

IDT Software Inventory Application Main Menu

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.

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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: <i>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 were purchased can have their Fiscal Year modified.</i>
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). <i>This field is used in support of Archive Processing (See Support Files Reports for further explanation of status options).</i>
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	<i>This field is used in support of Archive Processing</i>

	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 **Pop-Up Add Buttons** 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.

Pop-Up Add Buttons

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 <i>Image</i>

	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 (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

	<i>stored locations).</i>
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 (<i>See Support Files Reports for further explanation of manual stored locations).</i>
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 (<i>See Support Files Reports for further explanation of other items stored locations</i>).
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 <i>Image Name</i> (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 and will not change 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: <i>The default text is NO SERIAL # and it must be removed,</i>

	<i>if that is NOT the serial number.</i>
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 do NOT want 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 <i>Image Name</i> (See Support Files Reports for further explanation of images). <i>Tip: See the Image Cheat Sheet for SW Keys associated with named Images.</i>
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

	<i>SERIAL #</i> 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.
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.
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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 (<i>See Support Files Reports for further explanation of manual stored locations</i>).
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 (<i>See Support Files Reports for further explanation of manual stored locations</i>).
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 (<i>See Support Files Reports for further explanation of media stored locations</i>).
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 (<i>See Support Files Reports for further explanation of media stored locations</i>).
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 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 **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 (<i>See Support Files Reports for further explanation of other statuses</i>).
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.

Assignments Report

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.

UnMatched Software Assignment Records Report

This link on the application's Main Menu runs a report of any unmatched software assignment records as a way to verify assignment data is healthy.

Tip: *This report requires ADMIN level security or above access, while the rest of the Software Inventory Reports can be produced by USER level security access.*

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

Archive Processing

These links on the application's Main Menu support the retiring and deletion of software data in the IDT Software Inventory Application.

Tip: Archive Processing requires ADMIN Level security or above access.

Every summer and winter, the IDT Software Coordinator goes through the IDT Software Inventory to weed out items that are expired, usage has been discontinued, or upgraded. After the Inventory records are updated, the physical files are moved to LL-465 file cabinets and held for another 6 months (1 year is maximum and the corresponding items will be tagged in the files with the 1 year date) or the next weeding project (whichever comes first).

When the combination of their **Upgrade Status** and **Toss Status** meets the required criteria for final archiving, their child records (Assignment, Manuals, Media, and Other Items) are **deleted** and their parent record (Inventory) is archived (**moved**) in the IDT Software Inventory application. Then their corresponding physical files are destroyed. See **Steps for Software Inventory Archive Processing** procedure for further details.

Simple Archive

Tip: *DO NOT click this command unless you are very sure of the results, as it can mean a lot of work if you are wrong. There is NO simple UNDO, as the child records would need to be re-entered from scratch.*

This link on the application's Main Menu goes to an automatic run of archive processing on any records that meet the archive criteria. The automatic archive criteria must have 2 fields that match the following:

*Upgrade Status field must equal UPGR, DISCONTINUED USE, or EXPIRED
and
Toss Status must equal TOSS, TOSS-CEA, or TOSS-R.*

Once the matching records are found, the process appends all the found Inventory records to the Software Archive table and deletes all the found Inventory records from the Software Inventory Table. Finally, it generates a report popup window showing all the records that were appended.

Selected Archive Lookup

This link on the application's Main Menu goes to an *Inventory To Archive Selection* screen, where criteria can be set for the archive processing. Enter complete values to Lookup a specific record. 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:

Software Key and Title from Software Inventory	Dropdown selection of Software Key and Title OR Type a complete Title; a partial may not get the desired record.
Requisition Number	Dropdown selection of Requisition Number OR Type a complete Requisition Number
Requisition Number – Requisition Line Number – Software Title	Dropdown selection of Requisition Number - Requisition Line Number – Software Title OR Type a complete Requisition Number Requisition Line Number
PO Number	Dropdown selection of PO Number OR Type a complete PO Number
Upgrade Status	Dropdown selection of Upgrade Status
Toss Status	Dropdown selection of Toss Status
Type a single Creation Date	OR Type a series of dates separated by commas, NO spaces OR Type a two dates separated by a semicolon for range
Modified By	Dropdown selection of the person who modified the records
Type a single Modified Date	OR Type a series of dates separated by commas, NO spaces OR Type a two dates separated by a semicolon for range

More than one field can be selected above except where text and dropdown represent the same field. All typed data must be complete (no partial data), so the exact record(s) can be found. All fields above, except Software Key and Title or Title, have Negate boxes associated with their input options. These allow with a check in the box the ability to omit the option from the search. Based on the

criteria, you can find particular Inventory (Parent) records and then confirm that these are the right ones to be archived.

