KENNESAW STATE UNIVERSITY

Job Aid EPC3
Request for DELL Computers & Related Items

This job aid is designed to help a requester purchase DELL computers and related items using **UITS eQuotes** through **Georgia*FIRST* Marketplace**.

Obtaining an eQuote from ITS:

1. Visit the Technology Purchases website at http://www.kennesaw.edu/techpurchases/ or from the KSU Intranet select University Information Technology Services > Request Forms > Technology Purchases > Computers, Server & Peripheral Purchases.

2. Click on the link that best describes your proposed technology purchase and complete the request form.

3. Click **"Submit"** once you've reviewed the information you entered on the form.

4. Once reviewed and approved, UITS will email a **DELL eQuote** number which is linked with the requested equipment; this **eQuote** number will then be used to build the order for the requested item(s).

Ordering via GeorgiaFIRST Marketplace:

1. Select **eProcurement** from the menu.

2. Select **Requisition.**

3. Select the **Georgia*FIRST* Marketplace** link.
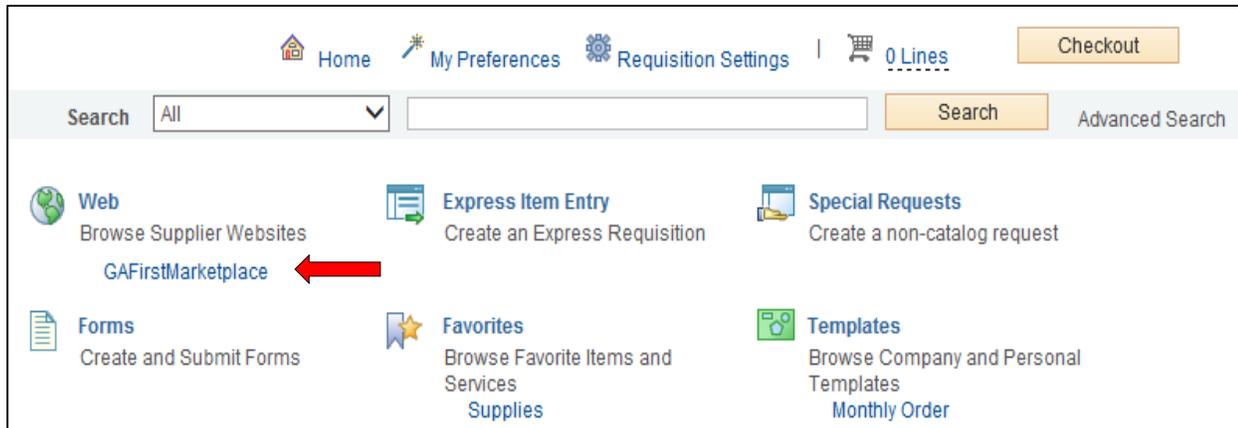
4. Select the **DELL** punch-out.
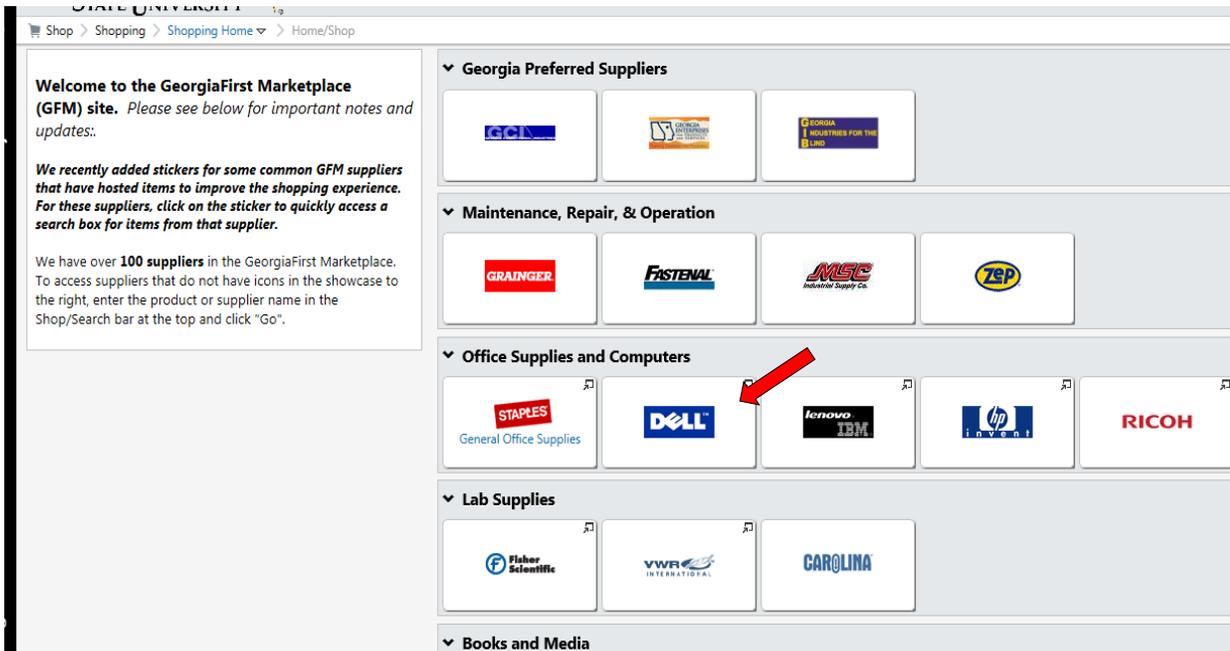
5. Click the **'Quotes'** link.
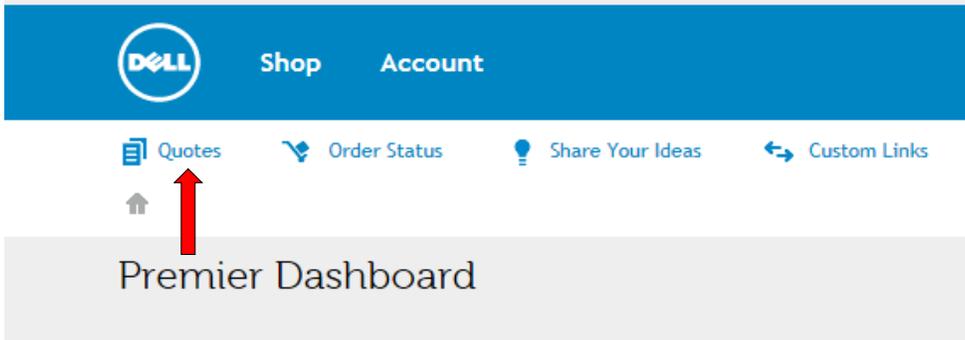
6. Enter the eQuote number you were provided by UITS, then click **"Find Quote".**
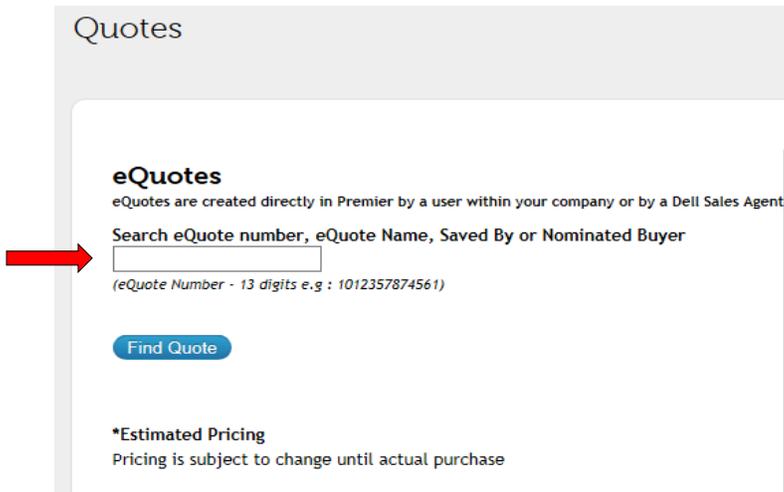
7. When your eQuote is retrieved, review the information and then click **"Create Order Requisition"** on the right side of the screen.
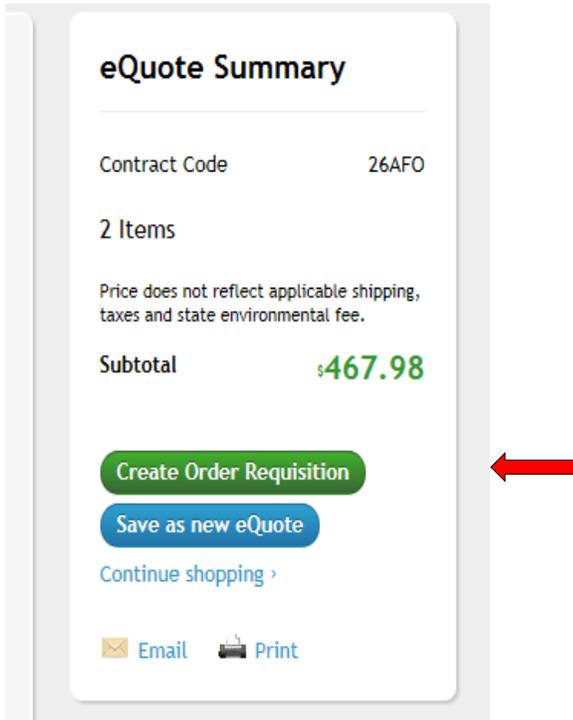
8. On the next screen, select the Delivery Option of **"No Charge Delivery - $0.00"** <u>and</u> select the Trade Compliance of **"No, I will not be exporting"**.

