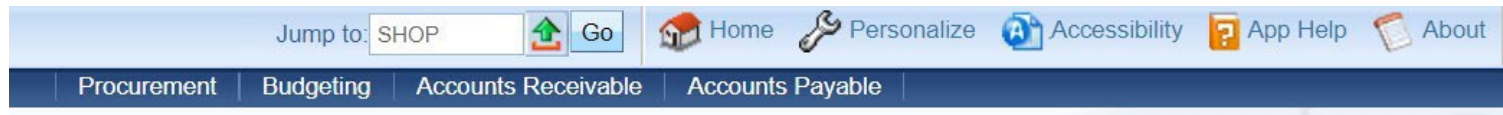


NOTE: If Release Order exceeds \$250,000.00, a CDO should be executed

Step 1:

Type “SHOP” in the *Jump-To* box at the top of the page. Press Enter or click “Go”.



Step 2:

In the *Search For* field, enter “Dell%” in the *Search For* field and “0212” in the *Department* field. Hit Enter or click “Browse”. A listing of items available on the IP19 contract will appear. Select those items you wish to purchase by entering the appropriate quantities and selecting ‘Add to Cart’ at the bottom of the page. (Note: ensure the items you are selecting are from the IP19 contract.)

A screenshot of the search interface. On the left, under 'Check Sources of Supply:', there are several checked checkboxes: 'Select All or check Sources to be searched:', 'Inventory', 'MA Catalog Items', 'Master Agreements', 'Similar Purchases', and 'Commodities'. The main search area has a 'Search For:' field containing 'DELL%' and a 'Department:' field containing '0212'. Below these are 'Advanced Search' fields for 'Commodity', 'Vendor', 'Part Number', 'Price (from)', and 'Price (to)'. To the right, there are fields for 'Warehouse', 'Expiration Date', and dropdown menus for 'Include Expired Agreements' (set to 'No'), 'Mandatory Source Enabled', and 'Include Substitute Stock Items'. A 'Document Description' field is at the bottom right. At the bottom left of the search area are 'Search' and 'Clear Search Fields' buttons.

Statewide Master Agreement IP19, Ordering Tips

Step 3:

Once you have selected all the needed items and added them to the cart, you will see the total dollar amount in the shopping cart in the top left-hand corner of the page. Click 'Proceed to Checkout' when ready to create the Delivery Order.

3 Items : \$17,458.00

Edit Shopping Cart
Proceed to Checkout

Check Sources of Supply :

- Select All or check Sources to be searched:
- Inventory
- MA Catalog Items
- Master Agreements
- Similar Purchases
- Commodities

Search For : DELL%

Advanced Search:

Department : 0212 Warehouse :
Commodity : Expiration Date :
Vendor : Include Expired Agreements : No
Part Number : Mandatory Source Enabled :
Price (from) : Include Substitute Stock Items :
Price (to) : Document Description :

Search Clear Search Fields

Step 4:

To create the Delivery Order, enter the Unit information, Agency ID prefix, Shipping and Billing Locations, and Delivery Date. Once entered, hit 'Checkout' and the Delivery Order will be created.

3 Items : \$17,458.00

Edit Shopping Cart

Document Identifier

Code : ADO Department : 0210 ID : ISC
Unit : 4401 Auto Numbering :

Additional Information

Shipping Location : SP2113 Accounting Template : PCard ID :
Billing Location : BL0434 Accounting Profile : PCard Expiration Date :
Delivery Date : 09/30/2020 Group Purchases By : Allow System to Choose Grouping

Continue Shopping Checkout

Statewide Master Agreement IP19, Ordering Tips

Step 5:

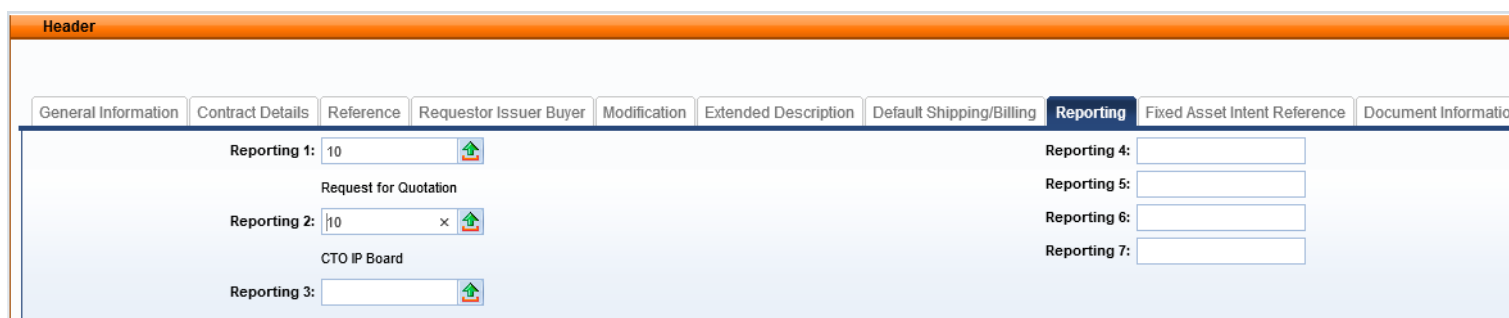
Once the Agency Delivery Order/Central Delivery Order is created, some necessary information must be completed, such as *Description, Requestor Issuer Buyer*, etc. This process has not changed in the 3.11 upgrade. Should users need assistance, please refer to the wvOASIS Training Video under Enterprise Readiness – Training – Financial – Upgrade 3.11 – Shopper (Create a Single Delivery Order)

Please be aware that Agencies must submit the order to the IP Board for review and approval through wvOASIS. Any WV-39s received from Agencies or Entities with wvOASIS access will be rejected.

NOTE: The West Virginia Office of Technology is requiring that Agencies submit the Office of Technology Approval Attachment (found at the end of these instructions) with every order submitted to the IP Board. Agencies must indicate the number of machines that are new and the number of machines that are replacements for existing equipment. Agencies must include this document in the Procurement Folder. If the document is not submitted to the IP Board when purchasing machines, the order will be rejected. Agencies without wvOASIS access can submit a WV-39 and the Approval Attachment to OTES@wv.gov

Please use the following steps to submit your purchase to the IP Board:

In the Header Section, click on the *Reporting Tab* (the eighth from the left). In the *Reporting 2* Field, choose option *10 – CTO IP Board* from the pick list. Leave the *Reporting 1* Field as is.



The screenshot shows the 'Reporting' tab selected in the system header. The interface includes several input fields for reporting information:

- Reporting 1:** A text box containing the value '10' with an up arrow icon.
- Request for Quotation:** A label positioned below the Reporting 1 field.
- Reporting 2:** A pick list dropdown menu showing '10' with a close 'x' icon and an up arrow icon.
- CTO IP Board:** A label positioned below the Reporting 2 field.
- Reporting 3:** An empty text box with an up arrow icon.
- Reporting 4:** An empty text box.
- Reporting 5:** An empty text box.
- Reporting 6:** An empty text box.
- Reporting 7:** An empty text box.

Once the ADO/CDO has been completed, validated, and submitted into workflow, the Agency will take the task and approve, which will send the document to your agency’s 3rd Party Approver’s worklist. The 3rd Party Approver must reassign the order to the IP Board’s worklist by using the following instructions:

When the document appears in the Agency’s 3rd Party Approver’s worklist, he/she will check the document box and from the *Action Menu* at the top of the page, select the *Reassign* function (fifth one down).

Statewide Master Agreement IP19, Ordering Tips

Select Worklist: 3rd Party Appr Dept:0210 [Change Worklist Role Order](#)

Level: ▼

Code:

Dept:

ID:

Submitter ID:

Escalated Item: ▼

[Browse](#) [Clear](#)

Approve

- Unapprove
- Reject
- Reject All
- Reassign
- Take Task
- Return Task
- Manual Route
- Bypass Approvals
- Track Work In Progress

Level	Code	Dept	ID	Escalated Item	Comments	Creator ID	Submitter ID	Date	Reason	Message	
<input checked="" type="checkbox"/>	4	ADO	0210	ISC1900000173	No	No	lorean1	lorean1	1/25/2019 11:21:10 AM	Apply approval	Reporting Field 2 is populated. Please Assign to the correct 3rd party Approver

[First](#) [Prev](#) [Next](#) [Last](#)
 [Approve](#) [Reject](#) [Take Task](#) [Return Task](#) [Refresh](#)

[Menu](#) [Recall](#)

After selecting *Reassign*, type “harveyad1” in the *UserID* Field and click *Browse* or hit Enter to search. Select “harveyad1” in Dept 0210 and Unit 0210 and click “Select” hyperlink underneath the search results.

Your ADO/CDO will be assigned to the IP Board. You can verify this step by looking at the document’s workflow. If done correctly, you will see the document is assigned to Adena Mays. If changes are requested, the IP Board will reject the document. If approved, it will continue through the workflow.

Date Submitted : 1/25/2019 **Submitter :** Andrew Lore

Approval Rule ID	Seq No	Approval Level	Assignment Date	Initial Assignee Name	Approval Status	Approval User Name
13097	3	3	2019-01-25	ADO Lvl 1 Dept:0210	Approved	Andrew Lore
<input checked="" type="checkbox"/>	13097	4	4	2019-01-25	3rd Party Appr Dept:0210	Pending
13097	5	5		ADO Lvl 2 Dept:0210	Pending	

[View Log](#)

Current Assignee

Approval Level	Current Assignee Name
<input checked="" type="checkbox"/> 4	Adena Mays

[First](#) [Prev](#) [Next](#) [Last](#)



Statewide Master Agreement IP19, Ordering Tips

Once the ADO/CDO has been approved through workflow and finalized, the Agency can send the order to the Vendor at T1WVIP19@dell.com with the following information in the subject:

Subject: IP19 - Agency Name - Total PO \$ Amount - Contact Name

Ex. Subject: IP19 - DOT - \$2,389 - John Smith

NOTE: Agencies with wvOASIS access WILL NOT receive an IP Board Approval Memo – approval will be given via 3rd Party Approver only. Agencies without wvOASIS access will receive an approval memo after submitting the necessary information to OTES@wv.gov

Office of Technology Approval Attachment

ADO/CDO#:

	# of New Machines	# of Lifecycle Replacements
Standard PC		
Power PC		
Fixed Workstation		
Standard Laptop		
Power Laptop		
Tablet		

NOTE: Submit this form, along with your ADO/CDO, to the IP Board via 3rd Party Approval in wvOASIS. See step-by-step ordering instructions for more detail.