Either the **Match Any Field Entered** or the **Match All Fields Entered** button will search and display an *Inventory to Archive Lookup Report* as a pop-up screen to verify the found records, while the original screen changes to an *Inventory to Archive Confirmation* screen. This screen displays the first record of the found set and asks for confirmation.

When the **Confirm** button is clicked, the program continues with the deleting of associated child records and the move of the Inventory (Parent) records to Archive and out of Software Inventory.

Tip: DO NOT click this command unless you are very sure of the results, as it can mean a lot of work if you are wrong. There is NO simple UNDO, as the child records would need to be re-entered from scratch.

Selected Reverse Archive Lookup

This link on the application's Main Menu goes to an *Archive to Inventory Selection* screen, where criteria can be set for a partial undo of the archive processing. Enter complete values to Lookup a specific record. 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:

Software Key and Title from Archive	Dropdown selection of Software Key and Title OR Type a complete Title; a partial may not get the desired record.
Requisition Number	Dropdown selection of Requisition Number OR Type a complete Requisition Number
Requisition Number – Requisition Line Number – Software Title	Dropdown selection of Requisition Number - Requisition Line Number – Software Title OR Type a complete Requisition Number Requisition Line Number
PO Number	Dropdown selection of PO Number OR Type a complete PO Number
Upgrade Status	Dropdown selection of Upgrade Status
Toss Status	Dropdown selection of Toss Status
Creation Date	Type a single Creation Date OR Type a series of dates separated by commas, NO spaces OR Type a two dates separated by a semicolon for range
Modified By	Dropdown selection of the person who modified the records

Modified Date	Type a single Modified Date OR Type a series of dates separated by commas, NO spaces OR Type a two dates separated by a semicolon for range
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Based on the criteria, you can only bring back the Inventory (Parent) record. Associated child records will have to be re-entered, if you return the found Inventory record permanently.

Either the **Match Any Field Entered** or the **Match All Fields Entered** button will search and display an *Archive to Inventory Lookup Report* as a pop-up screen to verify the found records, while the original screen changes to an *Archive to Inventory Confirmation* screen. This screen displays the first record of the found set and asks for confirmation.

When the **Confirm** button is clicked, the program will move the Inventory (Parent) record(s) to Software Inventory and out of Archive.

Tip: Remember only the Inventory record will be there. Child records would need to be re-entered from scratch, if the Parent record is viable again.

Archive Reports

These links on the application's Main Menu support the retiring and deletion of the software data in the IDT Software Inventory Application.

Tip: Archive Reports require ADMIN 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.

Duplicate Archive/Inventory Records Report

This link on the application's Main Menu goes to an automatic report of duplicate ARCHIVE records in Inventory. The fields displayed are: *Software Inventory Key, Title, Version, Platform, Quantity Licensed, Requisition Number, P.O. Number, Upgrade Status and Toss Status*. This report is a tool to keeping the database data accurate and healthy; requires the maintainer to make the appropriate corrections. See **Steps for Software Inventory Archive Processing** procedure for further details for correcting the data.

Duplicate Inventory/Archive Records Report

This link on the application's Main Menu goes to an automatic report of duplicate INVENTORY records in Archive. The fields displayed are: *Software Inventory Key, Title, Version, Platform, Quantity Licensed, Requisition Number, P.O. Number, Upgrade Status and Toss Status*. This report is a tool to keeping the database data accurate and healthy; requires the maintainer to make the appropriate corrections. See **Steps for Software Inventory Archive Processing** procedure for further details for correcting the data.