9. Click **Continue.**

10. Verify/review your order, and click **"Submit Order Requisition".**

11. Select **"Proceed to Checkout".**

12. Click **"Issue Requisition"** in the upper right of your screen to pull your order out of the Marketplace and into an ePro requisition.

13. You will now be re-directed back into **ePro** to make any edits *(if necessary)*, to add supporting documentation and to submit your Requisition into the approval process.

14. Enter a name for your requisition in the **Requisition Name** field in the upper right *(see UITS email for preferences).*

15. You can update the distribution/accounting information, using <mark>one</mark> of two methods below *(Individual Lines or Mutiple Lines)*:

> <mark>NOTE:</mark>
> When using <u>either</u> option for accounting allocation changes:
> If you use the <u>SpeedChart</u> function, you must also populate the **BudRef** field on the **Chartfields 2** tab.
> If you <u>manually enter</u> the allocation, you must first populate the **GL Unit** field on the **Chartfields 1** tab in addition to populating the BudRef on the Chartfields 2 tab.

> <mark>To Update Accounting Allocation on Individual lines:</mark>
> Click the **Expand** buttons (triangles) and make necessary updates for each line

Select the line checkboxes of the lines you need to update, then select the **Mass Change** link

-Update the accounting allocation by manually populating the information on **Chartfields 1 – 3** tabs or by using the **SpeedChart** field/box
-Update the **Ship To Location** if necessary

-Click **'OK'**
-Click **'Ok'** for **All Distribution Lines** to apply to all selected lines

16. *Special Notes from and for UITS:*

- For all computer/technology/audio-visual purchases, the **Ship To** code <mark>must be **KCP109**</mark> *(unless stated otherwise in the email quote from ITS)*
- Populate the correct account number for your request; <mark>the specific accounts codes to use for your purchase will probably be one of the following unless an Asset:</mark>
  714114 – main equipment
  714100 – accessories
  715100 – maintenance
- In order to process your request in a timely manner, the following information is required by and used by UITS for any computer related purchases. This information aids in checking accuracy and expediting delivery. This should be added in the **Approval Justification** field:
  a. Entire & complete **Quote/Proposal number**
  b. **Recipient's name, location/room number and extension**
  c. Any **other notes** as needed or requested by ITS , Business Manager, or Department head

