL in lower case include the html coding necessary to open a new window when the URL is clicked. I.E. <A HREF="http://www.apple.com/support/" **target="_blank"**> http://www.apple.com/support</A>
Vendor Comments	Optional. Text field; Enter any additional comments about the Vendor.
Modified-By	Dropdown of available modifiers; Defaults to login user.
Date Modified	**Display Only**. Date field; Today's Date in format MM/DD/YYYY.

Once the data is modified, click the **MODIFY** button. This will submit your information as a changed Vendor record and return you to the Lookup screen.

If deleting the Vendor is desired, clicking the **DELETE** button will delete that Vendor record and return you to the previous Lookup screen. However, if the Vendor has associated Contact records, you will need to delete the associated Contacts before you will be allowed to delete the corresponding Vendor.

If neither modifying or deleting, clicking the **Cancel** button will return you to the Lookup screen. Here you can either chose another Vendor, or click the **Cancel** button to return to the IDT Purchasing Application Main Menu.

<u>OPTIONAL Vendor Contact Modify</u> - If you also have changes in Contact information for this Vendor, click the **MODIFY CONTACT** button in the lower right of the screen. This will modify the Vendor record and move you to the *Modify/Delete Lookup Information to IDT Purchasing - Vendor Contacts* screen for a selection from a Vendor Contact Name dropdown containing just the contacts for that vendor.

Clicking the **GO** button after making a selection will move you to the *Modify/Delete Information to IDT Purchasing - Vendor Contacts* screen, you can complete the modifying of the remaining fields of *Contact Name, Phone Number, Fax Number, E-Mail Address, and Modified-By,* and click the **MODIFY** button to modify the Vendor Contact. The process returns to previous lookup screen. Here you can either select another Vendor Contact, or click the **Cancel** button to return to the IDT Purchasing Application Main Menu.

> ***Tip:*** *If there are no names in the Modify/Delete Lookup Information to IDT Purchasing - Vendor Contacts screen's Vendor Contact Name dropdown, it means this Vendor currently does NOT have any Contacts in the database. A Vendor Contact record needs to be added before there can be a record to modify.*

If deleting the Vendor Contact is desired, clicking the **DELETE** button will delete that Vendor Contact record and return you to the previous Lookup screen. Here you can either chose another Vendor Contact (if any), or click the **Cancel** button to return to the IDT Purchasing Application Main Menu.

Vendor Contacts – Add

> ***Tip:*** *The Vendor Contact support processing/reports can be reached from both the IDT Purchasing Application and the IDT Hardware Inventory Application with MAINT level security access.*

This link on the application's Main Menu goes to the *Add Information to IDT Purchasing – Vendor Contacts* screen and opens to a new empty record container. The fields are:

Vendor Name	**Required**. Dropdown of available Vendors. Select the Vendor's Name needed.
Contact Name	Text field; Enter the name of the contact. Web Pricing or Web Store, Sales, Customer Service, Tech Support can be used if no person given.
Phone Number	Text field; Enter the Contact's phone. ONLY used hyphens to separate the number sets. NO ()'s for area codes.
Fax Number	Text field; Enter the Contact's fax. ONLY used hyphens to separate the number sets. NO ()'s for area codes.
E-Mail Address	Text field; Enter the Contact's email address.
Modified-By	Dropdown of available modifiers; Defaults to login user.
Date Created	**Display Only.** Date field; Today's Date in format MM/DD/YYYY.

Once the data above is entered, click the appropriate button:

1. The **ADD** button will submit the information as a new Vendor Contacts record and return you to another new empty record container.

If you do NOT want to add a new Vendor Contacts record, clicking the **CANCELADD** button will delete the current empty record container and return you to the IDT Purchasing Application Main Menu.

> ***Tip:*** ***CANCELADD*** *is a process that deletes an empty record container and is very important to the health of the database's data.*

Vendor Contacts – Modify/Delete

> ***Tip:*** *The Vendor Contact support processing/reports can be reached from both the IDT Purchasing Application and the IDT Hardware Inventory Application with MAINT level security access.*

This link on the application's Main Menu goes to the *Modify/Delete Lookup Information to IDT Purchasing – Vendor Contacts* screen, and allows a selection from a dropdown of the available Vendor Contacts.

