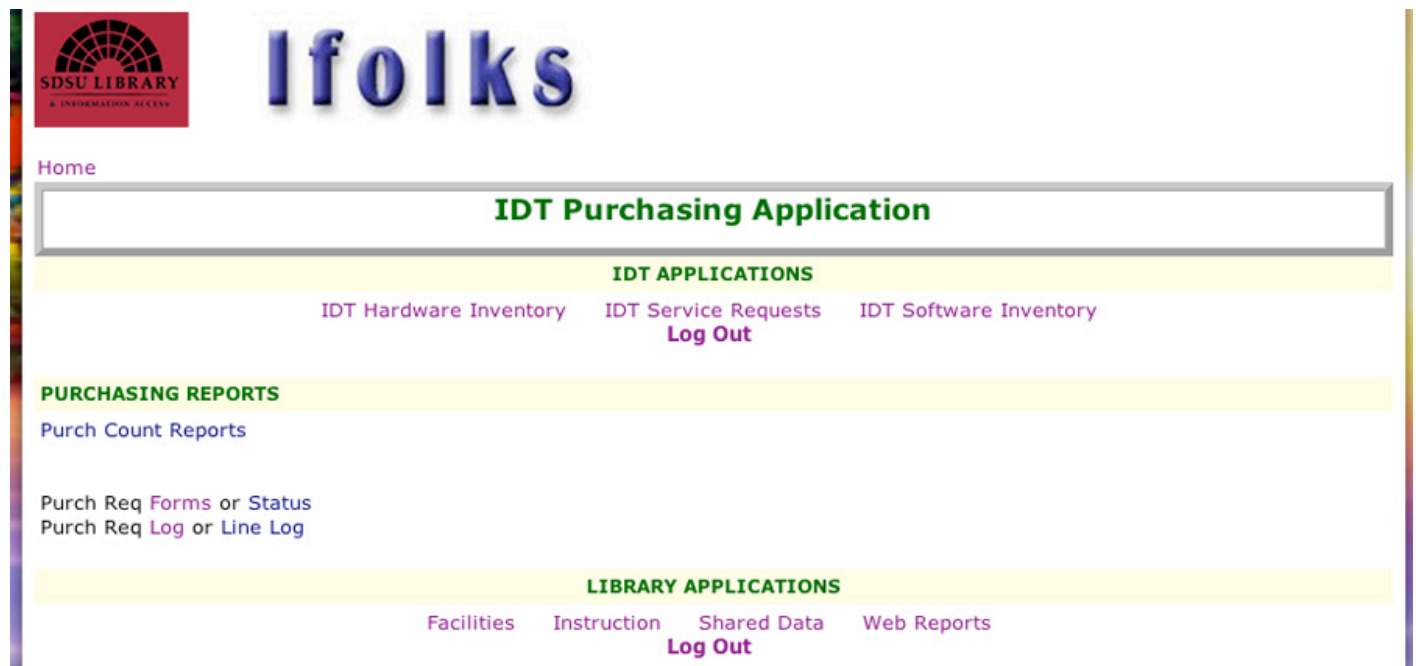# IDT Purchasing Application
## Main Menu
## USER ACCESS ONLY

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 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.*

*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.  <u>This is the only instance where a browser's **BACK** button can be used.</u>*

## 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