Assets and Purchasing Management Tool

FOR

IT Governance Team

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Document Information and Distribution List

Version History

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

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

Distribution List

Name	Title	Date
Jae CHAE	Governance Manager	12th December, 2011
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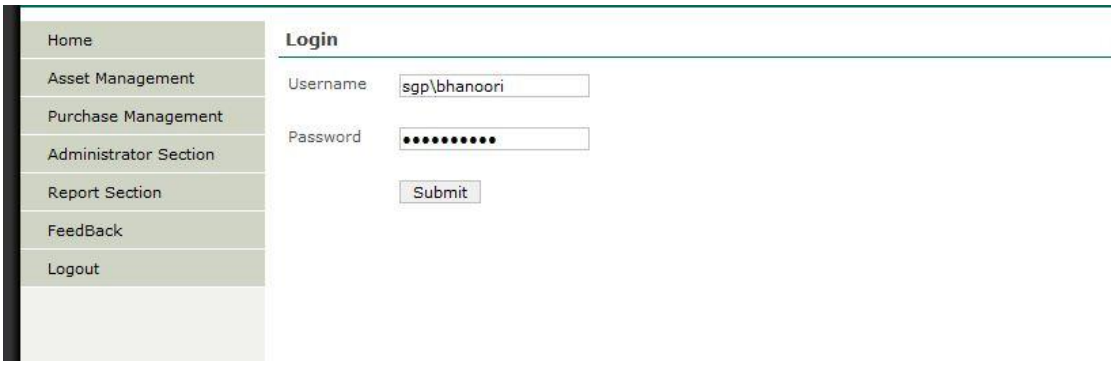
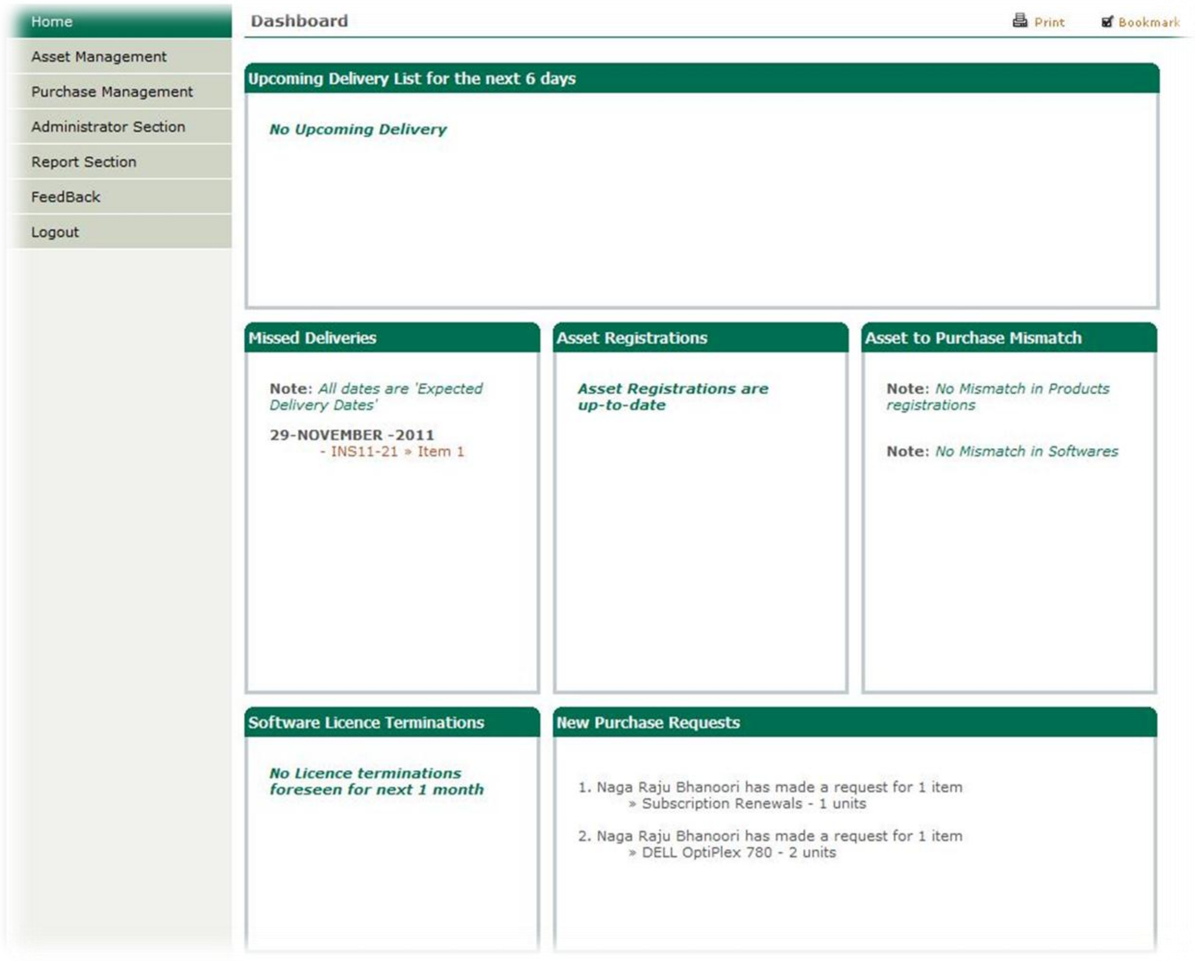
Ghislaine LABRO	IT Budget and Control Manager	12th December, 2011
David GABAY	Purchasing Manager	12th December, 2011

Asset and Purchase Management Tool User Interface

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



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.



Once the User logins, 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

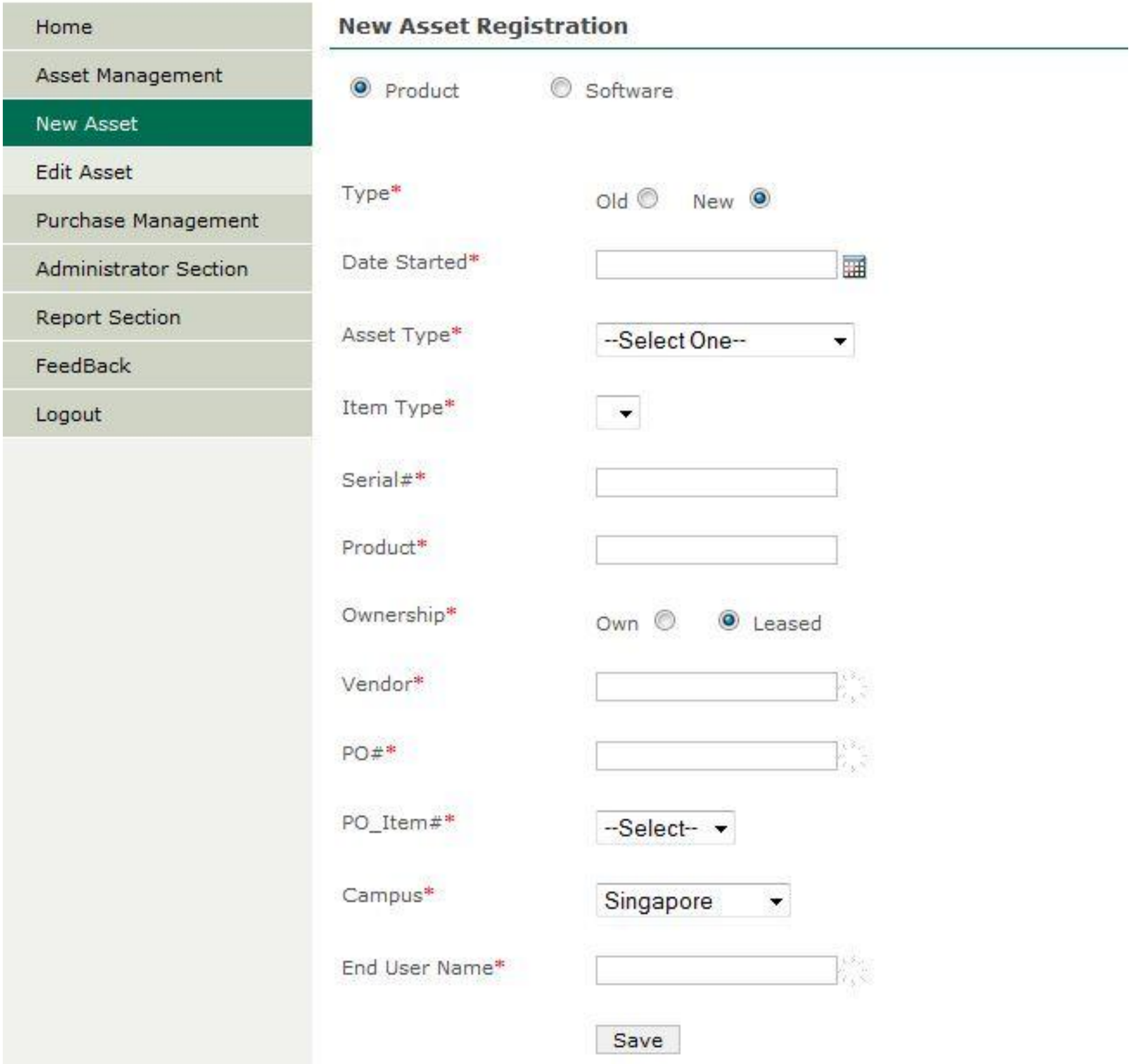
Asset Registration

"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:

