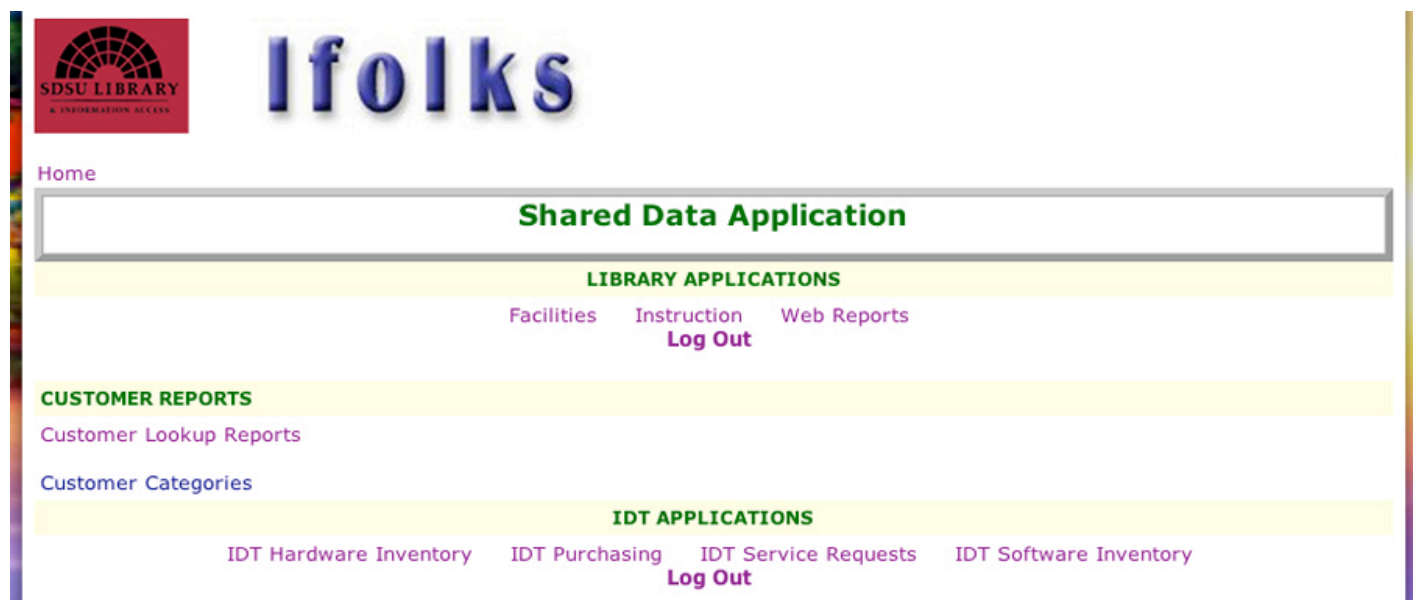


## Shared Data Application Main Menu USER ACCESS ONLY

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



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

**Tip:** Data can be entered in Uppercase or Upper/lowercase, but all displays of Data are in Uppercase. Display exceptions are E-Mail Addresses and Web Addresses.

**Tip:** Field Labels that are preceded by an asterisk are required fields. Field Labels without asterisks are optional fields.

**Tip:** To exit from a screen, always use the screen's **Cancel** or **CANCELADD** button. There is only one instance where a browser's **BACK** button can be used to exit a screen in this application. See **Customer Reports** for its requirements. This was done to prevent the accumulation of empty record containers in the Oracle tables.

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

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## Customer Reports

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

**Tip:** Customer Reports require MAINTLESS level security or above access.

**Tip:** Any report with multiple criteria/report options will allow the browser's **BACK** button to be used between the actual report and the previous lookup screen to preserve the criteria/report used. This way minor changes in the criteria can be made without starting from scratch or a second report can be chosen using the same criteria. This is the only instance where a browser's **BACK** button can be used.

## Customer Lookup Reports

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

<b>Customer's First Name</b>	Text field; Enter the First Name <b>OR</b>
<b>Customer's Last Name</b>	Text field; Enter the Last Name
<b>Customer Category</b>	Text field; Enter the Customer Category <b>OR</b> Enter a series of Customer Categories separated by commas,NO spaces <b>OR</b> Enter two Customer Categories separated by a semicolon for range in alphabetical order.
<b>Unit</b>	Dropdown selection of available Units Names – Numbers <b>OR</b> Enter a series of Unit Numbers separated by commas,NO spaces.
<b>Group</b>	Dropdown selection of available Groups.
<b>Department</b>	Dropdown selection of available Departments.
<b>Red ID</b>	Text field; Enter a partial or full Red ID.
<b>Room Number</b>	Dropdown selection of available Room Numbers <b>OR</b> Enter a Room Number <b>OR</b> Enter a series of Room Numbers separated by commas,NO spaces.
<b>Active or Inactive Customers</b>	Dropdown YES or NO Flag.
<b>Security Level</b>	<b>Dropdown that requires ADMIN level access with an IDT login or above to see.</b>
<b>Dialing Capability</b>	Dropdown selection of available Dialing Capabilities

	(CAMPUS, CAMPUS & LOCAL, OR CAMPUS, LOCAL & SD COUNTY).
<b>Long Distance Authorization Code</b>	Dropdown YES or NO Flag.
<b>Unit Head</b>	Dropdown YES or NO Flag.
<b>Department Chair</b>	Dropdown YES or NO Flag.
<b>Contact-By</b>	Dropdown E-MAIL or PHONE Flag.
<b>Bibliographer</b>	Dropdown YES or NO Flag.
<b>Comments</b>	Text field; This is for Library employees only.
<b>AA Comments</b>	Text field; <b>This is for IDT outside customers only.</b>
<b>Modified By</b>	Dropdown selection of available modifiers.
<b>Date Modified</b>	Text field; Enter a single Date Modified <b>OR</b> Enter a series of dates separated by commas, NO spaces <b>OR</b> Enter two dates separated by a semicolon for range of dates.

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

### **CUSTOMER REPORTS**

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

### **UNIT REPORTS**

- Customer By Unit
- Red ID By Group/Unit

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

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

### **Customer Categories**

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

ACS-FACULTY  
 ACS-STAFF  
 FACILITY- ROOM  
 FOUNDATION EMPLOYEE  
 GRADUATE TEACHING ASSISTANT  
 INVENTORY  
 LAB

LIB-FACULTY  
LIB-STAFF  
OFFICE  
PATRON  
STUDENT ASSIDTANT  
TEACHING ASSIDTANT  
VISITOR/CONTRACTOR