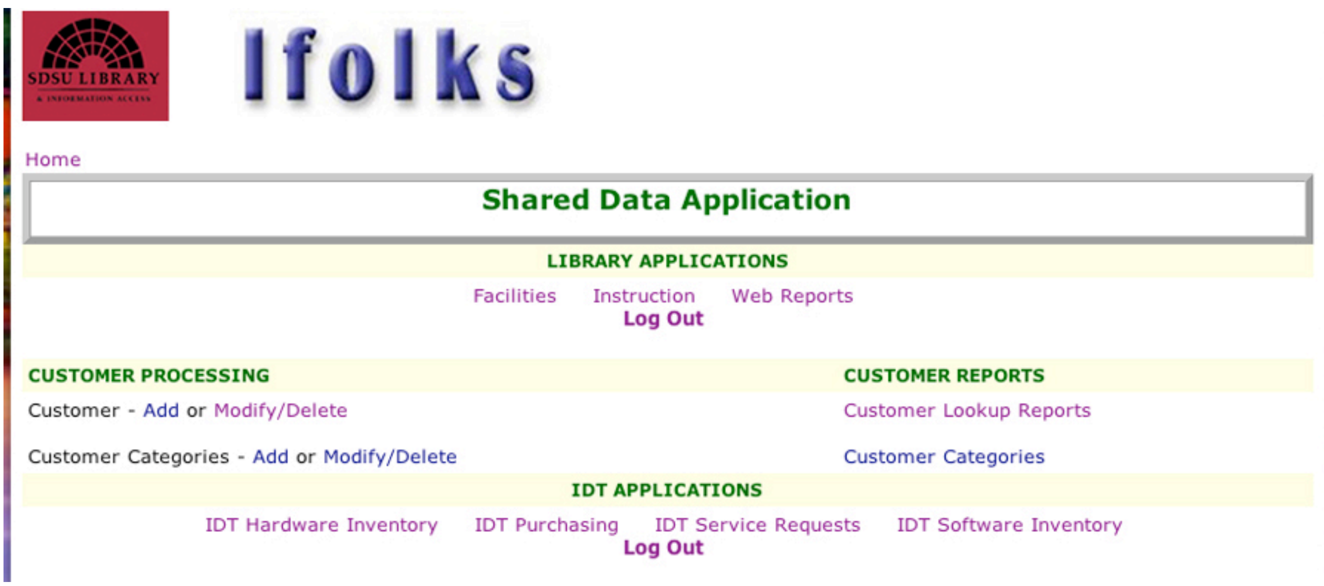
Information and Digital Technologies
February 15, 2008

Shared Data Application
Main Menu
MAINTLESS ACCESS ONLY

The Shared Data Application allows all of the Oracle web application to share common data related to Library/Academic Affairs (outside) customers and Date/Time, as well as provide reports for the department. New Library customers are added/modified by LibAdmin (Mark Lester and Mo Dotson) and IDT (Carol Phillips and Sandy Neer, backup), while IDT (Carol Phillips and Sandy Neer, backup) only adds/modifies any new outside-customers.



Tip: *Remember to delete customer access to any web applications before making a customer inactive (leaving the Library or SDSU or no longer one of our outside customers) in the Shared Data application.* ***See IDT for this.***

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

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

Customer Processing

These links support the creation, modification, and deletion of customer data and customer categories in support of Shared Data and other applications.

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

Customer - Add

This link on the application's Main Menu is used to add a new record in the Oracle Library Shared Data tables, so it immediately moves you to an empty Customer record container. The Customer fields contain information used to support customer access to the rest of the Oracle Application screens. The fields for the *Add Information to Shared Data - Customer* screen are:

First Name	**Required**. Text field; First Name of the Customer
Last Name	**Required**. Text field; Last Name of the Customer; DR. or JR. should be entered after the Last Name.
SR Initials	Text field; 2-3 characters; **Used by IDT Division employees only.**
Customer Category	**Required**. Dropdown of available Customer Categories.
Unit/Group Name	**Required**. Dropdown of available Unit/Group Names with associated Departments.
E-Mail Address	**Required**. Text field; default text in the field is @mail.sdsu.edu (correct this if necessary)
Red ID	Text field; 9-digit; default text is 0. Only needed by employees of the Library; **IDT's outside customers should use 0.**
Room Number	**Required**. Dropdown of available Room Numbers.
Campus Phone Number	**Required**. Text field; 5-digit.
2nd Campus Phone Number	Text field; 5-digit.
Fax Number	Text field; 5-digit.
Cell Phone Number	Text field; 12-digit includes area code.
Number Listed?	Dropdown YES or NO Flag.
Bibliographer?	Dropdown YES or NO Flag.
Dialing Capability	Dropdown of available Dialing Capabilities *(CAMPUS, CAMPUS & LOCAL, OR CAMPUS, LOCAL & SD COUNTY).*
Long Distance	Dropdown YES or NO Flag.

Authorization Code?	
Contact-By	Dropdown E-MAIL or PHONE Flag.
Allowed To Approve?	Dropdown YES or NO Flag.
Unit Head?	Dropdown YES or NO Flag.
Department Chair?	Dropdown YES or NO Flag.
Security Level	**Dropdown that requires ADMIN level access with an IDT login or above to see.**
Password	**Text field that requires ADMIN level access with an IDT login or above to see**; Default password is shown in asterisks.
Active Customer	Dropdown YES or NO Flag.
Comments	Text field; This is for Library employees only.
AA Comments	Text field; **This is for IDT outside customers only.**
Modified By	Dropdown of available modifiers; Defaults to login user
Date Created	**Display only.** Today's Date; Using format MM/DD/YYYY.

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

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

2. If you **do NOT** want to add the new Customer record, clicking the **CANELADD** button will delete the current empty Customer record container and return you to the Shared Data Application Main Menu.

Customer - Modify/Delete

This link on the application's Main Menu goes to the Lookup screen for *Modify/Delete Information to Shared Data - Customer*, where the selection is by a dropdown of *Customer Name*. Use this link to modify existing records/fields in the Oracle Shared Data tables. Make your selection and click the **GO** button to move to the second Modify/Delete screen. The fields are:

First Name	**Required**. Text field; Enter the First Name of the Customer
Last Name	**Required**. Text field; Enter the Last Name of the Customer; DR. or JR. should be entered after the Last Name.
SR Initials	Text field; 2-3 characters; **Used by IDT Division employees only.**
Full Name	**Display Only** of the concatenation of the First and Last Name fields.
Customer Category	**Required**. Dropdown of available Customer Categories.
Unit/Group Name	**Required**. Dropdown of available Unit/Group Names.

E-Mail Address	**Required**. Text field; default text in the field is @mail.sdsu.edu (correct this if necessary)
Department Name	**Display Only** of the associated Department.
Red ID	Text field; 9-digit; default text is 0. Only needed by employees of the Library; **IDT's outside customers should use 0.**
Room Number	Dropdown of available Room Numbers.
Campus Phone Number	**Required**. Text field; 5-digit
2nd Campus Phone Number	Text field; 5-digit
Fax Number	Text field; 5-digit
Cell Phone Number	Text field; 12-digit includes area code.
Number Listed?	Dropdown YES or NO Flag.
Bibliographer?	Dropdown YES or NO Flag.
Dialing Capability	Dropdown of available Dialing Capabilities *(CAMPUS, CAMPUS & LOCAL, OR CAMPUS, LOCAL & SD COUNTY).*
Long Distance Authorization Code?	Dropdown YES or NO Flag.
Contact-By	Dropdown E-MAIL or PHONE Flag.
Allowed To Approve?	Dropdown YES or NO Flag.
Unit Head?	Dropdown YES or NO Flag.
Department Chair?	Dropdown YES or NO Flag.
Security Level	**Dropdown that requires ADMIN level access with an IDT login or above to see.**
Password	**Text field that requires ADMIN level access with an IDT login or above to see**; Default password is shown in asterisks.
Active Customer	Dropdown YES or NO Flag.
Comments	Text field; This is for Library employees only.
AA Comments	Text field; **This is for IDT outside customers only.**
Modified By	Dropdown of available modifiers; Defaults to login user
Date Modified	**Display only.** Today's Date; Using format MM/DD/YYYY.

