

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:

- Visit the Technology Purchases website at <u>http://www.kennesaw.edu/techpurchases/</u> 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.
- Once reviewed and approved, UITS will email a <u>DELL</u> 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 GeorgiaFIRST Marketplace link.

	A Home	e * My Preferences	Requisition Settings	∣ 浬 <u>oli</u>	nes	Checkout
	Search All	▼			Search	Advanced Search
8	Web Browse Supplier Websites GAFirstMarketplace	Express Item Create an Exp	Entry June 2015	Special Requ Create a non	uests I-catalog request	
	Forms Create and Submit Forms	Favorites Browse Favor Services Supplies	ite Items and	Templates Browse Com Templates Monthly Or	npany and Persor rder	nal

4. Select the **DELL** punch-out.

Shop > Shopping > Shopping Home → Home/Shop	
Welcome to the GeorgiaFirst Marketplace (GFM) site. Please see below for important notes and updates:. We recently added stickers for some common GFM suppliers	 ✓ Georgia Preferred Suppliers GCN GCN
For these suppliers, click on the sticker to quickly access a search box for items from that supplier.	✓ Maintenance, Repair, & Operation
We have over 100 suppliers in the GeorgiaFirst Marketplace. To access suppliers that do not have icons in the showcase to the right, enter the product or supplier name in the Shop/Search bar at the top and click "Go".	GRAINGER FASTERAL AND
	✓ Office Supplies and Computers
	STAPLES General Office Supplies
	✓ Lab Supplies
	✤ Books and Media

5. Click the 'Quotes' link.

Dell	Shop	Account		
Quotes	ि Vrde	er Status	Share Your Ideas	😋 Custom Links
Premie	er Dash	board		

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.

Contract Code	26AFO
2 Items	
Price does not reflect app taxes and state environm	plicable shipping, ental fee.
Subtotal	467.98
Create Order Requ	isition
Save as new eQuot	ie

- On the next screen, select the Delivery Option of "No Charge Delivery \$0.00" and 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 <u>one</u> of two methods below (*Individual Lines or Mutiple*

Lines):

NOTE:

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.

To Update Accounting Allocation on Individual lines:

Click the Expand buttons (triangles) and make necessary updates for each line

Line Description	item ID	Supplier	Quantity UOM	Price	i otal L	Jetalis Comments Delete
🔻 🗌 1 🥐 Testing		Apple Computer, Inc.	1.0000 Each	50.0000	50.00	🗄 🖓 _{Add} 🗊
Shipping Line 1	*Ship To	КТР3700		Quantity 1.0000		
	Address	KENNESAW STATE UNIVERSITY TOWN POINT RM3700 3391 TOWN POINT DR NW KENNESAW, GA 30144	Add One Time Address	Price 50.0000	Price Adjustment Pegging Inquiry Pegging Workbenc	h
	Attention To Due Date	Bohannon,Carolyn W				
	Accounting Lines *Distribute E	y Qty V Sp	eedChart			
	 Accounting Lines *Distribute E Accounting Lines 	y Qty V Sp	eedChart	Persona	alize Find View All ^E	🔊 🔡 First 🖲 1 of 1 🕑 La

To Update Accour	iting Allocation on	Multiple lines sin	nultaneously:		
Select the line che	eckboxes of the lir	nes you need to u	pdate, then select the	e Mass Change link	
🖌 Select All / Deselect All	Select lines to:	👍 Add to Favorites	😡 Add to Template(s)	Î Delete Selected	🗄 Mass Change 🤙

-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

e Information 🕐				
ite: The information below tered on this page will repla	does not reflect the d ace the data in the co	lata in the selected requisition rresponding fields on the selec	lines. When the 'OK' button is clicked, ted lines that are available for sourcir	, the data ng.
Supplier ID	Q	Supplier Location	Q	
Buyer	Q	Category	Q	
ipping Information				
Ship To Location	۹ 📛	Add	One Time Address	
Due Date	B1	Attention		
Ship Via		Freight Terms	Q	
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counting Lines SpeedChart Yease enter GL Business U Accounting Information	Q Init before selecting ot	her chartfield values	/쿄 👪 First ④ 1 of 1 🕑 L	
Comments Counting Lines SpeedChart Itease enter GL Business U Accounting Information Chartfields1 Chartfield	Init before selecting ot Is2 Chartfields3	her chartfield values Personalize Find Details Asset Information	🗷 🗰 First ④ 1 of 1 🚯 L ☶])	ii
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-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 <u>must be KCP109</u> (unless stated otherwise in the email quote from ITS)
- Populate the correct account number for your request; the specific accounts codes to use for your purchase will probably be one of the following unless an Asset:
 714114 main equipment
 714100 accessories
 - 715100 maintenance
- In order to process your request in a timely manner, the following information <u>is required by and used by</u> <u>UITS</u> 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 <u>or</u> the Add link at the end of the first line of your requisition; <u>DO NOT</u> use the *"Add More Comments and Attachments"* link at the bottom of the screen.

Add More Items					
UOM	Price	Total	Details	Comments	Delete
Each	50.0000	50.00	∎‡ ≞	🖓 Add	Î
Delete Selected	문 Ma	ass Change		1	
Т	otal Amount	50.00 USD			

- 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.

User/Date Time	View	Send to Supplier	
CBOHANN22016-01- 22-09.58.20.006	View		-
	Î		

(Supporting documentation should include any approval emails, specifications and a copy of the quote/proposal obtained from UITS.)

- 22. To insert any additional approvers (*if requested or required*), 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'.



- 24. Click 'Apply Approval Changes' button.
- 25. Click 'Save & Submit' start the requisition lines into the approval workflow.

******Note: The items will be shipped <u>and</u> 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.