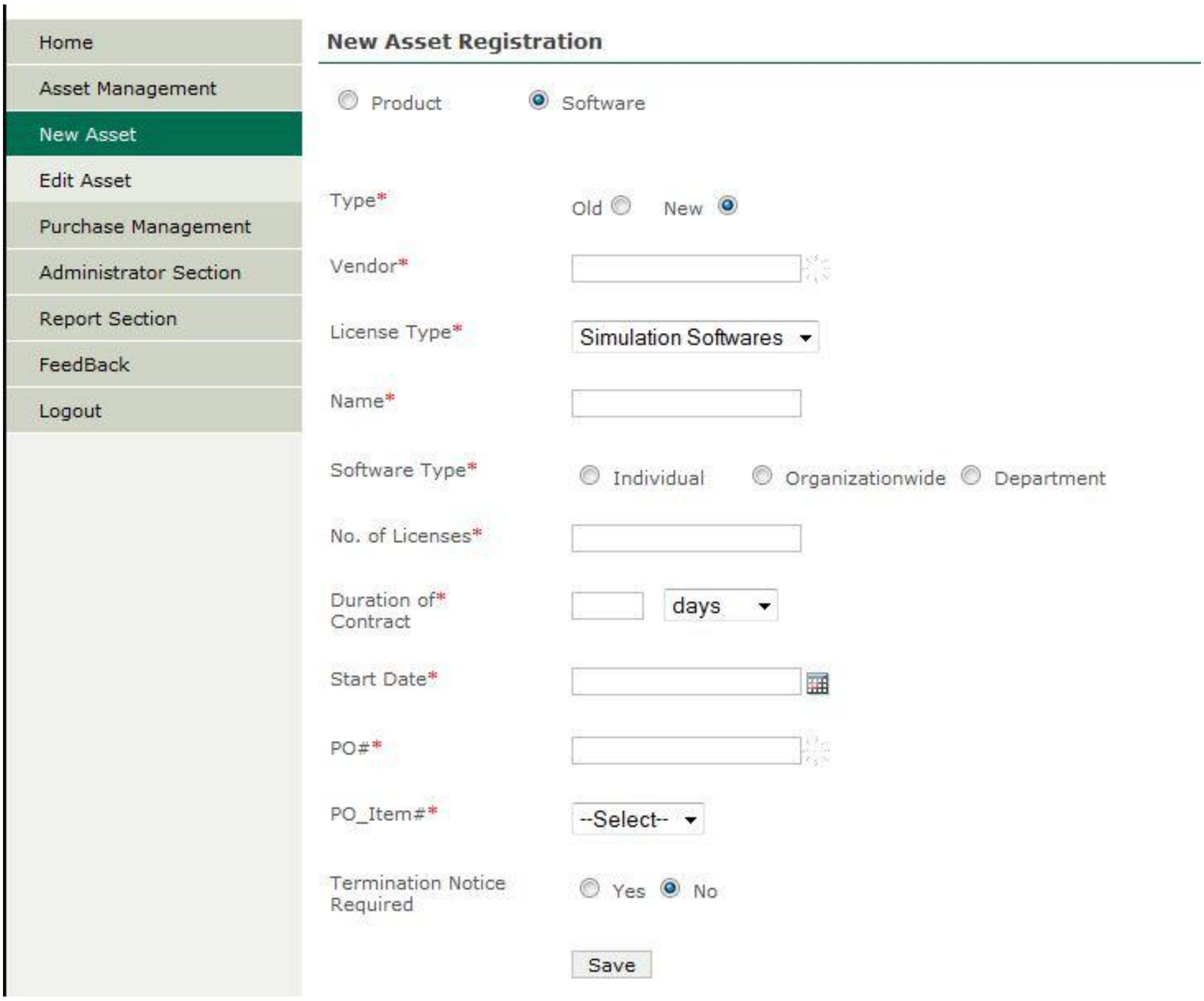


- **Type:** It’s a selection button between “Old” and “New”. Relevant fields appear on the corresponding selection.
- **Date Started:** It marks the date of start of Asset Life Cycle.
- **Asset Type:** It’s a drop down of selection of Type of Asset. Ex: Laptop, Desktop.
- **Item Type:** It’s a drop down 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:



- **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

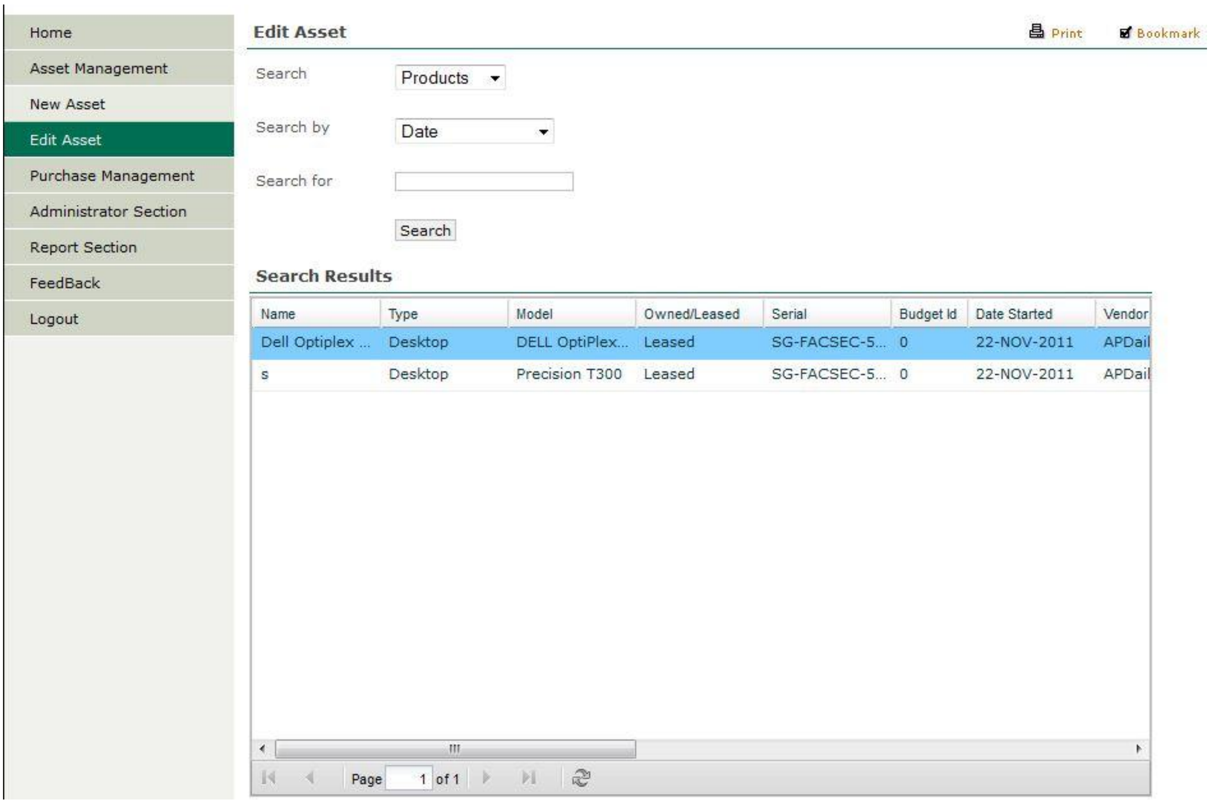
- ✓ **Model:** (Non-editable) Name of Model of the particular type of Asset
- ✓ **Owned/Leased:** (Editable)
- ✓ **Serial:** (Editable)
- ✓ **Budget Id:** (Editable)
- ✓ **Date Started:** (Non-Editable)
- ✓ **Vendor:** (Editable) Double clicking on the column gives the dropdown of list of vendors which 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:



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

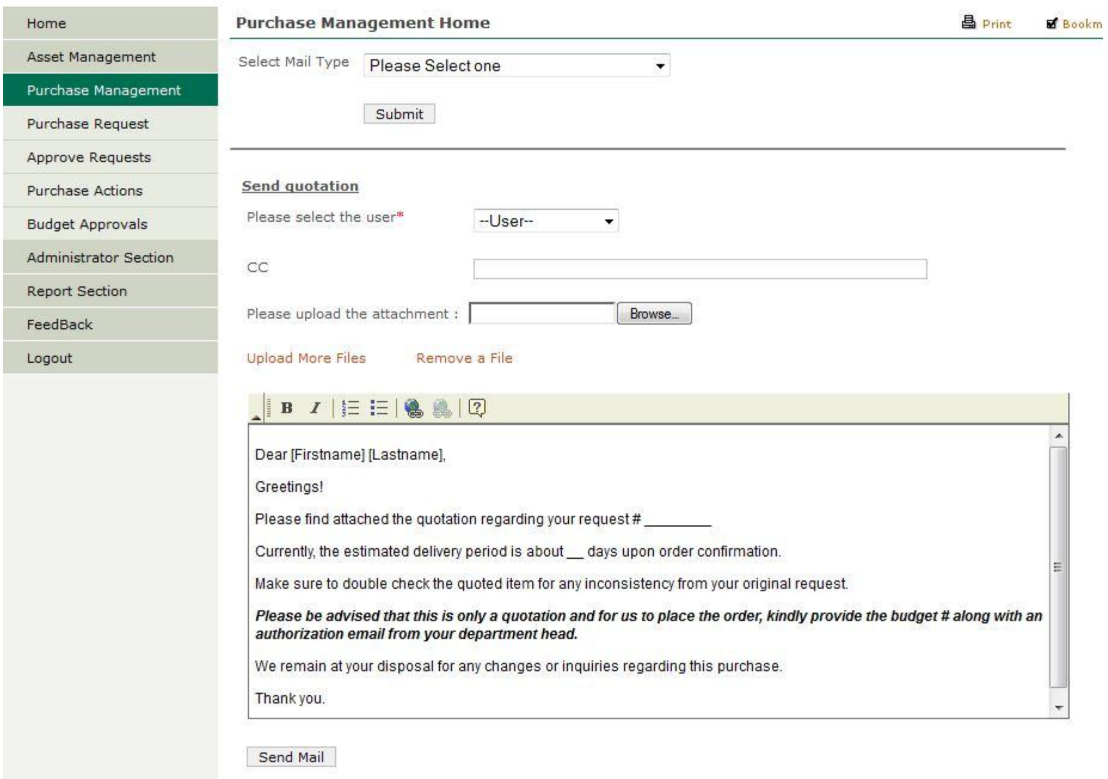
Using this section Mails can be sent through the Tool. Type of Mail can be selected from the drop down. The types of mails are

i. Quote to User:

Inputs needed for the Tool: **Username**

Provision for multiple attachments: **Yes**

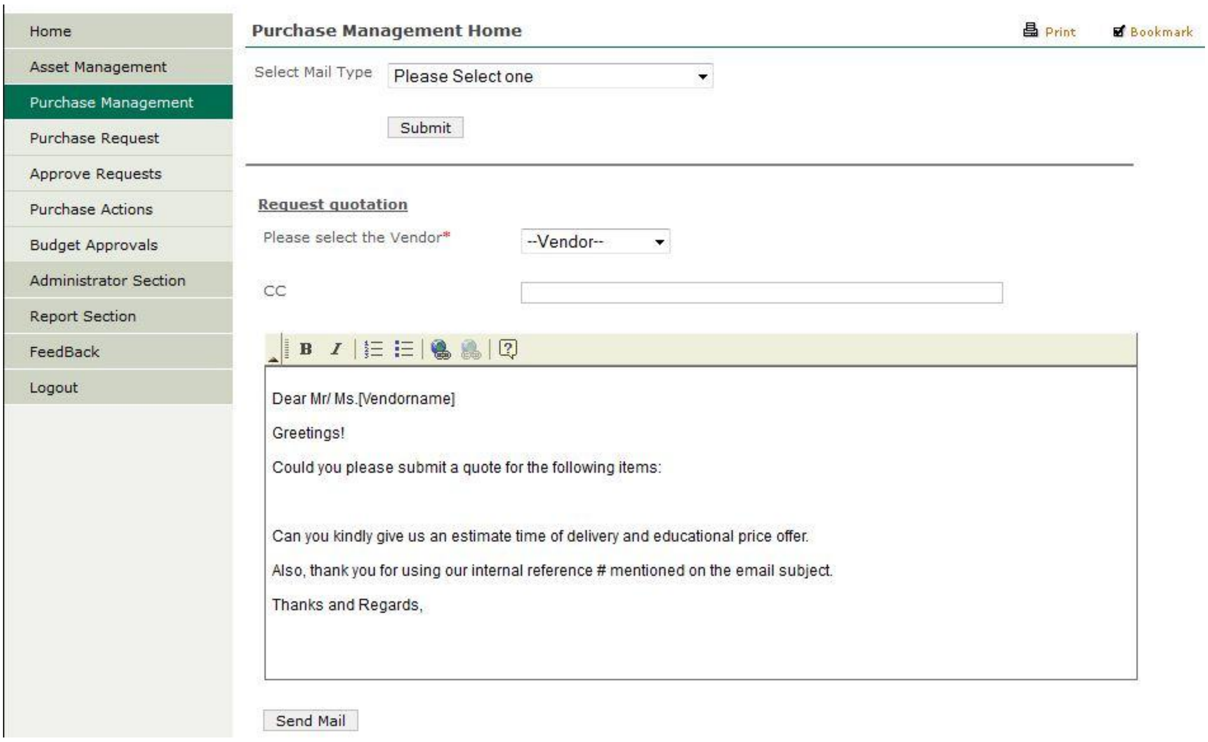
CC field: comma separated email list



ii. Request for Quote:

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

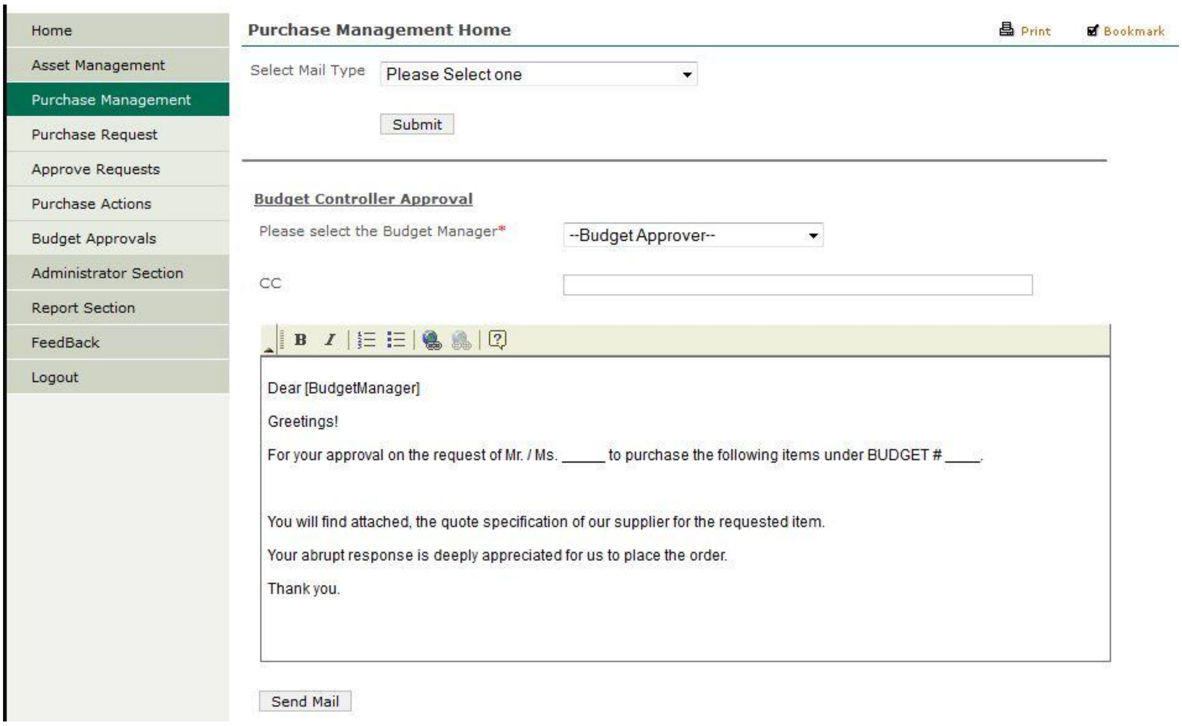
CC field: comma separated email list



iii. Budget Controller Approval

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

CC field: comma separated email list

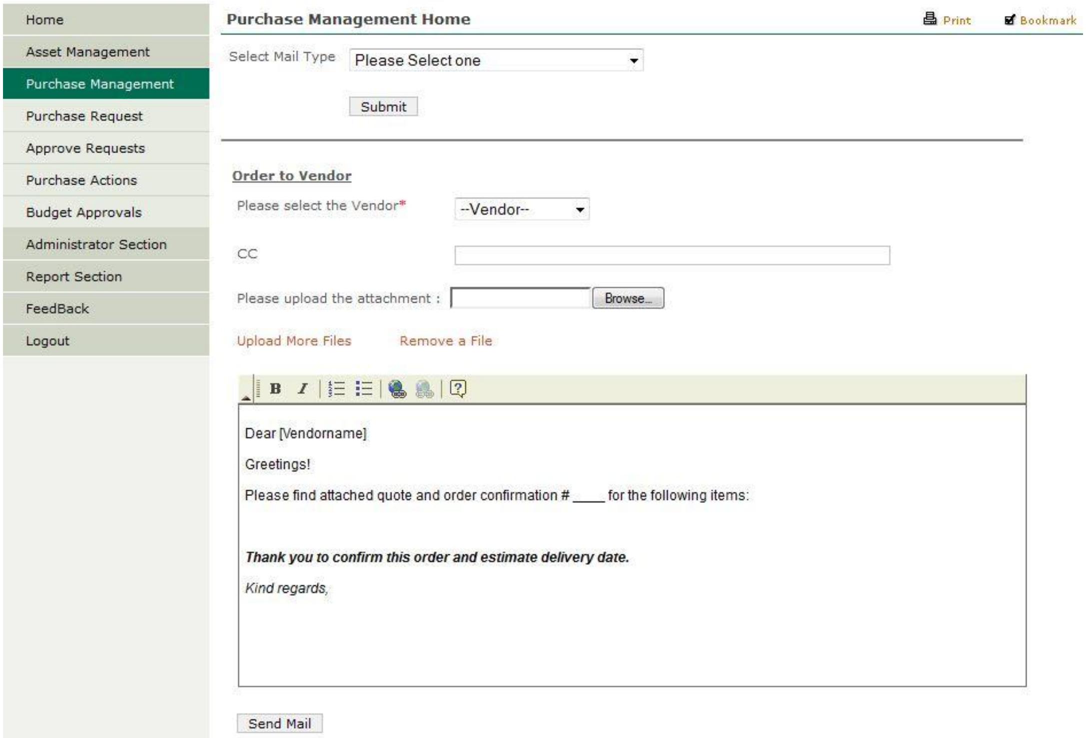


iv. Order to Vendor

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

Provision for multiple attachments: **Yes**

CC field: comma separated email list

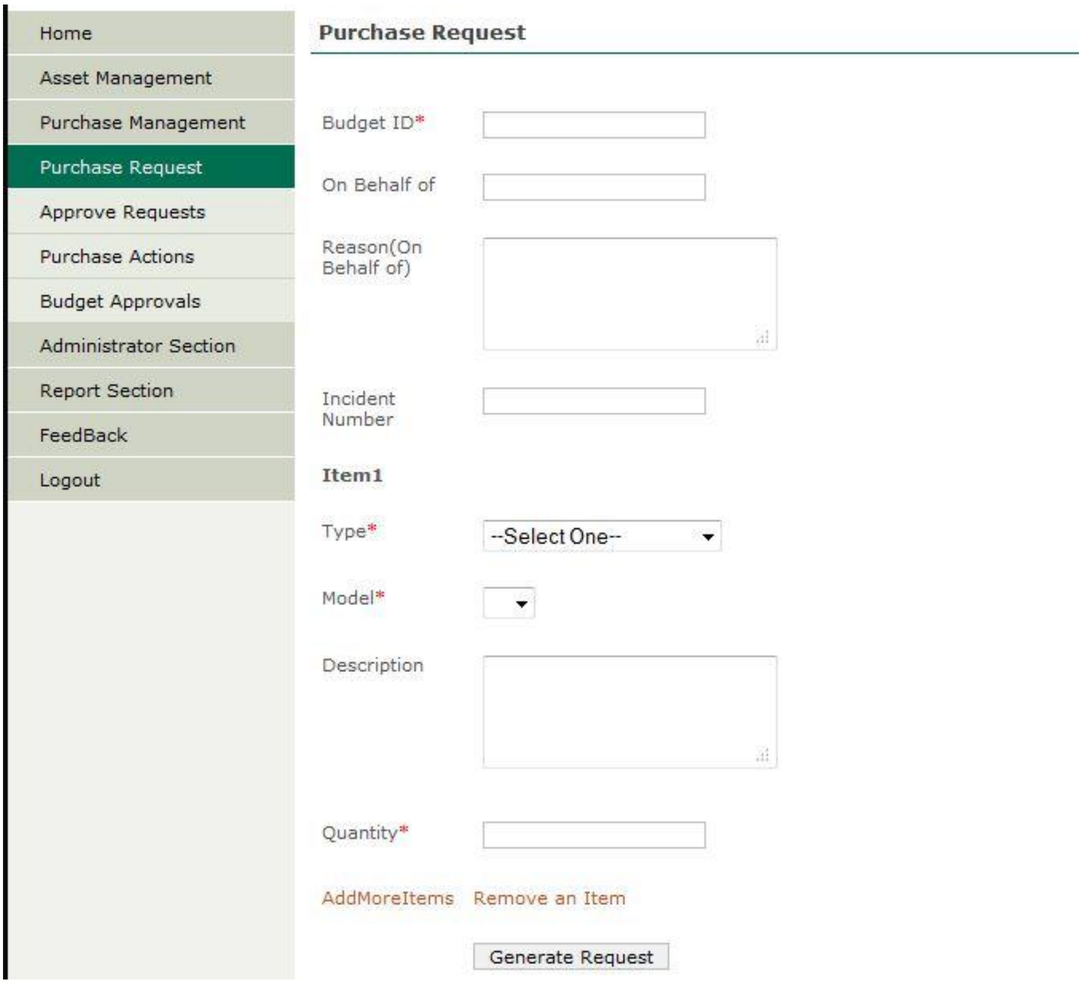


Note: *Body of the mail can be changed except placeholders like "Vendor name". Placeholders are included between square brackets. (**[]**) The * fields are mandatory.*

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:



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.

