

User Guide for Summus/Dell Purchases in eSHOP

Procedures for completing Dell computer equipment purchases
utilizing eSHOP and PeopleSoft

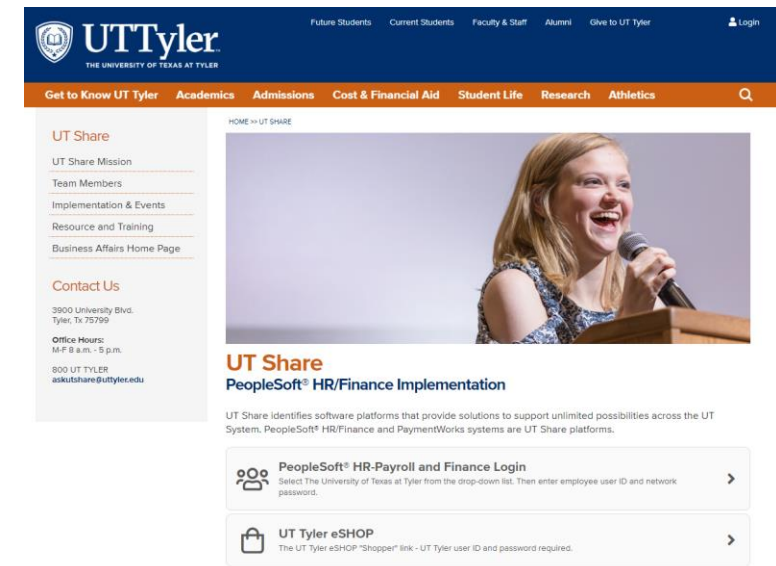
Entering as Shopper or Requester?

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



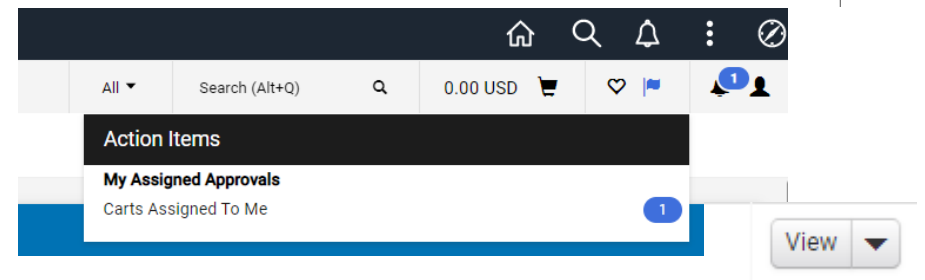
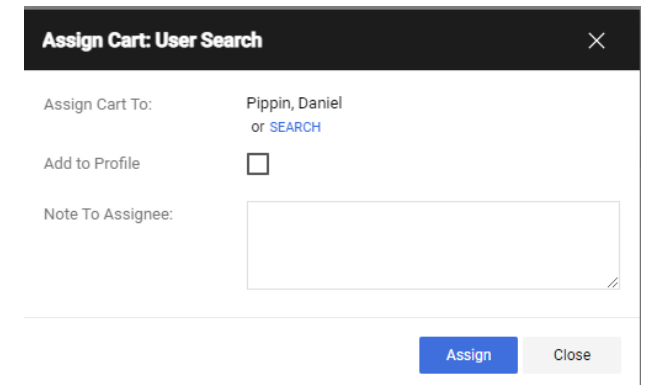
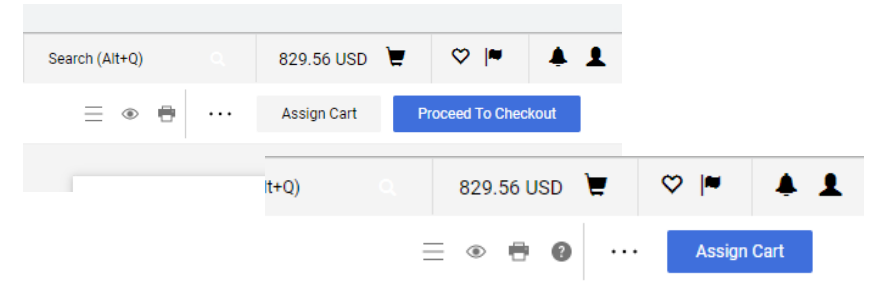
UT Tyler eSHOP

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”.

