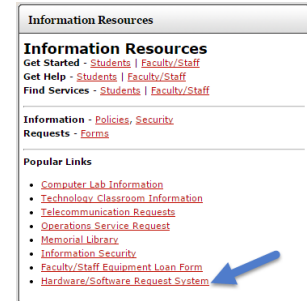


Hardware/Software Ordering System

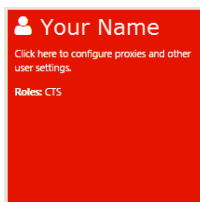
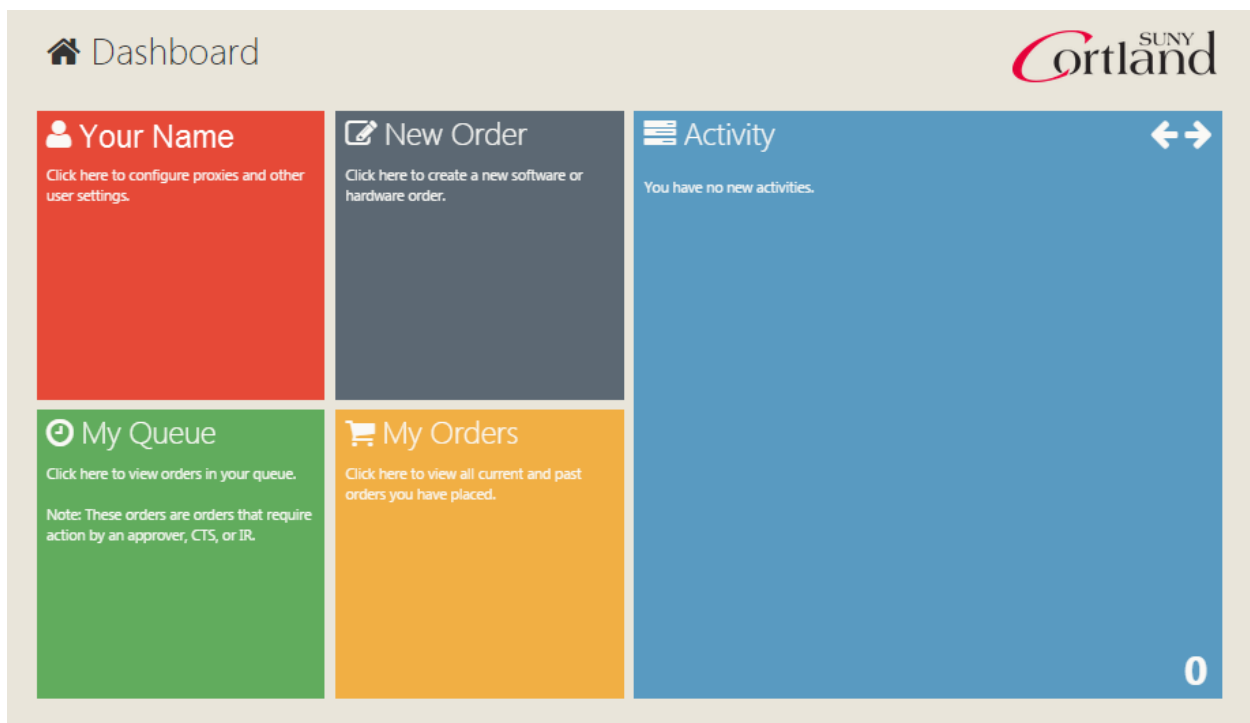
To order hardware or software first please review the guidelines in the IT Purchasing Policy to be familiar with what is appropriate to purchase through this online system.

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.

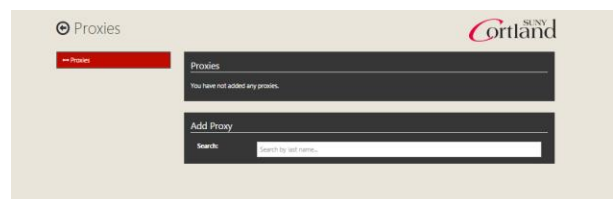
Log on to MyRedDragon and then enter **webapp.cortland.edu/hardwaresoftware** in the address bar or go to the Tech Help tab and you will find it at the bottom of the Information Resources channel.

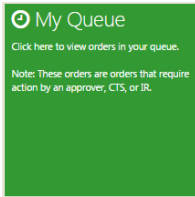


Your workspace:

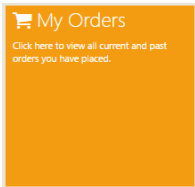


The red action square with your name is where you would click to assign proxies. Proxies are people who can approve orders in your stead in the hardware/software ordering process.

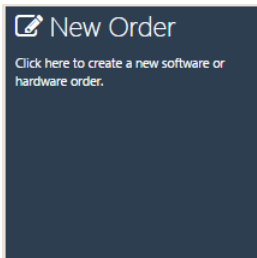




In the My Queue action square, you will find orders that require your approval. If you are not an *approver* in the hardware/software ordering process, you will not have orders to act upon in your queue.

