# IDT Software Inventory Application
Main Menu
MAINTLESS 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.
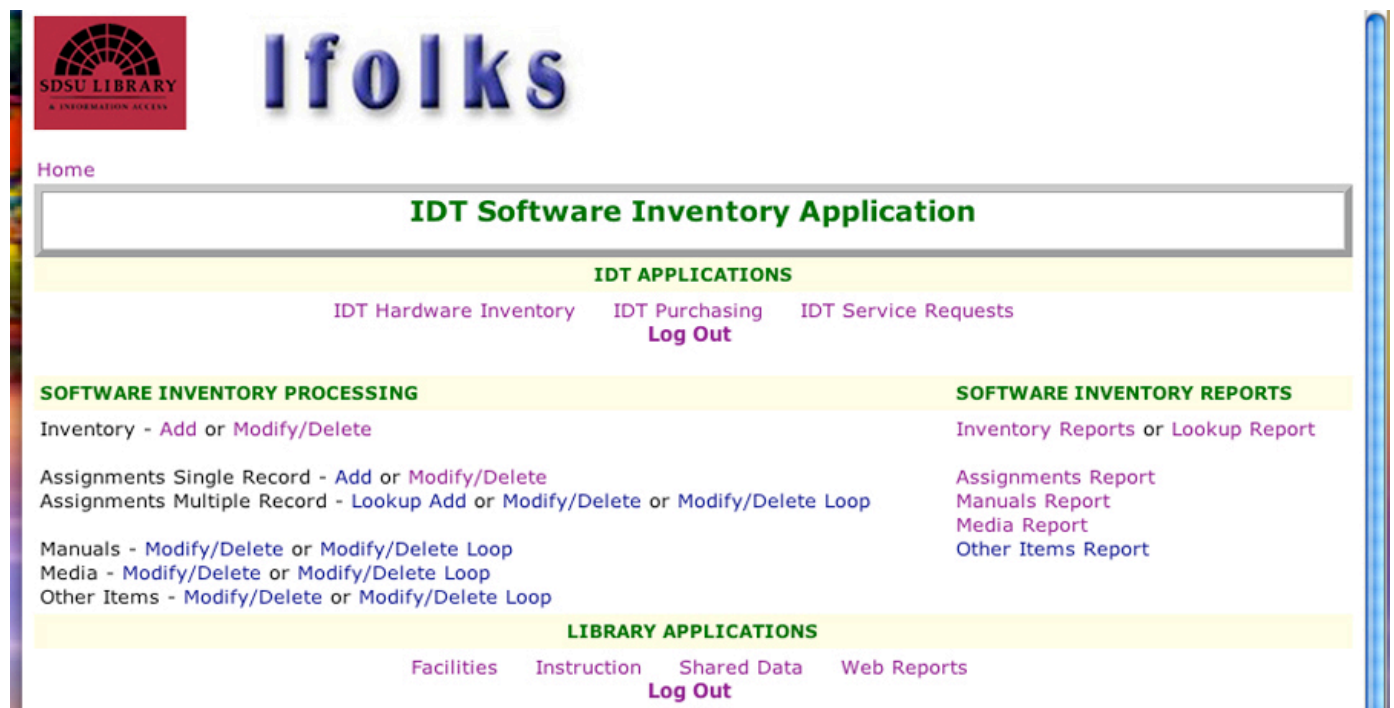
Tip: Data can be entered in Uppercase or Upper/lowercase, but all displays of Data are in Uppercase. Display exceptions are E-Mail Addresses and Web Addresses.

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 Processing

These links support the creation, modification, and deletion of the IDT Software Inventory Application records.

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

Inventory ("Parent") records in the application are for software packages (i.e. Adobe Photoshop) purchased/obtained for free, or for software/manuals or warranty documentation that came with hardware purchased/obtained for free (i.e. HP LaserJet 5000). These records can have "Child records" for assignments, media, manuals, and other items. The cord that binds the "Parent and Child" relationship in the application is based on the Software Inventory (SW) Key (located under the screen title with the creation date) of the Inventory record. The SW Key is also used for the physical filing of items associated with the Inventory record, (i.e. media, manuals, license paperwork, etc.).

> *Tip:* *This is our only Oracle web application that fully utilizes record keys in this way.*

Inventory Add

This link on the application's Main Menu is used to add a new record in the Oracle Software Inventory tables, so it immediately moves you to an empty Inventory record container. The Inventory fields contain information used to support the rest of the assignments, manuals, media, and other items screens. The fields are:

Title	**Required**. The Title of the Software or the Hardware item received. **Use existing titles as a guideline on how to enter a new title** (i.e. All Adobe software starts with "Adobe"), so similar items will appear next to each other in the dropdowns.
Version	**Required**. The version of the item received.
Category	**Required**. Dropdown of available Categories. Defines the usage type of the item.
Product Platform	**Required**. Dropdown of available Product Platforms. Defines the platform required by the software. MULTI is used for items that can be used by more than one OS.
Product Description	Descriptive text about the item's capabilities and planned usage.
Requisition Number	**Required**. Dropdown of available Requisition/PO

