

# Technology Purchasing Process

## Overview

All purchases for new technologies using University funds for both hardware and software must be processed through the **Ferris Technology Service Portal** using the **Technology Purchase Process**. This document reviews how to access the Ferris Technology Service Portal, how to make a technology purchase request, and how to check the status of a purchase request using the service portal.

## Access to the Ferris Technology Service Portal

Open an Internet browser (Internet Explorer, Firefox, or Chrome) and log in to MyFSU:

On the **Employee** tab, click on the **My Workplace** icon in the Quick Links, and then click on **Technology Support**.

Then, log in using `Ferris_AD\yourMyFSUId` in the username box, and your MyFSU password. You will be logged into the portal.

The screenshot shows the Ferris Technology Service Portal interface. At the top, there is a navigation bar with links for Home, Browse Service Catalog, New Ticket, My Tickets, Stats/Dashboards, and Documentation. The main content area is divided into several sections:

- Current Known Issues:** Lists issues such as Hardware Services (Dell Monitors installed during PCR are not working properly), Storage Management (System Outage Campus Wide), Application Hosting Services (INB Banner is down), and Connectivity Services (ATC cannot get to external sites).
- Submit a New Ticket:** Includes a section for "I need Help with:" (Network Access/Setup) and "Purchase Items with University Funds:" (Purchase HP Desktop, Purchase HP Laptop, Purchase HP High Mobility Laptop, Purchase Apple MacBook Pro 15" (Laptop), Purchase HP Single User Color Pro 200dn Color...). There are also buttons for "Purchase an Item from the Catalog" and "Purchase a Non-Standard Item", each with an "info..." link.
- Helpful Links:** Lists links for Password Reset, Training Schedule, Network Maintenance Schedule, My Tech Support, and Feedback Forum.
- Contact TAC:** Provides contact information for the Technology Assistance Center (TAC), including "Chat with a Specialist", "Submit a New Ticket", "Remote Assistance", and phone numbers 877.779.4822 and 231.591.4822. It also includes a "TAC Hours" icon.
- My Tickets:** A table showing a list of tickets with columns for ID, Created Date Time, Description, Status, and Pending Reason. The table contains two rows: one with ID 116048, Created Date Time 2/4/2015 11:05:11, Description [redacted], Status Work In Progress, and Pending Reason [redacted]; and another with ID 119125, Created Date Time 3/4/2015 2:01:10, Description [redacted], Status Work In Progress, and Pending Reason [redacted].

## Submitting a Request through the Purchase Process

Before submitting a purchase request, you must know whether you are ordering a **standard item** or a **non-standard item**.

### Standard Items versus Non-Standard Items

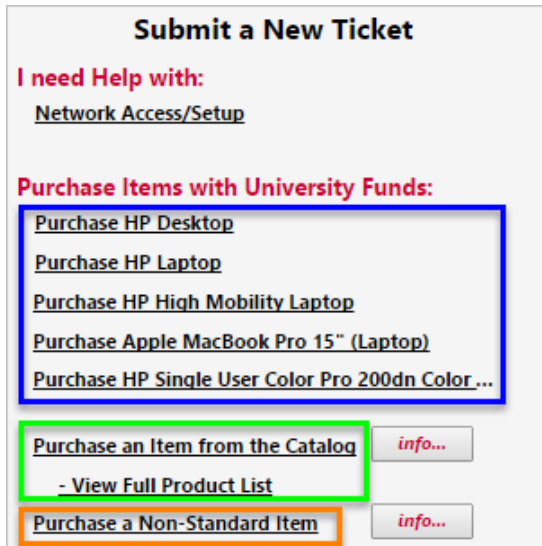
A **standard item** is something that is purchased frequently at the University and is in line with the technology standards set by various committees throughout the University. An example of a current standard is a Hewlett Packard (HP) EliteBook laptop or EliteDesk desktop computer. When a department has a need for a new or replacement computer, they would use the **Purchase Standard Items** link to begin their purchase request on the **Browse Service Catalog** page or select the appropriate item from the **Submit a New Ticket, Purchase Items with University Funds** section on the Home page (see instructions on the next page).

Another example is the purchase of a network cable or video adapter. There are certain models that work with most of the computers we have, thus, we have a limited selection of cables and adapters in the “pre-approved” item catalog. These items are regularly purchased and can be found in the standard items list.

*Items that are not frequently purchased at the University fall into the Non-Standard Items area. This would include software such as AutoCAD or items not found in the standard product catalog. Tickets processed using the non-standard items form take longer to process. Please review the items in the standard items list to see if one of those items would meet your needs before submitting a non-standard purchase request.*

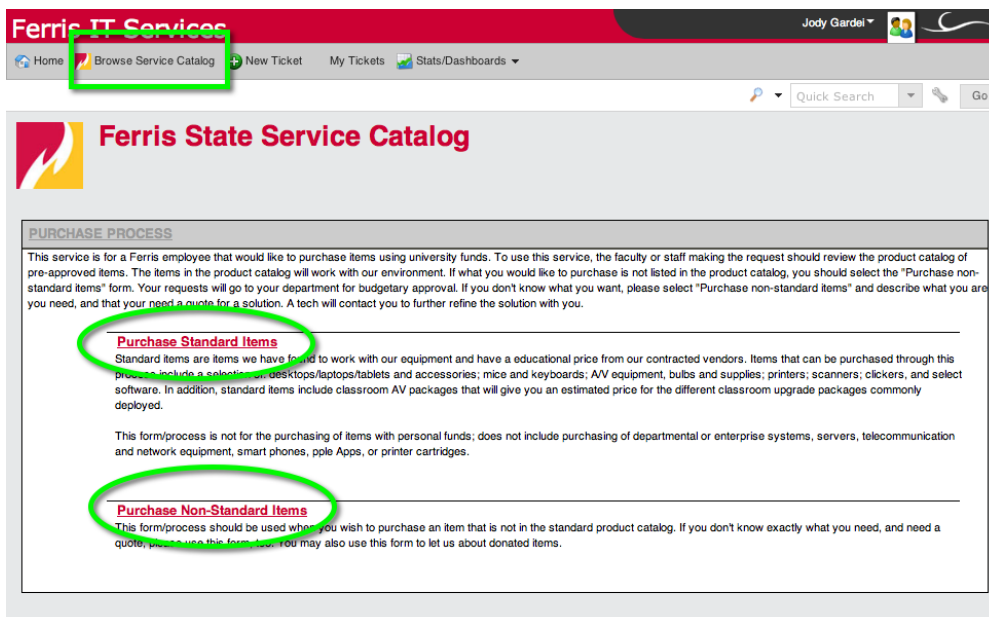
## Submit a New Ticket

Now that you know what type of item you are ordering, there are several ways to begin a technology purchase request in the service portal. One way is to use the quick links listed in the **Submit a New Ticket** section under **Purchase Items with University Funds**.



The items in **blue** are the most commonly purchased items. Selecting one of these will automatically fill in a request form for that item. The **green** option allows for selecting other standards items as defined above. The **orange** option allows for the purchase of a non-standard item, also as defined above.

Another way is to select the **Browse Service Catalog** menu from the top of the screen. There are currently two options in the **Purchase Process** box: **Purchase Standard Items** and **Purchase Non-Standard Items**.



## Filling out the Purchase Request Form

### Standard Purchase Request

Once you select Standard Purchase Request, a new ticket is opened. You will need to complete the following information on the top half of the ticket:

1. **Where are You Located?**
2. **Preferred Contact Method:** Phone or Email.
3. Please Provide a **Complete Description** (Fill in the details. This will show up in the email you receive to track your purchase and help you differentiate between multiple requests).
4. You may add an attachment by clicking on the paperclip icon located on the ticket menu.

The screenshot shows the Ferris IT Services web interface. At the top, there's a navigation bar with 'Home', 'Browse Service Catalog', 'New Ticket', 'My Tickets', and 'Stats/Dashboards'. Below that is a toolbar with 'Save', 'Abandon', 'Lookup', and a search bar. The main content area is titled 'Ticket 75829' and shows the following fields:

- Verify Your Contact Information:** A blurred section.
- Status:** New
- Where are You Located? (1):** A text input field containing 'FLT 110'.
- Preferred Contact Method: (2):** A section with 'Phone: (555) 555-5555' and an empty 'Email:' field.
- Please Provide a Complete Description: (REQUIRED) (3):** A large text area containing 'Purchase Request for a new computer.' A callout bubble points to this area with the text 'Add details about your request here.'

### Standard Purchase Request

Please select from the items below

Next, scroll to the bottom half of the screen, Standard Purchase Request. Enter the Desired Completion Date of your purchase request in the box provided. This will provide TAC staff with information on when you would most like to have this request fulfilled. Please remember to put in a reasonable date based on the complexity of your request.

If you used one of the quick links on the home page that item will appear in row one. If you used the link on the Browse Service Catalog screen, you will need to browse the category list, then select the item you would like to purchase from the list of items available for that category. You may select up to five different items per ticket. You may change the quantity of each item from one to the number of items you would like to purchase.

After you have all your items populated, there is a box to put in any comments or notes. The information you provide in this box will help the TAC and your departmental approver process your request. Some information you may want to include:

- Installation location (building and room, barcode of computer, person receiving the technology)
- What to do with existing equipment? (dispose, repurpose)
- How does this purchase enhance your program? (What does your department funds approver need to know?)
- Concerns




When you are finished, select **Submit** to save the ticket.

Here is a recap of the items you need to complete in the Standard Purchase Request area before your ticket is submitted:

1. **Desired Completion Date**
2. **Category** for each item
3. **Item**
4. **Quantity**
5. **Comments/Notes**
6. **Submit**

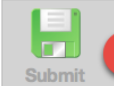
**Standard Purchase Request** Please select from the items below

Desired Completion Date: 03/28/2014 1

Category	Item	Unit Price	Qty	Total Price	
Item 1 Computers and Laptops <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">2</span>	Apple iMac 27" <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">3</span> iMac 27 inch: 3.4 GHz i7 Processor 16 GB RAM 1 TB Hard Drive 2 GB NVidia GeForce	\$2,738.00	1 <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">4</span>	\$2,738.00	
Item 2 Cable	Cable Wholesale USB Printer Cable 10' 10-foot USB printer cable	\$4.10	1	\$4.10	
Item 3 Software	TechSmith Snag It 11 A screenshot program that captures video display and audio output. Originally for the Microsoft Windows operating systems recent versions have are available for Mac OS but with fewer	\$0.00	1	\$0.00	[ Imported ] Globa 
Item 4		\$0.00	0	\$0.00	
Item 5		\$0.00	0	\$0.00	

**Total Price:** \$2,742.10

Comments/Notes: This is for a new employee who starts next month. 5

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## Non-Standard Purchase Request

Once you select **Purchase Non-Standard Items**, a new ticket is opened. The top portion of the ticket requests the same details as the Standard Purchase Request: Your location, preferred contact information, and complete description of the request.

The second part of the ticket appears different because you will need to type in the details of your request.

The screenshot shows a web form titled "Non-Standard Purchase Request" with a green header bar that says "Please specify what you want below". The form includes a checkbox labeled "Is this a Donation?". Below this is a large text area for "Item Description" containing the text "I need a copy of Dolt/All Elite Software." with a red circle '1' next to it. To the right of the text area are two input fields: "Desired Completion Date:" with the value "03/28/2014" and a calendar icon, and "Cost Not to Exceed:" with the value "\$300.00", both with red circles '2' and '3' respectively. Below these is a "Customer Notes:" section with a text area containing "This is for my student employee." and a red circle '4' next to it. To the right of the text area is a "Submit" button with a floppy disk icon and a red circle '5' next to it.

1. Enter the **Item Description** for what it is you would like to purchase.
2. Enter the **Desired Completion Date**.
3. Enter the **Cost Not to Exceed** amount. Include shipping costs.
4. Enter **Customer Notes** about your request. Include:
  - Installation location (building and room, barcode of computer it is replacing, person it will be assigned to)
  - What to do with existing equipment? (dispose, repurpose)
  - How does this purchase enhance your program? (What does your department funds approver need to know?)
  - Concerns
5. Click **Submit** to finalize your request.

## Donations

**All technology donations must have a non-standard items ticket submitted.** There is a checkbox labeled "Is this a Donation?" that you will need to check. The "Cost Not to Exceed:" amount should be the amount the donation is worth.

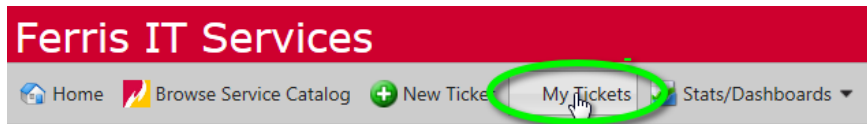
## Checking the Status of your Ticket

You can log into the Ferris Technology Service Portal at

<https://cherwell.ferris.edu/CherwellPortal/IT>, to view the status of your ticket, add attachments, or add comments. Go to the **Home** page under the **My Tickets** section and scroll to find the appropriate ticket. Select the ticket to view the details. The journals section at the bottom of the ticket will show you the approvals that have been completed so far, and more.

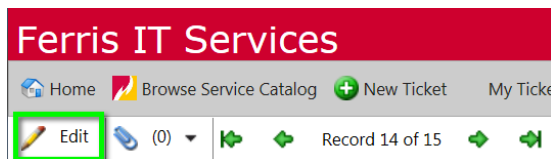
My Tickets						Submit a New Ticket
ID	Created Date Time	Description	Status	PendingReason	Resolve By	
109782	1/15/2015 1:41:23 PM	Non-Standard Purchase Request - ...	Work In Progress		2/12/2015 1:41:2	
109781	1/15/2015 1:39:56 PM	Non-Standard Purchase Request - ...	Work In Progress		2/12/2015 1:39:5	
109779	1/15/2015 1:37:27 PM	Non-Standard Purchase Request - ...	Work In Progress		2/12/2015 1:37:2	
109777	1/15/2015 1:36:10 PM	Non-Standard Purchase Request - ...	Work In Progress		2/12/2015 1:36:1	
109774	1/15/2015 1:33:06 PM	Non-Standard Purchase Request - ...	Work In Progress		2/12/2015 1:33:0	
109772	1/15/2015 1:31:47 PM	Non-Standard Purchase Request - ...	Work In Progress		2/12/2015 1:31:4	
109769	1/15/2015 1:29:26 PM	Non-Standard Purchase Request - ...	Work In Progress		2/12/2015 1:29:2	

You may also select **My Tickets** from the top menu items. This screen allows you to access all of your open and closed tickets placed with the TAC, including other requests for assistance.



## Modifying Your Request

With the ticket open, you may modify the description of your request by selecting the **Edit** option on the top menu.

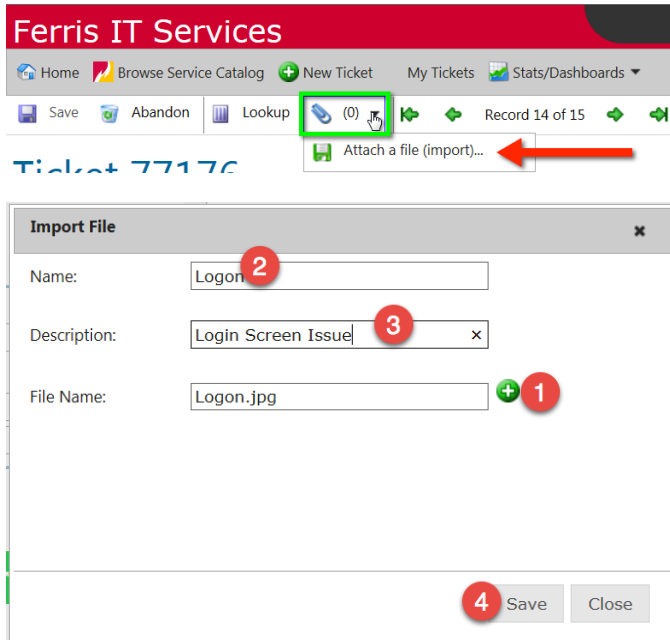


Place the cursor in the description box and modify it as necessary. Make sure you save the ticket once your changes are complete.

## Adding Attachments

If you have a quote or document to share with your TAC support technician, you may attach it to the ticket. Open the ticket and select the **Edit** option from the top menu.

Once in edit mode, the menu options will change. Select the **attachment paperclip**, then the **Attach a file (import)...** option. The Import File window will appear.



1. Press the green plus icon next to the **File Name** field to browse your computer for the file.
2. Once you have selected the file, the name of the file will populate the **Name** field. You may change this name if you choose.
3. Provide a **description** (optional).
4. Select **Save**.



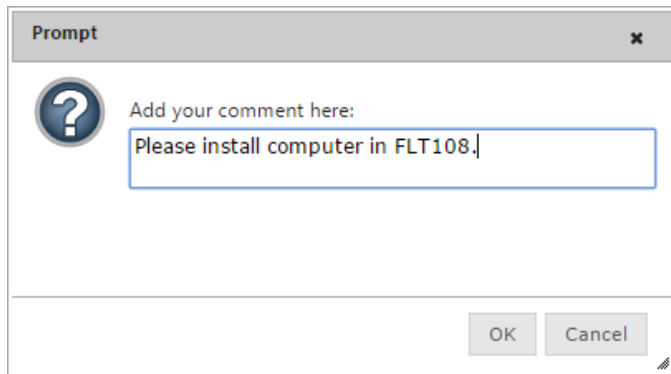
## Adding a Comment

Open the ticket and select the **Edit** option from the top menu. Under the Preferred Contact Method entry fields is the “**I want to: Add Comment**” option. Click on **Add Comment**.

I want to:

[Add Comment](#)

A **Prompt** will appear. Type your comments in the box and select **OK**. Your comments will be saved in the ticket’s journal.



The image shows a 'Prompt' dialog box with a grey title bar containing the word 'Prompt' and a close button (X). On the left side of the dialog is a circular icon with a question mark. To the right of the icon, the text 'Add your comment here:' is displayed above a text input field. The input field contains the text 'Please install computer in FLT108.'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'. A small mouse cursor icon is visible at the bottom right corner of the dialog box.