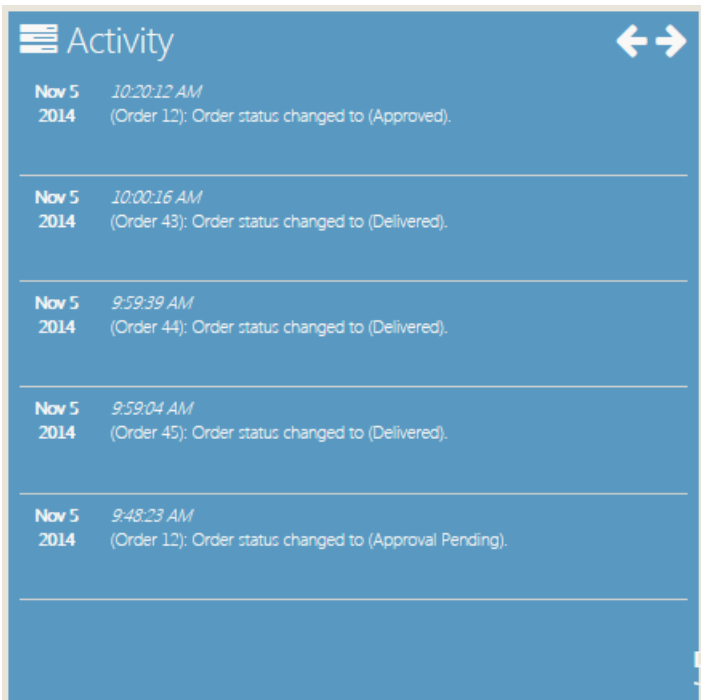


The My Orders action box will show you the current and past orders that you have placed, in the order they were placed. You will be able to filter the orders by their order number, status or recipient.



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:

The screenshot shows the 'New Order' form in the SUNY Cortland system. The form is titled 'New Order' and includes a 'Requestor Info' section and an 'Approval Routing' section. The 'Requestor Info' section contains fields for Name (Julia Morog), Department (Campus Technology Services), Account # (empty), Room/Bldg. (Sperry Center Room 322), Max Approved (0), Phone (607-753-2740), Notes, and Email (julia.morog@cortland.edu). The 'Approval Routing' section has a search field for the approver. A 'Place Order' button is at the bottom right. A sidebar on the left has a '2' icon and buttons for 'Add Hardware Recipient', 'Add Software Recipient', and 'Item Price List'. A '1' icon is placed next to the 'Account #' field.

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:

Please specify any additional order notes.

Note: Please refer to the [IT Purchase Policy](#) before placing this order.

Hardware Info (#1)

Recipient Name

C Number

Note: Only required if different than requestor.

Hardware Items

Add Item

Select an item to add...

Can't find the item you're looking for?

Approval Routing

Begin by typing in the approver's last name. Once found select the approver.

Search Approver

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

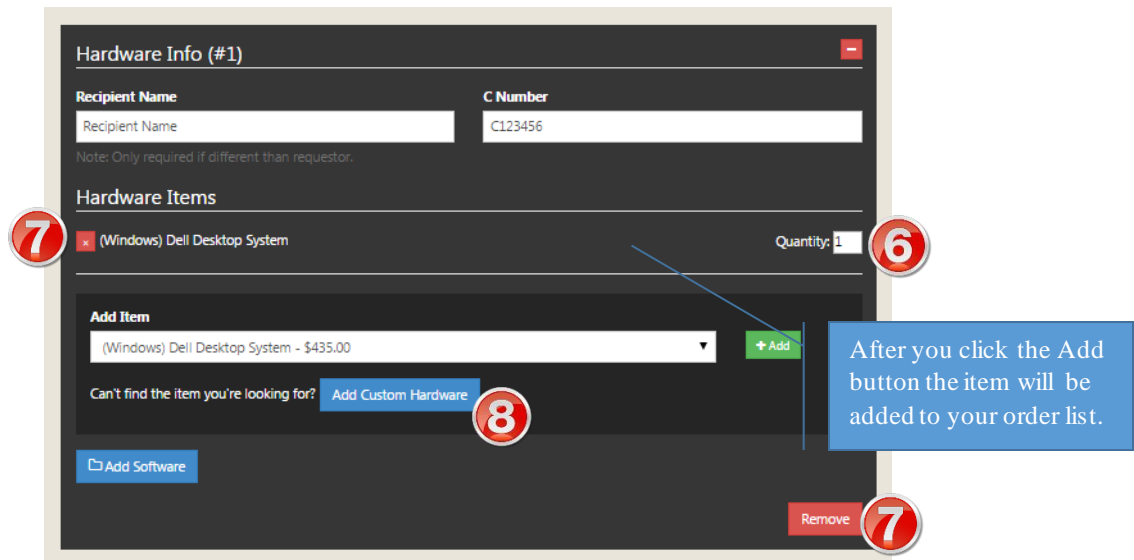
4 In the **Add Item** section, choose the hardware to be ordered from the dropdown.

Select an item to add...

- (All) 19" Flat Panel Monitor - \$110.00
- (Apple) Apple External Harddrive - \$74.00
- (Apple) Flat Panel Monitor - \$0.00
- (Apple) MacBook Pro 13" - \$1,300.00
- (Apple) Macintosh Desktop System - \$1,300.00
- (Apple) Wired Keyboard extended - \$50.00
- (Apple) Wireless Ergonomic Keyboard - \$60.00
- (Apple) Wireless keyboard (short) - \$70.00
- (Apple) iMac System 21.5 - \$1,500.00
- (Apple) iPad 16GB - \$500.00
- (Apple) iPad 32GB - \$700.00
- (Apple) iPad 64GB - \$800.00
- (Apple) iPad Case - \$0.00
- (Windows) Dell Desktop System - \$435.00**
- (Windows) Dell Notebook - \$1,031.00
- (Windows) Regular Keyboard - \$15.00
- (Windows) Regular Mouse - \$15.00
- (Windows) USB Webcam - \$80.00
- (Windows) Windows External Harddrive - \$62.00

5 Click the Add button

This is the screen you should see:



6

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

7

Repeat steps 4 – 6 as many times as necessary.

