OFFICE OF RESEARCH ADMINISTRATION

PMO MATERIAL TRACKING SYSTEM

PRODUCTION URL = http://material.stanford.edu

TEST URL = http://material2.stanford.edu
OVERVIEW

Security & Access: The site has a unique login for each user. Each user is placed in an organization with user access. Only Property Management Office (PMO) Personal can give access to the Material Track System. Personal in PMO are given “Administrator” privileges. As administrators they can create new user profiles, contracts, and inventory records. Administrators can not create “Parts” in the system.

Edits & Cross Checks: Many crosscheck are built into the entire site. You can not add duplicate (Contract, Part, Lot Code Numbers, and Org code) combinations in the system. The Lot Code can be empty for entry but no other contract, part, empty lot code, and org will be allowed.

Other checks include updating child transaction records via the system when the lot code is edited on the parent record. This happens automatically on the back-end. This is important to note since the “lot code” is the only part of the unique identifier scheme that can be edited. This exception was allowed due to the fact that the lot code number is often received after the initial record is created.

All of the fields that require some type of formatting have built in checks to validate that the value being entered corresponds to the required format. Fields that do not have validation are standard text fields.
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## SAMPLES & ADDITIONAL INFO:

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Welcome to the Stanford University Property Management Office Material Tracking System. This is the homepage of the site.

1. Before you can do anything you will need to login.
2. If you have forgotten your password simply click on the “forgot password” link and enter your email address.
3. If you are not a current user in the system one of the administrators will need to create a user profile for you. To find a list of system administrators click on the “administrator list” link and send an email to one of the administrators listed.
The login page is used to give you access to the site based on the organization you belong to and the level of privileges you have been granted. If have trouble login into the site simply click on the “forgot password” link and enter your registered email address.

The check box (Remember Me) will create a cookie on your machine that is good for 90 days. To use this feature you will need to enable cookies in your browser. Do not use this option if you are on a public computer. This cookie can be removed by clicking the logout button or in the browser’s settings. This is done for the purpose of having a coworker that may have to login to the same computer where you have enable the (Remember Me) feature. This allows them to cancel your session and login with their own user name and password.
The “forgot password” page is used to send an email notification to a registered user of the Material Tracking System. This page is not used to request a new user profile. This is not a secure page and any one can request that you receive a copy of your current username and password. On the other hand it will only go to your registered email account and is secure in the sense that only you have access to your email account.
This is the home page after you have logged in with standard (user) authority. Notice the yellow hi-light in the left menu and how login has changed to logout and Search, Add, Request Contract, Update Password, and information about your profile is now showing. At this point you will click the link for the corresponding task you would like to perform.
The search page allows you to search by the most common and distinct values of each parent record. The less information you place in the fields the greater the number of results will be displayed. If you leave the form blank you will get all the records that correspond to your organization.
LIST (search Results)

The list page is used to display a list of your search results. The values on the list are six common record elements that help you identify what, where, and how many of a given item is available. To get to the details of an individual record click on the underlined part number in blue. This will take you to the detailed information about that record. The details page will link you to all other functions related to part such as issuing and receiving.

The top of the page show how many individual records were found and what is currently being displayed. The page will only show 10 records at a time. If more than 10 records were found in your search use the navigation links just above the results to see additional results. Navigation page one will refer to records 1 threw 10 and navigation page 2 will refer to results 11 threw 20.
The details page show or links you to all the information regarding the part number and contract number combination. There are six main links on this page to help you navigate to additional functions or display additional information about this record.

- **Print** – This will open a new window with a printable version of the record.
- **Print With Histories** – This includes all histories.
- **Issue/Receive/Adjust** – Use this page to manage the details of Issue/Receive/ and Adjustments.
- **Edit Parent** – This will all you to make corrections or adjustment to the parent record. Contract# & Part# are not editable.
- **Show Transactions** – This shows a summary of the transaction history.
- **Show Inventory** – This shows a summary of the Physical Inventory history.
This is a screen shot of the basic print page. It was designed to look similar to the note cards that were previously used. Go to the browsers print setup to remove the header and footer for a clean looking printout. Please note there is a time and date stamp for when the record was printed.