After making a selection, click the **Go** button. This moves to another screen, where a change or a deletion can be made. The fields are:

Vendor Name	**Required**. Dropdown of available Vendors. Select the Vendor's Name needed.
Contact Name	Text field; Enter the name of the contact. Web Pricing or Web Store, Sales, Customer Service, Tech Support can be used if no person given.
Phone Number	Text field; Enter the Contact's phone. ONLY used hyphens to separate the number sets. NO ()'s for area codes.
Fax Number	Text field; Enter the Contact's fax. ONLY used hyphens to separate the number sets. NO ()'s for area codes.
E-Mail Address	Text field; Enter the Contact's email address.
Modified-By	Dropdown of available modifiers; Displays existing modifier's name
Date Modified	**Display Only.** Date field; Today's Date in format MM/DD/YYYY.

Clicking the **GO** button after making a selection will move you to the *Modify/Delete Information to IDT Purchasing - Vendor Contacts* screen, you can complete the modifying of the remaining fields of *Contact Name, Phone Number, Fax Number, E-Mail Address, and Modified-By,* and click the **MODIFY** button to modify the Vendor Contact. The process returns to previous lookup screen. Here you can either select another Vendor Contact, or click the **Cancel** button to return to the IDT Hardware Inventory Application Main Menu.

> ***Tip:*** *If there are no names in the Modify/Delete Lookup Information to IDT Purchasing - Vendor Contacts screen's Vendor Contact Name dropdown, it means this Vendor currently does NOT have any Contacts in the database. A Vendor Contact record needs to be added before there can be a record to modify.*

If deleting the Vendor Contact is desired, clicking the **DELETE** button will delete that Vendor Contact record and return you to the previous Lookup screen. Here you can either chose another Vendor Contact (if any), or click the **Cancel** button to return to the IDT Hardware Inventory Application Main Menu.

Support Files Reports

These reports are mostly used for verification of the information in necessary dropdown lists supporting IDT Purchasing Application.

> ***Tip:*** *Support Files Reports require MAINT Level security or above access.*

Fund Accounts

This link on the application's Main Menu goes to *IDT Purchasing – Fund Accounts Report* (a list of the Fund Accounts) and lists the total number of Fund Accounts records. The definition of the current Fund Accounts are:

Fund Account Names	***Definition***
AA FUNDS	Purchase is on Academic Affairs Funds
AZTEC PARENT ASSOC. FUNDS	Purchase is on Aztec Parent Association Funds
BATS FUNDS	Purchase is on BATS Funds; items transferred to library after the fact
BFA FUNDS	Purchase is on Business Affairs Funds; chargeback to library is done
CERF FUNDS	Purchase is on CERF Funds
COLL. OF EDUC FUNDS	Purchase is on College Of Education Funds
EQUIP. LIDT GENERAL FUNDS	Purchase is on Equip. List General Funds (Given by AA to the Library in the Fall)
FSP FUNDS	Purchase is on FDP Funds
IER LOTTERY FUNDS	Purchase is on Instructional Equipment Replacement Funds (Given by AA to the Library in the Fall)
ITS FUNDS	Purchase is on ITS Funds; items transferred to library after the fact
LIBRARY FUNDS	Purchase is on Library Funds; standard choice
PAID PRINTING FUNDS	Purchase is on Paid Printing Funds; anything used by students

SSRL FUNDS	Purchase is on SSRL Funds
SUPPLE. EQUIP. LIDT GENERAL FUNDS	Purchase is on Supplemental Equipment List Funds (Given by AA to the Library in the Spring)
SUPPLE. IER LOTTERY FUNDS	Purchase is on Supplemental Instructional Lottery Funds (Given by AA to the Library in the Spring)

License Status

This link on the application's Main Menu goes to *IDT Purchasing – License Status Report* (a list of the License Statuses) and lists the total number of License Status records. The definition of the current License Statuses are:

License Status	***Definition***
CEA	Software is covered under the campus enterprise agreement
CONTRACT	Software is covered under a library contract with vendor
NONE	Nothing is covering this
VP	Software is covered under a volume purchase contract

Owning Org Codes

This link on the application's Main Menu goes straight to *Shared Data – Owning Org Codes Report* (a list of the Owning Org Codes) and lists the total number of Owning Org Codes records.

