

Job Aid EPC4 Request for Computers and Technology Related Items (<u>Non-DELL</u>)

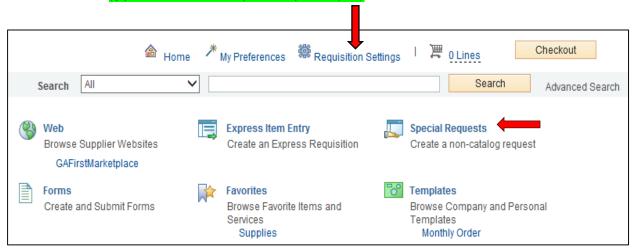
This job aid is designed to help a requester purchase computers and related items using UITS Quotes & Proposals via a Special Request ePro Requisition. (If you need to submit a request for DELL items, please use Job Aid EPC3.)

Obtaining quote 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.
- 4. Once reviewed and approved, UITS will email an approval with a vendor quote for the requested item(s); this quote will be used to create the requisition and place the order in eProcurement

Order via eProcurement > Special Request Requisition

- 1. Select **eProcurement** from the menu
- 2. Select Requisition
- 3. If you would like to use Requisition Settings to enter default settings/data (which is a time-saving option when creating multi-line requisitions), click the link <u>prior</u> to selecting 'Special Request'. When using this function, please only use for the Supplier, Unit of Measure and Category Code. These fields will populate as the default information on every line of your requisition. *(If you do not use this option, skip to Step 4.)*



- 4. Select 'Special Request'
- If you did not use Requisition Settings (step 3), complete steps a i below for each line/item you need to enter including credit lines and shipping/freight:
 - a. Enter an **Item Description**
 - b. Enter the **Price** of the item
 - c. Enter the **Quantity** requested
 - d. Enter or select the Unit of Measure (most common is EA and JOB)
 - e. Enter the NIGP/Category code in the Category field using the Category Code Reference sheet: <u>http://procurement.kennesaw.edu/docs/categorycodes.pdf</u> (It is not recommended to use the search function for this field)
 - f. Enter the Supplier ID <u>or</u> the Supplier Name
 - g. If you have any information associated with the line, enter it in the Additional Information field
 - h. Check the 'Show at Receipt' and 'Show at Voucher' checkboxes
 - i. Select the 'Add to Cart' button

The following fields will remain <u>blank</u>: Due Date, Supplier Item ID, Mfg ID, and Mfg Item ID

6. Confirm the Shopping Cart updated with your requisition line(s) in the upper right corner

🖉 0 Lines

- 7. Select the 'Checkout' button located beside the Shopping Cart
- 8. Enter a name for your requisition in the Requisition Name field in the upper right
- You can update the distribution/accounting information, using <u>one</u> of two methods below (Individual Lines or Mutiple Lines):

NOTE:

When using either 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:

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Address KENNESAW STATE UNIVERSITY Add One Time Address Price 50.00 TOWN POINT RM3700 3391 TOWN POINT DR NW KENNESAW, GA 30144 Attention To Bohannon,Carolyn W Due Date	000 Price Adjustmen Pegging Inquiry	
Due Date		
V Accounting Lines		
*Distribute By Qty V SpeedChart		
Accounting Lines	Personalize Find View All	ll 🖉 🔜 🛛 First 🕙 1 of 1 🕑 L
Chartfields1 Chartfields2 Chartfields3 Details Details 2 Asset Information Asset Information 3	2 Budget Information	
Line Status Dist Type *Location Quantity Percent Merchandise	Amt GL Unit Entry Eve	ent

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

To Update Accounting	Allocation on Mu	ltiple lines simulta	ineously:		
Select the line checkbo	oxes then select t	he Mass Change l	ink (Mass Change rep	laces the	
Modify Line/Shipping/	Accounting optic	n)			
Select All / Deselect All	Select lines to:	🖟 Add to Favorites	🖓 Add to Template(s)	Î Delete Selected	Mass Change
-Update the accou SpeedChart field/I -Update the Ship T	хос		information on Chart	f ields 1 – 3 tabs or b [,]	y using the

Edit Lines/SI	nipping/Accounti	ing for Selected	Lines			
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			responding fields on t			tton is clicked, the data able for sourcing.
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-Click **'OK'**

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

10. 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
- 11. To add supporting documentation, click on the Comments bubble or the Add link at the end of the first line of your requisition; **DO NOT** use the *"Add More Comments and Attachments"* link at the bottom of the screen.

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- 12. Click 'Add Attachments' and Browse for the saved scanned documents on your computer
- 13. Once located, click on your file then click **'Open'**
- 14. Click 'Upload' and then 'OK'
- 15. 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.

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

- 16. Enter the business purpose or comments in the **Approval Justification** field (**NOTE:** Do not include any slashes / in your comments)
- 17. To insert any additional approvers (if requested or required), click 'Save for Later' then the Preview Approvals link
- 18. Click on a green plus sign to search for the User ID of the Approver you would like to insert, click 'Insert'



- 19. Click 'Apply Approval Changes' button
- 20. Click the check boxes for Show at Receipt and Show at Voucher
- 21. Click 'Save & Submit' to 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 must be tagged in ITS. After that, you will be contacted to schedule an appointment for installation.