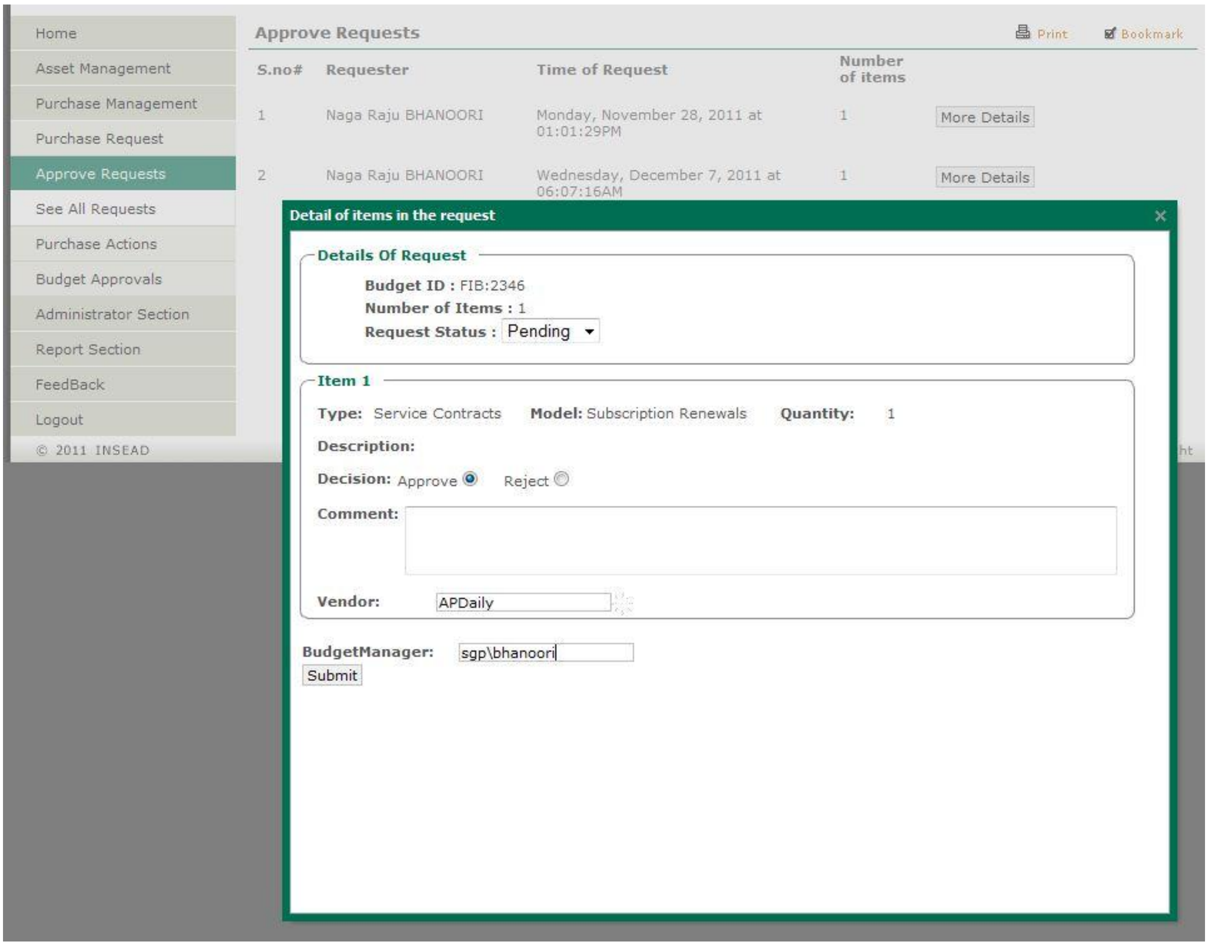
Note: The * fields are mandatory.

Approve Requests

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

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.

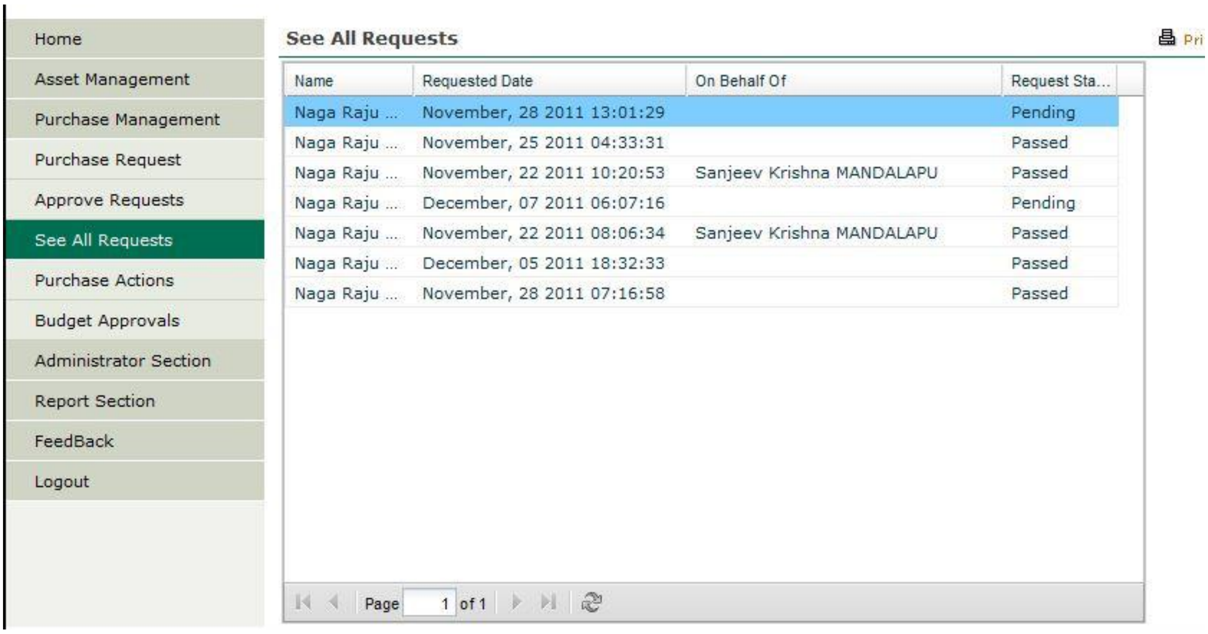
For each corresponding Request, a button "More details" is available which on clicking will open a window displays details regarding the request.



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.

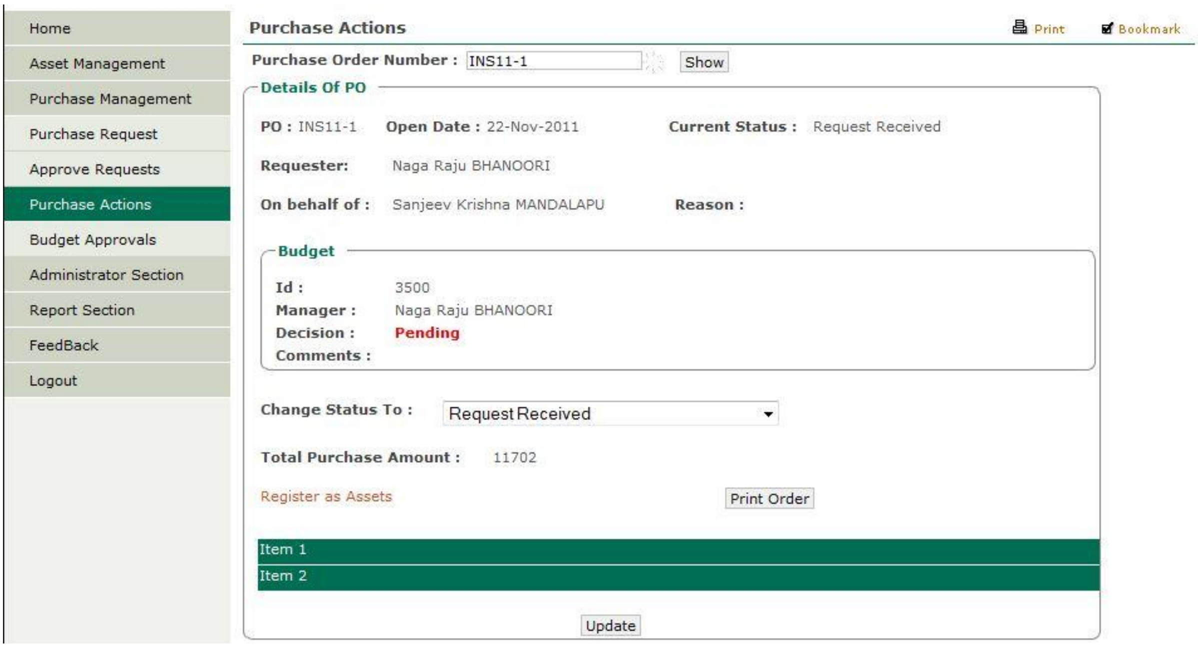
To monitor all Requests, “See All Requests” page displays all Requests on a grid along with corresponding details like Requester, Request Status etc.,



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.



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"

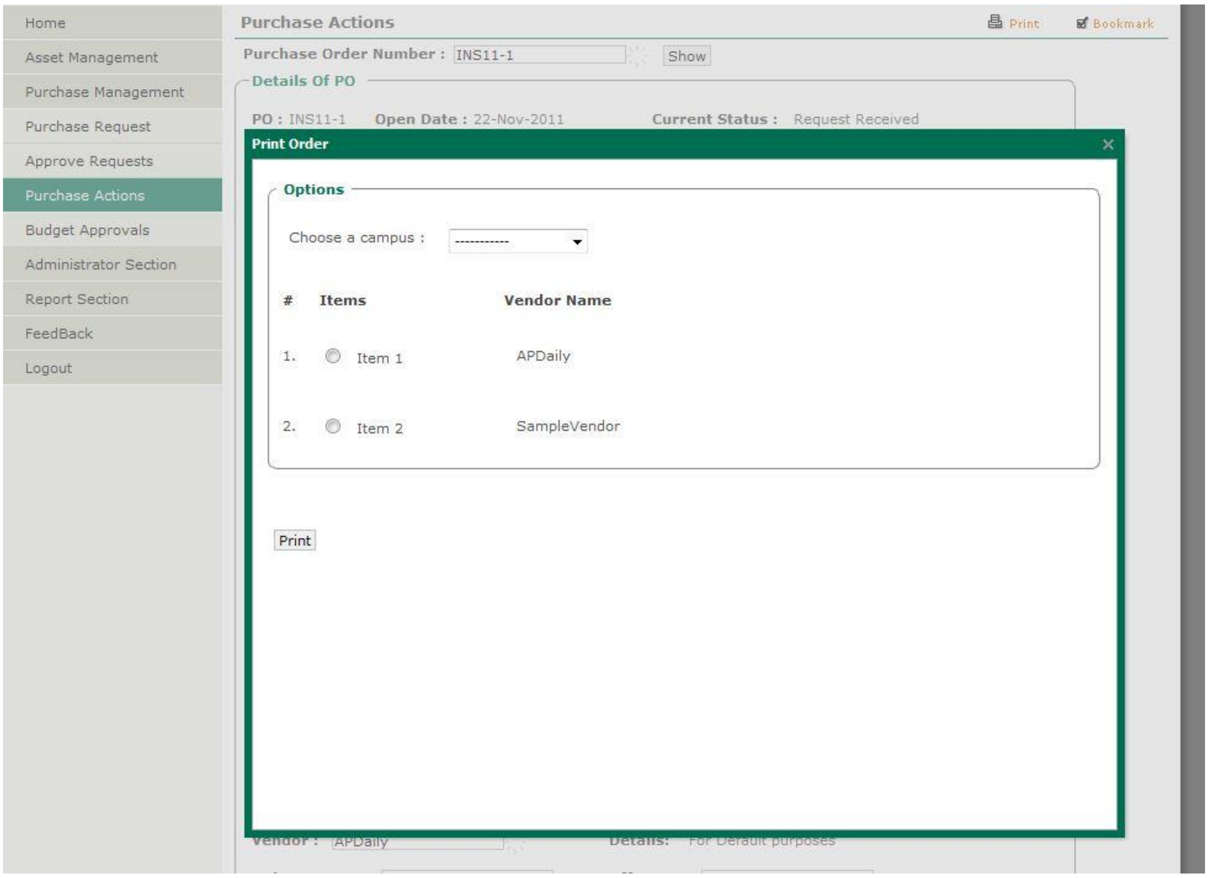
This allows Purchasing Department to register a Purchase as an asset directly after the delivery is made.