**Note:** The standard non-print screens will fit onto one page if you adjust the print margins to 0.25 for all four edges. This can be done in the browsers page setup found in the file menu.
This is a screen shot of the complete print page. You get to this page by clicking the “print with histories” link at the top of the “details” page. Go to the browsers print setup to remove the header and footer for a clean looking print out. Please note there is a time and date stamp for when the record was printed.

Note: The standard non-print screens will fit onto one page if you adjust the print margins to 0.25 for all four edges. This can be done in the browsers page setup found in the file menu.
INVENTORY HISTORY

This is the show inventory history pop-up window. This is used to display the base attributes of the physical inventory history. Qty-5 transactions will show per page. Use the navigation at the top of the page to see additional results. This window will automatically close when the parent window is unloaded. This means that when you navigate to a page other than the parent this window will close automatically. This is done so you do not mistakenly reference a pop-up window for a record that is not currently queried.

<table>
<thead>
<tr>
<th>Inv Name</th>
<th>Total</th>
<th>Inv Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>test1</td>
<td>1</td>
<td>12/4/2003</td>
<td>test1</td>
</tr>
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</table>

CLOSE WINDOW
This is the show transaction history pop-up window. This is used to display the base attributes of the transaction history. Qty-5 transactions will show per page. Use the navigation at the top of the page to see additional results. You can also use the search field at the bottom of the window to find a specific reference number. To get to the details of the transaction record simply click on the blue linked reference number. This window will automatically close when the parent window is unloaded. This means that when you navigate to a page other than the parent this window will close automatically. This is done so you do not mistakenly reference a pop-up window for a record that is not currently queried.

This shows the detailed transaction history. This is used to display the full record for a selected transaction history record. If you need to print this page simply click on the print link in blue at the top of the page. This should launch your printer. This window will automatically close when the parent window is unloaded. This means that when you navigate to a page other than the parent this window will close automatically. This is done so you do not mistakenly reference a pop-up window for a record that is not currently queried. You also have a link to show or hide a signature line. The signature line is used to print a receipt for a customer in case such documentation is need for your
in house records or the customer’s personal records.
This is the Issue/Receive/Adjust page. All three functions can be performed using this page. Be sure to select the correct radio button combinations to perform the desired function. The quantity on hand and total value is automatically calculated on the parent record.

- **Issue** – Select the radio button marked Issued (-) to issue a specified quantity of the part you are currently in.
- **Receive** – Select the radio button marked Received (+) to receive a specified quantity of the part you are currently in.
- **Adjust** – If you have found an error and need to adjust your quantity on hand to reflect an amount great or less that your current quantity, make sure the (adjustment) radio button has a value of (yes). As a business process you should issue to “ADJUSTMENT” and your comments should reflect any details about the adjustment you can provide.

All the fields with a red asterisk are required. By default the form is set to receive a non-adjusted item. Use the calendar pop-up for transaction date to avoid submission errors.
EDIT (parent part record)

The edit parent page is used to update or make adjustment to the parent record. All of the values with a red asterisk are required to complete the form. You cannot change the Contract Number or Part Number when editing the parent. If you change the unit price the form will automatically recalculate the total value on hand for details page.

Business Process: If a contract or part number is entered into the system incorrectly you must adjust the balance on hand to qty-0 with a comment stating the new contract and part number. After the new contract and part number combination have been created, you will need to reference the old combination in the description filed. The first entry on the receive/issue page will be the quantity that was adjusted form the old record. Be sure to mark the transaction as an adjustment and the comments are filled out with the appropriate reference information.
ADD (new part / contract / lot code - combination)

The add page is used to add new unique (Contract / Part / Lot Code) combinations. All of the values with a red asterisk are required to complete the form. The org. code of the individual adding the record is applied to the record by default. This is done to segregate your organization’s records when you login.
This is the request contract page. If you are trying to add a contract and find that the number you are looking for is not available then you would come to this page to send a request to the administrator to have it added to the list. Be aware that special character a very limited on this page and should not be used if at all possible.
This is the update password page and is used by any user who is logged in to change their current password.
This is the details page when an administrator is logged in. If you notice the administrator has two options just above the details of the record that the standard user does not have. The “Add Inventory Record” link is used by PMO to add information related to physical inventories. The “Make Inventory Adjustment” is used to by PMO to make any necessary adjustment after an inventory has been completed when discrepancies have been found.