	Number, Item Number, and Description information.
Received Date	Item's Received Date by IDT. Use format MM/DD/YYYY.
Title Status	**Required**. Dropdown of available Title Status. Defines the item's purchase (i.e. ORIGINAL, UPGRADE, RENEWAL, etc) status (See ==Support Files Reports== for further explanation of status options).
Man/Warr Vendor	Dropdown of Vendors. The Vendor that will do the warranty repairs; this can be different from the Purchase Vendor.
Warranty Phone Support	Phone number to reach Warranty assistance.
Warranty Web Support	URL for the Warranty Vendor's Tech Support web site.
Support Comments	Information about the item that doesn't fit elsewhere (i.e. restrictions on use, or tech support info.)
Warranty Fax Support	Fax number to get Warranty assistance.
Quantity Ordered	**Required**. Total number of order (i.e. 1 site license = 1, 1 5-pack of single licenses = 1, etc.)
License Type	**Required**. Dropdown of available License Type. Defines the license's use/installation (See ==Support Files Reports== for further explanation of type options).
Quantity Licensed	**Required**. Total number of installed licenses (i.e. 1 site license = 800, 1 5-pack of single licenses = 5, etc.)
CD Key	Text field; Only for an actual CD key. Blank if none available. If it has another name for their supplied number, enter the information under the Support Comments field.
Product ID	Text field; Only for an actual Product ID. Blank if none available. If it has another name for their supplied number, enter the information under the Support Comments field.
Modified By	Dropdown of available modifiers; defaults to login user.
Modified Date (Creation Date)	**Display Only.** Default is Today's Date. Use format MM/DD/YYYY.

Tip: After the Add screen is displayed, write the SW Key near the bottom of the Purchase Requisition paperwork for later use in the physical record keeping of the paperwork.

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

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

2. If you **do NOT** want to add the new Inventory record, clicking the **CANCELADD** button will delete the current empty record container and return you to the IDT Software Inventory 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.*

Inventory Modify/Delete

This link on the application's Main Menu goes to the *Lookup for Modify/Delete in IDT Software Inventory* screen, where the selection is by a dropdown of *Software Title - SW Key - Version - Platform - Req Number* or by *SW Key – Software Title*. Use this link to modify existing records/fields in the Oracle Software Inventory tables. Make your selection and click the **GO** button to move to the second Modify/Delete screen.

From the *Modify/Delete in IDT Software Inventory* screen, you can also use the appropriate **ADD** buttons to create Assignments, Manuals, Media, and Other Items records associated with the selected Inventory record. The Inventory fields are:

Title	**Required**. Text field; Enter the Title of the Software or the Hardware item received. **Use existing titles as a guideline on how to enter a new title** (i.e. All Adobe software starts with "Adobe"), so similar items will appear next to each other in the dropdowns.
Version	**Required**. Text field; Enter the version of the item received.
Category	**Required**. Dropdown of available Categories. Defines the usage type of the item.
Product Platform	**Required**. Dropdown of available Product Platforms. Defines the platform required by the software. MULTI is used for items that can be used by more than one OS.
Product Description	Text field; Enter descriptive text about the item's capabilities and planned usage.
Requisition Number	**Required**. Dropdown of available Requisition/PO Number, Item Number, and Description information.
Purchase Order Number	**Display Only**. Based on the Requisition Number chosen.
Fiscal Year	Dropdown of available Fiscal Years in YYYY/YYYY format with the current Fiscal Year as default. Please modify this, if necessary, to reflect the true Fiscal Year software was purchased. *Tip: This is not attached to the choice of Requisition Number, so software titles added to the database in other than the year in which they where purchased can have their Fiscal Year modified.*
Received Date	Text field; Use format MM/DD/YYYY. Date item

	received by IDT.
Title Status	**Required**. Dropdown of available Title Status. Defines the item's purchase (i.e. ORIGINAL, UPGRADE, RENEWAL, etc) status (See **Support Files Reports** for further explanation of status options).
Upgrade Status	Dropdown. Defines the item's current status (i.e. CURRENT USE, DISCONTINUED USE, UPGR, UPG-PARTIAL, etc). This field is used in support of Archive Processing (See **Support Files Reports** for further explanation of status options).
Req. Unit	**Display Only**. Library Unit that requested the purchased item.
Purchase Justification	**Display Only**. Reason for the purchase.
Purchase Vendor	**Display Only**. The Vendor who supplied the items purchased.
Purch-License Status	**Display Only**. License "purchased under" status (i.e. NONE, CEA, CONTRACT or VP) (See **Support Files Reports** for further explanation of status options).
Man/Warr Vendor	Dropdown of available Vendors; selection depends on the vendor who **repairs** the equipment; this can be different from the Purchase Vendor.
Warranty Phone Support	Text field; Enter the Phone number to reach Warranty assistance.
Warranty Web Support	Text field; Enter the URL for the Warr. Vendor's Tech Support web site.
Support Comments	Text field; Enter any information about the item that doesn't fit elsewhere (i.e. restrictions on use, or tech support info.)
Warranty Fax Support	Text field; Enter the Fax number to get Warranty assistance.
Quantity Ordered	**Required**. Text field; Enter the total number of license order (i.e. 1 site license = 1, 1 5pack of single licenses = 1, etc.)
License Type	**Required**. Dropdown of available License Type. Defines the license's use/installation (See **Support Files Reports** for further explanation of type options).
Quantity Licensed	**Required**. Text field; Enter the total number of installed licenses (i.e. 1 site license = 800, 1 5-pack of single licenses = 5, etc.)
Toss Status	This field is used in support of **Archive Processing only, otherwise do not select a status** (See **Support Files Reports** for further explanation of status options).
CD Key	Text field; Only for an actual CD key. Blank if none available. If it has another name for their supplied number, enter the information under the Support Comments field.

