![Kennesaw State University - Office of Fiscal Services logo]

HOW TO

Request Computers & Technology Related Items

This job aid is designed to help a requester purchase computers and technology related items using UITS Quotes & Proposals via a Special Request Requisition. (If your purchase includes Dell items, please reference the job aid How To Request Dell Computers & Technology Related Items instead.)

Obtaining a Quote from UITS

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 have reviewed the information 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.

Ordering With a Special Request

1. Log in to **PeopleSoft** via https://www.usg.edu/gafirst-fin/ by clicking **GeorgiaFIRST Financials** under **Core Users** on the right of the page. You will be prompted to log in using **Duo**.
2. Click the compass icon at the top right of the page. This opens the NavBar menu.
   a. NOTE: Do not click the *GFM Shopper Access* tile to get to the marketplace. It routes you through "Window Shopper" mode, through which you will not be able to complete your order.
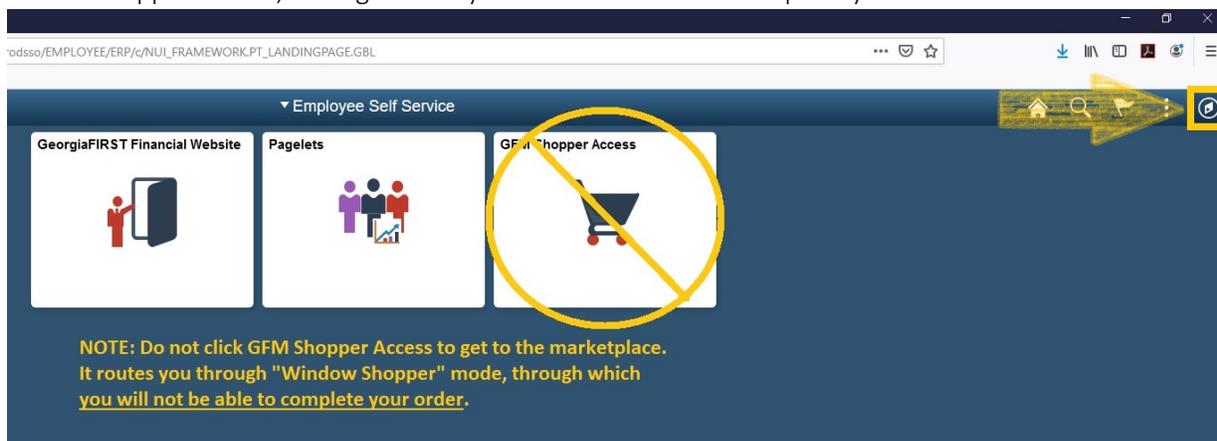
3. On the NavBar menu, click **Navigator** > **eProcurement** > **Requisition**.
4. On the new page, click **Special Requests**.
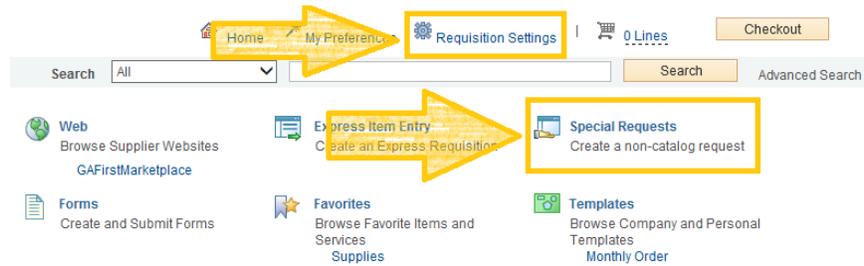
a. **To Note:** Requisition Settings can be used to enter default settings/data; a timesaving option when creating multi-line requisitions. To do so, click the link **prior** to selecting **Special Request**. Please only use this function for the **Supplier, Unit of Measure** and **Category Code**. These fields will populate as the default information on every line of your requisition.

5. If you did not use **Requisition Settings,** complete the steps 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 – found on Fiscal Services website in the job aids section. *(It is not recommended to use the search function for this field)*
   f. Enter the **Supplier ID** or 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.
   j. The following fields will remain blank: **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.
7. Select the **Checkout** button located beside the Shopping Cart.
8. Enter a name for your requisition in the **Requisition Name** field.
9. You can update the distribution/accounting information, using one of two methods below *(Individual Lines or Multiple Lines)*:

   a. **NOTE:** When using either option for accounting allocation changes:
      i. If you use the SpeedChart function, you must populate the **BudRef** field on the **Chartfields 2** tab.
      ii. If you manually enter 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.

To Update Accounting Allocation on Multiple lines simultaneously:

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

-Update the accounting allocation by populating the information in the **Chartfields 1 – 3** tabs, or by using the **SpeedChart** field.

-Update the **Ship To Location** if necessary.

-Click **OK**, and then click **OK** for **All Distribution Lines** to apply changes to all the selected lines.

Special Notes From & For UITS

1. For all computer/technology/audio-visual purchases, the **Ship To** code must be **KCP109** *(unless stated otherwise in the email quote from UITS).*
2. Populate the correct account number for your request; the specific account codes to use for your purchase will probably be one of the following unless an Asset:
   a. **714114 –** main equipment
   b. **714100** – accessories
   c. **715100** – maintenance
3. In order to process your request in a timely manner, the following information is required 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 UITS, a Business Manager, or Department head.
4. 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.
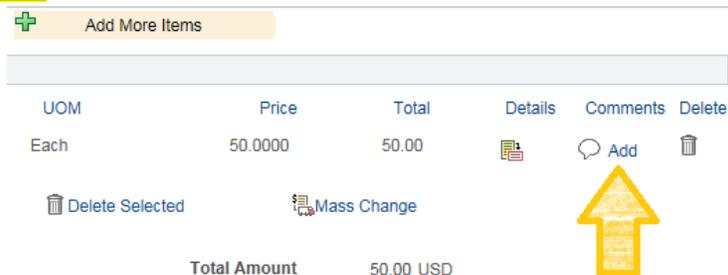
5. Click **Add Attachments** and then **Browse** for the saved scanned documents on your computer.
6. Once located click on the file, click **Open**, then click **Upload** and **OK.**
7. To verify you have attached your document(s), you will be able to see a **View** button; and when you return to the **review and submit** screen, you will see a paperclip attached to the comments bubble on the line you added it to.
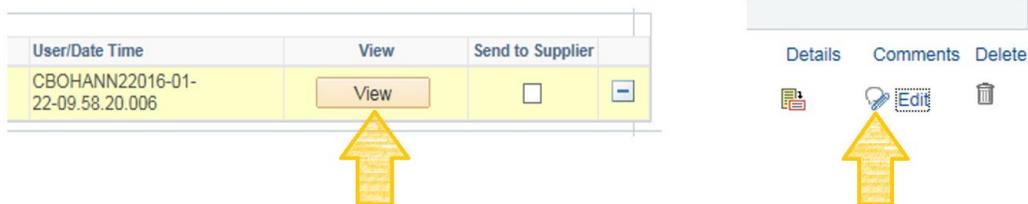
   (Supporting documentation should include any approval emails, specifications and a copy of the quote/proposal obtained from UITS.)
8. To insert any additional approvers *(if requested or required),* click **Save for Later** then the **Preview Approvals** link.
   a. Click on a green plus sign to search for the **User ID** of the Approver you would like to insert, click **Insert.**
   b. Click **Apply Approval Changes** button
9. Click **Save & Submit** to submit the requisition lines into the approval workflow.

**Note: The items will be shipped to and 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.