> ***Tip:*** *While this originates in the Shared Data Application, there is full access here with MAINT level security or above access.* ***NOTE:*** *Possible use in Purchasing Processing in the future, as a similar field is in the Oracle Financials database that Library Purchasing uses.*

Org Code	**Description**
40050	SENATE
40111	LIBRARY ADMINIDTRATION
40199	LIBRARY DEVELOPMENT
40205	ACADEMIC COMPUTING TECHNOLOGY
40206	INTERNATIONAL PROGRAMS, OFFICE OF
40401	IVC
40404	IVC - BRAWLEY SITE
40501	ITS
40502	BATS
40601	STUDENT ADMISSIONS
40705	UNDERGRADUATE STUDIES, DEAN'S OFFICE
40715	FRESHMAN SUCCESS
41003	ART, DESIGN, AND ART HIDTORY, SCHOOL OF
42001	SCIENCES, DEANS OFFICE
42002	ASTRONOMY, DEPT. OF

42004	CHEMIDTRY DEPT
43001	BUSINESS ADMINIDTRATION, DEANS OFFICE
46007	MECHANICAL ENGINEERING, DEPT OF
48024	SOCIOLOGY, DEPT OF
49001	EXTENDED STUDIES, DEANS OFFICE
50015	CAREER SERVICES
50030	DISABLED STUDENT SERVICES
50035	EOP AND ETHNIC AFFAIRS
50130	INFORMATION SYSTEM MANAGEMENT, STUDENT AFFAIRS
50190	STUDENT AFFAIRS ADMIN, ASSOC VP
52100	ATHLETICS
60100	PRESIDENT'S OFFICE
60200	DIVERSITY AND EQUITY
60326	UNIVERSITY ADVANCEMENT, VP, OFFICE OF
61010	BUSINESS AND FINANCIAL AFFAIRS, VP
63071	UNIVERSITY COMPUTER OPERATIONS
90100	FOUNDATION, SDSU

States

This link on the application’s Main Menu goes to *Shared Data - States Report* (a list of the US States and several foreign countries we have done business with over the years in both 2-Letter State Code and Full State Name) and lists the total number of States records. The report is sorted by the 2-Letter State Code.

> ***Tip:*** *The States support processing/reports can be reached from both the IDT Purchasing Application and the Shared Data Application.*

Unit of Measure

This link on the application’s Main Menu goes to *IDT Purchasing - Unit Of Measure Report* (a list of Unit of Measures being used for orders) and lists the total number of Unit of Measures records. Currently, the following Unit of Measures are available:

10-PK	5-PK	LAB
12-PK	6-PK	NODE
15-PK	8-PK	PAIR
20-PK	BOTTLE	PKG
2-PK	BOX	REAM
3-PK	DOZEN	ROLL
4-PK	EACH	SET

Vendor

> ***Tip:*** *The Vendor support processing/reports can be reached from both the IDT Purchasing Application and the IDT Hardware Inventory Application.*

This link moves you to the *IDT Purchasing - Vendor Lookup* screen, where you can type in partial values to choose report criteria. Checking an adjacent checkbox will Negate the data entered. The fields are:

Vendor Name	Text field; Enter a Vendor Name.
Web Site	Text field; Enter a URL.
Product Name	Text field; Enter a Product Name.

Once you've entered the criteria, you can choose between **Match Any Field Entered** button or the **Match All Fields Entered** button. The *IDT Purchasing - Vendors Report* will then display the criteria matching records sorted by *Vendor Name* and list the total number of matching records.

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

Click the **Cancel** button to return to the previous lookup screen for another search. If done, click the **Cancel** button there to return to the IDT Purchasing Application Main Menu.

Vendor Contacts

> ***Tip:*** *The Vendor support processing/reports can be reached from both the IDT Purchasing Application and the IDT Hardware Inventory Application.*

This link moves you to the *IDT Purchasing Vendor Contacts Lookup* screen, where you can type in partial values to choose report criteria. Checking an adjacent checkbox will Negate the data entered. The fields are:

Vendor Name	Text field; Enter a Vendor Name.
Contact Name	Text field; Enter a Contact Name. Web Pricing or Web Store, Sales, Customer Service, Tech Support can be used if no person given.
Phone Number	Text field; Enter a Phone Number. Hyphens are used to separate the numbers.
E-Mail Address	Text field; Enter an E-Mail Address.

Once you've entered the criteria, you can choose between 2 reports:

- **Vendor Contact Report By Vendor Name**
- **Vendor Contact Report by Vendor Contact**

Click the radio button on the report you want to run. Only one report can be run at a time. Then click either the **Match Any Field Entered** button or the **Match All Fields Entered** button to begin the search. The *IDT Purchasing – Vendor Contacts Report* will then display the criteria matching records sorted by your choice and list the total number of matching records.

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

Click the **Cancel** button to return to the previous lookup screen for another search. If done, click the **Cancel** button there to return to the IDT Purchasing Application Main Menu.