Product ID	Text field; Only for an actual Product ID. Blank if none available. If it has another name for their supplied number, enter the information under the Support Comments field.
Modified By	Dropdown of available modifiers; defaults to login user.
Modified Date	**Display Only.** Default is Today's Date. Use 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*.

   ❖ If you are initially creating this SW Key and need to add associated records, use the appropriate **Add** buttons: **Add Assignments, Add Media, Add Manuals**, or **Add Other items** first. Each will display a Pop-Up screen to handle their processes; see <mark>**Pop-Up Add Buttons**</mark> below for further explanation on each Add process. When you are done with these Pop-Up Add processes and back at the Inventory Modify/Delete screen, 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 the Inventory record, clicking the **Cancel** button will return you to the IDT Software Inventory Application Main Menu.

<mark>Pop-Up Add Buttons</mark>

Add Assignments button uses the same screen/fields as the Assignments Single Record Add link from the Main Menu does, but presents the screen here as a Pop-Up screen. The fields for the empty Assignment record container are:

Title	**Display Only.** Displays current information that can be used by the new Assignment.
Version - Platform	**Display Only.** Displays current information that can be used by the new Assignment.
Image	Dropdown of available Images. Select the appropriate Image for the Software. If not known, leave it at *Image Name* (See <mark>**Support Files Reports**</mark> for further explanation of images). *Tip: See the **Image Cheat Sheet** for SW Keys associated with named Images.*
Serial Number	Text field; Enter the appropriate Software Serial Number for the Assignment. *Tip: The default text is **NO SERIAL #** and it must be removed, if that is NOT the serial number.*
Assigned SW Customer	Dropdown of available Customers. Select the appropriate Customer for the Assignment.

CPU Assigned – Division Number - HW Customer	Dropdown of available CPUs and associated information. Select the appropriate CPU Barcode for the Assigned SW Customer. *Tip:* *If the CPU Barcode Customer does NOT match the Assigned SW Customer, see the **Assignment Scenario Cheat Sheet.***
Modified By	Dropdown of available modifiers; defaults to login user.
Modified Date (Creation Date)	**Display Only.** Default is Today's Date. Use format MM/DD/YYYY

Once your information is chosen/entered, click on:

1. The **ADD** button to submit the information as a new single Assignment record. Click the **OK** button at the Data Added message to close the Pop-Up screen and return to the Inventory record's Modify/Delete screen.
2. The **CANCELADD** button to delete the empty Assignment record container and return to the Inventory record's Modify/Delete screen.

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

*Tip: When entering a new Software Inventory record, **always add at least 1 assignment record.** If assignee is unknown, use Available Software and the 0 0000 00000 0000 barcode for the assignment.*

Add Media button will display a Pop-Up screen with the following fields:

Title	**Display Only.** Displays current information that can be used by the new Media.
Version – Platform	**Display Only.** Displays current information that can be used by the new Media.
Media Type	**Required**. Dropdown of available Media Types.
Media Quantity	**Required**. Text field; Enter the quantity of the Media. How many of the same media title? = Quantity
Media Location	**Required**. Dropdown of available Media Locations *(See Support Files Reports for further explanation of media stored locations).*
Part Number	**Required**. Text field; Enter the Part Number of the Media. If none, enter a zero.
Media Title	**Required**. Text field; Enter the title of the Media
Modified By	Dropdown of available modifiers; defaults to login user.
Modified Date	**Display Only.** Default is Today's Date. Use format MM/DD/YYYY

Once your information is chosen/entered, click on:

1. The **ADD** button to submit the information as a new Media record. Click the **OK** button at the Data Added message to close the Pop-Up screen and return to the Inventory record's Modify/Delete screen.
2. The **ADDLOOP** button to submit the information as a new Media record and return to the same Pop-Up screen for another new record to be created. *Tip: Use this if several media items will be added for the Software Title.*
3. The **CANCELADD** button to delete the empty Media record container and return to the Inventory record's Modify/Delete screen.

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

Tip: Add Media link is only available from the Modify/Delete in IDT Software Inventory screen.