"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.

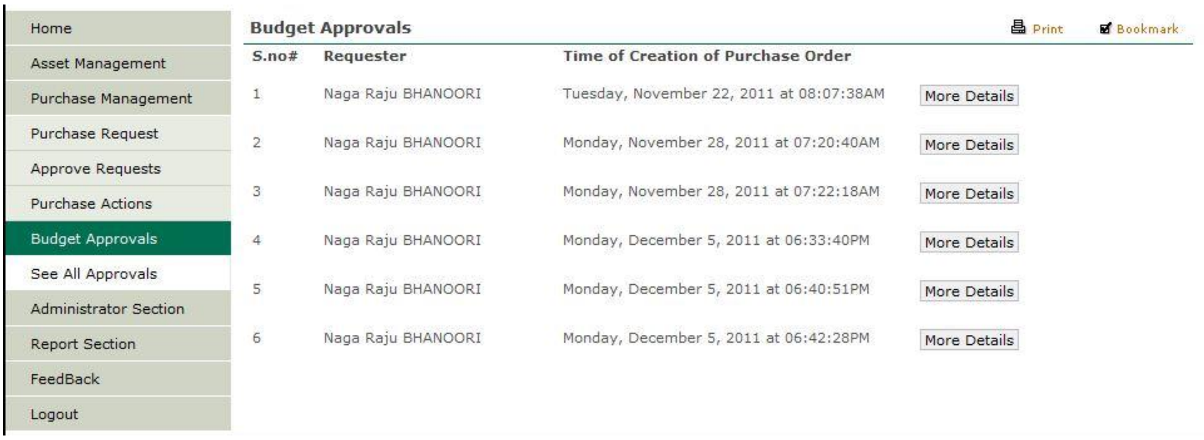
Once submitted .pdf file will be generated. User can right click the download icon and download the pdf.

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.

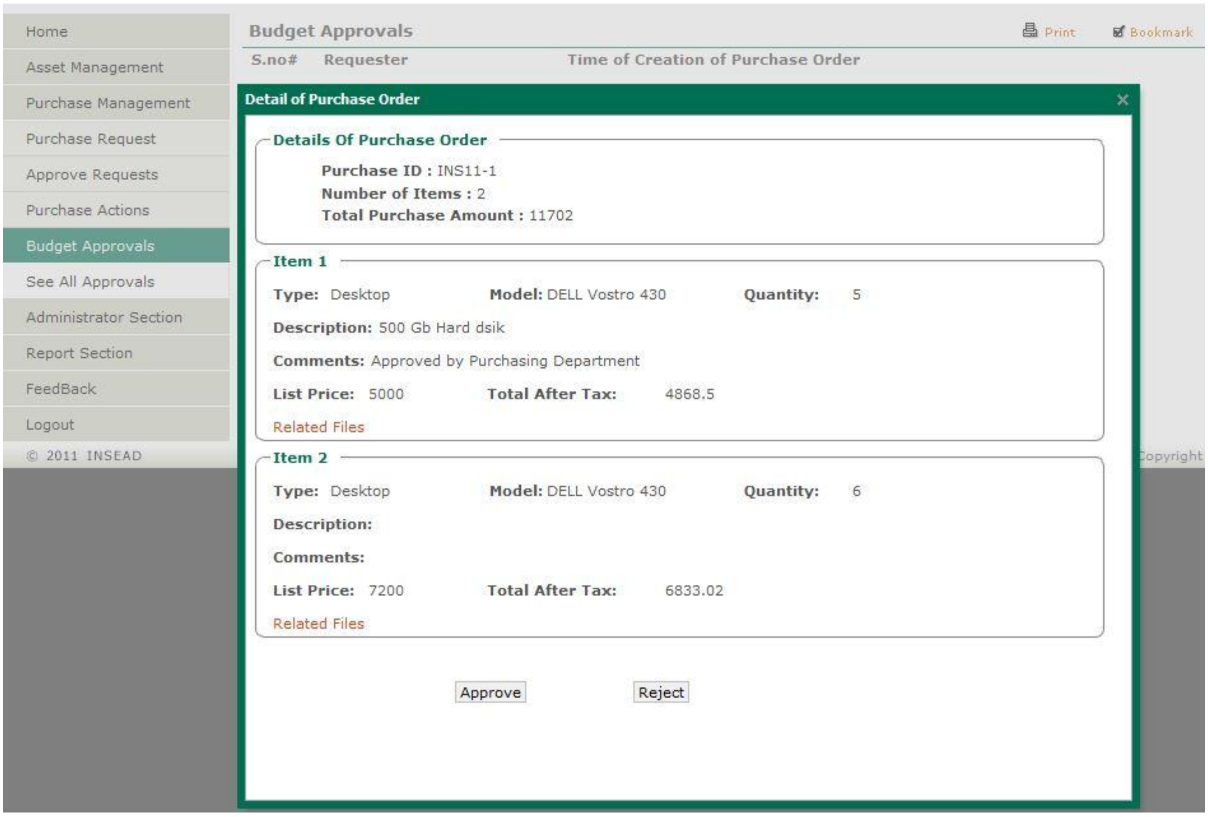


Budget Approvals

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



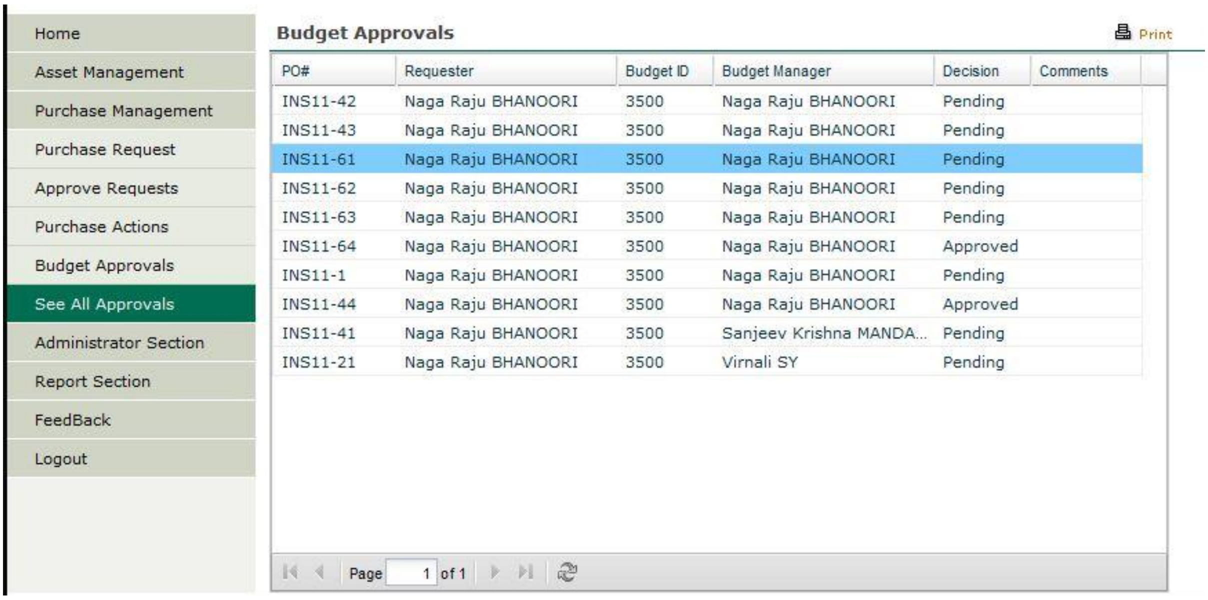
For each corresponding Request, a button "More details" is available which on clicking will open a window displays details regarding the request.



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.,



Administrator Section

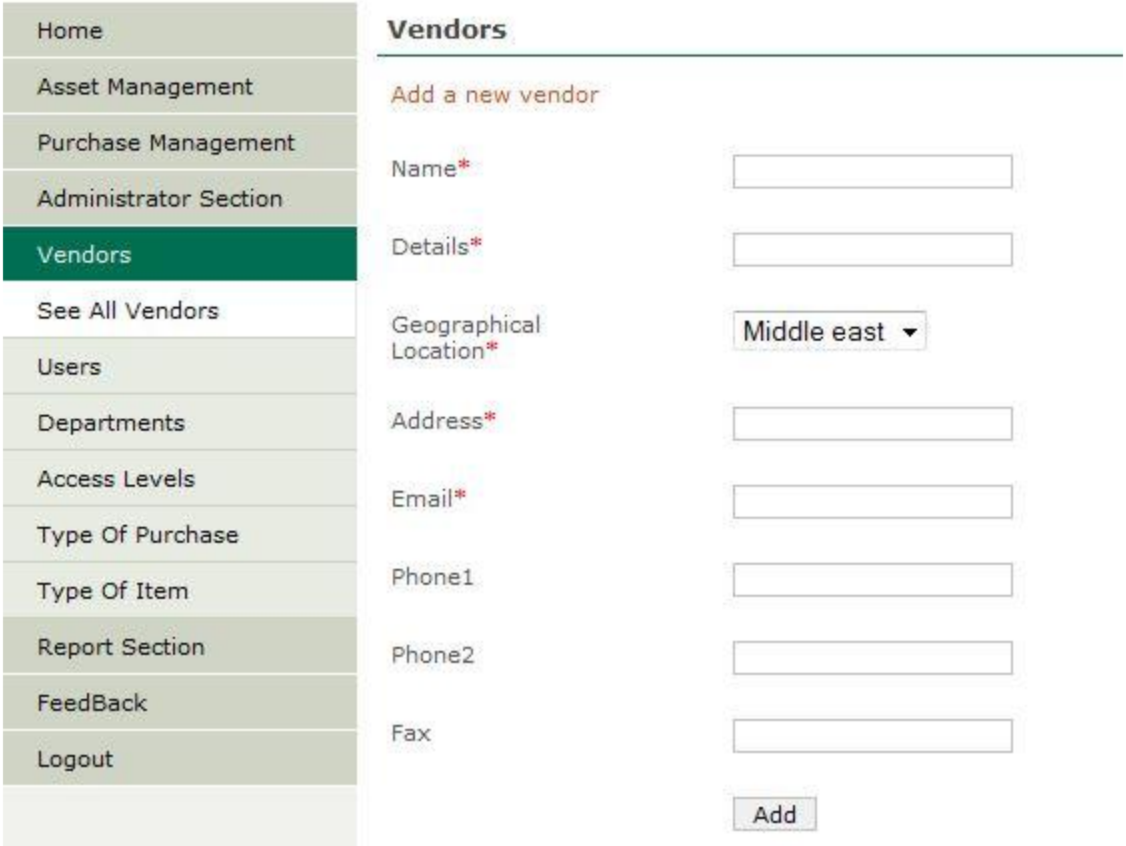
Vendors

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:

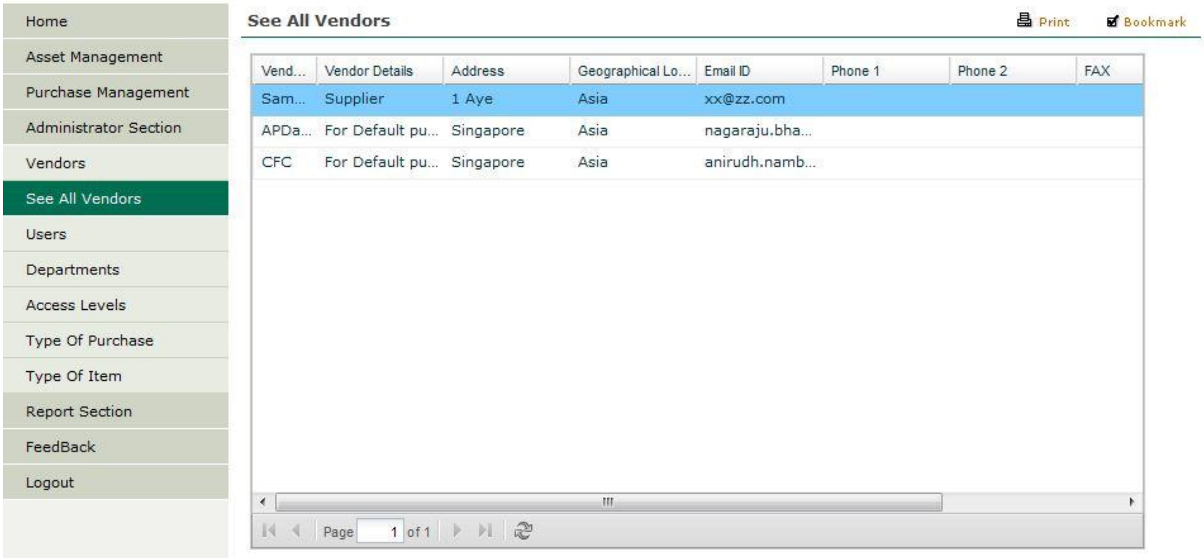
- Name: (Compulsory) Name of Vendor.
- Details: (Compulsory) A little detail regarding Vendor.
- Geographical Location: (Compulsory) A drop-down for selecting either “Middle East” or “Europe” or “Asia”.
- Address: (Compulsory)
- Email: (Compulsory)
- Phone1:
- Phone2:
- Fax:



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.



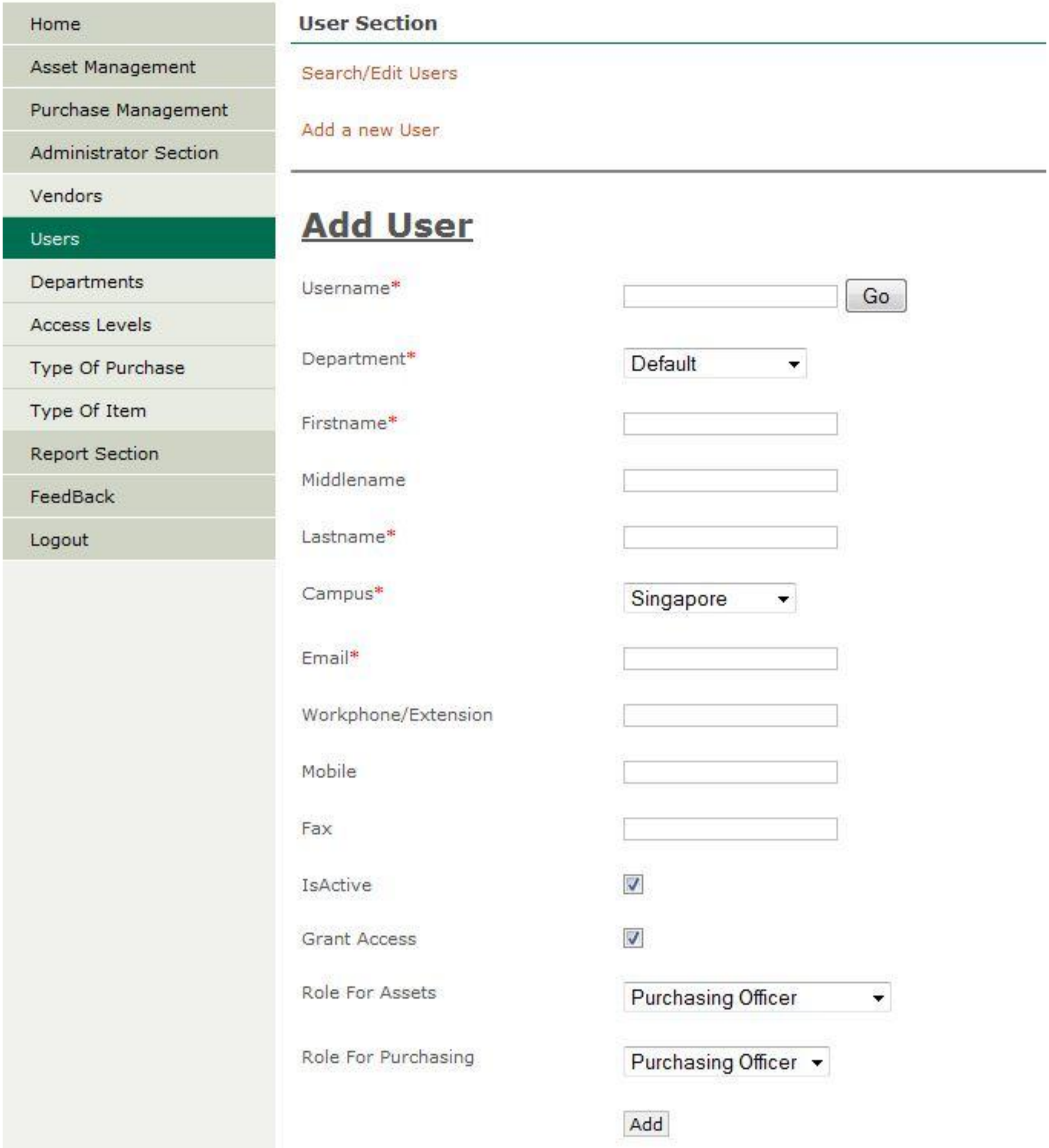
Users

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 two monitor all Users.

"Add a new User"

The fields required for adding a User are:

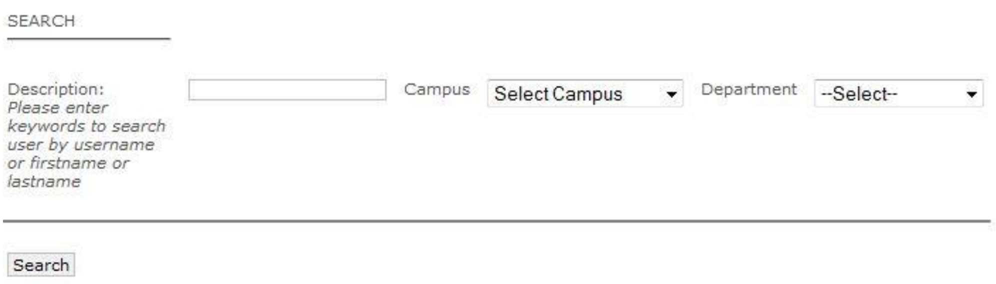
- User Name: "DOMAIN\login"
- Department: A drop down of list of departments.
- First name:
- Middle name:
- Last name:
- Campus:
- Email:
- Workphone/Extension:
- Mobile:
- Fax:
- Is Active: Checking this box indicates that user is Active and possesses certain Assets.
- Grant Access: Checking this box 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.



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.



The result is a grid which displays

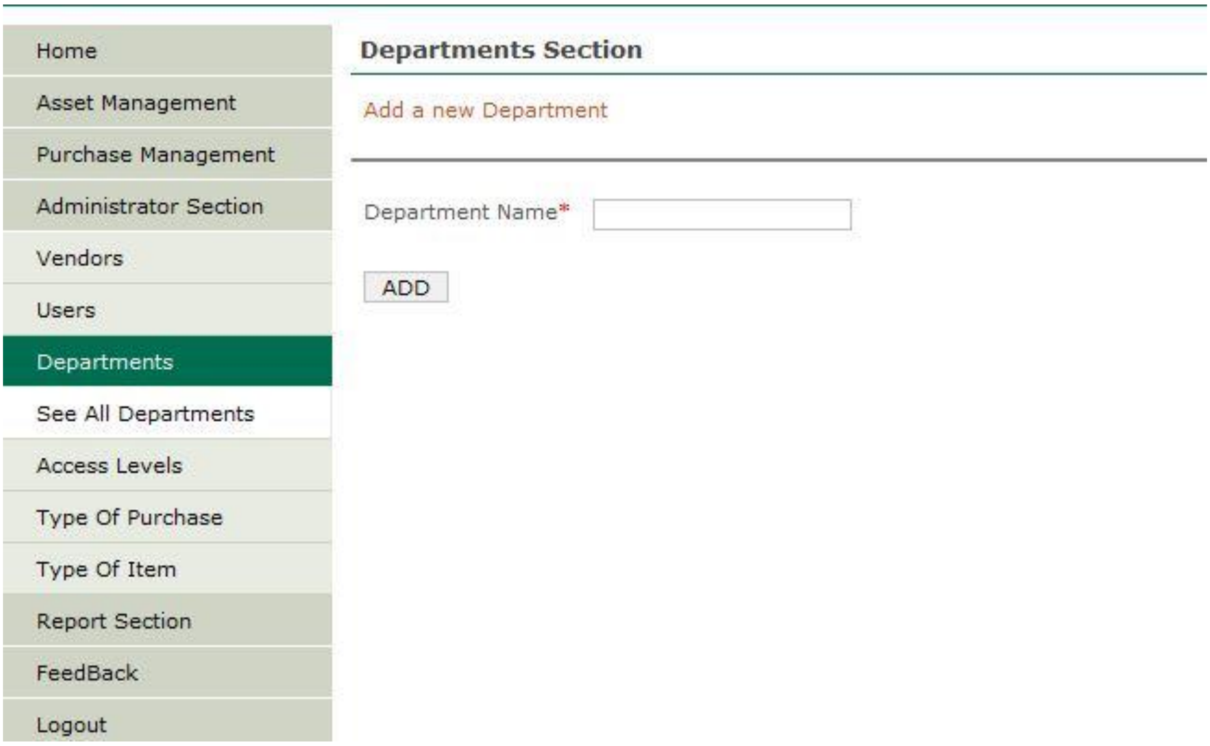
- User name: (Non-Editable)
- First name: (Editable)
- Middle name:
- Last name: (Editable)
- Campus:
- Email: (Editable)
- Work Phone: (Editable)
- Mobile Phone: (Editable)
- Fax: (Editable)
- Department Name: (Editable)
- Action: The Action tab in the grid has a button in its cell. The button is either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



"See All Departments"

