User Guide for Summus/Dell Purchases in eSHOP

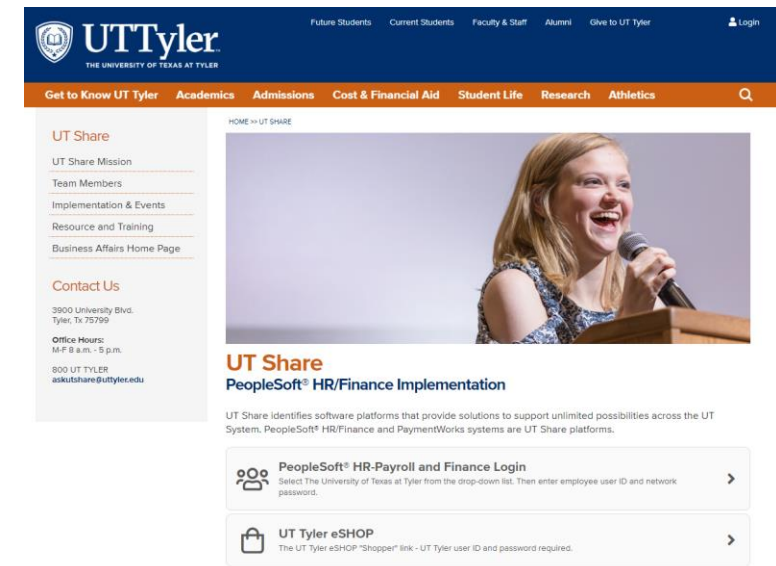Procedures for completing Dell computer equipment purchases utilizing eSHOP and PeopleSoft

Entering as Shopper or Requester?

eSHOP is a role-based shopping tool that allows the University to take advantage of pre-negotiated contracts from well known suppliers.

- Shopper – **A Shopper is anyone on campus that does not have security access to create a Requisition in UT Share/Peoplesoft.** Shoppers are able to search and shop the site for goods, knowing these are pre-approved for the University. Shopper training manual: https://www.uttyler.edu/finserv/files/eshop-shoppers-training-manual.docx

- Requester – **Requesters are users who have the authority to create requisitions in UT Share/Peoplesoft.** As a requester, you are responsible for creating, reviewing, editing and submitting carts to become formal requisitions for approval in UT Share/Peoplesoft. Requester training manual: https://www.uttyler.edu/finserv/files/eshop-requesters-training-manual.docx

Link to UT Share/Peoplesoft and eSHOP "Shopper" page:

https://www.uttyler.edu/utshare/

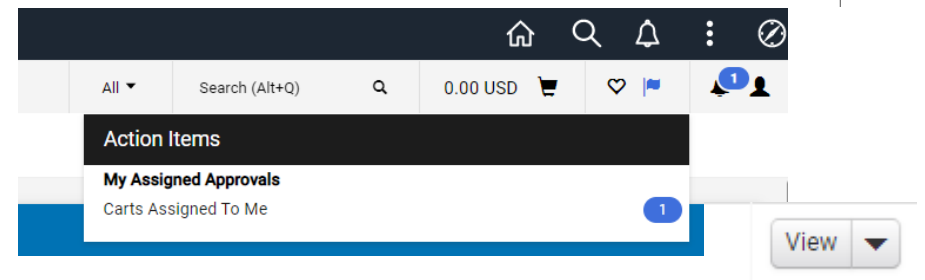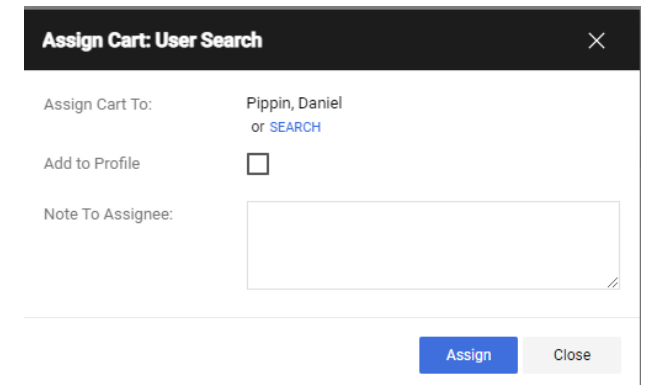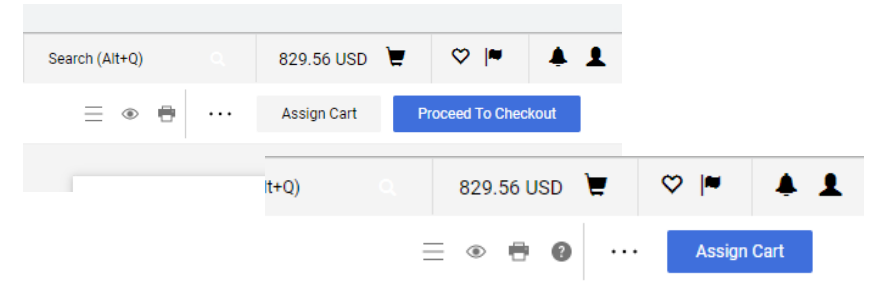# Navigation as a Shopper

UT Tyler eSHOP
The UT Tyler eSHOP "Shopper" link - UT Tyler user ID and password required.