Add Manuals button will display a Pop-Up screen with the following fields:

Title	**Display Only.** Displays current information that can be used by the new Manual.
Version - Platform	**Display Only.** Displays current information that can be used by the new Manual.
Manuals Quantity	**Required**. Text field; Enter the quantity of the Manual. How many of the same manual title? = Quantity
Manuals Location	**Required**. Dropdown of available Manuals Location *(See* ==*Support Files Reports*== *for further explanation of manual stored locations).*
Part Number	**Required**. Text field; Enter the Part Number of the Manual. If none, enter a zero.
Manuals Title	**Required**. Text field; Enter the title of the Manual
Modified By	Dropdown of available modifiers; defaults to login user.
Modified Date	**Display Only.** Default is Today's Date. Use format MM/DD/YYYY

Once your information is chosen/entered, click on:

1. The **ADD** button to submit the information as a new Manual record. Click the **OK** button at the Data Added message to close the Pop-Up screen and return to the Inventory record's Modify/Delete screen.
2. The **ADDLOOP** button to submit the information as a new Manual record and return to the same Pop-Up screen for another new record to be created. *Tip: Use this if several manual items will be added for the Software Title.*

3. The **CANCELADD** button to delete the empty Manuals record container and return to the Inventory record's Modify/Delete screen.

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

*Tip: **Add Manuals** link is only available from the Modify/Delete in IDT Software Inventory screen.*

Add Other items button will display a Pop-Up screen with the following fields:

Title	**Display Only.** Displays current information that can be used by the new Other Items.
Version - Platform	**Display Only.** Displays current information that can be used by the new Other Items.
OtherItems Quantity	**Required**. Text field; Enter the quantity of the Other Items. How many of the same other item title? = Quantity
OtherItems Location	**Required**. Dropdown of the Other Items Location *(See **Support Files Reports** for further explanation of other items stored locations).*
Part Number	**Required**. Text field; Enter the Part Number of the Other Items. If none, enter a zero.
OtherItems Title	**Required**. Text field; Enter the title of the Other Items.
Modified By	Dropdown of available modifiers; defaults to login user.
Modified Date	**Display Only.** Default is Today's Date. Use format MM/DD/YYYY

Once your information is chosen/entered, click on:

1. The **ADD** button to submit the information as a new Other Items record. Click the **OK** button at the Data Added message to close the Pop-Up screen and return to the Inventory record's Modify/Delete screen.
2. The **ADDLOOP** button to submit the information as a new Other Items record and return to the same Pop-Up screen for another new record to be created. *Tip: Use this if several media items will be added for the Software Title.*
3. The **CANCELADD** button to delete the empty Other Items record container and return to the Inventory record's Modify/Delete screen.

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

*Tip: **Add Other Items** link is only available from the Modify/Delete in IDT Software Inventory screen.*

Assignments Single Record Add

This link on the application's Main Menu goes to the *Inventory Lookup for Single Record ADD in IDT Software Inventory – Assignments* screen, where the selection is by *Software Title - Version - SW Key - Req Number* or by *SW Key – Software Title*. Make your selection and click the **GO** button to move to the Add screen. The fields for the *Assignments Single Record Add* screen are:

Title	**Display Only.** Displays current information that can be used by the new Assignment.
Version - Platform	**Display Only.** Displays current information that can be used by the new Assignment.
Image	Dropdown of available Images. Select the appropriate Image for the Software. If not known, leave it at *Image Name* (See **Support Files Reports** for further explanation of images). *Tip: See the **Image Cheat Sheet** for SW Keys associated with named Images.*
Serial Number	Text field; Enter the appropriate Software Serial Number for the Assignment. *Tip: The default text is **NO SERIAL #** and it must be removed, if that is NOT the serial number.*
Assigned SW Customer	Dropdown of available Customers. Select the appropriate Customer for the Assignment.
CPU Assigned – Division Number - HW Customer	Dropdown of available CPUs and associated information. Select the appropriate CPU Barcode for the Assigned SW Customer. *Tip: If the CPU Barcode Customer does NOT match the Assigned SW Customer, see the **Assignment Scenario Cheat Sheet.***
Modified By	Dropdown of available modifiers; defaults to login user.
Modified Date	**Display Only.** Default is Today's Date. Use format MM/DD/YYYY

This allows a choice for Image, Assigned SW Customer, Inventory Barcode (Customer), and Modified By. Then:

1. Completing the choices and clicking the **ADD** button, will submit the information as a new record and return you to the previous Lookup screen.
2. If you **do NOT** want to add a new Assignment record, clicking **CANCELADD** button will delete the empty record container and return you to the previous Lookup screen.

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

Here you can repeat the process for the software of your choice or click the **Cancel** button to return to the Main Menu.