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

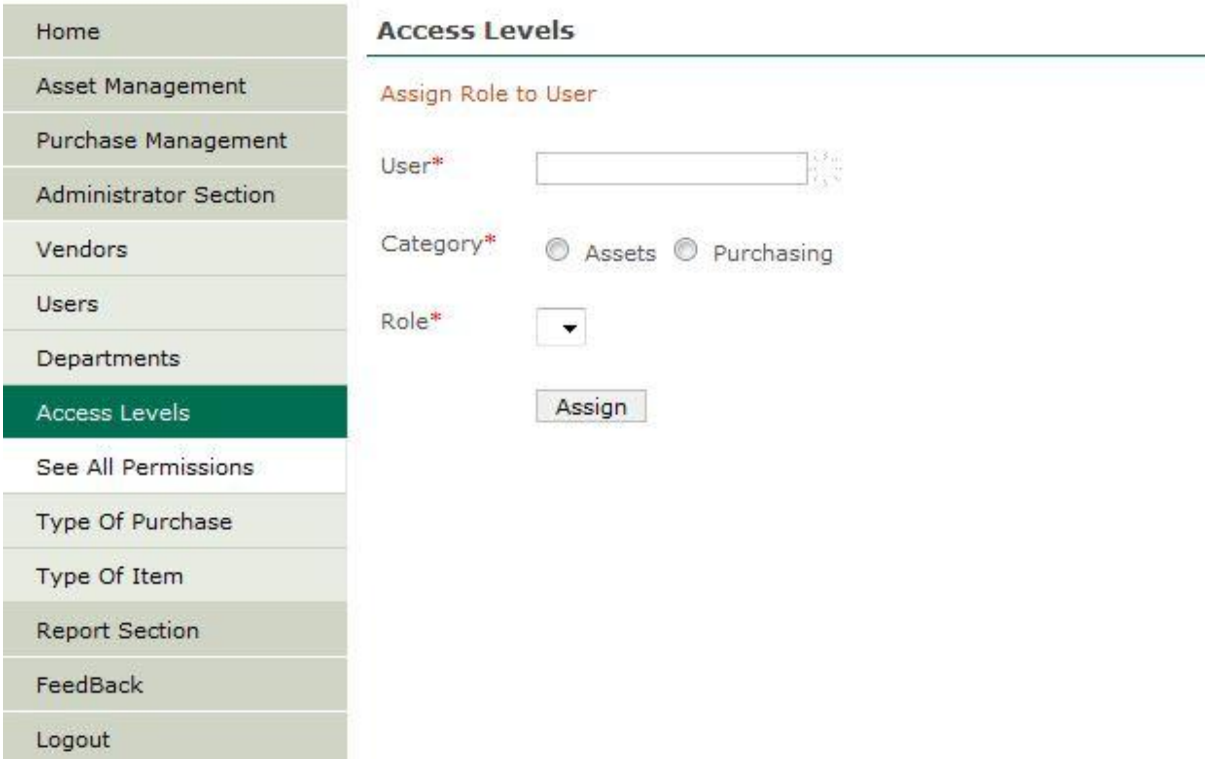
Access Levels

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.



"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.

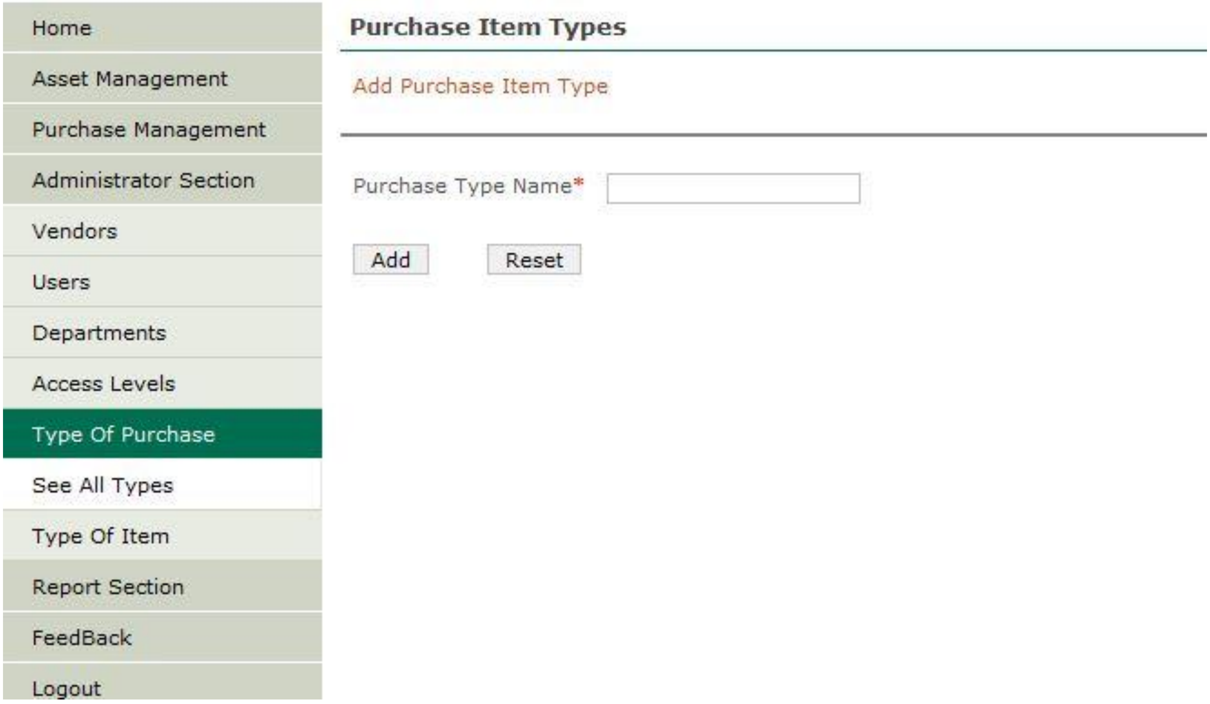
Asset and Purchase Roles are editable. The maximum of the previous role and currently assigned role will be taken.

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.



"See All Types"

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

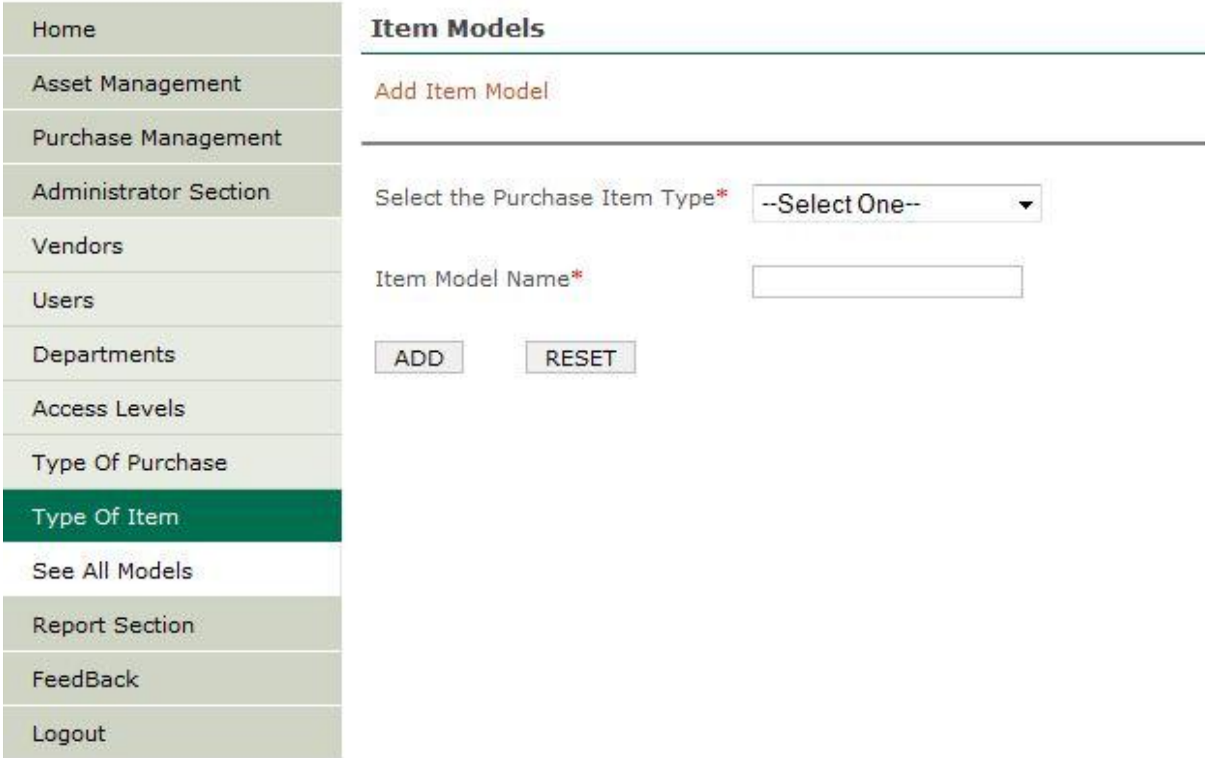
Type of Item

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"

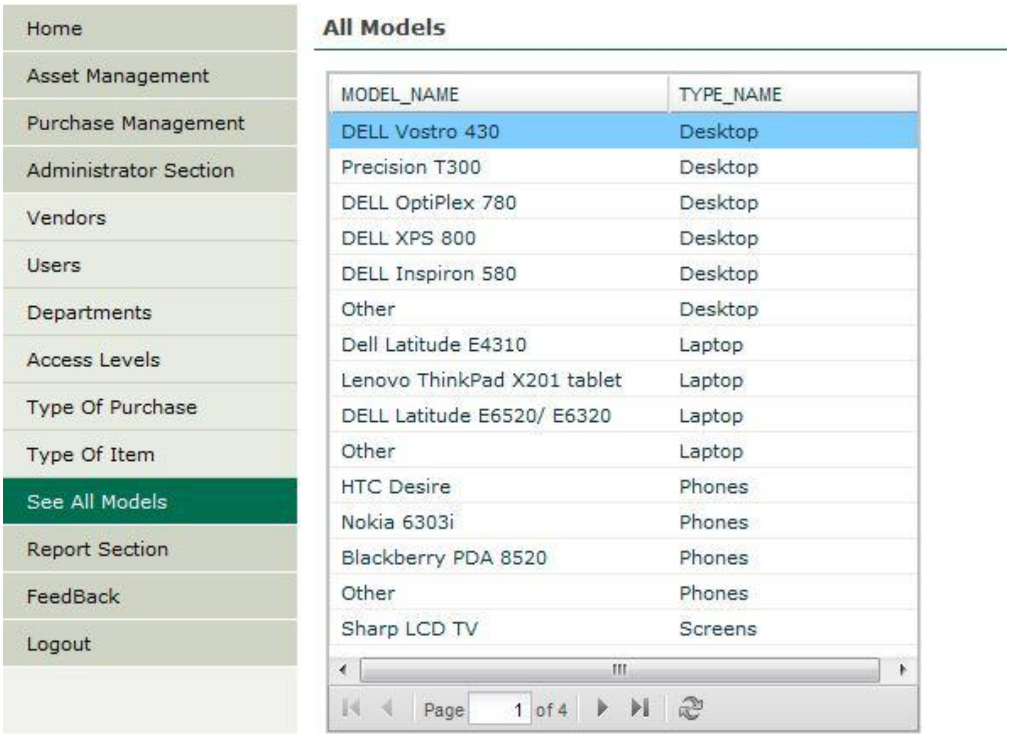
"Purchase Type" is a drop-down which is to be selected mandatorily.