The shopping experience for a Shopper is the same as a Requester up until completing checkout. *See slides 5-9 for relevant information.*

- Instead of being directed to return cart to Peoplesoft, a Shopper will be asked to click "Proceed To Checkout" and "Assign Cart".

- Assign Cart requires the Shopper to select an approved Requester to complete the requisition steps. Click "SEARCH" hyperlink and enter name of approved Requester. Select name from list by clicking "+" sign. Then, click "Assign".

- The Requester will receive an email notifying them that a cart has been assigned. They will then enter eSHOP through Peoplesoft "Sciquest eSHOP Portal" and retrieve cart by clicking Action Item flag and then click "Carts Assigned To Me". Click "View".
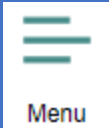
Navigation as a **Requester**

NavBar

Menu

Financials

eProcurement

Create Requisition

SciQuest eSHOP Portal (Link)

Create Requisition

Welcome Daniel Lee Pippin

🏠 Home   🪄 My Preferences   ⚙ Requisition Settings | 🛒 0 Lines   Checkout

Request Options ▾   Search All ▾   Search   Advanced Search

All Request Options

Web
SciQuest eShop Portal

Special Requests

Favorites

Templates

Special Requests ⓘ

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description

*Price   *Currency USD
*Quantity   *Unit of Measure
*Category   Due Date

Address Sequence Number

Supplier

Supplier ID
Supplier Name
Supplier Item ID

Manufacturer

Mfg ID
Manufacturer
Mfg Item ID

Opening Dell Premier Page

- Select the Punchout Catalog for Summus/Dell

Note: If a new screen does not open after clicking catalog, please check pop-up blocker settings on your browser.

Standard Configurations

- Items pre-approved by IT are listed under Standard Configurations.

- Both Standard and NonStandard catalog items should be purchased through the Summus/Dell punchout catalog.

- Access Standard Configurations by clicking "Shop" in the Dell Catalog menu and then select "Standard Configurations" in the secondary navigation. Another alternative is to select "Standard Configurations" available from the quick access strip.
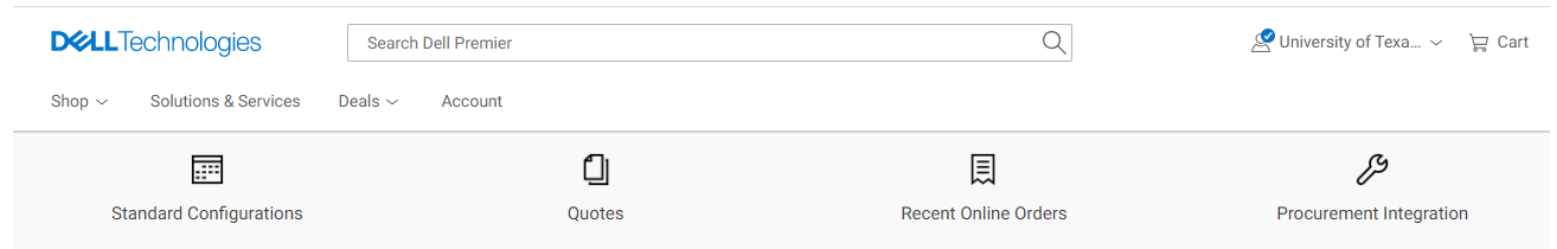
Requesting a Quote

- If you need to purchase NonStandard catalog items, <u>not on the pre-approved list under Standard Configurations</u>, you may request a quote.

- Process for requesting a quote:
  - Campus Requester should reach out to UT Tyler Information Technology (IT) contact at itsupport@uttyler.edu.
  - UT Tyler IT Department will request a quote from Dell.
  - The quote provided to the IT Department will be forwarded to the Requester.
  - Once received, the requester can return to the Summus/Dell punchout catalog in eSHOP to pull the quote items into the portal.

- For more information regarding IT related purchases for University use, please visit Technology Support website: https://www.uttyler.edu/technology-support/purchases/

Pulling Quote Information into eShop

- After logging into eSHOP and entering Summus/Dell punchout catalog, the Requester can pull quote information into portal by selecting "Quotes" on the landing page.

- Enter quote number or other information into search bar and selecting the appropriate quote from list clicking "View Details" and then clicking "Create Order Requisition" to finish pulling order into cart.

If Quote is a "Home Consumer" Item

- If your quote has "Home Consumer" in the Contract Code portion of the document, there is an additional step for pulling in quote.

- Enter the "Customer #" into field provided and click "Retrieve Quote".

Placing an Order
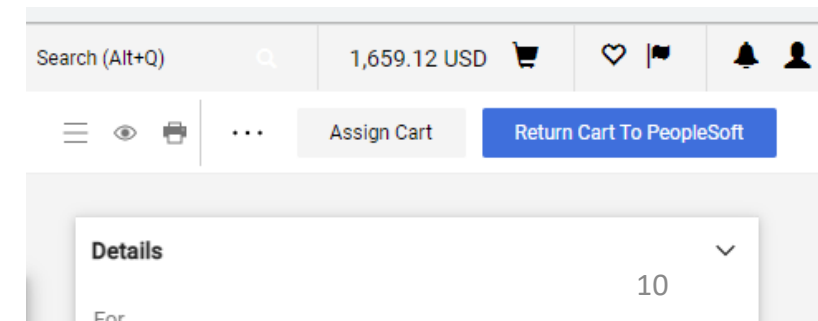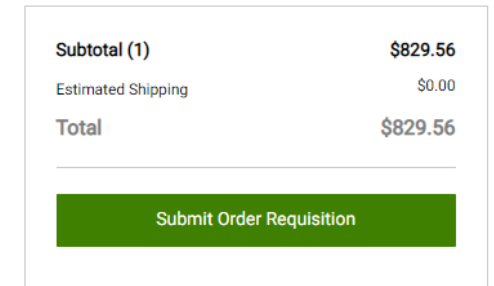
- Step 1 – Once you have added all products to a cart, view cart and click "Create Order Requisition".

- Step 2 – Click "Continue Securely"

- Step 3 – Click "Submit Order Requisition"

- Step 4 – Click "Return Cart to Peoplesoft"
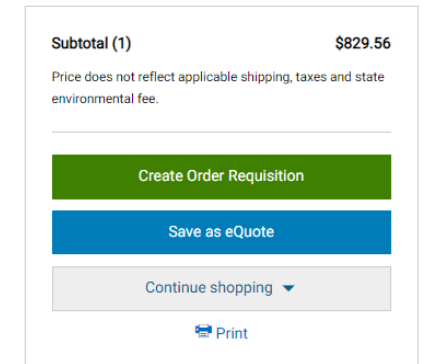
Complete Requisition in Peoplesoft

- Fill in Requisition Name field (optional)

- Click on arrow triangles to pull down Accounting Lines

- Enter cost center number into SpeedChart field and hit Enter

Complete Requisition in Peoplesoft

- Attach any quotes or purchase authorization information, as necessary by clicking "Add more Comments and Attachments"

- Click "Check Budget"

- Click "Save & Submit"

- Budget Authority can then approve Requisition for dispatch into Purchase Order

PO Issued and Order Placed

- An order is placed with Summus/Dell when a purchase order number is issued by Peoplesoft. Requester should receive an email indicating the PO number and that the PO has been sent to supplier.

Re: PURCHASE ORDER#: UTTYL.0000038459
Cart name: 2023-05-30 5000111415@UTTYL 02
Requisition number: 172525476
Supplier: Summus Dell (UTTyler)
Sent Via: CXML
Date/Time: 5/30/2023 3:05 PM

Dear Daniel Pippin,

The purchase order listed above has been created for your requisition "2023-05-30 5000111415@UTTYL 02 (172525476)" and has been sent to the supplier. You can update and track the status of this purchase order on line by using " document search "

If you have any questions with regard to your purchase order, please contact your SelectSite Support Team.

Support Team Contact Information:
purchasing@uttyler.edu

Thank you,
University of Texas System

Receipt of Product & Invoicing

- Invoicing is an automated process for eSHOP purchase orders. After items are shipped, the supplier sends an invoice directly to UT Share/Peoplesoft. There is no need for a Requester to enter a manual voucher.

- Per our contract, OptiPlex, Latitude, and Precision models will arrive tagged; all others will require tagging and then be sent to IT for imaging. (See next slide for additional Asset Management and Inventory Control information)

- When IT notifies department that item has arrived or item is delivered to department, Requester can enter Receipt in Peoplesoft (For instructions, please see "Procedures for Receiving PO in Peoplesoft" under Helpful Information on the Procurement Services website. https://www.uttyler.edu/procurement-services/)

- If there are no Budget Checking errors and No Matching errors, the Voucher will automatically be approved.

Asset Management and Inventory Control Process for Summus/Dell Orders

- Asset Management Receives an Order Notification from Summus/Dell along with a spreadsheet that list all pertinent information including projected delivery date

- Tagged devices are received by campus receiving, then delivered to the IT Department for imaging.

- IT Department notifies the campus requestor to receive the Purchase Order in PeopleSoft, and requests imaging specifications for this device from the requestor.

- Receipts are reviewed in the asset system and compared to the projected delivery date on the spreadsheet Summus/Dell provides and are then added to the asset inventory module in PeopleSoft.

- IT then notifies the requestor when the device is ready for delivery or pick up. The Inventory Contact Person will then update asset information with accurate location and custodian information for this device in the asset inventory system.

Issues and Questions

- For unresolved issues, status updates or return requests, please contact: orders@summusindustries.com or call 281.640.1765

- For more information regarding ordering process, please visit Procurement Services website at https://www.uttyler.edu/procurement-services/

- For questions, you can also email purchasing@uttyler.edu