



HEART + LUNG INSTITUTE  
UBC JAMES HOGG RESEARCH CENTRE

# **Orders Database System: User Manual**

Author: Wendy Alexander

Modified By:

Version : 1.0

Date : February 12, 2004

## Table of Contents

|                                         |           |
|-----------------------------------------|-----------|
| <b>Table of Contents</b> .....          | <b>i</b>  |
| <b>List of Tables and Figures</b> ..... | <b>ii</b> |
| <b>Instructions</b> .....               | <b>1</b>  |
| <b>Starting Up</b> .....                | <b>1</b>  |
| <b>Placing an Order</b> .....           | <b>2</b>  |
| Select the Grant.....                   | 2         |
| Select the Item.....                    | 2         |
| Enter the Order Details.....            | 3         |
| Place the Order.....                    | 4         |
| Reorder from a Previous Order .....     | 4         |
| Edit or Cancel an Order .....           | 4         |
| View the Progress of an Order .....     | 5         |
| <b>Adding a Supplier</b> .....          | <b>5</b>  |
| <b>Adding an Item</b> .....             | <b>7</b>  |
| <b>Generating Reports</b> .....         | <b>8</b>  |
| All Incomplete Orders by User.....      | 8         |
| All Orders by User .....                | 8         |
| All Orders for Grant .....              | 9         |
| All Orders from Supplier .....          | 9         |
| All Orders of an Item.....              | 9         |
| All Received Orders by Supplier.....    | 10        |
| Viewing and Printing Reports .....      | 10        |
| <b>Setting Your Preferences</b> .....   | <b>10</b> |

## List of Tables and Figures

|                                           |    |
|-------------------------------------------|----|
| Figure 1: Orders Database Main Menu ..... | 1  |
| Figure 2: Orders Form .....               | 2  |
| Table 1: Order Status Definitions .....   | 5  |
| Figure 3: Suppliers Form .....            | 6  |
| Figure 4: Items Form.....                 | 7  |
| Figure 5: Reporting Form.....             | 8  |
| Figure 6: Preferences Form.....           | 10 |

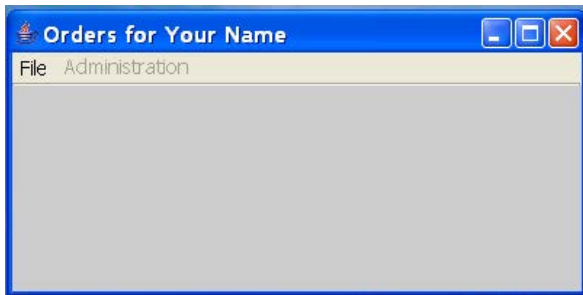
# Instructions

## Starting Up

The Orders Database system can be found on your desktop as an icon called “Orders”.

When the program launches for the first time, it will take a little longer to load than usual. A main window will open and you should see your name on the form as shown below.

**Figure 1: Orders Database Main Menu**



You will have access to specific menu options based on the security level assigned to you. The system automatically gives you rights to the File menu under which you can place all of your orders. Administrators have access to the Administration menu. Administrators can grant and revoke the ordering privileges of other users.

If the database is unavailable or the network is down, the main window will show a message informing you of the problem.

## Placing an Order

To place an order, go to File -> Orders. The order entry screen will pop up.

Figure 2: Orders Form

Order Status: Complete Current Date: Mar 26, 2004

Grant Information:

Grant Holder: Dr. McManus

Grant Number: 20R90214

Order Details:

Supplier: iCAPTURE Store Add Supplier

Description: ethanol 95% Add Item

Catalog #:

Search for item: Search

Dimension: 4 L Quantity: 1

Notes: Unit Price: 30.00

Total Price: 30.00

Currency: CAD

Processing and Receiving:

Processed On: Mar 25, 2004

Due Date: Mar 25, 2004 Confirmation #: n/a

Received On: Mar 25, 2004 Quantity Received To Date: 1

Place Order Edit Delete Print Close

| Order# | Requested    | Supplier       | Description             | Cost  | Qty |
|--------|--------------|----------------|-------------------------|-------|-----|
| 15     | Mar 25, 2004 | iCAPTURE Store | ethanol 95%             | 30.00 | 1   |
| 14     | Mar 25, 2004 | Fisher         | transfer pipettes, 5 mL | 28.91 | 1   |

### Select the Grant

The form is broken up into several sections. The top section is the Grant Information section. To place an order, you must select the appropriate grant holder and grant number from the drop down lists. Select the grant holder first. The grant number list will then be filled with all available grant numbers for the selected grant holder. Next select the grant number.