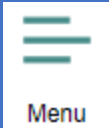


Navigation as a Requester

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

*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

Home Create Requisition

UT Tyler. eSHOP All Search (Alt+Q) 0.00 USD

Shop • Shopping Dashboard

Organization Message

Welcome to eShop

An eProcurement system for the University of Texas at Tyler

The eShop eProcurement system provides a familiar online shopping experience and negotiated pricing from The University of Texas at Tyler's preferred suppliers for goods and services you need.

You can search for items by keyword or item number. When you find the item you need, just put it in your shopping cart.

Further Reading & Training

- Punch-out Shopping

Shop By Catalog

Hosted Catalogs

eppendorf

Punchout Catalogs

Airgas

BURGOON GRAINGER

Cell Signaling

fisherscientific Possible Missions

STAPLES Summus

TODAY'S

DELL Summus - UT Tyler

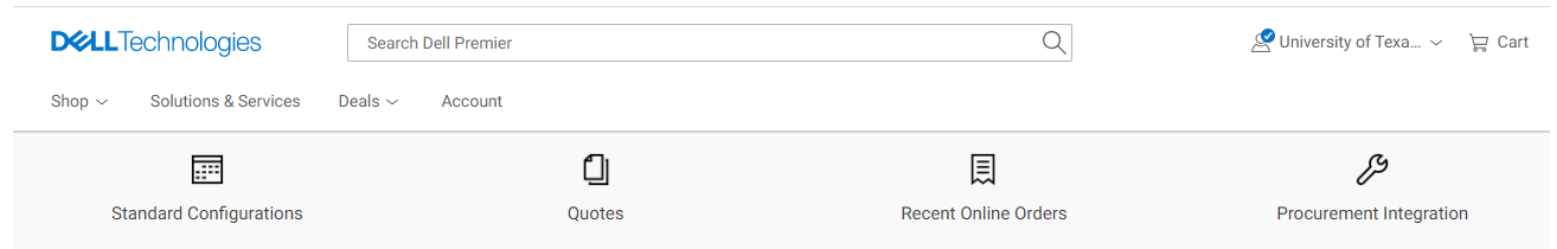
- Select the Punchout Catalog for Summus/Dell



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.



WELCOME TO PREMIER

THE SEASON FOR SAVINGS

Save up to 68% on top business tech with Black Friday offers, now through 11/27.

[View Deals](#)



Requesting a Quote

- If you need to purchase NonStandard catalog items, not on the pre-approved list under Standard Configurations, 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.

Quotes

Choose the quotes you'd like to purchase from the list below or search for an eQuote (by entering the eQuote name, eQuote number, eQuote creator) or search for a Sales Quote (by entering Sales Quote Number).

3

Name	Number	Created	Authorized Buyer	Expires	Purchased	Subtotal / Total Price
Coby Dillard	3000151374000	cdillard@uttyler.edu April 27, 2023	--	June 26, 2023	No	\$7,200.02 \$7,200.00
Liberty Landing Laptops	3000145447496	cjackson@uttyler.edu February 23, 2023	--	April 24, 2023	No	\$3,593.02 \$3,593.02

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.



Summus Industries, Inc.
77 Sugar Creek Center Blvd., Suite 420
Sugar Land, TX 77478
United States
Tax ID # 76-0533392

Quote

Page 1 of 2

Date 10/4/2023
Quote # 3000162012975.1

Customer # 530031780316
UT Supply Chain#
Contract Code Home Consumer
Vendor ID # 1760533392500
Terms Net 30
Expires 11/3/2023

Item	Description	Quantity	Rate	Amount
Dell	210-BFZH Alienware m16 Estimated delivery if purchased today: Oct. 18, 2023 Alienware m16 R1 210-BFZH - 1 - 13th Gen Intel Core i9 13900HX (24-Core, 36MB L3 Cache, up to 5.4GHz Max Turbo) 338-CHER - 1 - Windows 11 Home, English, French, Spanish 619-AQKD - 1 - NVIDIA GeForce RTX 4090 16GB GDDR6 490-B1EP - 1 -	1	3,562.49	3,562.49

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

Choose the quotes you'd like to purchase from the list below or search for an eQuote (by entering the eQuote name, eQuote number, eQuote creator) or search for a Sales Quote (by entering Sales Quote Number).

Name Number Created Authorized Buyer Expires Purchased Subtotal / Total Price

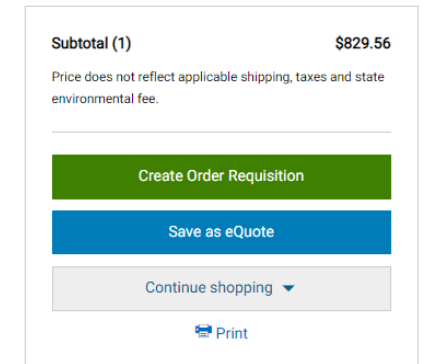
Further validation is required to retrieve Quote# 3000162012975.1. Please enter Customer Number.

Customer Number [Retrieve Quote](#) [Find customer number](#) ⓘ

[Home](#) > [Quotes](#)

Placing an Order

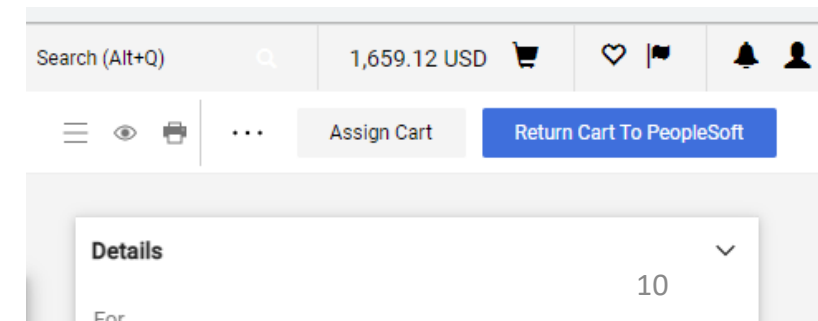
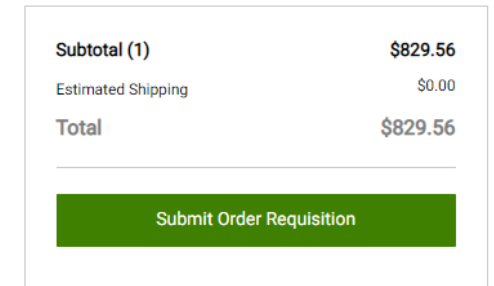
- Step 1 – Once you have added all products to a cart, view cart and click “Create Order Requisition”.
- Step 2 – Click “Continue Securely”
- Step 3 – Click “Submit Order Requisition”
- Step 4 – Click “Return Cart to Peoplesoft”



Requisition Initiated



Requisition Initiated



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

Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit UT Tyler
 *Requester Daniel Lee Pippin
 *Currency
 Requisition Name
 Priority
 Custom Fields

Cart Summary: Total Amount 829.56 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	OptiPlex Micro (Plus 7010);Opt		Summus Industries - Dell	1.0000	Each	829.5600	829.56		Add	
Shipping Line 1		*Ship To	<input type="text" value="PHY108"/>	Add Shipto Comments	Quantity	<input type="text" value="1.0000"/>		Price Adjustment		
		Address	3201 Old Glory Rd Tyler, TX 75799	Add One Time Address	Price	829.5600		Pegging Inquiry		
		Attention To	<input type="text" value="Daniel Lee Pippin"/>					Pegging Workbench		
		Due Date	<input type="text"/>					Custom Fields		

Accounting Lines

*Distribute By SpeedChart

Accounting Lines

Personalize | Find | View All | First | 1 of 1 | Last

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		<input type="text" value="STE123"/>	1.0000	100.0000	829.56	<input type="text" value="UTTYL"/>	

Select All / Deselect All

Select lines to:

[Add to Favorites](#)

[Add to Template\(s\)](#)

[Delete Selected](#)

[Mass Change](#)

Total Amount 829.56 USD

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

Requisition Comments and Attachments

Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher

[Add more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

[Check Budget](#) [Pre-Check Budget](#)

[Save & submit](#) [Save for Later](#) [Add More Items](#) [Preview Approvals](#)

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