7

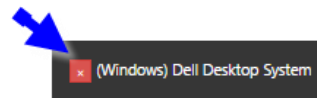
If you need to **remove** items you can

1. Click the **Remove** button in the bottom right of the Hardware Info section
To remove the entire Hardware Info (#_) section
2. Start again from step 2

Remove

Or

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



8

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.

Can't find the item you're looking for? Add Custom Hardware

The Custom Hardware section will open:

The screenshot shows a form titled "Hardware Info (#1)". It has two input fields: "Recipient Name" and "C Number" (containing "C123456"). Below these is a "Hardware Items" section with an "Add Item" dropdown menu. The "Custom Hardware" section is highlighted with a blue border and a red circle containing the number 8. It includes fields for "Name" (containing "Name of hardware"), "Platform" (a dropdown menu with "All" selected), and "Details" (containing "Additional details..."). There are "Add" and "Remove" buttons.

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

Your result will look like this:

The screenshot shows the same form as above, but now with an item added to the order list. The item is "(Windows) Hardware not in the dropdown list" with a quantity of 1. A blue callout box points to the "Add" button in the Custom Hardware section, containing the text: "After you click the Add button the item will be added to your order list." A red circle containing the number 9 is next to the "Add Software" button at the bottom left.

9 If software is needed, in addition to the hardware ordered, click the Add software button.

Add Software

The **Software Items** section will open:

The screenshot shows a web form titled "Hardware Info (#1)". It has two input fields: "Recipient Name" and "C Number" (containing "C123456"). Below is a "Hardware Items" section with a dropdown menu and a "Quantity" field set to "1". A message states "(Windows) Hardware not in the dropdown list". There are two "Add Item" sections: one with a dropdown menu and a "+ Add" button, and another titled "Custom Hardware" with fields for "Name", "Platform" (set to "All"), and "Details", also with a "+ Add" button. The "Software Items" section is highlighted with a blue border and a red "10" callout. It contains a warning message, a "Name of application" field, "Platform" radio buttons for "Windows" and "Macintosh", a "Version" field (set to "v1.0"), and a "+ Add" button. A "Remove" button is at the bottom right.

10

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.

This screenshot shows the "Software Items" section with a list of one item: "Application Name" (with a red 'x' icon), "Windows", and "1.0". Below the list is the "Add Item" form with the "Platform" radio button for "Windows" selected. A blue callout box with a white border contains the text: "After you click the Add button the item will be added to your order list." A blue arrow points from the callout box to the "Add" button in the form.

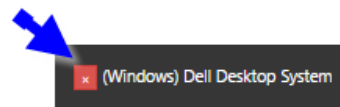
You can add as many items, for the same recipient, as necessary:

The screenshot shows a form titled "Hardware Info (#1)". It has several sections:

- Recipient Name**: A text input field with "Recipient Name" and a "C Number" field with "C123456". A note below says "Note: Only required if different than requestor."
- Hardware Items**: A list of items, each with a red 'x' icon and a "Quantity" field. The items are: "(Windows) Hardware not in the dropdown list", "(Windows) Dell Desktop System", "(Windows) Regular Keyboard", "(Windows) Regular Mouse", and "(Windows) USB Webcam".
- Add Item**: A dropdown menu showing "(Windows) USB Webcam - \$80.00" and a green "+ Add" button.
- Custom Hardware**: Fields for "Name" (text input), "Platform" (dropdown menu with "All"), and "Details" (text input). A green "+ Add" button is to the right.
- Software Items**: A table with columns for Application Name, Platform, and Version. The items listed are: "Application Name" (Windows, 1.0), "Adobe" (Windows, 11), and "Shagit" (Windows, 12). Below the table are fields for "Application" (text input), "Platform" (radio buttons for Windows and Macintosh), and "Version" (text input). A green "+ Add" button is to the right.
- Remove**: A red button in the bottom right corner of the form.

There are two red circular callouts with the number "11": one on the left side of the Hardware Items list, and one in the bottom right corner of the form.

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.

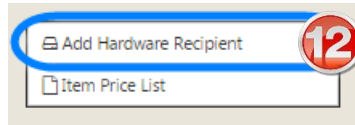


Note

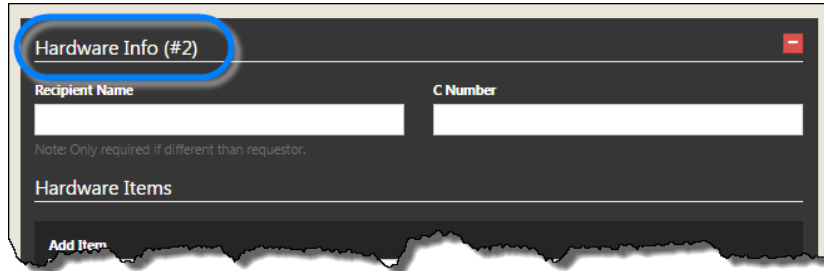
Clicking Remove will delete only the entire Hardware Info (#_) box that it is in. Any orders for other recipients or other Hardware Info boxes will not be removed.

12

To add hardware items for another recipient (but the same account number) click **Add Hardware Recipient** in the upper left corner of your screen.