Software Archived Reports

This link on the application's Main Menu goes to an *IDT Software Archived Report Lookup Selection* screen, where criteria can be selected and matched against records in **ARCHIVE**. The criteria fields are:

Software Key and Title OR Title from Archive	Dropdown selection of Software Key and Title OR Type a complete Title; a partial may not get the desired record.
Requisition Number	Dropdown selection of Requisition Number OR Type a complete Requisition Number.
Requisition Number – Requisition Line Number – Software Title	Dropdown selection of Requisition Number - Requisition Line Number – Software Title OR Type a complete Requisition Number Requisition Line Number.
PO Number	Dropdown selection of PO Number OR Type a complete PO Number.
Upgrade Status	Dropdown selection of Upgrade Status.
Toss Status	Dropdown selection of Toss Status.
Type a single Creation Date	OR Type a series of dates separated by commas,NO spaces OR Type a two dates separated by a semicolon for range.
Modified By	Dropdown selection of the person who modified the records.
Type a single Modified Date	OR Type a series of dates separated by commas,NO spaces OR Type a two dates separated by a semicolon for range.

After criteria is chosen, select 1 of the 4 types of reports to run by clicking the associated radio buttons. Only one report can be run at a time. The choices are:

- **Software ARCHIVE Report by SW Key**

- **Software ARCHIVE Report by SW Title**
- **Software ARCHIVE Report by Requisition Number**
- **Software ARCHIVE Report by Upgrade Status**

The **Modified By** and **Modified Date** fields are NOT shown on any of these reports.

Next either the **Match Any Field Entered** or the **Match All Fields Entered** button will search Software Inventory and display the selected report (sorted by your selection).

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

Software Inventory To Archive Reports

This link on the application's Main Menu goes to an *IDT Software To Be Archived Report Lookup Selection* screen, where criteria can be selected and matched against records in **INVENTORY**. Select from the drop down boxes or type in partial values to choose report criteria.

Software Key and Title from Software Inventory	Dropdown selection of Software Key and Title OR Type a complete Title; a partial may not get the desired record.
Requisition Number	Dropdown selection of Requisition Number OR Type a complete Requisition Number
Requisition Number – Requisition Line Number – Software Title	Dropdown selection of Requisition Number - Requisition Line Number – Software Title OR Type a complete Requisition Number Requisition Line Number
PO Number	Dropdown selection of PO Number OR Type a complete PO Number
Upgrade Status	Dropdown selection of Upgrade Status
Toss Status	Dropdown selection of Toss Status
Type a single Creation Date	OR Type a series of dates separated by commas,NO spaces OR Type a two dates separated by a semicolon for range
Modified By	Dropdown selection of the person who modified the records
Type a single Modified Date	OR Type a series of dates separated by commas,NO spaces OR Type a two dates separated by a semicolon for range

After criteria is chosen, select 1 of the 4 types of reports to run by clicking the associated radio buttons. Only one report can be run at a time. The choices are:

- **Software INVENTORY Report by SW Key**
- **Software INVENTORY Report by SW Title**
- **Software INVENTORY Report by Requisition Number**
- **Software INVENTORY Report by Upgrade Status**

The **Modified By** and **Modified Date** fields are NOT shown on any of these reports. However, the report will identify all child records (in RED and under the Title) associated with each Parent record in the reports. These reports are used as cues when doing the weeding of the Software Inventory records/files. See **Steps for Software Inventory Archive Processing** procedure for further details.

Next either the **Match Any Field Entered** or the **Match All Fields Entered** button will search Software Inventory and display the selected report (sorted by your selection).

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

Support Files Processing

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

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

Images - Add

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

Images	Required. Text field; Enter a name that holds meaning for topic of the image and the platform the image is for.
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Once the data above is entered, click the appropriate button:

1. The **ADD** button will submit the information as a new Images record and return you to another new empty record container.
2. If you do NOT want to add a new Images 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.*

Images - Modify/Delete

This link on the application's Main Menu goes to the *Lookup for Modify/Delete to IDT Software Inventory – Images* screen, and allows a selection from a dropdown of the current Images. After making a selection, click the **GO** button. This moves to another screen, where a change or a deletion can be made. The field is:

Images	Required. Text field; Enter a name that holds meaning for topic of the image and the platform the image is for.
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Once the data is modified, click the **MODIFY** button. This will submit your information as a changed Images 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.

