Technology Purchasing Process

Overview

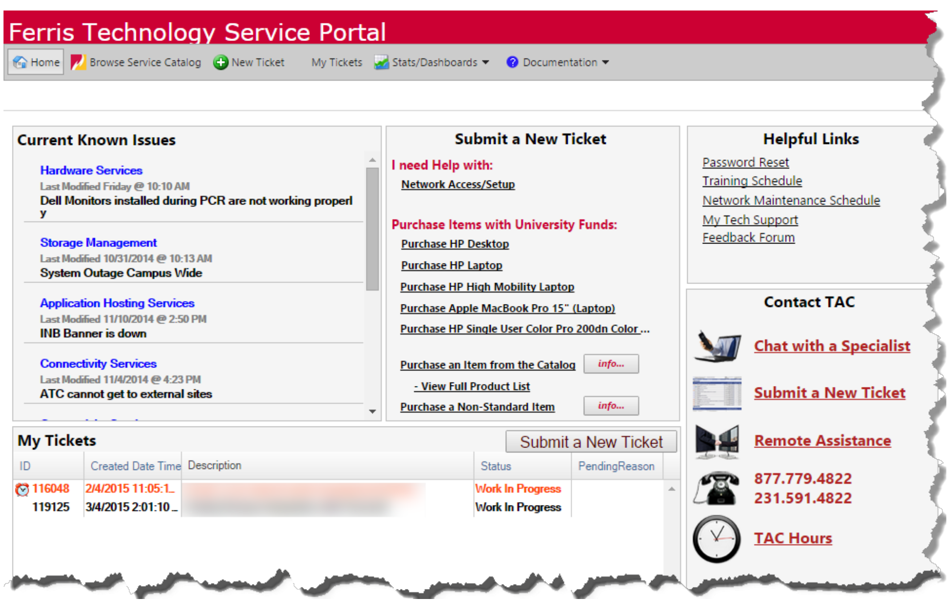
All purchases for new technologies using University funds for both hardware and software must be processed through the **Ferris Technology Service Portal** using the **Technology Purchase Process**. This document reviews how to access the Ferris Technology Service Portal, how to make a technology purchase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



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

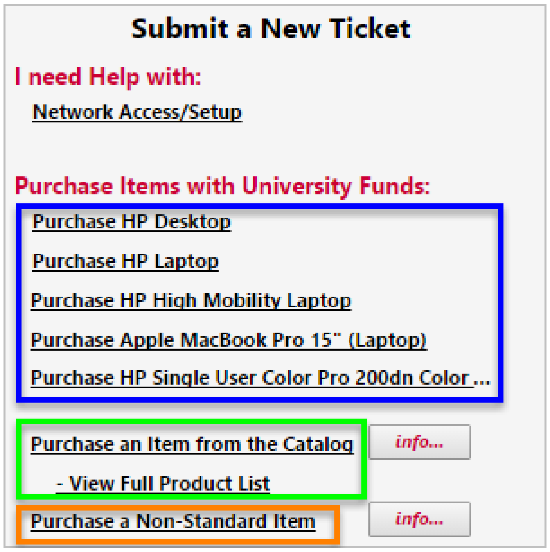
A **standard item** is something that is purchased frequently at the University and is in line with the technology standards set by various committees throughout the University. An example of a current standard is a Hewlett Packard (HP) EliteBook laptop or EliteDesk desktop computer. When a department 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.