17. To add supporting documentation, click on the Comments bubble or the Add link at the end of the first line of your requisition; <mark>**DO NOT**</mark> use the *"Add More Comments and Attachments"* link at the bottom of the screen.
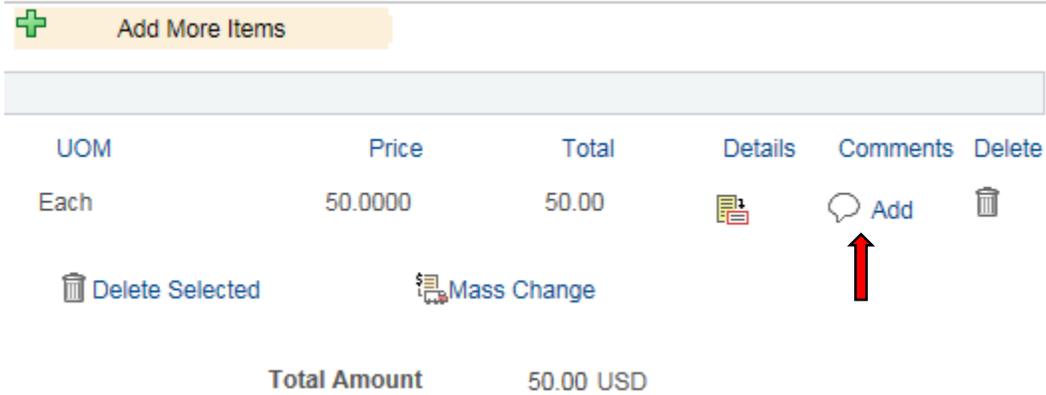
18. Click **'Add Attachments'** and then **Browse** for the saved scanned documents on your computer.
19. Once located, click on your file then click **'Open'.**
20. Then click **'Upload'** and then **'OK'.**
21. To verify you have attached your document(s), you will be able to see a **'View'** button on the screen where you added the document and you will see a paperclip attached to your Comment bubble on the line when you return to the **'Review and Submit'** screen.
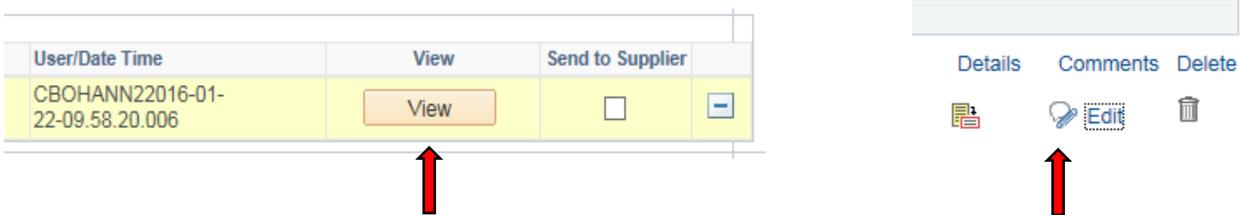
(Supporting documentation should include any approval emails, specifications and a copy of the quote/proposal obtained from UITS.)

22. <mark>To insert any additional approvers *(if requested or required),*</mark> click **'Save for Later'** then the **Preview Approvals** link.

23. Click on a green plus sign to search for the **User ID** of the Approver you would like to insert, click **'Insert'**.

Not Routed

McMillan,Laura Beth G
Dept-Manager and Dept-Appr

24. Click **'Apply Approval Changes'** button.

25. Click **'Save & Submit'** start the requisition lines into the approval workflow.

***Note:** The items will be shipped <mark>and</mark> received in the KSU Distribution Center. Once received, the item(s) will be tagged in UITS. You will then be contacted by UITS to schedule an appointment for delivery & installation.*