

ASSETS AND PURCHASING MANAGEMENT TOOL

FOR

IT GOVERNANCE TEAM

INSEAD



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Document Information and Distribution List

Version History

<u>Version#</u>	<u>Date</u>	<u>Revised by</u>	<u>Reason for change</u>
1.0	12 th December, 2011	NagaRaju BHANOORI	Initiation

The document gives the clear details of functionality of Asset and Purchase Management Tool and its usage.

Distribution List

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Jae CHAE	Governance Manager	12 th December, 2011
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Asset and Purchase Management Tool User Interface

The first screen that the user is directed to on login is the following login screen.

Home
Asset Management
Purchase Management
Administrator Section
Report Section
FeedBack
Logout

Login

Username

Password

A user can login using his Windows login credentials. Login credentials are verified with Active Directory, if they are validated then database of the tool is looked up for access rights of a user to the Tool, and then the user logs into the Tool.

Home
Asset Management
Purchase Management
Administrator Section
Report Section
FeedBack
Logout

Dashboard [Print](#) [Bookmark](#)

Upcoming Delivery List for the next 6 days

No Upcoming Delivery

Missed Deliveries

Note: All dates are 'Expected Delivery Dates'

29-NOVEMBER -2011
- INS11-21 » Item 1

Asset Registrations

Asset Registrations are up-to-date

Asset to Purchase Mismatch

Note: No Mismatch in Products registrations

Note: No Mismatch in Softwares

Software Licence Terminations

No Licence terminations foreseen for next 1 month

New Purchase Requests

1. Naga Raju Bhanoori has made a request for 1 item
» Subscription Renewals - 1 units
2. Naga Raju Bhanoori has made a request for 1 item
» DELL OptiPlex 780 - 2 units

Once the User logs in, a session is created and will be redirected to a home screen, which has a Dashboard. It consists of 6 Pods, which display Delivery List, Missed Deliveries, Asset Registrations, Mismatches between Assets and Purchases, Software License terminations,

New Purchase Requests. However a user should have sufficient access to view these pods, else he/she can see only a blank dashboard.

The User can then move on to Asset Management or Purchase management or Administrator Section or report Section.

Asset management









Asset Registration

“New Asset” page in Asset Management section handles Asset Registration. It has the compatibility of registering the Old and New assets. “Old” Asset means all the Assets which were not purchased using this new tool. “New” Asset means all the Assets purchased using this tool.

The mapping between Assets and Purchasing is done by the Purchase Order Number generated by the tool. Hence the classification “Old” and “New” becomes really necessary.

Assets are broadly classified into “Products” and “Softwares”. The registration pages are different for both of them. After entering all the related fields and clicking the “Save” button will display a confirmation message regarding the same.

The fields in “Product Registration” are:

Home	New Asset Registration	
Asset Management	<input checked="" type="radio"/> Product <input type="radio"/> Software	
New Asset		
Edit Asset	Type* Old <input type="radio"/> New <input checked="" type="radio"/>	
Purchase Management	Date Started* <input type="text"/> 	
Administrator Section	Asset Type* --Select One-- 	
Report Section	Item Type* 	
FeedBack	Serial#* <input type="text"/>	
Logout	Product* <input type="text"/>	
	Ownership* Own <input type="radio"/> <input checked="" type="radio"/> Leased	
	Vendor* <input type="text"/> 	
	PO#* <input type="text"/> 	
	PO_Item#* --Select-- 	
	Campus* Singapore 	
	End User Name* <input type="text"/> 	
	<input type="button" value="Save"/>	

- **Type:** It's a selection button between “Old” and “New”. Relevant fields appear on the corresponding selection.
- **Date Started:** It marks the date of start of Asset Life Cycle.
- **Asset Type:** It's a drop down of selection of Type of Asset. Ex: Laptop, Desktop.
- **Item Type:** It's a drop down of particular item depending on the selection of “Asset Type”.
- **Serial #:** Serial number of the Asset.
- **Product:** Name of the product (if incase the Item Type can't give clear detail)
- **Ownership:** It's a selection button between “Own” and “Lease”.
- **Budgetid:** Appears if the **Ownership** is “Own”.

- **Vendor:** Name of the Vendor. It's an autosuggest on entering a minimum of 3 characters.
- **PO#:** Appears only if the **Type** is "New". It's an autosuggest on entering a minimum of 3 characters.
- **PO_Item#:** Appears only if the **Type** is "New" and on entering the PO#. It's a drop down of the Items in that particular PO#.
- **OldPO#:** Appears only if the **Type** is "Old".
- **Campus:** It's a drop down of campus name.
- **End User Name:** It's an autosuggest on entering a minimum of 3 characters. Format of user name is "Domain\Loginname". Ex: sgp\bhanoori

Note: Whenever an End User is registered with an asset, Asset will be moved from stock to the End User. The * Fields are mandatory.