> **Tip:** *Use the above link, if you **do NOT** want to retain the previous Image and S/N data for each subsequent add. If you **DO** want to retain that data and add multiple assignments, then use the Assignments Multiple Record – Lookup Add link.*

Assignments Single Record Modify/Delete

This link on the application's Main Menu goes to the *Lookup for Single Record Modify/Delete in IDT Software Inventory - Assignment* screen, where the selection is by *Title - Version - SW Key - Platform – Customer – Inventory Barcode* or by *Customer –Title - Version - SW Key – Platform*. After making a selection, click the **GO** button. This moves to another screen, where a change can be made. The *Single Record Modify/Delete in IDT Software Inventory – Assignments* fields are:

Title	**Display Only.** Displays current information that can be used by the new Assignment.
Version - Platform	**Display Only.** Displays current information that can be used by the new Assignment.
Image	Dropdown with current Image displayed (See **Support Files Reports** for further explanation of images). **Tip:** *See the **Image Cheat Sheet** for SW Keys associated with named Images.*
Serial Number	**Required**. Text field; Enter the appropriate Software Serial Number for the Assignment. **Tip:** *The default text is **NO SERIAL #** and it must be removed, if that is NOT the serial number.*
Assigned SW Customer	Dropdown with current Assigned SW Customer displayed.
CPU Assigned – Division Number - HW Customer	Dropdown with current CPU Assigned (barcode) and HW Customer displayed.
State Found Number	**Display Only and based on the CPU Assigned previously**
Division Number	**Display Only and based on the CPU Assigned previously**
Loc	**Display Only and based on the CPU Assigned previously**
Modified By	Dropdown of available modifiers displaying current Modified By name that can be used by the new Assignment. Select new information, if name does not match the person modifying the record.
Modified Date	**Display Only.** Default is Today's Date. Uses format MM/DD/YYYY

> *Tip:* *The displayed information related to Hardware is based on previous selections <u>and will not change</u> on the screen when a new CPU is chosen, until after the **MODIFY** button is selected.*

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

If you want to delete the chosen record instead, clicking the **DELETE** button will delete that record and return you to the previous Lookup screen. Or clicking the **Cancel** button will return you to the previous Lookup screen, if neither is desired. Here another record can be chosen or you can click the **Cancel** button to return to the IDT Software Inventory Application Main Menu.

Assignments Multiple Record Lookup Add

This link on the application's Main Menu goes to the *Lookup for Multiple Record ADD in IDT Software Inventory - Assignments* screen, where the selection is by *SW Key – Title – Version – Image Name – Assign Key*. Make your selection and click the **GO** button. This moves to another screen, where multiple adds can be made from existing information.

> *Tip:* *Use the above link, if you **DO** want to retain the previous Image and S/N data for each subsequent add.*

The fields for the *Multiple Record Add in IDT Software Inventory – Assignments* screen display the current information of the record you are using to base each subsequent add on in the Assignment's Add record container. The fields are:

Title	**Display Only.** Displays current information that can be used by the new Assignment.
Version - Platform	**Display Only.** Displays current information that can be used by the new Assignment.
Assigned SW Customer	Dropdown with current record's SW Customer displayed. Select the appropriate Customer for the new Assignment.
Serial Number	Text field; Displays current information that can be used by the new Assignment. If the data is not correct, enter the appropriate Software Serial Number for the new Assignment. *Tip: The default text is **NO SERIAL #** and it must be removed, if that is NOT the serial number.*
CPU Assigned – Division Number -HW Customer	Dropdown of available CPUs and associated information displaying current information. Select new information as needed.
Image	Dropdown of available Images displaying current Image that can be used by the new Assignment. Select new information as

	needed.
Modified By	Dropdown of available modifiers displaying current Modified By name that can be used by the new Assignment. Select new information, if name does not match the person modifying the record.
Modified Date	**Display Only.** Default is Today's Date. Uses format MM/DD/YYYY

*Tip: In the **ADDLOOP** process, the above fields will retain the previous add's information to allow you to use it again for the next add. If you change any field in the current add record container, the next add record container in the process will display the change made in the previous one.*

You can:

1. Complete the choices and click the **ADD** button (you only add 1 record based on the previous information), to submit the information as a new record and return you to the previous Lookup screen.
2. Or after completing the choices, click the **ADDLOOP** button (you add multiple records based on the previous information) to submit the information as a new record. The process will return you another add screen with the previous ADD's information for the next add. The process will continue looping in this fashion until you either click the **ADD** button on your last record or click the **CANCELADD** button on the next one that you don't need to add. Either choice will return you to the previous Lookup screen.
3. If you <u>do NOT want</u> to add a new Assignment record, clicking **CANCELADD** button will delete the Assignment's current record container and return you to the previous Lookup screen.

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

Here you can repeat the process for the software of your choice or click the **Cancel** button to return to the IDT Software Inventory Application Main Menu.