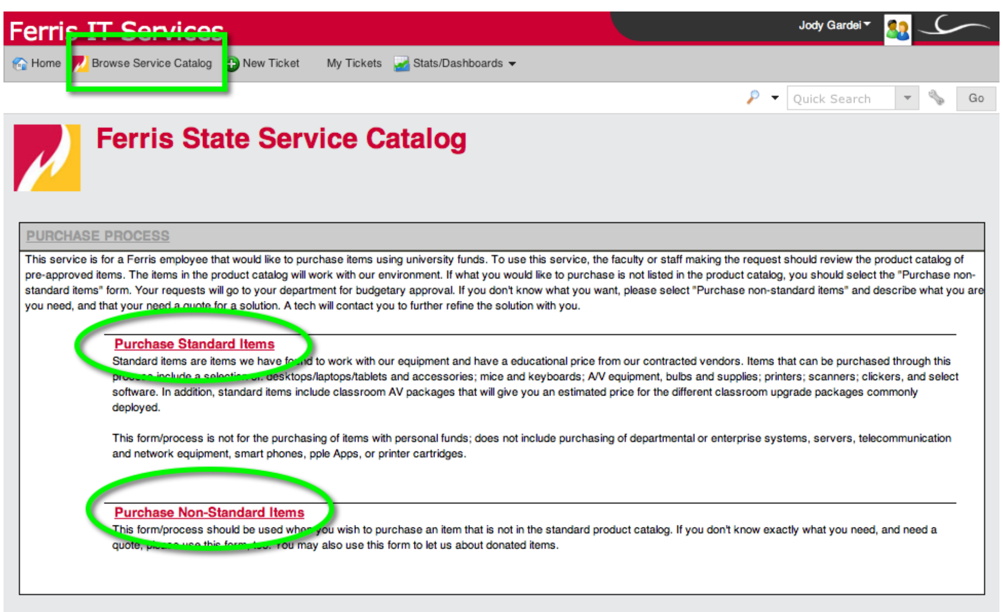
Submit a New Ticket

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**.

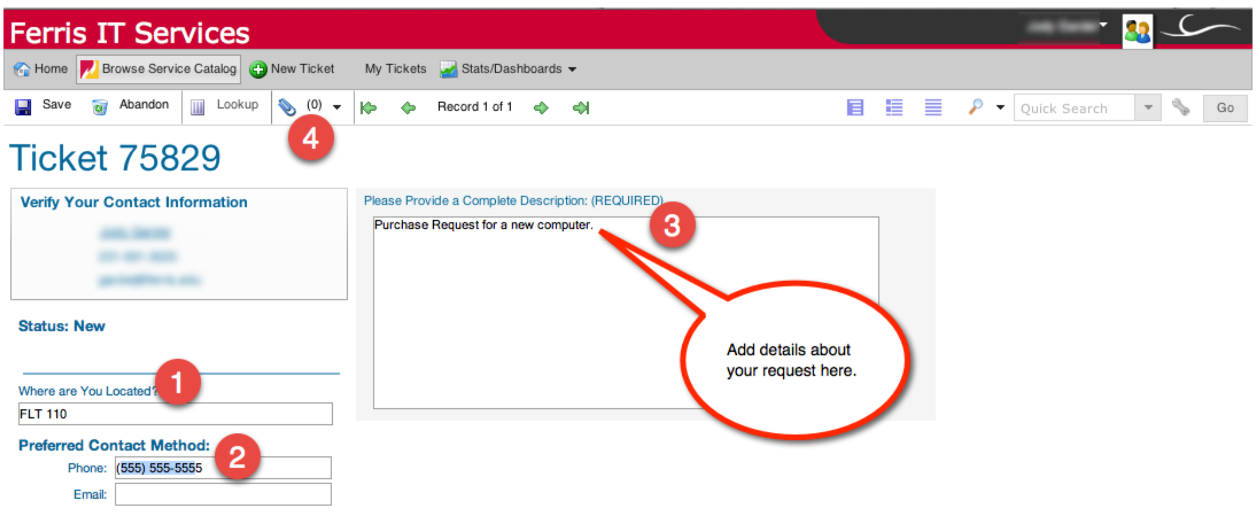


Filling out the Purchase Request Form

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.



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.

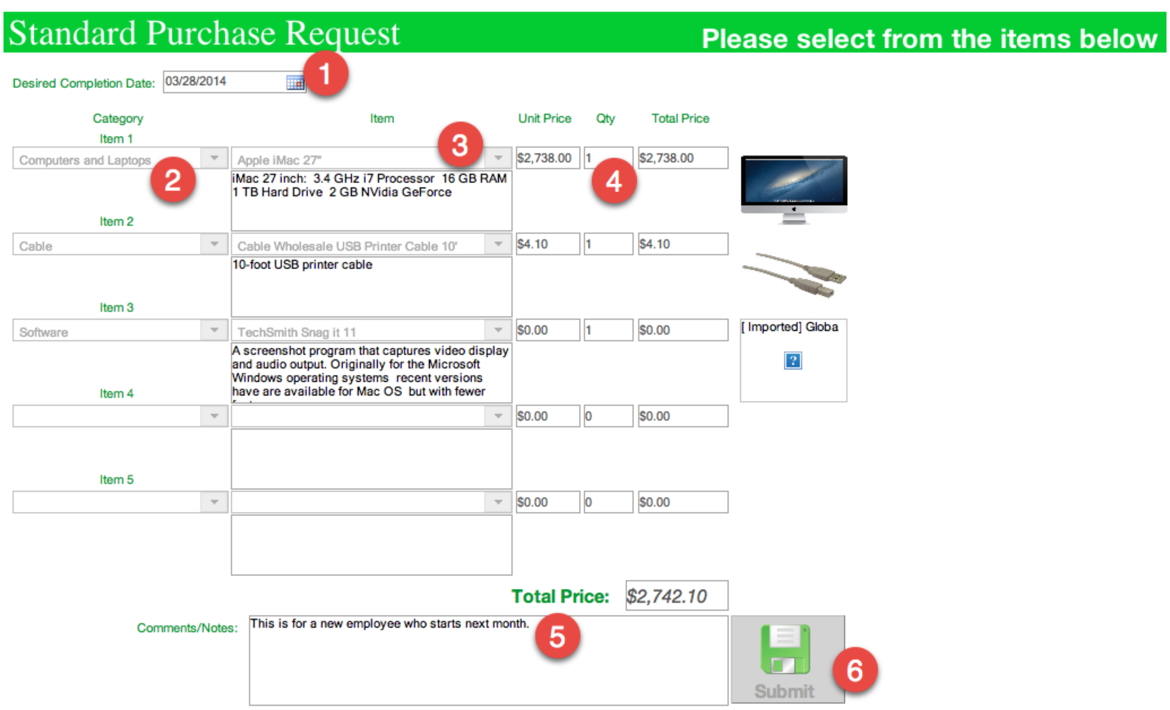
After you have all your items populated, there is a box to put in any comments or notes. The information you provide in this box will help the TAC and your departmental approver process your request. Some information you may want to include:

- 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:

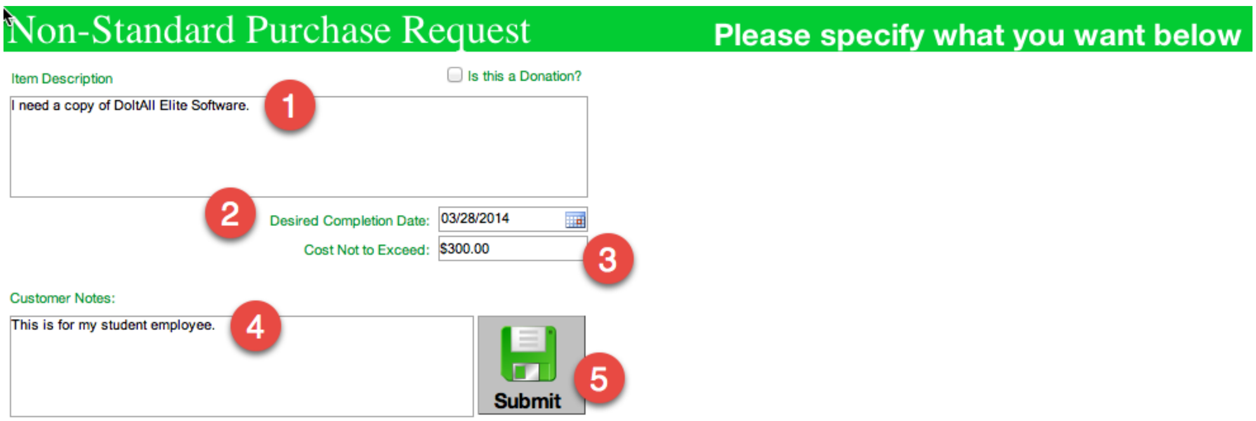
1. **Desired Completion Date**
2. **Category** for each item
3. **Item**
4. **Quantity**
5. **Comments/Notes**
6. **Submit**



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.



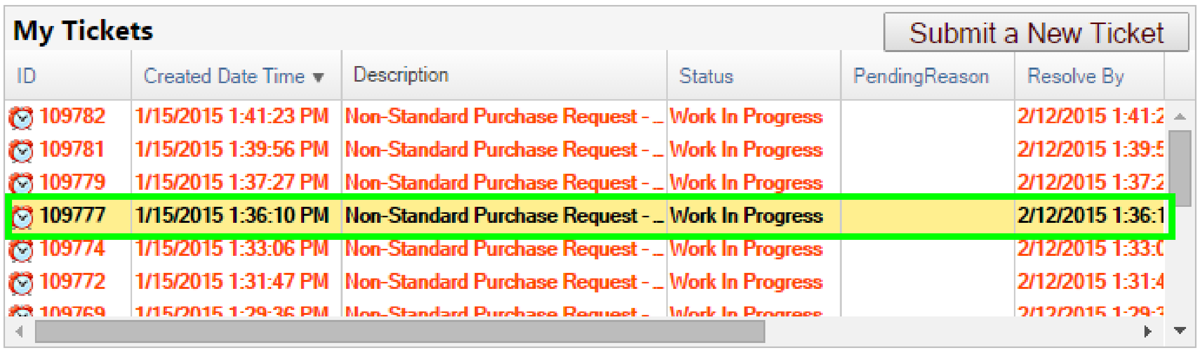
1. Enter the **Item Description** for what it is you would like to purchase.
2. Enter the **Desired Completion Date**.
3. Enter the **Cost Not to Exceed** amount. Include shipping costs.
4. Enter **Customer Notes** about your request. Include:
    - Installation location (building and room, barcode of 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

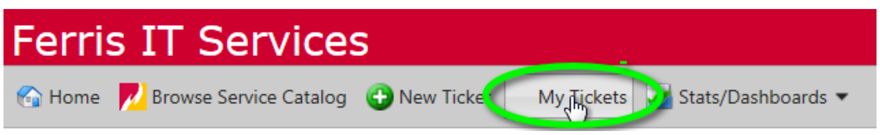
All technology donations must have a non-standard items ticket submitted. There is a checkbox labeled “Is this a Donation?” that you will need to check. The “Cost Not to Exceed:” amount should be the amount the donation is worth.

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.

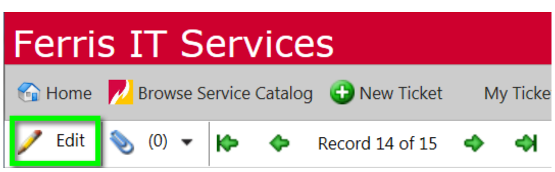


You may also select **My Tickets** from the top menu items. This screen allows you to access all of your open and closed tickets placed with the TAC, including other requests for assistance.



Modifying Your Request

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

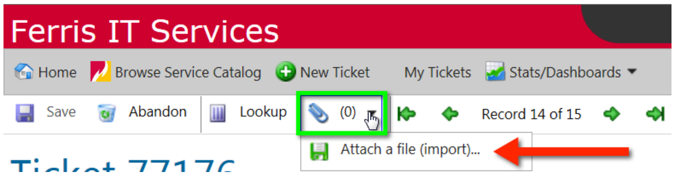


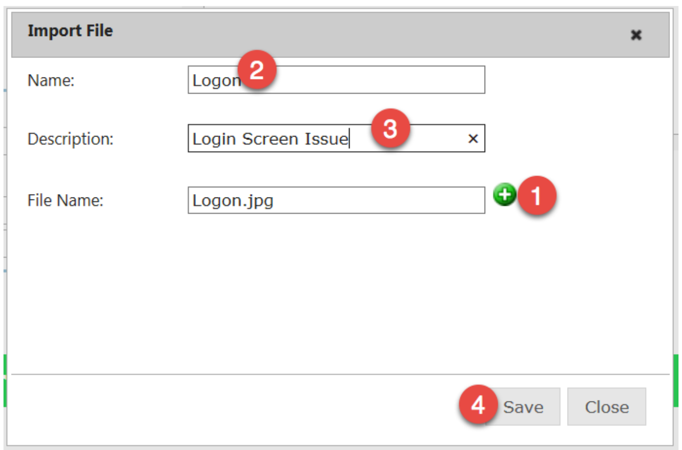
Place the cursor in the description box and modify it as necessary. Make sure you save the ticket once your changes are complete.

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**.

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