The fields in "Software Registration" are:

Home	New Asset Registration	
Asset Management	<input type="radio"/> Product <input checked="" type="radio"/> Software	
New Asset	Type*	Old <input type="radio"/> New <input checked="" type="radio"/>
Edit Asset	Vendor*	<input type="text"/>
Purchase Management	License Type*	Simulation Softwares ▾
Administrator Section	Name*	<input type="text"/>
Report Section	Software Type*	<input type="radio"/> Individual <input type="radio"/> Organizationwide <input type="radio"/> Department
FeedBack	No. of Licenses*	<input type="text"/>
Logout	Duration of* Contract	<input type="text"/> days ▾
	Start Date*	<input type="text"/>
	PO#*	<input type="text"/>
	PO_Item#*	--Select- ▾
	Termination Notice Required	<input type="radio"/> Yes <input checked="" type="radio"/> No
		<input type="button" value="Save"/>

- **Type:** It's a selection button between "Old" and "New". Relevant fields appear on the corresponding selection.
- **Vendor:** Name of the Vendor. It's an autosuggest on entering a minimum of 3 characters.
- **License type:** It's a drop down of type of Software.
- **Name:** Name of the Software.
- **Type of Software:** It's a selection button between "Individual" or "Organization wide" or "Department"
- **No. of Licenses:** It's the number of licenses being registered.
- **Duration of Contract:** Duration of Licenses
- **Start date:** Start date of validity of License.
- **PO#:** Appears only if the **Type** is "New". It's an autosuggest on entering a minimum of 3 characters.
- **PO_Item#:** Appears only if the **Type** is "New" and on entering the PO#. It's a drop down of the Items in that particular PO#.
- **OldPO#:** Appears only if the **Type** is "Old".
- **Termination Notice Required:** It's a selection between "Yes" and "No".
- **Notice Requirement:** It will appear only if "**Termination Notice Required**" is Yes.

Note: *The * Fields are mandatory.*

Editing Asset

Life Cycle of an Asset can be monitored using "Edit Asset" page. Few Details of Asset like Name, Budgetid, and Serial number can also be modified using this page.

For selecting an asset for editing, Search on Products or Softwares can be done by various parameters, and the search word is to be entered. The result is displayed on a "grid". The result can be sorted by double-clicking on the column Headers.

The clear description on Column Headers is as below:

Columns Headers for Products are:

- ✓ **Name:** (Editable) Name of product when it was registered
- ✓ **Type:** (Non-editable) Type of Asset. Ex: Desktop, Laptop

- ✓ **Model:** (Non-editable) Name of Model of the particular type of Asset
- ✓ **Owned/Leased:** (Editable)
- ✓ **Serial:** (Editable)
- ✓ **Budget Id:** (Editable)
- ✓ **Date Started:** (Non-Editable)
- ✓ **Vendor:** (Editable) Double clicking on the column gives the dropdown of list of vendors which can be changed.
- ✓ **End user:** (Editable) Double clicking on the column gives the dropdown of list of Users through which ownership of an Asset can be changed.
- ✓ **Old/New:** (Editable)
- ✓ **Purchase Order Number:** (Non-Editable)
- ✓ **Old Purchase Order Number:** (Non-Editable)
- ✓ **Start date:** (Non-Editable) It indicates that Asset was with the particular End User from this date.
- ✓ **End date:** (Non-Editable)
- ✓ **Action:** It has two buttons inside its cell. They are
 - D or E: 'D' indicates on clicking it will decommission this Asset. 'E' indicates that Asset has been already decommissioned and can be enabled on clicking it.
 - H: On clicking this button displays History of this Asset Ownership in a separate Window. It has also provision of Downloading History as .xls file.

Columns Headers for Softwares are:

- ✓ **Name:** (Editable)
- ✓ **Model:** (Non-Editable)
- ✓ **Duration:** (Non-Editable)
- ✓ **Duration type:** (Non-Editable)
- ✓ **Start date:** (Non-Editable)
- ✓ **End Date:** (Non-Editable)

- ✓ **Type of Software:**
- ✓ **Vendor:** (Editable) Double clicking on the column gives the dropdown of list of vendors which can be changed.
- ✓ **Old/New:** (Editable)
- ✓ **Purchase Order Number:** (Non-Editable)
- ✓ **Old Purchase Order Number:** (Non-Editable)
- ✓ **Termination Notice:** (Non-Editable)
- ✓ **Notice Requirement:** (Non-Editable)
- ✓ **Action:** It has a button inside its cell.
 - D or E: 'D' indicates on clicking it will disable this Software. 'E' indicates that Software has been already disabled and can be enabled on clicking it.

The following is a sample snapshot of how the grid looks like:

Edit Asset Print Bookmark

Search Products

Search by Date

Search for

Search Results

Name	Type	Model	Owned/Leased	Serial	Budget Id	Date Started	Vendor
Dell Optiplex ...	Desktop	DELL OptiPlex...	Leased	SG-FACSEC-5...	0	22-NOV-2011	APDail
s	Desktop	Precision T300	Leased	SG-FACSEC-5...	0	22-NOV-2011	APDail

Page 1 of 1

Double clicking in a particular cell makes the field editable.

Searching Asset

An Asset Details can be searched in “Asset Management” page. Search on Products or Softwares can be done by various parameters, and the search word is to be entered. The result is displayed on a “grid”. The result can be sorted by double-clicking on the column Headers.