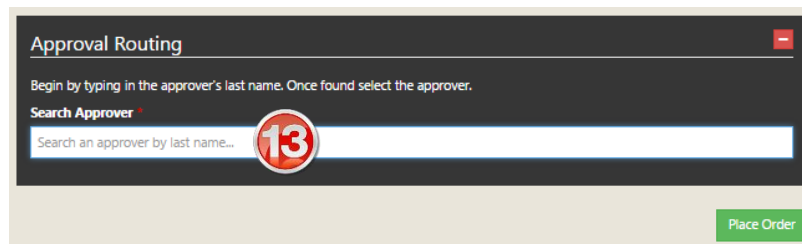
Another Hardware Info box will open:



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

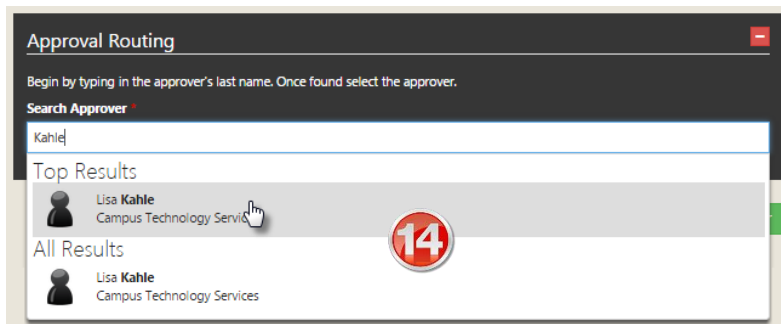
13

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:

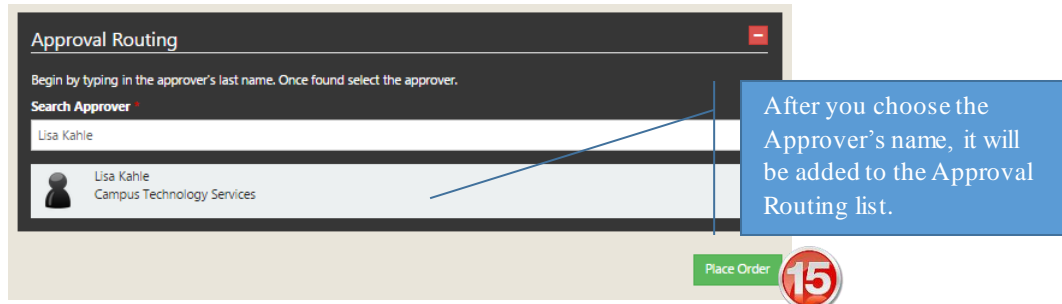


14

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:

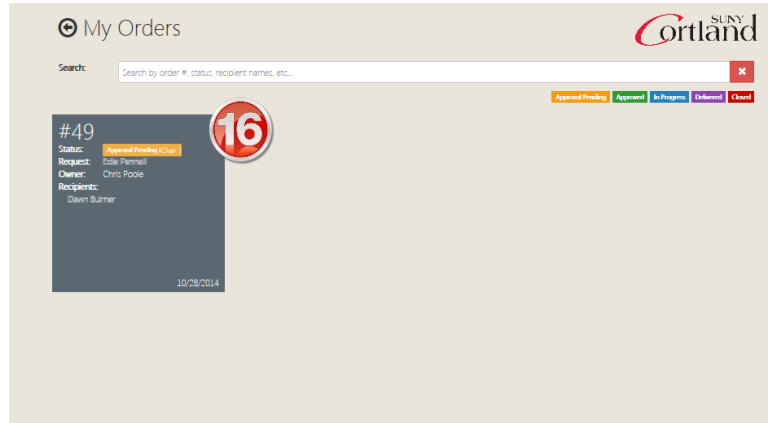


15

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

16

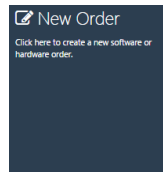
The order will now be found in your My Orders queue with an Approval Pending (Chair) tag.



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:

A screenshot of the "New Order" web form. The form is titled "New Order" and has a "SUNY Cortland" logo in the top right. On the left, there are three buttons: "Add Hardware Recipient", "Add Software Recipient", and "Item Price List". A red circle with the number "2" is next to the "Add Software Recipient" button. The main form area has a "Requestor Info" section with fields for Name (Julia Morog), Department (Campus Technology Services), Account # (empty, with a red 'x' error), Room/Bldg. (Sperry Center Room 322), Max Approved (0), Phone (607-753-2740), and Email (julia.morog@cortland.edu). A red circle with the number "1" is next to the Notes field. Below the Requestor Info is an "Approval Routing" section with a search bar for the approver. A "Place Order" button is at the bottom right. The date "Oct 29, 2014" is in the top right corner.

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.

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.

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.

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 Software Recipient** in the top left corner of your screen.

The Software Info box will open:

The screenshot shows a 'Software Info (#1)' form. At the top, there are two input fields: 'Recipient Name' and 'SUNY Barcode ID'. A note below the Recipient Name field says 'Note: Only required if different than requestor.' Below these is a 'C Number' input field. The 'Software Items' section contains a disclaimer: 'Campus Technology Services reserves the right to charge academic departments for limited or unsupported software. Please refer to the [Software Support Policy](#) for Faculty/Staff.' Below the disclaimer are three input fields: 'Application' (with a placeholder 'Name of application'), 'Platform' (with radio buttons for 'Windows' and 'Macintosh'), and 'Version' (with a placeholder 'v1.0'). To the right of the Version field is a green '+ Add' button. At the bottom right of the form is a red 'Remove' button. Red circles with numbers 3, 4, and 5 are overlaid on the form: 3 is next to the Recipient Name field, 4 is next to the Application field, and 5 is next to the + Add button.

3

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.

4

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.

5

Click the **Add** button:

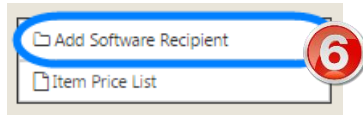
This screenshot is similar to the previous one but shows the form after an item has been added. The 'Recipient Name' field now contains 'R. Name' and the 'SUNY Barcode ID' field contains 'Z*****'. The 'Software Items' section now displays a list with one item: 'Office 2013' on 'Windows' platform, version '2013'. A blue callout box with white text says 'After you click the Add button the item will be added to your order list.' and has an arrow pointing to the newly added item. The '+ Add' button is now green and has a white plus sign. A red circle with the number 5 is overlaid on the + Add button.

6

Add as many items as needed for the first recipient by repeating steps 3 thru 5

6

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:

A screenshot of a 'Software Info (#2)' form. The form has a dark background with white text and input fields. It includes fields for 'Recipient Name', 'SUNY Barcode ID', and 'C Number'. A note below the fields states: 'Note: Only required if different than requestor.' Below the fields is a section titled 'Software Items' with a disclaimer: 'Campus Technology Services reserves the right to charge academic departments for limited or unsupported software. Please refer to the software Support Policy for Faculty/Staff.'

Note


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.

6

Repeat steps 3 thru 5 for the next recipient as many times as needed.

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

4 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.

5 Click the **Add** button 

7

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:

The screenshot shows the 'Approval Routing' interface. At the top, it says 'Begin by typing in the approver's last name. Once found select the approver.' Below this is a search field labeled 'Search Approver' with the placeholder text 'Search an approver by last name...'. A red circle with the number 7 is overlaid on the search field. At the bottom right of the interface is a green 'Place Order' button.

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

The screenshot shows the 'Approval Routing' interface with search results. The search field contains the text 'Kahle'. Below the search field, there are two sections: 'Top Results' and 'All Results'. The 'Top Results' section shows a single result: 'Lisa Kahle, Campus Technology Services'. A red circle with the number 8 is overlaid on this result. The 'All Results' section also shows the same result. A green 'Place Order' button is visible at the bottom right.

8

The Approval Routing box will look like this:

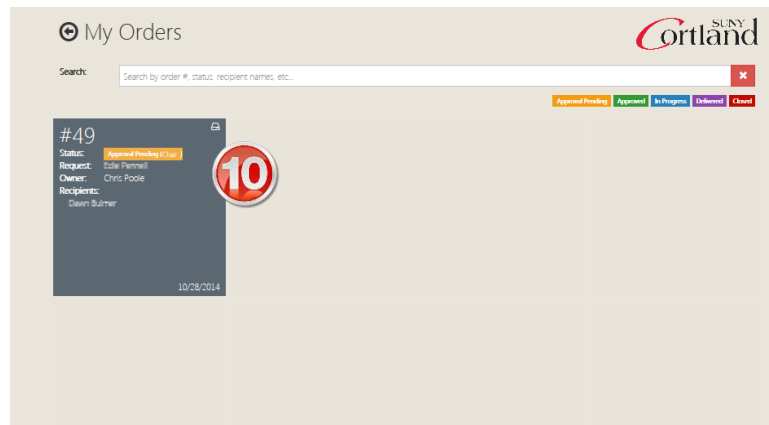
The screenshot shows the 'Approval Routing' interface. The search field now contains 'Lisa Kahle'. Below the search field, the 'All Results' section shows the selected result: 'Lisa Kahle, Campus Technology Services'. A blue callout box with white text points to the selected result and says: 'After you choose the Approver's name, it will be added to the Approval Routing list.' A red circle with the number 9 is overlaid on the bottom right corner of the interface.

9

Click the Place Order button to place the order.

10

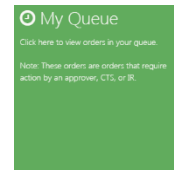
The order will now be found in your My Orders queue with an Approval Pending (Chair) tag.



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

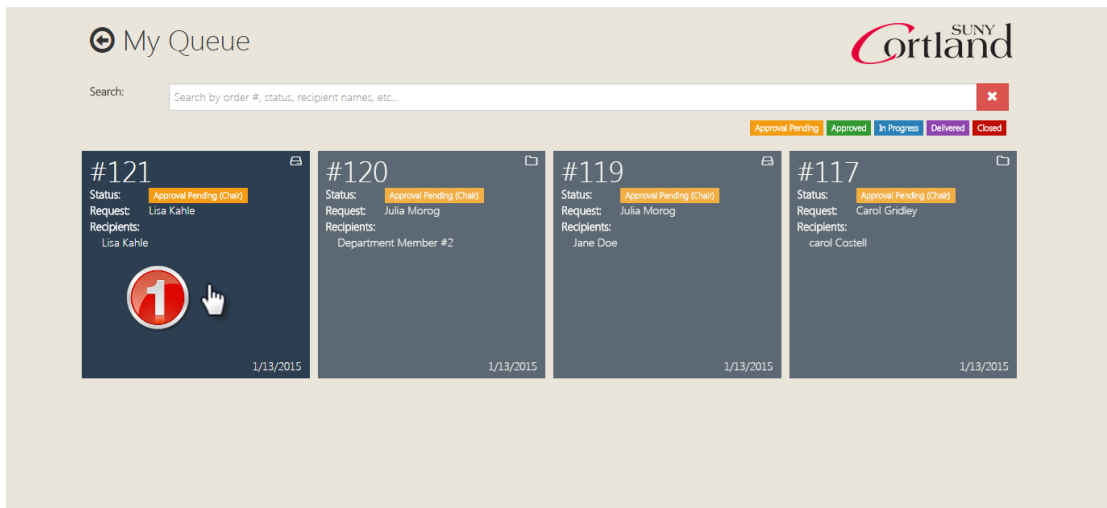
The Approver (and their Proxy) will receive an email if an order is placed and needs their approval. To approve an order follow the link in the e-mail or select the My Queue action square:



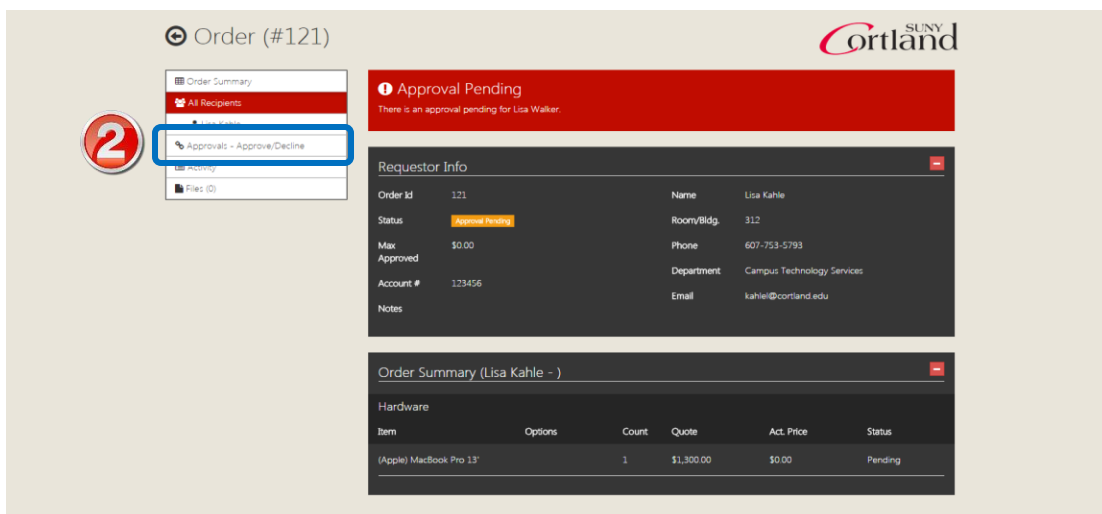
Your approval queue will open.



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

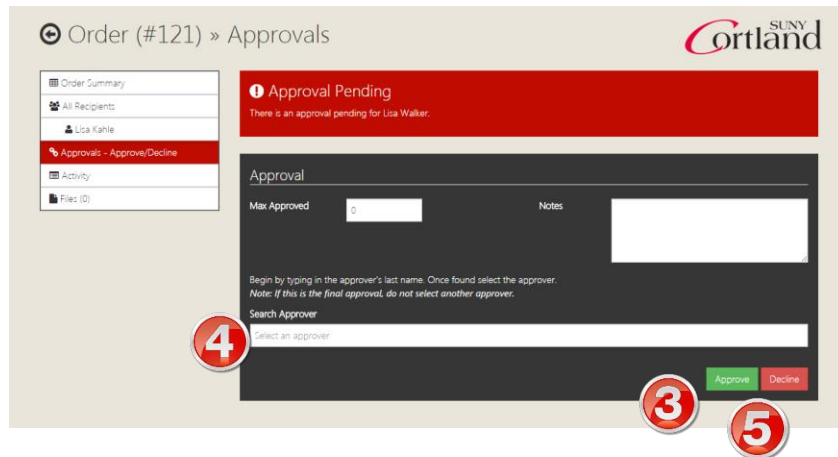


The order will open. Be sure to review the order to make sure it is correct.



Click the **Approval-Approve/Decline** button at the top left of the page.

The Approval screen will open:



Please note:

3

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

or

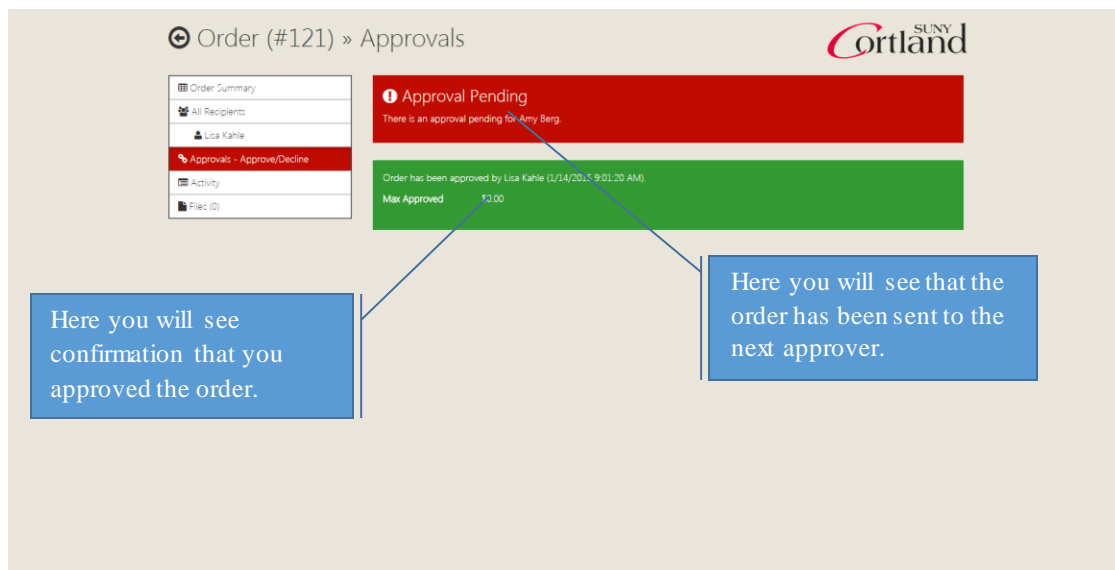
4

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.

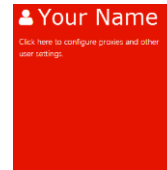


Adding a Proxy

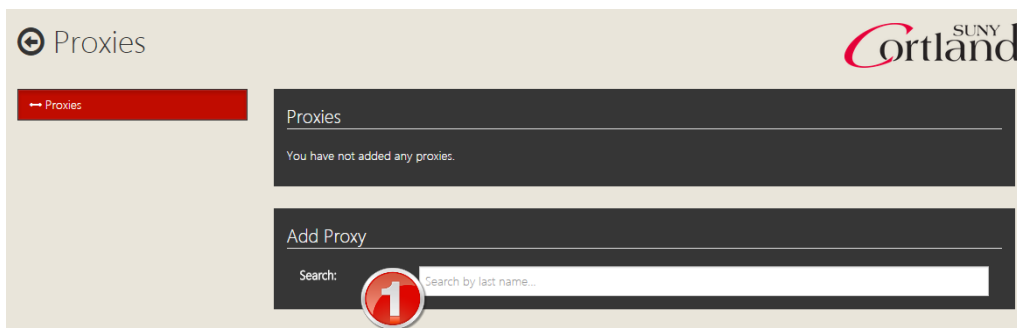
If an approver knows that they will not be able to approve a specific order or in the general course of business would like delegate that responsibility to someone else, they can assign a proxy to approve orders for them.

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:

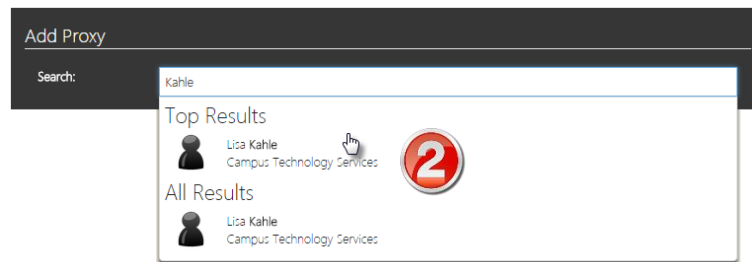


The Proxies screen will open:



1

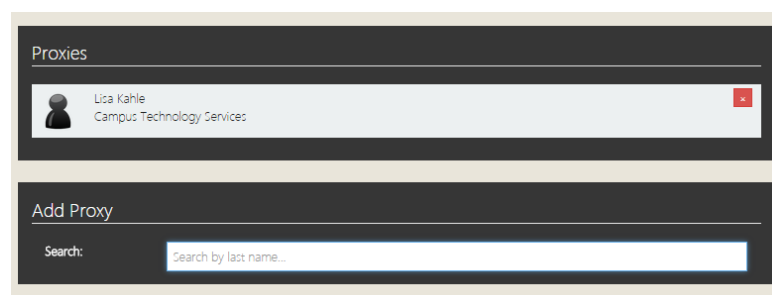
In the Add Proxy search field enter the last name of the prospective proxy and click Enter to access the list from the university address book.



2

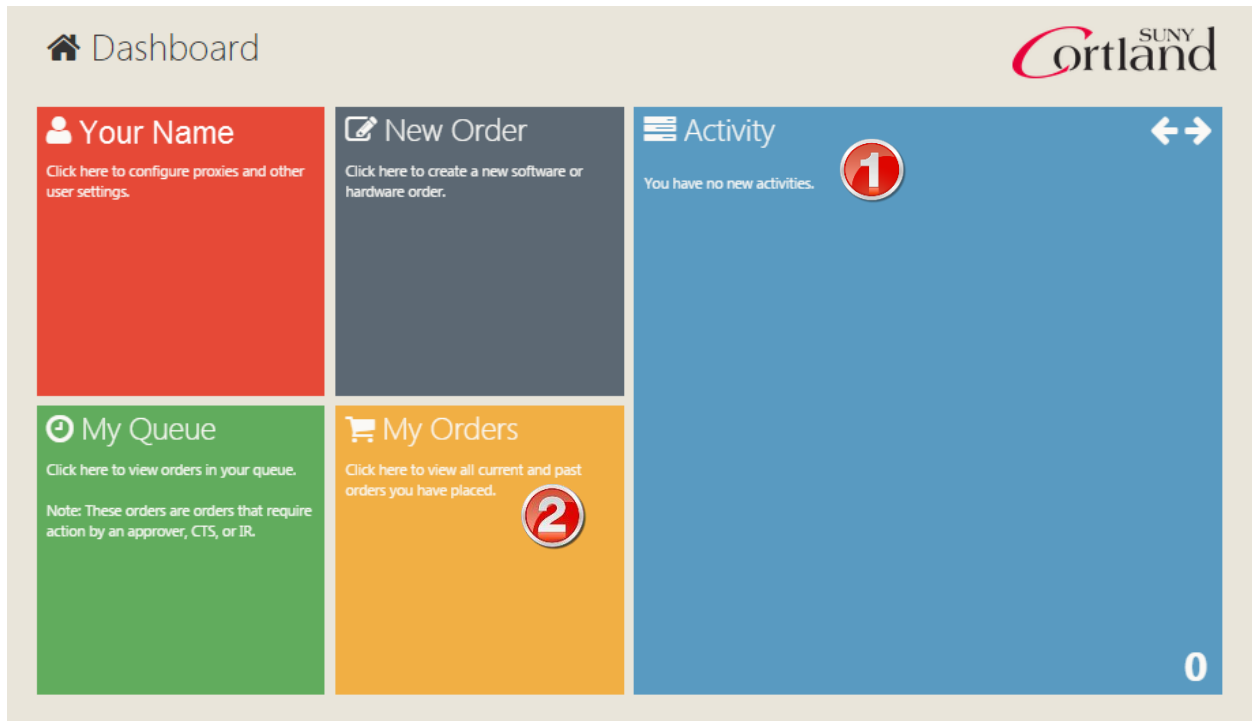
Click on the name from the drop-down list.