### Select the Item

The second section is the Order Details section. There are two ways you can proceed from this point; select the item manually or search for the item by description.

## **Search for Items by Description**

In the Order Details section, you will see that the fourth field down is the “Search for item” text field. Enter a search word or words in this field and press “Enter” or click the “Search” button. All suppliers will be searched for matching items.

If no items matched your search, the text field will be updated to say “your\_search\_word –not found”. If you do not receive this message then the search was successful and you can browse the results under either the description list or the catalog number list. In each list, the supplier of each item is shown in round brackets after the description or catalog number.

If you see the item you want to order in either list, select it and the form will automatically be filled with all of the information stored for that item.

## **Enter an Order Item Manually**

If you know the supplier you wish to order from, select it from the list of suppliers. All suppliers that have been ordered from by any user will show in the list unless it has been inactivated by an administrator.

**IMPORTANT:** If the supplier you want is not in the list, contact Ligia before adding the new supplier. Many of the suppliers used in the past are manufacturers and not distributors. This means that Ligia cannot place an order directly with them and has to find a distributor for that supplier. Extra work on both sides can be reduced if you first ensure that the order is made with the correct distributor. If you confirm with Ligia that the supplier you want to add is indeed a distributor, click the “Add Supplier” button and follow the instructions for that form.

Once a supplier is selected, the description and catalog number lists are filled with all of the items on record for that supplier. All items that have been ordered from the selected supplier by any user will show in the list unless it has been discontinued or inactivated by an administrator. Administrators maintain the item information.

If you see the item that you wish to order, select it and the form will automatically be filled with all of the information on record for that item. If you do not see the item you wish to order, you can add it by clicking the “Add Item” button and following the instructions for that form. When you finish adding the item you want, it will be added to the list of items in the Orders form and you can continue placing your order by selecting the item from the list.

## **Enter the Order Details**

Once the item you wish to order is selected, you can enter the quantity you wish to order, write any notes and change the item price for the order.

### **Enter the Quantity to Order**

The form will automatically fill in a quantity of one. If you wish to order more, enter the new quantity in the Quantity text field and press “Enter”. The Total Price field will show the new price for multiple items.

If the quantity is set back to one when you press enter, then the quantity you entered was not a whole number. Only whole numbers will be accepted.

### **Enter a Different Item Price**

If the item price you see is incorrect, just change it in the Order form. You cannot change the item price directly in the Items form. Only administrators can change the item prices. They make the change when they call in the order and verify the item cost with the supplier. The next time you order that item, the correct price will show.

If you have a coupon or a discounted price, enter the price in the Unit Price text field and enter the coupon number in the Notes field.

After you enter a new price, the form checks that it is a valid price. If the price field changes to 1.00, then the price you entered was not numeric.

### **Enter Notes**

Any information that you want to communicate with the administrator can be entered in this field. If you have a coupon, enter the details in the Notes field. If you have already picked this item up, say so in this field.

### **Place the Order**

When you have entered all of the details for the order, click the "Place Order" button. You will either receive a confirmation message that your order has been placed, or you will receive a message telling you what is missing or incorrect in your order.

### **Reorder from a Previous Order**

At the bottom of the screen, you will see a table of all the orders you have placed in the past. When you begin using this program, you will not see any orders in the table. Once you have placed orders in the system, you can view them by selecting them from the table. The form will display the details of that order.

If you want to reorder that item, you can do so by clicking the "Place Order" button. If you would like to place the same order with a few changes, you can select the order, make some changes and then click the "Place Order" button.

### **Edit or Cancel an Order**

To edit or cancel an order that you have already placed into the system, you must first select the order from the table at the bottom of the form. The details of the order will be displayed. If the order has a status of "Requested" then it has not yet been seen by an administrator and you can edit or cancel it.

To edit an order, click the Edit button then make the desired changes to the order. When you are satisfied with the changes, click the "Save Changes" button. You will either receive a confirmation message saying that your order has been modified, or a message telling you what was wrong with the changes you tried to make. If instead, you change your mind and don't want to save the changes, click "Cancel Edit".

To cancel the order, just click the Cancel button. You will be asked to confirm that you want to cancel the order. Click Yes and the order will be cancelled. You will still see it in the table, but its status will be set to "Cancelled".