Assignments Multiple Record Modify/Delete
This link on the application's Main Menu goes to a *Modify/Delete Multiple Records Lookup for IDT Software Inventory – Assignments* screen. Here you can select from the dropdown boxes or type in partial values to choose criteria. Lookup criteria options are:

Title	Dropdown of available Software Inventory Titles – SW Keys
Version - Platform	Dropdown of available Versions – Platforms
Image	Dropdown of available Image names
Serial Number	Text field; Type a Serial Number

Assigned SW Customer	Dropdown of available Customers
CPU Assigned – Division Number - HW Customer	Dropdown of available CPU Barcodes and their assigned Customer in Hardware Inventory.
Division Number	Text field; Enter a Division Number
Modified By	Dropdown will allow for a choice to Customers in IDT who may have modified the record.
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; as in everything but a matching criteria. Once you've entered the criteria, you can choose between the **Match Any Field Entered** button or the **Match All Fields Entered** button.

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

The Match process displays a report of all records matching the criteria in a Pop-Up screen to allow a quick verification that you have the records you really want the change. At the same time, your original window moves to another screen, where changes can be made. The *Modify/Delete Multiple Records in IDT Software Inventory – Assignments* fields are:

Title	**Display Only.** Displays current information that can be used by the Assignment being modified.	
Version - Platform	**Display Only.** Displays current information that can be used by the Assignment being modified.	
Image	Dropdown of available Images. Select the appropriate Image for the Software. If not known, leave it at *Image Name* (See **Support Files Reports** for further explanation of images). **Tip:** *See the **Image Cheat Sheet** for SW Keys associated with named Images.*	Drop... for th **Supp** *Tip: name*
Serial Number	Enter the appropriate Software Serial Number for the Assignment.	
Assigned SW Customer	Select the appropriate Customer for the Assignment.	
CPU Assigned – Division Number - HW Customer	Enter the appropriate CPU Barcode for the Assignment.	
Division Number	**Display Only.** This is a visual cue only when changing records assigned to a particular CPU.	
Modified By	Dropdown of available modifiers displaying current Modified By name that can be used by the new Assignment. Select new information, if name does not	

	match the person modifying the record.
Modified Date	**Display Only.** Default is Today's Date. Uses format MM/DD/YYYY

Tip: *To modify a field on multiple records, a check in the adjacent checkbox is required for each field being modified on all records found.*

Once the data is modified and the necessary adjacent checkbox is checked, click the **MODIFYMULTIPLE** button. This will submit your information as changed Assignment records (the change will be the same for all records) and return you to the Lookup screen. You can either chose another criteria set or click the **Cancel** button to return to the IDT Software Inventory Application Main Menu.

If you want to delete the chosen records instead, clicking the **DELETEMULTIPLE** button will delete all the record matching the criteria set and return you to the Lookup screen. Or clicking the **Cancel** button will also return you to the Lookup screen, if neither is desired. Here another criteria set can be searched or you can click the **Cancel** button to return to the IDT Software Inventory Application Main Menu.

Assignments Multiple Record Modify/Delete Loop

This link on the application's Main Menu goes to a *Lookup for Multiple Record Modify/Delete Loop in IDT Software Inventory – Assignments* screen and allows a selection by *SW Key - Title* Or by *CPU Assigned – Division Number – HW Customer* from dropdowns. After making a selection, click the **GO** button. The next screen displays the fields below one assignment record at a time for either the SW Key or the CPU Assigned:

Title	**Display Only.** Displays current information that can be used by the Assignment being modified.
Version - Platform	**Display Only.** Displays current information that can be used by the Assignment being modified.
Image	**Display Only.** Displays current information that can be used by the Assignment being modified.
Serial Number	Text field; Displays current information that can be used by the Assignment being modified. If the data is not correct, enter the appropriate Software Serial Number for the new Assignment. *Tip: The default text is **NO SERIAL #** and it must be removed, if that is NOT the serial number.*
Assigned SW Customer	Dropdown of available SW Customers with the current Customer displayed. Select the appropriate Customer for the Software Assignment being modified.
CPU Assigned – Division Number - HW Customer	Dropdown of available CPUs and associated information displaying current information. Select the appropriate CPU Barcode for the Software Assignment.

15

State Found Number	**Display Only.** Based on the CPU Assigned previously.
Division Number	**Display Only.** Based on the CPU Assigned previously.
Loc	**Display Only.** Based on the CPU Assigned previously.
Modified By	Dropdown of available modifiers displaying current Modified By name that can be used by the new Assignment. Select new information, if name does not match the person modifying the record.
Modified Date	**Display Only.** Default is Today's Date. Uses format MM/DD/YYYY

Once the data is modified, click the **MODIFYLOOP** button. This will submit your information as a changed Assignment record and move to the next record in the Loop.

If you did not want to change the record displayed but need to move to the next record in the loop, click the **NEXTRECORD** button. This will move you to the next record in the Loop without altering any field (including the Modified Date) of the previous record.

If you select the **DELETELOOP** button, you will delete all Assignment records for either the SW Key or the CPU Assigned that was used as the criteria for the Multiple Record Modify/Delete Loop. **BE CAREFUL** – If this is NOT what you truly want – there is no **UNDO**.

Or clicking the **Cancel** button will also return you to the previous Lookup screen, if neither is desired. Here you can repeat the process for another lookup of your choice or click the **Cancel** button to return to the IDT Software Inventory Application Main Menu.