The column headers are similar to as mentioned in “Editing Asset” part, but the cells are non-editable.

Purchase Management

Purchase Management Home

Using this section Mails can be sent through the Tool. Type of Mail can be selected from the drop down. The types of mails are

- i. Quote to User:

Inputs needed for the Tool: **Username**

Provision for multiple attachments: **Yes**

CC field: comma separated email list

The screenshot displays the 'Purchase Management Home' interface. On the left is a vertical sidebar with navigation links: Home, Asset Management, Purchase Management (highlighted), Purchase Request, Approve Requests, Purchase Actions, Budget Approvals, Administrator Section, Report Section, FeedBack, and Logout. The main content area is titled 'Purchase Management Home' and includes a 'Select Mail Type' dropdown menu with 'Please Select one' selected, and a 'Submit' button. Below this is a section titled 'Send quotation' with a 'Please select the user*' dropdown menu showing '--User--'. There is a 'CC' input field and a 'Please upload the attachment :' field with a 'Browse...' button. At the bottom of this section are links for 'Upload More Files' and 'Remove a File'. The email body is shown in a text area with a rich text editor toolbar. The email content is as follows: 'Dear [Firstname] [Lastname], Greetings! Please find attached the quotation regarding your request # _____. Currently, the estimated delivery period is about ____ days upon order confirmation. Make sure to double check the quoted item for any inconsistency from your original request. **Please be advised that this is only a quotation and for us to place the order, kindly provide the budget # along with an authorization email from your department head.** We remain at your disposal for any changes or inquiries regarding this purchase. Thank you.' A 'Send Mail' button is located at the bottom of the email body.

ii. Request for Quote:

Inputs needed for the Tool: **Vendor name**

CC field: comma separated email list

The screenshot displays the 'Purchase Management Home' interface. On the left is a vertical navigation menu with options: Home, Asset Management, Purchase Management (highlighted), Purchase Request, Approve Requests, Purchase Actions, Budget Approvals, Administrator Section, Report Section, FeedBack, and Logout. The main content area is titled 'Purchase Management Home' and includes a 'Print' icon and a 'Bookmark' icon. Below the title, there is a 'Select Mail Type' dropdown menu set to 'Please Select one' and a 'Submit' button. A horizontal line separates this from the 'Request quotation' section. This section contains a label 'Please select the Vendor*' followed by a dropdown menu showing '--Vendor--'. Below this is a 'CC' label and an empty text input field. A rich text editor follows, containing the text: 'Dear Mr/ Ms.[Vendorname]', 'Greetings!', 'Could you please submit a quote for the following items:', 'Can you kindly give us an estimate time of delivery and educational price offer.', 'Also, thank you for using our internal reference # mentioned on the email subject.', and 'Thanks and Regards,'. At the bottom of the form is a 'Send Mail' button.

iii. Budget Controller Approval

Inputs needed for the Tool: **Vendor name**

CC field: comma separated email list

Home	Purchase Management Home	Print Bookmark
Asset Management	Select Mail Type Please Select one	
Purchase Management	<input type="button" value="Submit"/>	
Purchase Request		
Approve Requests		
Purchase Actions		
Budget Approvals		
Administrator Section		
Report Section		
FeedBack		
Logout		

Budget Controller Approval

Please select the Budget Manager* --Budget Approver--

CC

B I

Dear [BudgetManager]

Greetings!

For your approval on the request of Mr. / Ms. _____ to purchase the following items under BUDGET # _____.

You will find attached, the quote specification of our supplier for the requested item.

Your abrupt response is deeply appreciated for us to place the order.

Thank you.

iv. Order to Vendor

Inputs needed for the Tool: **Vendor name**

Provision for multiple attachments: **Yes**

CC field: comma separated email list

Home	Purchase Management Home	Print Bookmark
Asset Management	Select Mail Type Please Select one	
Purchase Management	<input type="button" value="Submit"/>	
Purchase Request		
Approve Requests		
Purchase Actions		
Budget Approvals		
Administrator Section		
Report Section		
FeedBack		
Logout		

Order to Vendor

Please select the Vendor* --Vendor--

CC

Please upload the attachment :

[Upload More Files](#) [Remove a File](#)

B I

Dear [Vendorname]

Greetings!

Please find attached quote and order confirmation # _____ for the following items:

Thank you to confirm this order and estimate delivery date.

Kind regards,

Note: Body of the mail can be changed except placeholders like “Vendor name”.
Placeholders are included between square brackets. ([]) The * fields are mandatory.

Purchase Request

To raise a request for a Purchase, Users reach this place. Any number of Items can be added, on clicking **Add More Items** hyperlink.

The fields required for generating the request are:

Home	Purchase Request	
Asset Management	Budget ID*	<input type="text"/>
Purchase Management	On Behalf of	<input type="text"/>
Purchase Request	Reason(On Behalf of)	<input type="text"/>
Approve Requests	Incident Number	<input type="text"/>
Purchase Actions	Item1	
Budget Approvals	Type*	--Select One--
Administrator Section	Model*	
Report Section	Description	<input type="text"/>
FeedBack	Quantity*	<input type="text"/>
Logout	AddMoreItems Remove an Item	
	<input type="button" value="Generate Request"/>	

Budget Id:

On Behalf of: (This can be used in the case where user wants to raise a request on behalf of other Employee; relevant reasons should be mentioned in the next field)

Reason (On Behalf of):

Incident Number: The incident number created by Service Desk.