If the order has already been seen by an administrator, then the Edit and Cancel buttons will be grayed out and you cannot edit or cancel the order except by contacting an administrator directly.

### **View the Progress of an Order**

If you place an order through the Orders Database System, you can watch its progress as it is processed and received. If you want to check the status of an order, select it from the table at the bottom of the Orders form. The form will be filled with the details of the order.

At the top of the form is a Status field. There are six possible order statuses: Requested, Viewed, Ordered, Partial, Complete and Cancelled. The following table describes the meaning of each status.

**Table 1: Order Status Definitions**

| <b>Order Status</b> | <b>Status Description</b>                                                                                                                                                                                           |
|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Requested           | The order has been entered into the system, but has not yet been seen by an administrator. This order can be edited or cancelled by its creator.                                                                    |
| Viewed              | The order has been viewed by an administrator but has not yet been placed with the supplier. The order is locked to the creator. Only administrators can edit or cancel the order from this point on.               |
| Ordered             | An administrator has placed the order with the supplier. The order has a confirmation number and a due date associated with it.                                                                                     |
| Partial             | The order has been partially received. Only a portion of the total quantity ordered has been received by an administrator. This does not mean that the quantity received has been picked up by the requesting user. |
| Complete            | The order is complete. The full quantity ordered has been received by an administrator. This does not mean that the order has been picked up by the requesting user.                                                |
| Cancelled           | The order has been cancelled.                                                                                                                                                                                       |

Based on the order status alone, you know how far your order has progressed through the system. More information is available however.

The third section from the top is called “Processing & Receiving”. This section tells you the details about the order progress. You can view the date that the order was processed, the due date, the confirmation number, the received date and the quantity received to date. All of these pieces help to keep you up to date on the progress of your orders.

### **Adding a Supplier**

When you place an order and you find that the supplier you want to order from is not in the Supplier list, it is important that you check with an administrator before you add the supplier into the system.



Many catalogs that you find are for manufacturers, not distributors. This is a crucial difference when it comes to placing orders. Administrators cannot place orders directly with manufacturers and must instead find a distributor that carries that manufacturer's products. By contacting an administrator, you can find out what supplier you should use when placing an order for a specific manufacturer.

If you are given approval to add a supplier, you can start the process by either clicking the "Add Supplier" button from the Orders form or from selecting File -> Suppliers from the main menu. A Suppliers form will open.

**Figure 3: Suppliers Form**

The image shows a software window titled "Suppliers" with a blue header bar. The window contains a form with the following fields and controls:

- Supplier Name: A dropdown menu.
- Address: Two stacked text input boxes.
- City: A dropdown menu and an "Add City" button.
- Province: A dropdown menu and an "Add Province" button.
- Country: A dropdown menu and an "Add Country" button.
- Postal Code: A text input box.
- Currency: A dropdown menu and an "Add Currency" button.
- Phone: A text input box.
- Fax: A text input box.
- URL: A text input box.
- Contact Person: A text input box.
- Customer #: A text input box.
- Standing PO #: A text input box.
- At the bottom: "Add New" and "Close" buttons.

You can view the information on any active supplier currently in the system by selecting its name from the Supplier Name drop down list. The form will be filled with all of the information available for that supplier. Only administrators can edit or inactivate a supplier and only administrators are able to view the Customer# or the Standing PO#. These fields will appear blank to all other users.

To add a new supplier, enter the supplier name. Enter all of the information you have on the supplier but leave blank any fields that you do not have information for. If you do not know the web site, leave the URL field blank. If the city, province country or currency that you want to enter is not in the list, add it by clicking the appropriate Add button. Please enter the information clearly and neatly as this will be used by all other users in the system.

Only the Supplier Name and the Phone fields are required for adding a supplier, but it is helpful to the administrators if you can enter more information.