Manuals Modify/Delete

This link on the application's Main Menu goes to the *Lookup for Modify/Delete in IDT Software Inventory – Manuals* screen, and allows a selection of either *Part Number – Manual Title – SW Key* OR *Manual Title – Part Number – SW Key* from a dropdown. After making a selection, click the **GO** button. This moves to a second screen, where a change can be made. The fields are:

Title	**Display Only.** Displays current information that can be used by the Manual being modified.
Version - Platform	**Display Only.** Displays current information that can be used by the Manual being modified.
Manuals Quantity	**Required**. Text field; Enter the quantity of the Manual. How many of the same manual title? = Quantity.
Manuals Location	**Required**. Dropdown of available Manuals Location *(See Support Files Reports for further explanation of manual stored locations).*
Part Number	**Required**. Text field; Enter the Part Number of the

	Manual. If none, enter a zero.
Manuals Title	**Required**. Text field; Enter the title of the Manual.
Modified By	Dropdown of available modifiers; defaults to login user.
Modified Date	**Display Only.** Default is Today's Date. Uses format MM/DD/YYYY

Once the data is modified, click the **MODIFY** button. This will submit your information as a changed Manuals record and return you to the previous Lookup screen. You can either chose another record here or click the **Cancel** button to return to the IDT Software Inventory 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. Here you can repeat the process for another lookup of your choice or click the **Cancel** button to return to the IDT Software Inventory Application Main Menu.

Manuals Modify/Delete Loop

This link on the application's Main Menu goes to a *Lookup for Modify/Delete Loop in IDT Software Inventory – Manuals* screen, and allows a selection of *SW Key – Title* from a dropdown. After making a selection, click the **GO** button. This moves to a second screen, where a change can be made. The fields are:

Title	**Display Only.** Displays current information that can be used by the Manuals being modified.
Version - Platform	**Display Only.** Displays current information that can be used by the Manuals being modified.
Manuals Quantity	**Required**. Text field; Enter the quantity of the Manual. How many of the same manual title? = Quantity
Manuals Location	**Required**. Dropdown of available Manuals Location *(See Support Files Reports for further explanation of manual stored locations).*
Part Number	**Required**. Text field; Enter the Part Number of the Manual. If none, enter a zero.
Manuals Title	**Required**. Text field; Enter the title of the Manual
Modified By	Dropdown of available modifiers; defaults to login user.
Modified Date	**Display Only.** Default is Today's Date. Uses format MM/DD/YYYY

Once the data is modified, click the **MODIFYLOOP** button. This will submit your information as a changed Manuals record and move to the next record in the Loop.

If you did not want to change the record displayed but need to move to the next record in the loop, click the **NEXTRECORD** button. This will move you to the next record in the Loop without altering any field (including the Modified Date) of the previous record.

If you select the **DELETELOOP** button, you will delete all Manual records for the SW Key that was used as the criteria for the Modify/Delete Loop. **BE CAREFUL** – If this is NOT what you truly want – there is no **UNDO**.

Or clicking the **Cancel** button will also return you to the Lookup screen, if neither is desired. Here you can repeat the process for another lookup of your choice or click the **Cancel** button to return to the IDT Software Inventory Application Main Menu.

> *Tip:* **Add Manuals** *link is only available from the Inventory Modify/Delete screen.*

Media Modify/Delete

This link on the application's Main Menu goes to the *Lookup for Modify/Delete in IDT Software Inventory – Media* screen, and allows a selection of either Part Number – Media Title – SW Key or Media Title – Part Number – SW Key from a dropdown. After making a selection, click the **GO** button. This moves to a second screen, where a change can be made. The fields are:

Title	**Display Only.** Displays current information that can be used by the Media being modified.
Version - Platform	**Display Only.** Displays current information that can be used by the Media being modified.
Media Type	**Required**. Dropdown of available Media Types. Select the type of the Media being modified.
Media Quantity	**Required**. Text field; Enter the quantity of the Media. How many of the same media title? = Quantity.
Media Location	**Required**. Dropdown of available Media Location *(See* **Support Files Reports** *for further explanation of media stored locations).*
Part Number	**Required**. Text field; Enter the part number of the Media. If none, enter a zero.
Media Title	**Required**. Text field; Enter the title of the Media
Modified By	Dropdown of available modifiers; defaults to login user.
Modified Date	**Display Only.** Default is Today's Date. Uses format MM/DD/YYYY

Once the data is modified, click the **MODIFY** button. This will submit your information as a changed Media record and return you to the Lookup screen. You can either chose another record or click the **Cancel** button to return to the IDT Software Inventory 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. Here you can repeat

the process for another lookup of your choice or click the **Cancel** button to return to the IDT Software Inventory Application Main Menu.