License Type - Add

This link on the application's Main Menu goes to the *Add Information to IDT Software Inventory - License Type* screen and opens to a new empty record container. The field is:

License Type Name	Required. Text field; Enter a name that holds meaning for how the license is applied.
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Once the data above is entered, click the appropriate button:

1. The **ADD** button will submit the information as a new License Type record and return you to another new empty record container.
2. If you do NOT want to add a new License Type 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.

License Type - Modify/Delete

This link on the application's Main Menu goes to the *Lookup for Modify/Delete to IDT Software Inventory - License Type* screen, and allows a selection from a dropdown of the current License Type. After making a selection, click the **GO** button. This moves to another screen, where a change or a deletion can be made. The field is:

License Type Name	Required. Text field; Enter a name that holds meaning for how the license is applied.
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Once the data is modified, click the **MODIFY** button. This will submit your information as a changed License Type 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.

Media Type - Add

This link on the application's Main Menu goes to the *Add Information to IDT Software Inventory - Media Type* screen and opens to a new empty record container. The field is:

Media Type Name	Required. Text field; Enter a name that describes the type of media associated with the software application.
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Once the data above is entered, click the appropriate button:

1. The **ADD** button will submit the information as a new Media Type record and return you to another new empty record container.
2. If you do NOT want to add a new Media Type 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.

Media Type - Modify/Delete

This link on the application's Main Menu goes to the *Lookup for Modify/Delete to IDT Software Inventory - Media Type* screen, and allows a selection from a dropdown of the current Media Types. After making a selection, click the **GO** button. This moves to another screen, where a change or a deletion can be made. The field is:

Media Type Name	Required. Text field; Enter a name that describes the type of media associated with the software application.
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Once the data is modified, click the **MODIFY** button. This will submit your information as a changed Media Type 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.

Product Categories - Add

This link on the application's Main Menu goes to the *Add Information to IDT Software Inventory - Product Categories* screen and opens to a new empty record container. The field is:

Product Category Name	Required. Text field; Enter a name that describes the software application use.
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Once the data above is entered, click the appropriate button:

1. The **ADD** button will submit the information as a new Product Categories record and return you to another new empty record container.
2. If you do NOT want to add a new Product Categories 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.

Product Categories - Modify/Delete

This link on the application's Main Menu goes to the *Lookup for Modify/Delete to IDT Software Inventory - Product Categories* screen, and allows a selection from a dropdown of the current Product Categories. After making a selection, click the **GO** button. This moves to another screen, where a change or a deletion can be made. The field is:

Product Category Name	Required. Text field; Enter a name that describes the software application use.
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Once the data is modified, click the **MODIFY** button. This will submit your information as a changed Product Categories 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.

Statuses - Add

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

Status Type	Required. Text field; Enter a type that describes the status use.
Status Name	Required. Text field; Enter a name that describes the status.

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

1. The **ADD** button will submit the information as a new Status record and return you to another new empty record container.
2. If you do NOT want to add a new Status 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.

Statuses - Modify/Delete

This link on the application's Main Menu goes to the *Lookup for Modify/Delete to IDT Software Inventory – Status* screen, and allows a selection from a dropdown of the current Status Type/Name. After making a selection, click the **GO** button. This moves to another screen, where a change or a deletion can be made. The fields are:

Status Type	Required. Text field; Enter a type that describes the status use.
Status Name	Required. Text field; Enter a name that describes the status.

Once the data is modified, click the **MODIFY** button. This will submit your information as a changed Statuses 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.

Stored Locations - Add

This link on the application's Main Menu goes to the *Add Information to IDT Software Inventory - Stored Locations* screen and opens to a new empty record container. The fields are:

Stored Locations Type	Required. Text field; Enter a type that describes the stored locations use.
Stored Locations Name	Required. Text field; Enter a corresponding Stored Location name that describes the storage area.

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

1. The **ADD** button will submit the information as a new Stored Locations record and return you to another new empty record container.
2. If you do NOT want to add a new Stored Locations 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.

Stored Locations - Modify/Delete

This link on the application's Main Menu goes to the *Lookup for Modify/Delete to IDT Software Inventory - Stored Locations* screen and allows a selection from a dropdown of the current Stored Locations Type/Name. After making a selection, click the **GO** button. This moves to another screen, where a change or a deletion can be made. The fields are:

Stored Locations Type	Required. Text field; Enter a type that describes the stored locations use.
Stored Locations Name	Required. Text field; Enter a corresponding Stored Location name that describes the storage area.