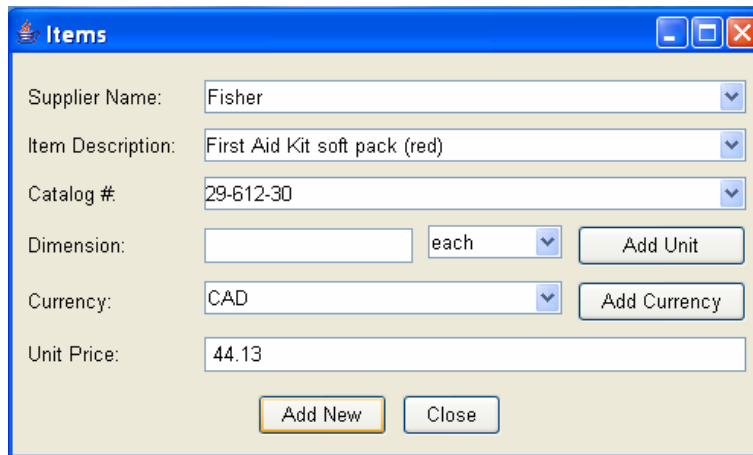
When you have entered all the information that you have about the supplier, click the "Add New" button. You will either receive a confirmation message saying that the supplier was successfully added or an error message telling you what was wrong with the information you entered.

When you are finished, close this window. If you opened this form from the Orders form, the new supplier will automatically be added to the Supplier list in the Orders form and you can select it to continue placing your order.

## Adding an Item

When you place an order and you find that the item you want to order is not in the Description or Catalog# lists, you can add the item to the system. To start the process, you can either click the “Add Item” button from the Orders form or you can select File -> Items from the main menu. An Items form will open.

**Figure 4: Items Form**



You can view the information on any active item currently in the system by selecting its supplier from the Supplier Name drop down list and then either its description or catalog number. The form will be filled with all of the information available for that item. Only administrators are able to view iCAPTUR<sup>4</sup>E Store items and only administrators can edit or inactivate items.

To add a new item, first select the supplier name. Enter the item description in the Description list. Enter the item catalog number in the Catalog# list. If you do not know the catalog number, enter “unknown” and a number. This must be unique and it must start with “unknown” if you do not have the real catalog number.

The next part to enter is the dimension. The dimension entry is split up into two fields. The first is meant to hold the dimension quantity, while the second holds the unit or package type.

There is some confusion about what the dimension is supposed to be. This is to describe the unit that is ordered. For instance, if the item is a box of gloves, the dimension might be “100/box”. In this case, you would enter “100” in the text field, then select “/box” from the dimension list. The size of the glove (“Large”) would be part of the description. Another example would be a thermometer. The dimension might be “each”. The text field would remain blank while you select “each” from the drop down list. The range of the thermometer would go in the description.

You must select a currency for the item’s unit price. Select it from the drop down list. Next enter the item’s unit price in the Unit Price field. You must enter a valid numeric value or the field will be set to “1.00”.

If the dimension unit or currency that you want to enter is not in the list, add it by clicking the “Add Unit” button. You will be prompted to enter the value.

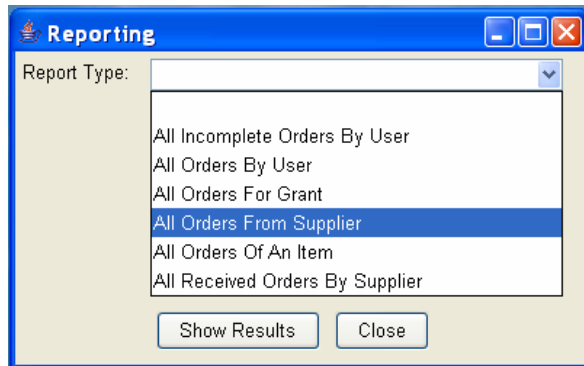
Please enter all item information clearly and neatly as this is will be used by all other users in the system.

When you have entered all of the information for the item, click the “Add New” button. You will either receive a confirmation message that the item was added successfully or you will receive a message informing you of the problems with the item you tried to enter.

## Generating Reports

There are several reporting features that are built in to the Orders Database System. To generate reports, select File -> Reporting from the Orders Database Main Menu. A Reporting form will open.

**Figure 5: Reporting Form**



There are six types of reports that are currently available. The privileges are different for administrators than for other users. If you are not an administrator, only your own orders will be searched. Administrators can search through all orders for all users.

### All Incomplete Orders by User

This report searches for all orders that have a status of Requested, Viewed, Ordered or Partial for a specific user. When you select this report from the Report Type list, you will be shown a User list to select from.

If you are not an administrator, then you are the only user that is shown in the list. For administrators, any user can be selected, or if no user is selected, all users will be searched.

### All Orders by User

This report searches for all orders for a specific user over a date range. When you select this report from the Report Type list, you will be shown a User list, a Start Date list and an End Date list to select from.

If you are not an administrator, then you are the only user that is shown in the list. For administrators, any user can be selected, or if no user is selected, all users will be searched.