1. Changing the current data and clicking the **MODIFY** button, will submit the information, modify the record and return you to the previous *Lookup screen*.
2. There is a **DELETE** button – ***Tip:*** *DO NOT USE IT.*
3. If you **do NOT** want to modify this particular Customer record, clicking the **Cancel** button will return you to the previous Lookup screen. Here another choice can be made from the Customer Name dropdown or clicking the **Cancel** button on this screen will return you to the Shared Data Application Main Menu.

Customer Categories - Add

This link on the application's Main Menu goes to the *Add Information to Shared Data - Customer Categories* screen and opens to an empty Customer Categories record container. The field is:

Category Name	**Required**. Text field; Enter a unique Customer Category Name.

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

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

If you do NOT want to add a new Customer Categories record, clicking the **CANCELADD** button will delete the current empty Customer Categories record container and return you to the Shared Data Application Main Menu.

Customer Categories - Modify/Delete

This link on the application's Main Menu goes to the *Modify/Delete Information to Shared Data - Customer Categories* screen, and allows a selection from a dropdown of the current Customer Names. After making a selection, click the **GO** button. This moves to a second screen, where a change or a deletion can be made. The field is:

Category Name	**Required**. Text field; Enter a unique Customer Category Name.

Once the data is modified, click the **MODIFY** button. This will submit your information as a changed Customer Categories record and return you to the previous 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 previous Lookup screen. Or clicking the **Cancel** button will also return you to the previous Lookup screen, if neither is desired.

Customer Reports

These reports are for the verification of customer data used by Shared Data and other applications.

Tip: *Customer Reports require MAINTLESS 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.*

Customer Lookup Reports

This link on the application's Main Menu goes to the *Customer Report Selection Lookup* screen, where search criteria selection can be done. Select from the drop down boxes or type in partial values to choose report criteria. Checking an adjacent checkbox will Negate the selection or data entered. The Lookup fields are as follows and some fields allow for an **OR** choice:

Customer's First Name	Text field; Enter the First Name **OR**
Customer's Last Name	Text field; Enter the Last Name
Customer Category	Text field; Enter the Customer Category **OR** Enter a series of Customer Categories separated by commas,NO spaces **OR** Enter two Customer Categories separated by a semicolon for range in alphabetical order.
Unit	Dropdown selection of available Units Names – Numbers **OR** Enter a series of Unit Numbers separated by commas,NO spaces.
Group	Dropdown selection of available Groups.
Department	Dropdown selection of available Departments.
Red ID	Text field; Enter a partial or full Red ID.
Room Number	Dropdown selection of available Room Numbers **OR** Enter a Room Number **OR** Enter a series of Room Numbers separated by commas,NO spaces.
Active or Inactive Customers	Dropdown YES or NO Flag.
Security Level	**Dropdown that requires ADMIN level access with an IDT login or above to see.**
Dialing Capability	Dropdown selection of available Dialing Capabilities *(CAMPUS, CAMPUS & LOCAL, OR CAMPUS, LOCAL & SD COUNTY).*
Long Distance Authorization Code	Dropdown YES or NO Flag.
Unit Head	Dropdown YES or NO Flag.
Department Chair	Dropdown YES or NO Flag.
Contact-By	Dropdown E-MAIL or PHONE Flag.
Bibliographer	Dropdown YES or NO Flag.
Comments	Text field; This is for Library employees only.
AA Comments	Text field; **This is for IDT outside customers only.**
Modified By	Dropdown selection of available modifiers.

Date Modified	Text field; Enter a single Date Modified **OR** Enter a series of dates separated by commas,NO spaces **OR** Enter two dates separated by a semicolon for range of dates.

Once the criteria are selected, click the radio button on the report you want to run. Only one report can be run at a time. The report choices are below:

CUSTOMER REPORTS

- Full Customer List
- IDT Customer List
- LibAdmin Customer List

UNIT REPORTS

- Customer By Unit
- Red ID By Group/Unit

Next choose between the **Match Any Field Entered** button, or the **Match All Fields Entered** button to search the Customer records and display the chosen report.

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

Customer Categories

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

ACS-FACULTY
ACS-STAFF
FACILITY- ROOM
FOUNDATION EMPLOYEE
GRADUATE TEACHING ASSIDTANT
INVENTORY
LAB
LIB-FACULTY
LIB-STAFF
OFFICE
PATRON
STUDENT ASSIDTANT
TEACHING ASSIDTANT
VISITOR/CONTRACTOR