Once the data is modified, click the **MODIFY** button. This will submit your information as a changed Stored Locations 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.

Support Files Reports

These reports are mostly used for verification of information in the dropdown lists for IDT Software Inventory Application.

Tip: Support Files Reports requires ADMIN Level security or above access.

Images

This link on the Main Menu goes straight to the *IDT Software Inventory - Stored Locations Report* (a list of Images) and lists the total number of Images records. Below are Images and their definitions:

Images	Definition
BATS/WIN	Includes software used on a Win PC for the BATS classrooms
ILL/WIN	Includes software used on a Win PC for the ILL functions
INSTR/WIN	Includes software used on a Win PC for the LA-76 & 78 classrooms
LIB/MAC	Includes software used on a Library Mac
LIB/MULTI	Includes software used on a Library Mac & Win PC
LIB/WIN	Includes software used on a Library Win PC
LIBGX/WIN	Includes software used on a Library Win PC specific to the GX models
MEDIA/MAC	Includes software used on a Media Mac
MEDIA/WIN	Includes software used on a Media Win PC
NERO 6/POWERDVD5/WIN	Includes software used on a specific type of Win PC
OCLC/WIN	Includes software used on a Library Win PC for the OCLC functions
PAC/WIN	Includes software used on a Win PC for PAC use
SCC/MAC	Includes software used on a SCC Mac
SCC/WIN	Includes software used on a SCC Win PC
TABLETPC/WIN	Includes software used on a Tablet PC/Win PC

License Type

This link on the Main Menu goes straight to the *IDT Software Inventory - License Type Report* (a list of License Types) and lists the total number of License Type records. Below are License Types and their definitions:

License Type Name	Definition
CAMPUS SITE	Software is licensed for the entire campus' use
DEPT SITE	Software is licensed for the entire department's use
DOC	Legacy; No longer used by new records
DOUBLE	Software is licensed for 2 computers only
LIMITED	Software is licensed for a set amount of computers
MAINT	Software is a maintenance license only

MULTI	Software is licensed for a multiple amount of peripheral/computer use (i.e. printer software)
SERVER	Software is licensed for a server only
SINGLE	Software is licensed for 1 computer only
UNLIMITED	Software is licensed for an unlimited amount of computers

Media Type

This link on the Main Menu goes straight to the *IDT Software Inventory - Media Type Report* (a list of Media Types) and lists the total number of Media Type records. Below are Media Types and their definitions:

Media Type Name	Definition
3.5 DISKS	Legacy; No longer used by new records
3.5 DISKS & CD	Legacy; No longer used by new records
CD-ROM	Media came on a CD
DOC ONLY	Legacy; No longer used by new records
DOWNLOAD ONLY	Media came from a download. Generally used only for subscriptions.
DOWNLOAD/CD-ROM	Media came from a download and burned to a CD. This is preferred method for downloads
DVD-ROM	Media came on a DVD
DVD-ROM/CD-ROM	Legacy, when only 1 record for many media; No longer used by new records
LICENSE	Legacy; No longer used by new records
MAINTENANCE	Legacy; No longer used by new records
MINI-CD	Media came on a mini CD
PRE-INSTALLED	Legacy; No longer used by new records

Product Categories

This link on the Main Menu goes straight to the *IDT Software Inventory - Product Categories Report* (a list of Product Categories) and lists the total number of Product Category records. Below are Product Categories and their definitions:

Product Categories Name	Definition
3-D VIRTUAL GAMING	Software's primary function is 3-D Virtual Gaming (i.e. 2 nd Life)
ACCOUNTING	Software's primary function is accounting related
CALENDAR/SCHEDULER	Software's primary function is calendaring and scheduling day/time related
CHARTING	Software's primary function is creating charts; flow, org, etc.
DATA COMM	Software's primary function is data communications related

DATABASE MGMT	Software's primary function is database management related
DTP	Software's primary function is as desktop publishing related
EDITOR	Software's primary function is as a text editor
EMAIL/MESSENGING	Software's primary function is email or text messaging related
FILE UTILITY	Software's primary function is related to enhancing the use of the computer or its OS software; similar to network utilities
GRAPHICS/IMAGES	Software's primary function is image related or can create graphics/images
HARDWARE UTILITY	Software that came with and as support for hardware, and not a standalone package
INFO/MENU SYS	Software's primary function is either straight information or a menu driven system of information
INTEGRATED PKG	Software's primary function is as a suite of software (i.e. MS OFFICE)
MULTIMEDIA/PRES	Software's primary function is presentation and/or multimedia related
NETWORK SUITE	Software that comprises a set of tools IDT supports
NETWORK UTILITY	Software's primary function is related to enhancing the use of the network or networked software; similar to file utilities
OPERATING SYS	Software's primary function is as an operating system
PROGRAMMING	Software's primary function is programming related
PROJECT MGMT	Software's primary function is related to managing projects and timelines
REMOTE CONTROL	Software's primary function is remote control of other software or hardware
SCANNING TECH	Software's primary function is related to any form of scanning technology
SECURITY	Software's primary function is security protection related
SPEECH	Software's primary function is creating or understanding speech
SPREADSHEET	Software's primary function is spreadsheet related
STATIDTICAL	Software's primary function is statistical related
TRAINING – CBT/RESPONCE	Software's primary function is automated training OR response (i.e. Clickers)
TRAINING – EXERCISE	Software's primary function is non-automated training
WORD PROCESSING	Software's primary function is word processing related
WORLD WIDE WEB	Software's primary function is web related

Statuses

This link on the Main Menu goes straight to the *IDT Software Inventory - Status Report* (a list of Statuses) and lists the total number of Status records. Below are Statuses and their definitions:

Status Type	Status Name	Definition
PROD	CONVERTED	Vendor allowed Product to convert use to another platform than the original one
PROD	ORIGINAL	Product is the full original
PROD	RENEWAL	Product is a renewal of license/subscription only
PROD	UPGRADE	Product is only an upgrade and requires a previous full original
TOSS	MAYBE	Product is possible candidate to be removed from active filing and sent to archive
TOSS	MOVED	Product physical material were moved to archive file cabinets in LL-465
TOSS	TOSS	Product physical material was tossed out, as no longer needed
TOSS	TOSS-CEA	Product physical material was tossed out, as CEA contract changed or was discontinued
TOSS	TOSS-R	Product physical material was tossed out, as version was replaced by newer version
UPGR	CURRENT USE	Product is currently in use
UPGR	DISCONTINUED USE	Product has had its use discontinued
UPGR	EXPIRED	Product has an expiration date that has passed
UPGR	UPGR	Product had all licenses in this SW key record upgraded
UPGR	UPGR-PARTIAL	Product had some (not all) licenses in this SW key record upgraded

Stored Locations

This link on the Main Menu goes straight to the *IDT Software Inventory - Stored Locations Report* (a list of Stored Locations) and lists the total number of Stored Location records. Below are Stored Locations and their definitions:

Stored Location Type	Stored Location Name	Definition
MANOTHER	IDT	Used by manuals and other items. IDT keeps all manuals and other items.
MANOTHER	IDT/SCC	Used by manuals and other items. IDT and SCC share all manuals and other items.
MANOTHER	IDT/USER	Used by manuals and other items. IDT and the users share all manuals and other items.
MANOTHER	USER	Used by manuals and other items. Users keep all

		manuals and other items.
MEDIA	IN FILE	All media is kept in the LL-406 file cabinets.
MEDIA	IN FILES AND 465 CABINETS	All media is kept in the LL-406 file cabinets with overflow amounts in the LL-465 file cabinets.
MEDIA	IN FILES AND SCC	All media is kept in the LL-406 file cabinets with overflow amounts in the SCC.
MEDIA	IN SCC	All media is kept in SCC.
MEDIA	LICENSED	All media is licensed and came pre-installed.
MEDIA	NO DISKS - LICENSED	No physical media is kept, but the licensing covers the use of the software.
MEDIA	ON SERVER	All media is kept on the servers.
MEDIA	ON-SITE W/ USER	All media is kept on-site with the user.
MEDIA	UNKNOWN	The location of the physical media is unknown.