If you enter a start date and an end date, the search will return all orders that were requested between the two dates, inclusive. If you only enter a start date, the search will return all the orders requested after and including that date. If you only enter an end date, the search will return all orders up to and including that date. If you do not enter any dates, the search returns all orders.

### **All Orders for Grant**

This report searches for all orders charged to a specific grant holder and grant number over a date range. When you select this report from the Report Type list, you will be shown a Grant Holder list, a Grant Number list, a Start Date list and an End Date list to select from.

If you are not an administrator, the search is also restricted to orders that you placed. You will not see orders made by other users.

If you enter only a grant holder, then all of the grants for the selected grant holder will be searched. If you select a grant number as well, the search is narrowed to only the selected grant number. If you select neither a grant holder nor a grant number then all grants will be searched.

If you enter a start date and an end date, the search will return all orders that were requested between the two dates, inclusive. If you only enter a start date, the search will return all the orders requested after and including that date. If you only enter an end date, the search will return all orders up to and including that date. If you do not enter any dates, the search returns all orders.

### **All Orders from Supplier**

This report searches for all orders placed with a specific supplier over a date range. When you select this report from the Report Type list, you will be shown a Supplier list, a Start Date list and an End Date list to select from.

If you are not an administrator, the search is also restricted to orders that you placed. You will not see orders made by other users.

If you enter a start date and an end date, the search will return all orders that were requested between the two dates, inclusive. If you only enter a start date, the search will return all the orders requested after and including that date. If you only enter an end date, the search will return all orders up to and including that date. If you do not enter any dates, the search returns all orders.

### **All Orders of an Item**

This report searches for all orders placed with a specific supplier, for a specific item over a date range. When you select this report from the Report Type list, you will be shown a Supplier list, an Item Description list, a Start Date list and an End Date list to select from.

If you are not an administrator, the search is also restricted to orders that you placed. You will not see orders made by other users.

If you select only a supplier, then orders for all items from that supplier will be searched. If you select a supplier and an item, the search is narrowed to only orders for the specific item.

If you enter a start date and an end date, the search will return all orders that were requested between the two dates, inclusive. If you only enter a start date, the search will return all the orders requested after and including that date. If you only enter an end date, the search will return all orders up to and including that date. If you do not enter any dates, the search returns all orders.

## All Received Orders by Supplier

This report searches for all orders that have been received from a specific supplier over a date range. When you select this report from the Report Type list, you will be shown a Supplier list, a Start Date list and an End Date list to select from.

If you are not an administrator, the search is also restricted to orders that you placed. You will not see orders made by other users.

If you enter a start date and an end date, the search will return all orders that were received between the two dates, inclusive. If you only enter a start date, the search will return all the orders received after and including that date. If you only enter an end date, the search will return all orders up to and including that date. If you do not enter any dates, the search returns all orders.

## Viewing and Printing Reports

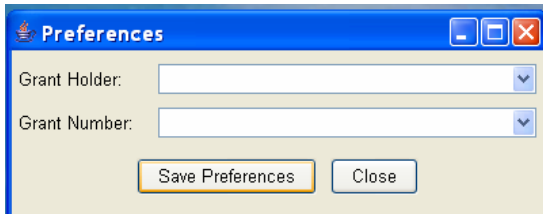
When you have entered all the parameters for the report you want to generate, click the Show Results button. A new window will open with a table of all the orders that matched your search. If no orders matched your criteria, the table will be empty. If the table is not empty, you can scan the orders for the information you were looking for, or you can print them off in order to view them in detail.

To print a selection of orders, check the boxes beside the orders you want to print, or click the Select All button to check all of the boxes and then click the Print button.

## Setting Your Preferences

You can set your preferred grant holder and grant number by going to File -> Preferences. A Preferences form will open.

Figure 6: Preferences Form

The image shows a screenshot of a software window titled "Preferences". The window has a blue title bar with standard minimize, maximize, and close buttons. Inside the window, there are two dropdown menus. The first is labeled "Grant Holder:" and the second is labeled "Grant Number:". Below these fields are two buttons: "Save Preferences" and "Close".

From the Preferences form, you can select a grant holder and optionally a grant number that you consistently order from. By clicking the Save Preferences button, the system remembers that you use this grant or grant holder for most of your orders and the next time you open the Orders form, the grant information will automatically be entered for you.

You can change your preferences at any time.