Media Modify/Delete Loop

This link on the application's Main Menu goes to a *Lookup for Modify/Delete Loop in IDT Software Inventory – Media* screen, and allows a selection of *SW Key – Title* from a dropdown. After making a selection, click the **GO** button. This moves to a second screen, where a change can be made. The fields are:

Title	**Display Only.** Displays current information that can be used by the Media being modified.
Version - Platform	**Display Only.** Displays current information that can be used by the Media being modified.
Media Type	**Required**. Dropdown of available Media Types. Select the type of the Media being modified.
Media Quantity	**Required**. Text field; Enter the quantity of the Media. How many of the same media title? = Quantity.
Media Location	**Required**. Dropdown of available Media Location *(See* **Support Files Reports** *for further explanation of media stored locations).*
Part Number	**Required**. Text field; Enter the part number of the Media. If none, enter a zero.
Media Title	**Required**. Enter the title of the Media
Modified By	Dropdown of available modifiers; defaults to login user.
Modified Date	**Display Only.** Default is Today's Date. Uses format MM/DD/YYYY

Once the data is modified, click the **MODIFYLOOP** button. This will submit your information as a changed Media record and move to the next record in the Loop.

If you did not want to change the record displayed but need to move to the next record in the loop, click the **NEXTRECORD** button. This will move you to the next record in the Loop without altering any field (including the Modified Date) of the previous record.

If you select the **DELETELOOP** button, you will delete all Media records for the SW Key that was used as the criteria for the Modify/Delete Loop. **BE CAREFUL** – If this is NOT what you truly want – there is no **UNDO**.

Or clicking the **Cancel** button will also return you to the Lookup screen, if neither is desired. Here you can repeat the process for another lookup of your choice or click the **Cancel** button to return to the IDT Software Inventory Application Main Menu.

> *Tip: Add Media link is only available from the Inventory Modify/Delete screen.*

Other Items Modify/Delete

This link on the application's Main Menu goes to a *Lookup for Modify/Delete Loop in IDT Software Inventory – Other Items* screen, and allows a selection of either *Part Number – Other Items Title – SW Key* OR *Other Items Title – Part Number – SW Key* from a dropdown. After making a selection, click the **GO** button. This moves to a second screen, where a change can be made. The fields are:

Title	**Display Only.** Displays current information that can be used by the Other Items being modified.
Version - Platform	**Display Only.** Displays current information that can be used by the Other Items being modified.
Other Items Quantity	**Required**. Text field; Enter the quantity of the Other Item. How many of the same other items title? = Quantity.
Other Items Location	**Required**. Dropdown of available Other Items Location *(See **Support Files Reports** for further explanation of other items stored locations).*
Part Number	**Required**. Text field; Enter the part number of the Other Item. If none, enter a zero.
Other Items Title	**Required**. Text field; Enter the title of the Other Item
Modified By	Dropdown of available modifiers; defaults to login user.
Modified Date	**Display Only.** Default is Today's Date. Uses format MM/DD/YYYY

Once the data is modified, click the **MODIFY** button. This will submit your information as a changed Other Items record and return you to the Lookup screen. You can either chose another record or click the **Cancel** button to return to the IDT Software Inventory 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. Here you can repeat the process for another lookup of your choice or click the **Cancel** button to return to the IDT Software Inventory Application Main Menu.

Other Items Modify/Delete Loop

This link on the application's Main Menu goes to a *Lookup for Modify/Delete Loop in IDT Software Inventory - Other Items* screen, and allows a selection of *SW Key – Title* from a dropdown. After making a selection, click the **GO** button. This moves to a second screen, where a change can be made. The fields are:

Title	**Display Only.** Displays current information that can be used by the Other Items being modified.
Version - Platform	**Display Only.** Displays current information that can be used by the Other Items being modified.
Other Items	**Required**. Text field; Enter the quantity of the Other

Quantity	Item. How many of the same other items title? = Quantity.
Other Items Location	**Required**. Dropdown of available Other Items Location *(See ==Support Files Reports== for further explanation of other items stored locations).*
Part Number	**Required**. Text field; Enter the part number of the Other Item. If none, enter a zero.
Other Items Title	**Required**. Text field; Enter the title of the Other Item
Modified By	Dropdown of available modifiers; defaults to login user.
Modified Date	**Display Only.** Default is Today's Date. Uses format MM/DD/YYYY

Once the data is modified, click the **MODIFYLOOP** button. This will submit your information as a changed Other Items record and move to the next record in the Loop.

If you did not want to change the record displayed but need to move to the next record in the loop, click the **NEXTRECORD** button. This will move you to the next record in the Loop without altering any field (including the Modified Date) of the previous record.

If you select the **DELETELOOP** button, you will delete all Other Items records for the SW Key that was used as the criteria for the Modify/Delete Loop. **BE CAREFUL** – If this is NOT what you truly want – there is no **UNDO**.

Or clicking the **Cancel** button will also return you to the Lookup screen, if neither is desired. Here you can repeat the process for another lookup of your choice or click the **Cancel** button to return to the IDT Software Inventory Application Main Menu.

> *Tip: **Add Other Items** link is only available from the Inventory Modify/Delete screen.*

==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 <mark>Support Files Reports</mark> 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.*

<mark>Assignments Report</mark>

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