For Each Item

Type: Purchase type Ex: Desktop, Laptop

Model: Model of above chosen type

Description: User description of the Item being ordered

Quantity:

A request can be generated after entering all the fields and clicking on “Generate Request” button, confirmation message can be seen on screen and also a confirmation mail can be sent to the Requested User automatically by the Tool.

Note: The * fields are mandatory.

Approve Requests

Approving the generated requests is handled by “Approve requests” page. Anyone with relevant permissions to this page can approve requests.

Home	Approve Requests				Print	Bookmark
Asset Management	S.no#	Requester	Time of Request	Number of items		
Purchase Management	1	Naga Raju BHANOORI	Monday, November 28, 2011 at 01:01:29PM	1	More Details	
Purchase Request	2	Naga Raju BHANOORI	Wednesday, December 7, 2011 at 06:07:16AM	1	More Details	
Approve Requests						
See All Requests						
Purchase Actions						
Budget Approvals						
Administrator Section						
Report Section						
FeedBack						
Logout						

This page displays a list of generated requests. A particular Request will be in “Pending” phase when it is generated which either will go to “Passed” or “Removed” phase depending on its Approval by Purchasing Department. Approve requests page shows only pending Requests.

For each corresponding Request, a button “More details” is available which on clicking will open a window displays details regarding the request.

The screenshot displays the 'Approve Requests' interface. On the left is a sidebar menu with the following items: Home, Asset Management, Purchase Management, Purchase Request, Approve Requests (highlighted), See All Requests, Purchase Actions, Budget Approvals, Administrator Section, Report Section, FeedBack, Logout, and a copyright notice for INSEAD. The main area is titled 'Approve Requests' and contains a table with two requests. A modal window titled 'Detail of items in the request' is open, showing details for the second request. The modal includes a 'Details Of Request' section with Budget ID (FIB:2346), Number of Items (1), and Request Status (Pending). Below this is an 'Item 1' section with fields for Type (Service Contracts), Model (Subscription Renewals), and Quantity (1). It also has a 'Description' field, a 'Decision' section with radio buttons for 'Approve' (selected) and 'Reject', a 'Comment' text area, a 'Vendor' dropdown (set to APDaily), and a 'BudgetManager' field (set to sgp\bhanoori). A 'Submit' button is at the bottom of the modal.

S.no#	Requester	Time of Request	Number of items
1	Naga Raju BHANOORI	Monday, November 28, 2011 at 01:01:29PM	1
2	Naga Raju BHANOORI	Wednesday, December 7, 2011 at 06:07:16AM	1

Detail of items in the request

Details Of Request

Budget ID : FIB:2346
 Number of Items : 1
 Request Status : Pending

Item 1

Type: Service Contracts Model: Subscription Renewals Quantity: 1

Description:

Decision: ☒ Approve ☐ Reject

Comment:

Vendor: APDaily

BudgetManager: sgp\bhanoori

Submit

Each item in the Request can be “Approved” or “Rejected” and relevant comments can be written for each case. If the Item is being “Approved”, Vendor name should be mentioned, (which can also be changed later). Name of Budget Manager should also be mentioned.

On clicking “Submit” **Purchase Order Number** will be generated and will be displayed, acknowledgement mail will also be sent to the user regarding the generation of Purchase Order Number.

To monitor all Requests, “See All Requests” page displays all Requests on a grid along with corresponding details like Requester, Request Status etc.,

Home	See All Requests				Pri
Asset Management	Name	Requested Date	On Behalf Of	Request Sta...	
Purchase Management	Naga Raju ...	November, 28 2011 13:01:29		Pending	
Purchase Request	Naga Raju ...	November, 25 2011 04:33:31		Passed	
Approve Requests	Naga Raju ...	November, 22 2011 10:20:53	Sanjeev Krishna MANDALAPU	Passed	
See All Requests	Naga Raju ...	December, 07 2011 06:07:16		Pending	
Purchase Actions	Naga Raju ...	November, 22 2011 08:06:34	Sanjeev Krishna MANDALAPU	Passed	
Budget Approvals	Naga Raju ...	December, 05 2011 18:32:33		Passed	
Administrator Section	Naga Raju ...	November, 28 2011 07:16:58		Passed	
Report Section					
FeedBack					
Logout					
	<div> ⏪ ⏩ Page 1 of 1 ⏴ ⏵ </div>				

Purchase Actions

This page displays all details of a created Purchase Order. It takes input “Purchase Order Number” which is an autosuggest upon entering a minimum of 3 characters.

This screen is one stop shop for all relevant information regarding a Purchase Order Number.