The name will be added under Proxies:



Tracking your order

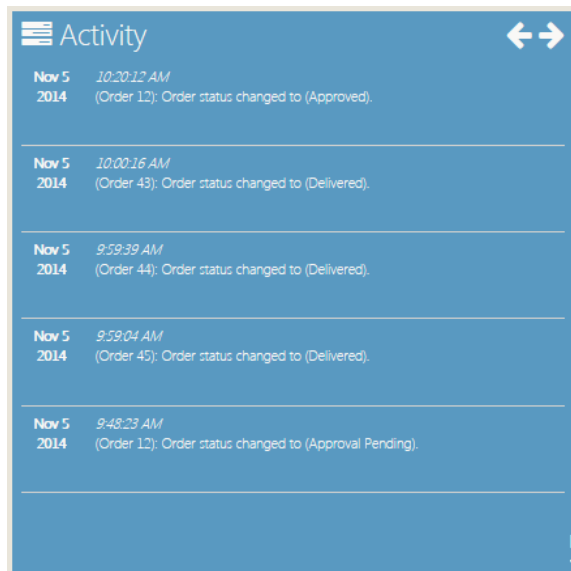
Once you have placed your order you will want to be able to find out what stage of the ordering process it is in in two ways.



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:



2

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:

The screenshot shows the 'My Orders' interface with a search bar and a grid of order cards. A callout box on the left states: 'You can search the orders by order #, status, recipient and requestor.' A callout box on the right states: 'Orders can be filtered by status.' The order cards display details such as order number, status, requestor, owner, recipient, and date.

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

The screenshot shows the details for Order #172. A sidebar on the left contains navigation options: Order Summary, All Recipients (Jane Smith), Approvals - Approve/Decline, Activity, and Files (0). A red banner at the top indicates 'Approval Pending' with the message 'There is an approval pending for Lisa Kahle.' Below this is the 'Requestor Info' section with the following details:

Order Id	172	Name	Julia Morog
Status	Approval Pending	Room/Bldg.	Sperry 327
Max Approved	\$0.00	Phone	607-753-2740
Account #	1234567	Department	Campus Technology Services
Notes		Email	julia.morog@ Cortland.edu

Below the requestor info is the 'Order Summary (Jane Smith -)' section, which includes a hardware table:

Item	Options	Count	Quote	Act. Price	Status
(Windows) Dell Desktop System		1	\$435.00	\$0.00	Pending
(All) 19" Flat Panel Monitor		1	\$110.00	\$0.00	Pending
(All) 19" Flat Panel Monitor		1	\$110.00	\$0.00	Pending

Or a software order:

The screenshot shows the Cortland SUNY software order system interface. At the top left, it says "Order (#109)". On the top right is the Cortland SUNY logo. On the left side, there is a navigation menu with options: "Order Summary", "All Recipients" (highlighted in red), "Julia Morog", "Approvals - Approve/Decline", "Activity", and "Files (0)". The main content area is divided into two sections. The top section is titled "Requestor Info" and contains a table with the following data:

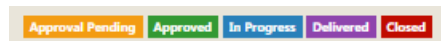
Order Id	109	Name	Julia Morog
Status	Closed	Room/Bldg.	Sperry Center Room 327
Max Approved	\$84.00	Phone	607-753-2740
Account #	860836	Department	Campus Technology Services
Notes		Email	julia.morog@cortland.edu

The bottom section is titled "Order Summary (Julia Morog -)" and contains a table with the following data:

Application	Platform	Version
Camtasia/Snagit bundle	Windows	latest

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.



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:

The screenshot shows an 'Order Summary (Jane Smith -)' window. It contains a table with the following data:

Item	Options	Count	Quote	Act. Price	Status
(Windows) Dell Desktop System		1	\$435.00	\$0.00	Pending
(All) 19" Flat Panel Monitor		1	\$110.00	\$0.00	Pending
(All) 19" Flat Panel Monitor		1	\$110.00	\$0.00	Pending

The 'Status' column is highlighted with a blue rounded rectangle, and each row in this column contains the word 'Pending'.

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.