If you also notice the admin does not have access to “Issue/Receive/Adjust” link. This is done to create an audit separation between the user in the organization and the admin.
This is the Inventory record page. It is used by PMO to create and track physical inventory results. Only PMO has access to this page. All fields marked with a red asterisk are required. To avoid bad date submissions please use the pop-up calendar for the date field. The date should reflect the date the inventory was performed.
This is the inventory adjustment page and it is used to make the adjustment when discrepancies are found during a physical inventory. All fields marked with a red asterisk are required. To avoid bad date submissions please use the pop-up calendar for the date field. The date should reflect the date the inventory was performed. This page also shows you your current quantity on hand to help with your adjustment. Be sure to select the correct radio button for adjusting the record count up or down.

This page used the same child record as the “Issue/Receive/Adjust” page. The difference is that the unique identifier is the inventory name and “adjustment” is a given value. The results of entering a record on this page will show up in the transaction history on the details page.

Business Process – When an adjustment is found during a physical inventory, a report should be given to the stockroom personnel for reconciliation. May require additional action be posted.
This is the user administration page and is used to Add, Update, and Delete users in the Material Tracking System. All fields marked with a red asterisk are required. When you first come to the page the form is blank and is in “ADD” mode. Look at the form buttons for clues to what functions are to be performed when the button is clicked.

Be sure to remember that users and administrators have different abilities. You can create an administrator for an organization but it is not recommended.

You cannot create multiple user profiles due to the fact that “user id” and “email” must be unique.
This is the user administration page in “update” mode. Notice that the buttons have changed on the form. When you select a user from the dropdown list it auto-populates the form with the information about that user's profile and change the “ADD” button to “UPDATE” and “DELETE” buttons. The functions correspond with the button name.

If a user is having trouble getting their user name and password this is where you would go to reset and create default values. This page could also be used to update information about a user's profile if they move from one organization to another.
This is the contract manager page and it is used to Add, Edit, and Accept or Deny Contract Request. Use the dropdown contracts list to get a contract for edit.
This shows a contract in EDIT mode. If you notice the button name have changed from “ADD” to “UPDATE”. When you close a contract it will remove it from selection on the add new part page. It does not stop users from continuing to issue and receive parts on the details page against a closed contract.

**Business Process** – If a contract is being closed it should be because all parts have been either consumed or issued to another contract and all associated balance is $0.00. Otherwise the contract should remain open.
CONTRACT ADMINISTRATION (process request)

This is the contract manager page when new contract requests have been received. You can select multiple check boxes and perform the corresponding function of add or delete. If you add the selected boxes that are checked they will become a new open contract number that can be used on the add part page. If you delete the selected check boxes it will permanently remove the request form the system.

The individual who requested the contract is notified by email when the contract administrator reviews the request. The requestor will receive a corresponding email letting them know the request was either approved or declined.

Note: The contract is not associated to any specific organizational group since one contract may span more than one organizational group. When the individual parts are created the users “ORG” code is associated to record. Only employee’s from that organization code can access the part. Parts can not be moved from one organization to another. This is due to the fact that an existing identical part may already exist with in that organization. The organizations would have to coordinate the transfer of the items separately with comments stating why and where the item was transferred to. This would be done by making adjustment transaction in each respective organization.
SAMPLE CONTRACT REQUEST (email sent to contract admin)

Subject: Contract Request from PMO Material Tracking System

Hello,

You have been sent a request for a new contract number in the Online PMO Material Tracking System. Please go to the website and login with your user name and password to access the contract manager page. Your requests will be waiting for your at the bottom of the page.

Thank you,
Hello,

Your contract request has been approved.

**CONTRACT NUMBER:** jered03

Thank you,
SAMPLE CONTRACT REQUEST (denial email)

Subject: PMO Material Tracking - Request Denied - jered02

Hello,

Your contract request has been denied. Please contact one of the admin for more information if you require it.

**CONTRACT NUMBER:** jered02

Thank you,
DATABASE BACK-UP SCHEDULE

Currently the database is backed up on an incremental basis during the week and a full back-up is written to a tape drive. The tape drive is located in a secure room where the on-site network administrator has keyed access to the room.

The Physical tape is then kept in a secure fire proof safe in the room. There are also off site back-up's that are done over the campus network and kept on the local storage device on that part of the campus.