Home	Purchase Actions		Print	Bookmark
Asset Management	Purchase Order Number : <input type="text" value="INS11-1"/> <input type="button" value="Show"/>			
Purchase Management	Details Of PO			
Purchase Request	PO : INS11-1	Open Date : 22-Nov-2011	Current Status : Request Received	
Approve Requests	Requester: Naga Raju BHANOORI			
Purchase Actions	On behalf of : Sanjeev Krishna MANDALAPU		Reason :	
Budget Approvals	Budget			
Administrator Section	Id : 3500			
Report Section	Manager : Naga Raju BHANOORI			
FeedBack	Decision : Pending			
Logout	Comments :			
	Change Status To : <input type="text" value="RequestReceived"/>			
	Total Purchase Amount : 11702			
	<input type="button" value="Register as Assets"/>		<input type="button" value="Print Order"/>	
	<div>Item 1</div> <div>Item 2</div>			
	<input type="button" value="Update"/>			

All the Purchase Order details related to Item, Vendor, Prices, Sales, Finance information can be updated. There is a feature to upload Quotes, Invoice and thereby monitor them.

“Register as Assets”

This allows Purchasing Department to register a Purchase as an asset directly after the delivery is made.

“Print Order”

Order Confirmation to Vendor can be printed by clicking this button. It will allow the user to select type of format by choosing a Campus. The user has to select Items grouped by the Vendor.

Once submitted .pdf file will be generated. User can right click the download icon and download the pdf.

For creating this pdf, **Adobe Live Cycle Designer** has been used to create a pdf form and then data was populated into the pdf form and then later protected.

The screenshot shows a web application interface with a sidebar menu on the left and a main content area. The sidebar menu includes: Home, Asset Management, Purchase Management, Purchase Request, Approve Requests, **Purchase Actions** (highlighted), Budget Approvals, Administrator Section, Report Section, FeedBack, and Logout. The main content area is titled 'Purchase Actions' and shows 'Purchase Order Number : INS11-1' with a 'Show' button. Below this is a 'Details Of PO' section with 'PO : INS11-1', 'Open Date : 22-Nov-2011', and 'Current Status : Request Received'. A 'Print Order' dialog box is open, featuring an 'Options' section with 'Choose a campus :' and a dropdown menu. Below this is a table with columns '#', 'Items', and 'Vendor Name'. The table contains two rows: '1. Item 1' with vendor 'APDaily' and '2. Item 2' with vendor 'SampleVendor'. A 'Print' button is located at the bottom left of the dialog box. At the bottom of the main content area, there is a 'Vendor : APDaily' field and a 'Details: For Default purposes' label.

#	Items	Vendor Name
1.	Item 1	APDaily
2.	Item 2	SampleVendor

Budget Approvals

This is the screen for a Budget Controller. A budget controller can see List of all requested Purchases under his/her name.

Home	Budget Approvals			Print	Bookmark
Asset Management	S.no#	Requester	Time of Creation of Purchase Order		
Purchase Management	1	Naga Raju BHANOORI	Tuesday, November 22, 2011 at 08:07:38AM		
Purchase Request	2	Naga Raju BHANOORI	Monday, November 28, 2011 at 07:20:40AM		
Approve Requests	3	Naga Raju BHANOORI	Monday, November 28, 2011 at 07:22:18AM		
Purchase Actions	4	Naga Raju BHANOORI	Monday, December 5, 2011 at 06:33:40PM		
Budget Approvals	5	Naga Raju BHANOORI	Monday, December 5, 2011 at 06:40:51PM		
See All Approvals	6	Naga Raju BHANOORI	Monday, December 5, 2011 at 06:42:28PM		
Administrator Section					
Report Section					
FeedBack					
Logout					

For each corresponding Request, a button “More details” is available which on clicking will open a window displays details regarding the request.

Home	Budget Approvals			Print	Bookmark
Asset Management	S.no#	Requester	Time of Creation of Purchase Order		
Purchase Management					
Purchase Request					
Approve Requests					
Purchase Actions					
Budget Approvals					
See All Approvals					
Administrator Section					
Report Section					
FeedBack					
Logout					
© 2011 INSEAD					

Detail of Purchase Order

Details Of Purchase Order

Purchase ID : INS11-1
Number of Items : 2
Total Purchase Amount : 11702

Item 1

Type: Desktop Model: DELL Vostro 430 Quantity: 5

Description: 500 Gb Hard disk

Comments: Approved by Purchasing Department

List Price: 5000 Total After Tax: 4868.5

Related Files

Item 2

Type: Desktop Model: DELL Vostro 430 Quantity: 6

Description:

Comments:

List Price: 7200 Total After Tax: 6833.02

Related Files

Approve Reject

The details include Purchase Order Number, Requester, and Budget Id for a Request. For Each Item in a Request details like Type, Model, Description, Vendor, Unit Price, Total Price, Relevant Attached files (Quotes) can also be seen by the Budget Controller.

A budget Controller has an Option to “Approve” or “Reject” a Request which on clicking will update the Approval Status of that Purchase and can be through Purchase Actions.

A separate page “See All Approvals” is created for an administrator to monitor all the requests. In this page a grid is displayed with details of Purchase like Purchase Order, Requester, Approval Status etc.,

Home	Budget Approvals Print					
Asset Management	PO#	Requester	Budget ID	Budget Manager	Decision	Comments
Purchase Management	INS11-42	Naga Raju BHANOORI	3500	Naga Raju BHANOORI	Pending	
Purchase Request	INS11-43	Naga Raju BHANOORI	3500	Naga Raju BHANOORI	Pending	
Approve Requests	INS11-61	Naga Raju BHANOORI	3500	Naga Raju BHANOORI	Pending	
Purchase Actions	INS11-62	Naga Raju BHANOORI	3500	Naga Raju BHANOORI	Pending	
Budget Approvals	INS11-63	Naga Raju BHANOORI	3500	Naga Raju BHANOORI	Pending	
See All Approvals	INS11-64	Naga Raju BHANOORI	3500	Naga Raju BHANOORI	Approved	
Administrator Section	INS11-1	Naga Raju BHANOORI	3500	Naga Raju BHANOORI	Pending	
Report Section	INS11-44	Naga Raju BHANOORI	3500	Naga Raju BHANOORI	Approved	
FeedBack	INS11-41	Naga Raju BHANOORI	3500	Sanjeev Krishna MANDA...	Pending	
Logout	INS11-21	Naga Raju BHANOORI	3500	Virnali SY	Pending	
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Administrator Section

Vendors

This section is used to monitor all Vendors. There are two pages in this sub-section. First one is to add a vendor and the latter is two monitor all Vendors.

“Add a Vendor”

The fields required for Adding a Vendor include:

- Name: (Compulsory) Name of Vendor.
- Details: (Compulsory) A little detail regarding Vendor.
- Geographical Location: (Compulsory) A drop-down for selecting either “Middle East” or “Europe” or “Asia”.
- Address: (Compulsory)
- Email: (Compulsory)
- Phone1:
- Phone2:
- Fax:

Home	Vendors
Asset Management	Add a new vendor
Purchase Management	Name* <input type="text"/>
Administrator Section	Details* <input type="text"/>
Vendors	Geographical Location* <input type="text" value="Middle east"/>
See All Vendors	Address* <input type="text"/>
Users	Email* <input type="text"/>
Departments	Phone1 <input type="text"/>
Access Levels	Phone2 <input type="text"/>
Type Of Purchase	Fax <input type="text"/>
Type Of Item	<input type="button" value="Add"/>
Report Section	
FeedBack	
Logout	

See All Vendors

This page displays a grid, which shows all details like Vendor name, Vendor Details, Geographical Location, Email, Phone1, Phone2, Fax and also an Action tab.

The Action tab in the grid has a button in its cell. The button is either a “Disable” or “Enable” button which Disables or Enables a particular Vendor.

Home

Asset Management

Purchase Management

Administrator Section

Vendors

See All Vendors

Users

Departments

Access Levels

Type Of Purchase

Type Of Item

Report Section

FeedBack

Logout

See All Vendors

Print

Bookmark

Vend...	Vendor Details	Address	Geographical Lo...	Email ID	Phone 1	Phone 2	FAX
Sam...	Supplier	1 Aye	Asia	xx@zz.com			
APDa...	For Default pu...	Singapore	Asia	nagaraju.bha...			
CFC	For Default pu...	Singapore	Asia	anirudh.namb...			

Page 1 of 1

Users

This section is used to monitor all Users. There are two pages in this sub-section. First one is to add a user and the latter is to monitor all Users.

“Add a new User”

The fields required for adding a User are:

- User Name: “DOMAIN\login”
- Department: A drop down of list of departments.
- First name:
- Middle name:
- Last name:
- Campus:
- Email:
- Workphone/Extension:
- Mobile:
- Fax:
- Is Active: Checking this box indicates that user is Active and possesses certain Assets.
- Grant Access: Checking this box gives the user Access to use this tool.
- Role for Assets: Appears only when “Grant Access” box is checked. A corresponding Role can be assigned to the user depending on the desired permission level intended to be given.
- Role for Purchasing: Appears only when “Grant Access” box is checked. A corresponding Role can be assigned to the user depending on the desired permission level intended to be given.

Home	User Section
Asset Management	Search/Edit Users
Purchase Management	Add a new User
Administrator Section	
Vendors	
Users	<u>Add User</u>
Departments	Username* <input type="text"/> <input type="button" value="Go"/>
Access Levels	Department* <input type="text" value="Default"/>
Type Of Purchase	Firstname* <input type="text"/>
Type Of Item	Middlename <input type="text"/>
Report Section	Lastname* <input type="text"/>
FeedBack	Campus* <input type="text" value="Singapore"/>
Logout	Email* <input type="text"/>
	Workphone/Extension <input type="text"/>
	Mobile <input type="text"/>
	Fax <input type="text"/>
	IsActive <input checked="" type="checkbox"/>
	Grant Access <input checked="" type="checkbox"/>
	Role For Assets <input type="text" value="Purchasing Officer"/>
	Role For Purchasing <input type="text" value="Purchasing Officer"/>
	<input type="button" value="Add"/>

Note: There's a button beside "Username" field, "Go". This on clicking automatically pings the Active Directory and fills First name, Last Name, Email automatically.

"Search/Edit Users"

Search on users can be done with various parameters like Username, First name, Last Name, Campus, Department.

SEARCH

Description: Campus: Department:

Please enter keywords to search user by username or firstname or lastname

The result is a grid which displays

- User name: (Non-Editable)
- First name: (Editable)
- Middle name:
- Last name: (Editable)
- Campus:
- Email: (Editable)
- Work Phone: (Editable)
- Mobile Phone: (Editable)
- Fax: (Editable)
- Department Name: (Editable)
- Action: The Action tab in the grid has a button in its cell. The button is either a "Disable" or "Enable" button which Disables or Enables a particular User.

Departments

This section is used to monitor all Departments. There are two pages in this sub-section. First one is to add a user and the latter is two monitor all Departments.

"Add a Department"

"Name" field is required to add a department.

Home	Departments Section
Asset Management	Add a new Department
Purchase Management	
Administrator Section	Department Name* <input type="text"/>
Vendors	<input type="button" value="ADD"/>
Users	
Departments	
See All Departments	
Access Levels	
Type Of Purchase	
Type Of Item	
Report Section	
FeedBack	
Logout	

"See All Departments"

This page displays a grid, which shows all departments. The department name is provided "Editable".

Access Levels

This section is used to assign Roles i.e. Permission Levels to users. There are two sub sections. First one is to assign a role and the latter is two monitor all Permissions allotted to various users.

"Assign a Role"

The fields required to assign a role are:

- User: (Auto-suggest) [Format: *DOMAIN\Login*]
- Category: It's a checkbox to select either Assets or Purchasing
- Role: A drop-down depending on the previous selection corresponding Roles of that category populate.

Home	<h3>Access Levels</h3> <hr/> <p>Assign Role to User</p> <p>User* <input type="text"/></p> <p>Category* <input type="radio"/> Assets <input type="radio"/> Purchasing</p> <p>Role* <input type="text"/></p> <p><input type="button" value="Assign"/></p>
Asset Management	
Purchase Management	
Administrator Section	
Vendors	
Users	
Departments	
Access Levels	
See All Permissions	
Type Of Purchase	
Type Of Item	
Report Section	
FeedBack	
Logout	

"See All Permissions"

All the assigned Roles can be monitored here. It displays a grid which shows Login Name, Name, Asset Role and Purchase Role.

Asset and Purchase Roles are editable. The maximum of the previous role and currently assigned role will be taken.

Type of Purchase

This section is used to monitor all Purchase Types. There are two pages in this sub-section. First one is to add a type and the latter is two monitor all Types.

"Add a Purchase Item Type"

"Name" field is required to add a type.

Home	Purchase Item Types <hr/> Add Purchase Item Type <hr/> <div>Purchase Type Name* <input type="text"/></div> <div><input type="button" value="Add"/> <input type="button" value="Reset"/></div>
Asset Management	
Purchase Management	
Administrator Section	
Vendors	
Users	
Departments	
Access Levels	
Type Of Purchase	
See All Types	
Type Of Item	
Report Section	
FeedBack	
Logout	

"See All Types"

This page displays a grid, which shows all types. The Purchase type name is provided "Editable".

Type of Item

This section is used to monitor all Item models. There are two pages in this sub-section. First one is to add an item model and the latter is two monitor all Models.

"Add a Purchase Item Model"

"Purchase Type" is a drop-down which is to be selected mandatorily.

"Name" field is required to add a type.

Home
Asset Management
Purchase Management
Administrator Section
Vendors
Users
Departments
Access Levels
Type Of Purchase
Type Of Item
See All Models
Report Section
FeedBack
Logout

Item Models

[Add Item Model](#)

Select the Purchase Item Type* --Select One--

Item Model Name*

“See All Models”

This page displays a grid, which shows all types and Models. The Model name is provided with “Editable” feature.

Home
Asset Management
Purchase Management
Administrator Section
Vendors
Users
Departments
Access Levels
Type Of Purchase
Type Of Item
See All Models
Report Section
FeedBack
Logout

All Models

MODEL_NAME	TYPE_NAME
DELL Vostro 430	Desktop
Precision T300	Desktop
DELL OptiPlex 780	Desktop
DELL XPS 800	Desktop
DELL Inspiron 580	Desktop
Other	Desktop
Dell Latitude E4310	Laptop
Lenovo ThinkPad X201 tablet	Laptop
DELL Latitude E6520/ E6320	Laptop
Other	Laptop
HTC Desire	Phones
Nokia 6303i	Phones
Blackberry PDA 8520	Phones
Other	Phones
Sharp LCD TV	Screens

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Report Section


This section includes reports related to Asset Management. It provides a search functionality over Products and Softwares, relevant results can be downloaded into an excel sheet on clicking “Download”.

Home	Reports
Asset Management	Search <input type="text" value="Products"/>
Purchase Management	Search by <input type="text" value="Date"/>
Administrator Section	Search for <input type="text"/>
Report Section	<input type="button" value="Download"/>
FeedBack	
Logout	

Feedback

It's a sample questionnaire which can be accessed by a user and responses can be sent.

The user has to input “Purchase Order Number” which is an autosuggest upon entering a minimum of 3 characters.

Home	Feed Back	 Print
Asset Management	Purchase Order Number : <input type="text"/>	
Purchase Management	Can We consider your Request Closed? Yes <input type="radio"/> No <input type="radio"/>	
Administrator Section	Have we fulfilled your requirements? Yes <input type="radio"/> No <input type="radio"/>	
Report Section	Were you satisfied with the service? Yes <input type="radio"/> No <input type="radio"/>	
FeedBack	If you replied "No" to any of the above questions, please provide further details	
See All Responses	<input type="text"/>	
Logout	<input type="button" value="Send"/>	

Responses from all users can be seen by an Administrator in “**See All Responses**” section. It looks like the below snapshot.

Home	Responses							Print	Bookmark
Asset Management									
Purchase Management									
Administrator Section									
Report Section									
FeedBack									
See All Responses									
Logout									

Name	Purchase Id	Request Closed ?	Requirements fu...	Satisfied ?	Reason	Responded on	
Naga Raju ...	INS11-1	Yes	Yes	Yes	No way	November, 22...	

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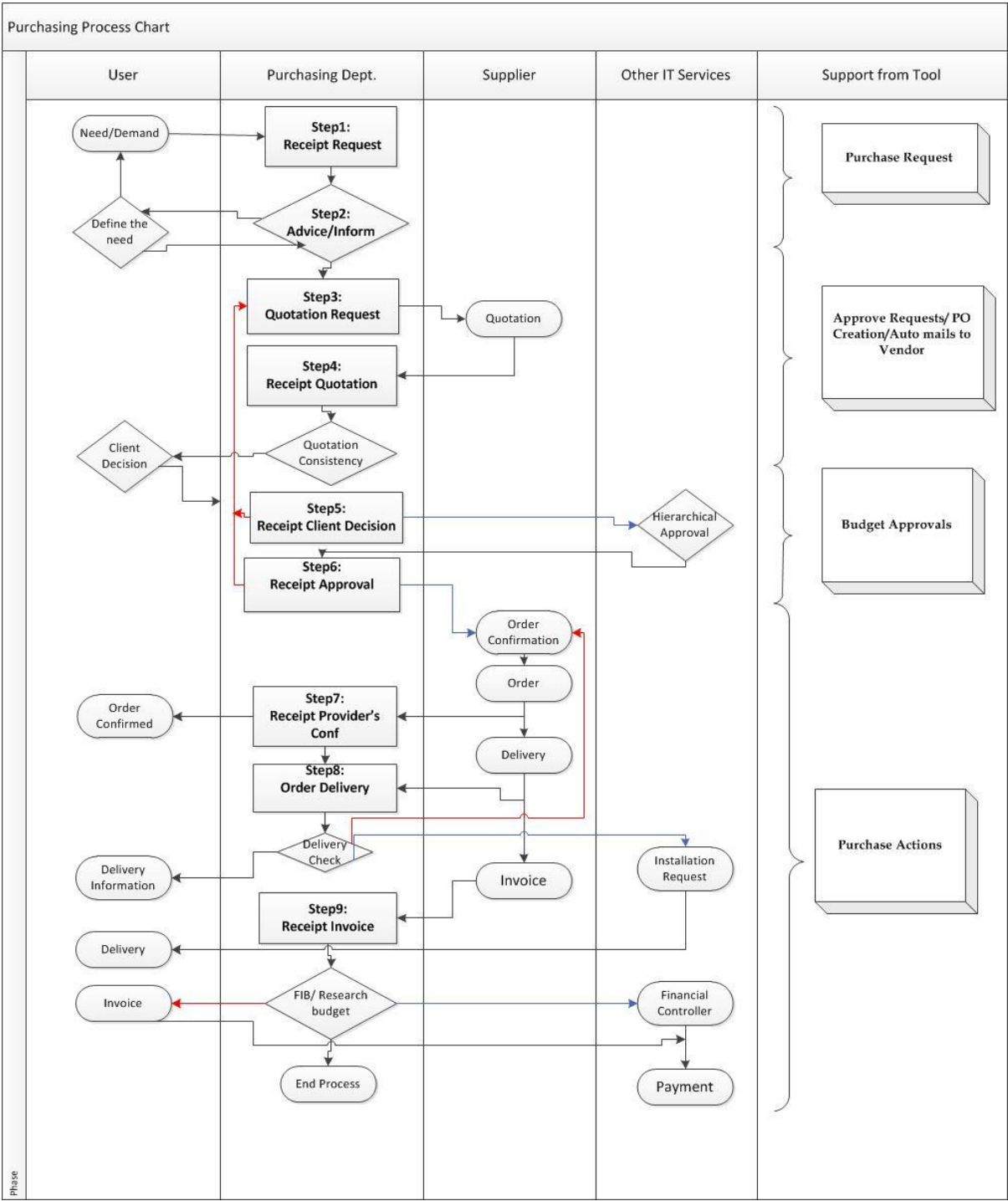
Flow

Purchase Management:

Black Arrows indicate Faithful Path.

Blue Arrows indicate Positive Settlement.

Red Arrows indicate Negative Settlement.



Asset Management:

