Hardware/Software Ordering System

To order hardware or software first please review the guidelines in the IT Purchasing Policy to be familiar with what is appropriate to purchase through this online system.

When you need to place an order for hardware or software, this new system will replace the green sheets for ordering hardware and the white sheets for ordering software that you had been using.

Log on to MyRedDragon and then enter webapp.cortland.edu/hardwaresoftware in the address bar or go to the Tech Help tab and you will find it at the bottom of the Information Resources channel.

Your workspace:

The red action square with your name is where you would click to assign proxies. Proxies are people who can approve orders in your stead in the hardware/software ordering process.
In the My Queue action square, you will find orders that require your approval. If you are not an approver in the hardware/software ordering process, you will not have orders to act upon in your queue.

The My Orders action box will show you the current and past orders that you have placed, in the order they were placed. You will be able to filter the orders by their order number, status or recipient.

Click this box to place a new hardware or software order.

The Activity box will show the real-time activity, such as status changes or approvals, for any orders you have submitted:
Placing an order for only Hardware or Hardware and software

To enter a new order in the system click on the New Order action square on the home page. The New Order screen will open:

1. Your Name, Location information and Email will automatically populate the requestor info section of the new order form. If any of the information is incorrect it can be simply be highlighted and changed. This information is pulled from the university directory, so if any permanent changes need to be made, they should be made in the university directory.

The Account # to be charged for the purchase is a required field. If an account number is not entered, the order will not go through.

If you use the Max Approved field, enter the maximum amount you would like to spend for the item being ordered, otherwise leave it at 0. Items in the drop down list have an associated price, but this field may be useful when ordering custom hardware or software.

Any Notes about the order can be entered in the Notes field. The Notes field will accommodate a significant amount of text.

2. Next, click Add Hardware Recipient in the top left corner of your screen.
The Hardware Info (#1) section will open on your screen:

3. Enter the **Recipient Name** and their **C Number** if known.

4. In the **Add Item** section, choose the hardware to be ordered from the dropdown.

5. Click the Add button
This is the screen you should see:

To change the quantity of the item you can enter a new number in the **Quantity** field.

Repeat steps 4 – 6 as many times as necessary.

If you need to **remove** items you can

1. Click the **Remove** button in the bottom right of the Hardware Info section
2. Start again from step 2

Or

1. Click the red ‘x’ to the left of the added item
2. Start again from step 4

If the hardware being ordered is not in the dropdown list, or if additional Custom Hardware needs to be ordered, choose the **Add Custom Hardware** button.
The Custom Hardware section will open:

In the Custom Hardware section enter the **Name of the Hardware**, choose the **Platform** from the drop-down, then add any relevant **details** about the purchase request. Then click the **Add** button.

Your result will look like this:

If software is needed, in addition to the hardware ordered, click the **Add software** button.
The **Software Items** section will open:

Type in the name of the software **Application**, click the radio button corresponding to the **Platform** and enter the **version number** or “latest” if the version number is not known but the most recent version of the software is being ordered. Then click the **Add** button.

After you click the Add button the item will be added to your order list.
You can add as many items, for the same recipient, as necessary:

To remove items from the list click the small red x to the left of the item name.

To remove the entire order for that recipient click the **Remove** button in the lower right corner of the Hardware Info (#_) box.

Clicking Remove will delete only the entire Hardware Info (#_) box that it is in. Any orders for other recipients or other Hardware Info boxes will not be removed.
To add hardware items for another recipient (but the same account number) click **Add Hardware Recipient** in the upper left corner of your screen.

Another Hardware Info box will open:

Add hardware and software items in the same way as for the first recipient.

When the order is complete, in the **Approval Routing** box, in the **Search Approver** field, type the last name of the departmental approver in the and click the Return key:

A list will be returned with possible approvers. Choose the person you need from the drop-down list:
The Approval Routing box will look like this:

Click the **Place Order** button to place the order.

The order will now be found in your My Orders queue with an Approval Pending (Chair) tag.

So that the Approver knows there is an order ready for approval, they will be sent an e-mail with a link to be able to access the order in their queue.
Placing a software order

Click the New Order action square on the home page, and the New Order screen will open:

1. Your Name, Location information and Email will automatically populate the requestor info section of the new order form. If any of the information is incorrect it can be changed.

2. The Account # to be charged for the purchase is a required field. If an account number is not entered, the order will not go through.

3. In the Max Approved field enter the maximum amount you would like to spend for the item being ordered. This may be an important field to use when ordering custom hardware or software.

4. Any Notes about the order can be entered in the Notes field. The Notes field will accommodate a significant amount of text.

5. Next, click Add Software Recipient in the top left corner of your screen.
The Software Info box will open:

Enter the **Recipient Name** and their **C Number** if known. Also enter the **SUNY Barcode ID** (commonly known as the ‘Z’ number) of the computer the software will be installed on. This is the asset number on the barcode assigned to the computer by Campus Technology Services.

In the **Application** section, type in the name of the software application, click the radio button corresponding to the **Platform** and enter the **version number** or “**latest**” if the most recent version of the software is to be purchased.

Click the **Add** button:

After you click the Add button the item will be added to your order list.

Add as many items as needed for the first recipient by repeating steps 3 thru 5
To add software for an additional recipient, click Add Software Recipient in the top left corner of the page.

Another Software Info box will open:

If the software is going to be installed on multiple machines, list the asset numbers of all the machines in the SUNY Barcode ID field.

Repeat steps 3 thru 5 for the next recipient as many times as needed.
When the order is complete, in the **Approval Routing** box, in the **Search Approver** field, type the last name of the departmental approver in the and click the Return key:

![Approval Routing box](image)

A list will be returned with possible approvers. Choose the person you need from the drop-down list:

![Approval Routing box with top results](image)

The Approval Routing box will look like this:

![Approval Routing box with selected approver](image)

Click the Place Order button to place the order.
The order will now be found in your My Orders queue with an Approval Pending (Chair) tag.

So that the Approver knows there is an order ready for approval, they will be sent an e-mail with a link to be able to access the order in their queue.
Approving an Order

The Approver (and their Proxy) will receive an email if an order is placed and needs their approval. To approve an order follow the link in the e-mail or select the My Queue action square:

Your approval queue will open.

Select the order that needs to be approved by clicking on it.

The order will open. Be sure to review the order to make sure it is correct.

Click the Approval-Approve/Decline button at the top left of the page.
The Approval screen will open:

![Image of Approval screen]

**Please note:**

3. If you are the last approver, click the **Approve** (or **Decline**) button. The order will then be send to Campus Technology Services and to IR for approval.

or

4. If the order needs to be approved by another person after you, search for their name from the directory in the **Search Approver** field, and click on it when comes up.

5. Then click the **Approve** button.

The order will now be sent to the person you chose in the Search Approver field.

![Image of approved order]

Here you will see confirmation that you approved the order.

Here you will see that the order has been sent to the next approver.
Adding a Proxy

If an approver knows that they will not be able to approve a specific order or in the general course of business would like delegate that responsibility to someone else, they can assign a proxy to approve orders for them.

A proxy is not needed to place orders for someone else, all faculty and staff have access to this online ordering system, it is only needed to approve orders for someone.

To add a proxy, first select the red action square with your name on it:

The Proxies screen will open:

1. In the Add Proxy search field enter the last name of the prospective proxy and click Enter to access the list from the university address book.

2. Click on the name from the drop-down list.

The name will be added under Proxies:
Tracking your order

Once you have placed your order you will want to be able to find out what stage of the ordering process it is in in two ways.

The Activity action square

When an order you have placed has a change in status, this will be noted in the Activity action square.

For example:
For more detailed information on an order you have placed, click the My Orders action square on the home page. You will see all the orders you have placed in this format:

You can search the orders by order #, status, recipient and requestor.

Orders can be filtered by status.

Click on an order square to show the details of a hardware order:
Or a software order:

![Order Overview](image)

What the status designations mean:

The **order** status is found in a colored square and can be seen on the My Orders page or in the Requestor Info section of an expanded order.

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**Approval Pending**
- Every order must be approved by the Department Chair, CTS and IR. There will be several designations for Approval Pending, you will see **Approval Pending (Chair)**, **Approval Pending (CTS)** and **Approval Pending (IR)**. These will depend on where the order is in the approval process.

**Approved**
- When the order has been approved by the Department Chair, CTS and IR it is marked **Approved** and sent back to CTS.

**In Progress**
- Approved orders are either assigned to a member of CTS to work on, these orders are marked as **In Progress**

**Delivered**
- Orders designated **Delivered** have been delivered to the designated Recipient. The order will be routed to IR for recharge.

**Closed**
• **Closed** orders have been completely finalized including recharge.

Additionally, hardware orders will have an **item** status which can be found on the expanded order, in the Order Summary section:

![Order Summary](image)

The designations are:

**Pending**
- Items will usually be *Pending* until all the Approvals have been completed.

**Ordered – Purchasing**
- Items have been approved and routed to Purchasing for ordering.

**Ordered – CTS**
- Items that are purchased by CTS will be designated as *Ordered-CTS* until they are received by CTS.

**On Campus**
- Items that have been received but not yet configured are designated as On Campus.

**Ready for Delivery**
- Indicates that the item is ready to be delivered and a phone call or e-mail has been made requesting a time for delivery.

**Delivered**
- The item has been delivered to the recipient and set up if necessary.

Please be aware that it is possible to have varying orders statuses for different items.