"Name" field is required to add a type.



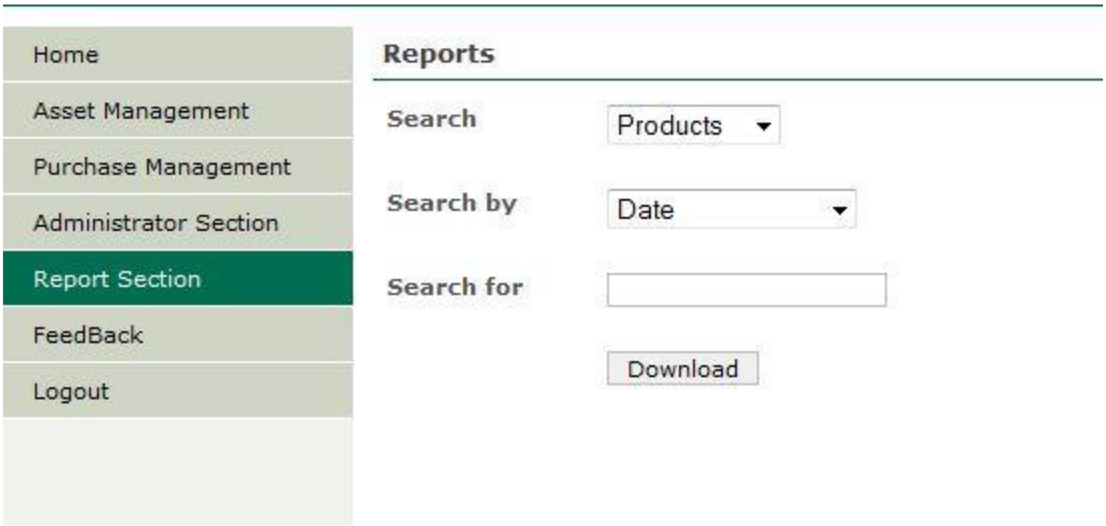
"See All Models"

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



Report Section

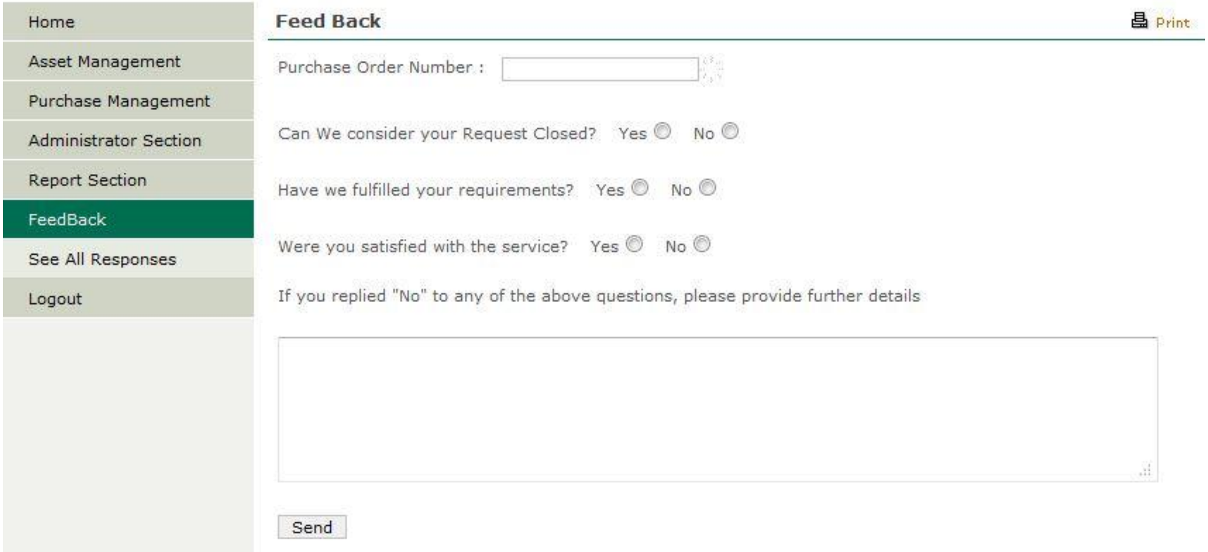
This section includes reports related to Asset Management. It provides a search functionality over Products and Softwares, relevant results can be downloaded into an excel sheet on clicking “Download”.



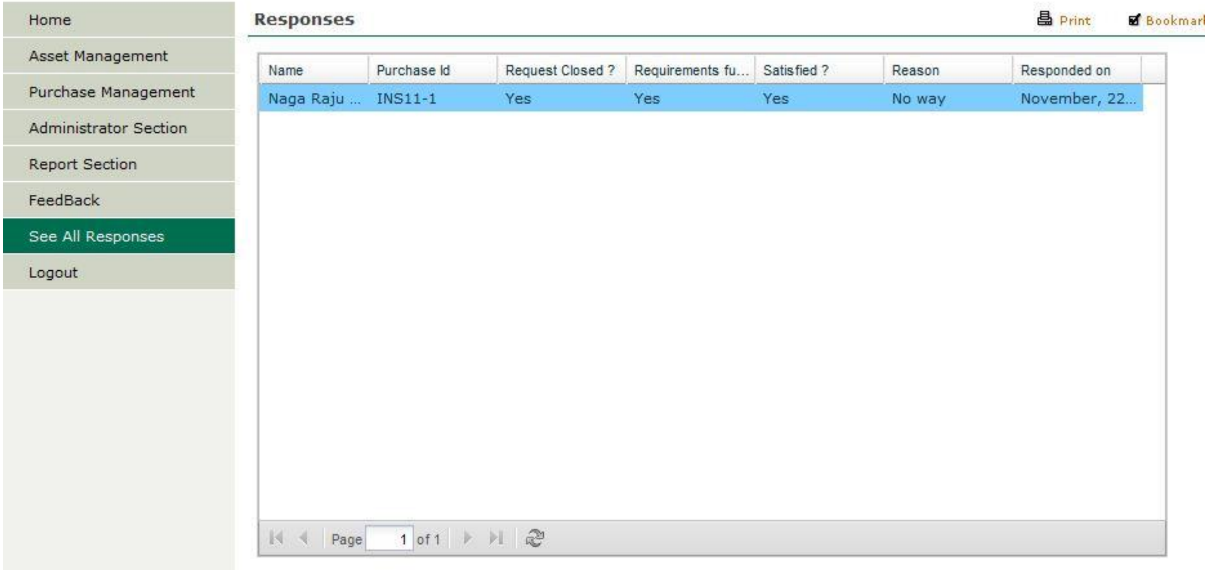
Feedback

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.



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



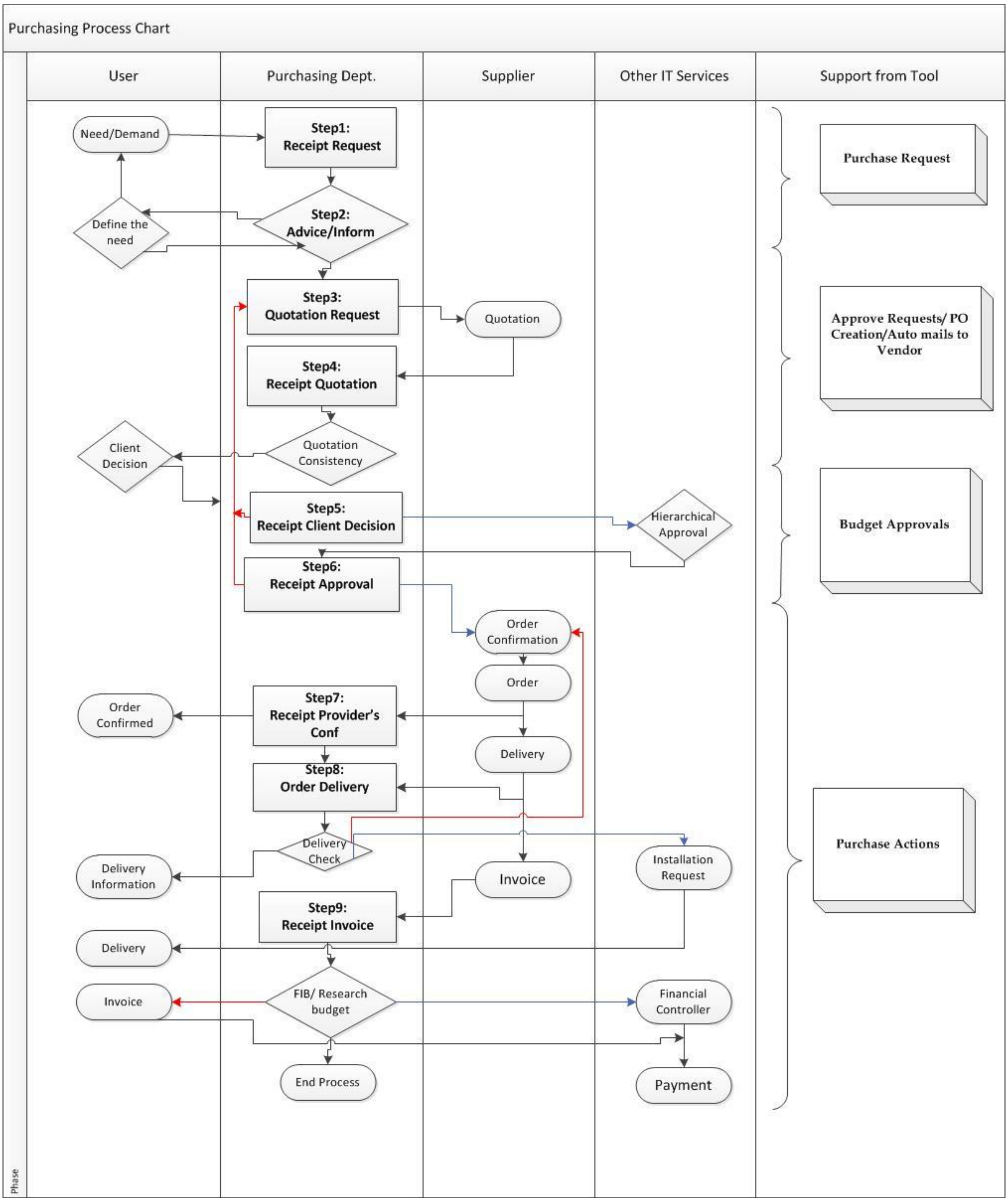
Flow

Purchase Management:

Black Arrows indicate Faithful Path.

Blue Arrows indicate Positive Settlement.

Red Arrows indicate Negative Settlement.



Asset Management: