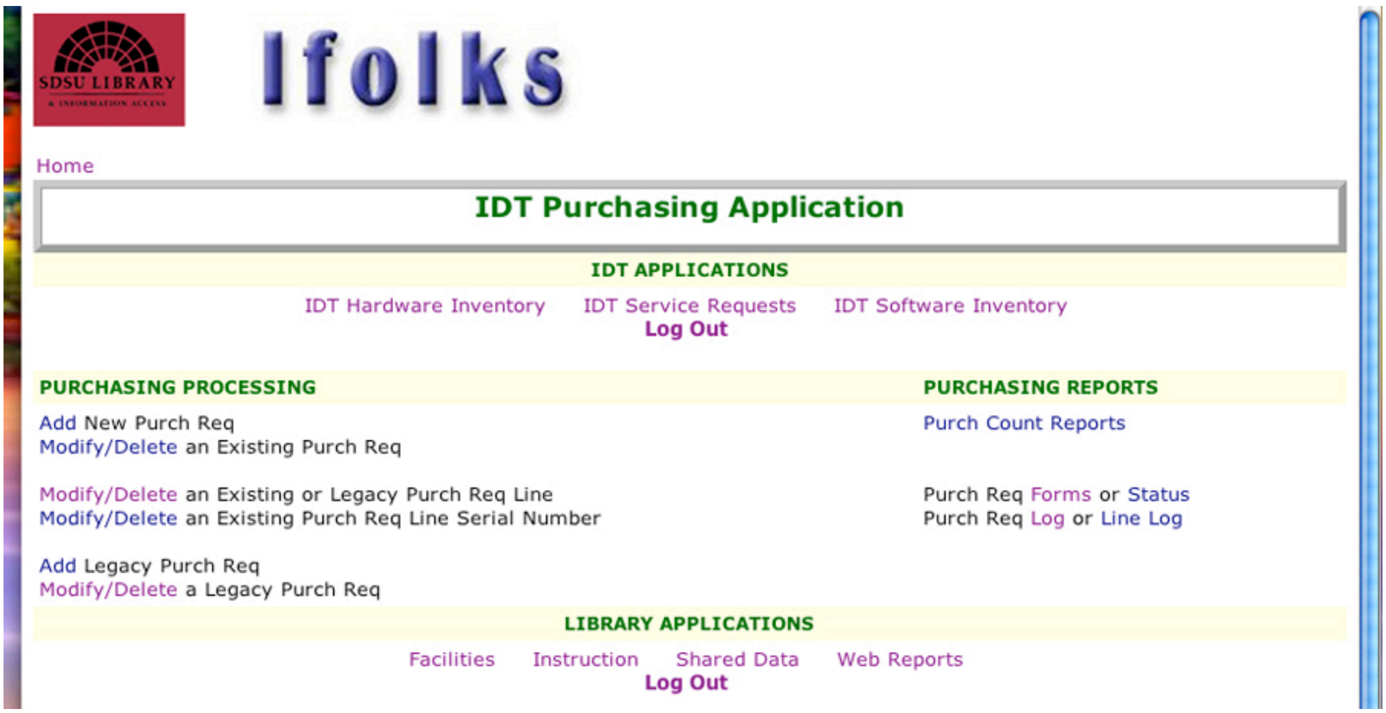
Information and Digital Technologies
February 15, 2008

IDT Purchasing Application
Main Menu
MAINTLESS 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 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	**Required**. Text field; Reason for the purchase.

Justification	
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 (depends on the number of Req Lines associated with Req) 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.

<u>This link is NOT based on IDT Service Requests Application NOR requires a pre-existing SR to support the new purchase requisition record.</u> 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 (depends on the number of Req Lines associated with Req) 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 (See instructions for this under **Modify/Delete an Existing Purch Req**). ***Tip:*** *This is a legacy process that can be ignored at the present time.*

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.*

> ***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 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)

- **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