

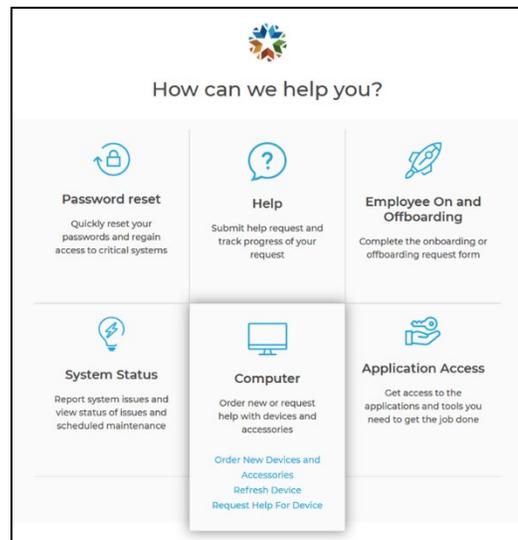
DSO portal quick start guide

Overview

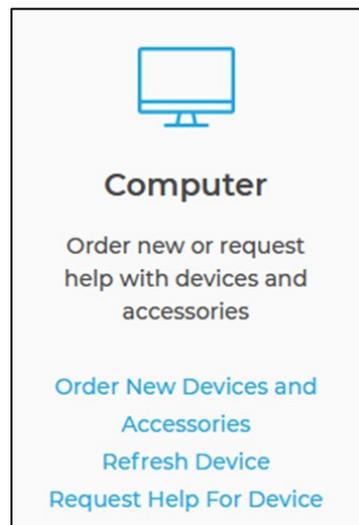
The DSO portal offers two Dell laptops, a Dell tablet and a Dell desktop computer. For assistance ordering any other device, please call the OMES Service Desk at 405-521-2444.

Ordering a device

1. Go to servicedesk.ok.gov.
2. Hover over the **Computer** card to make other options appear.

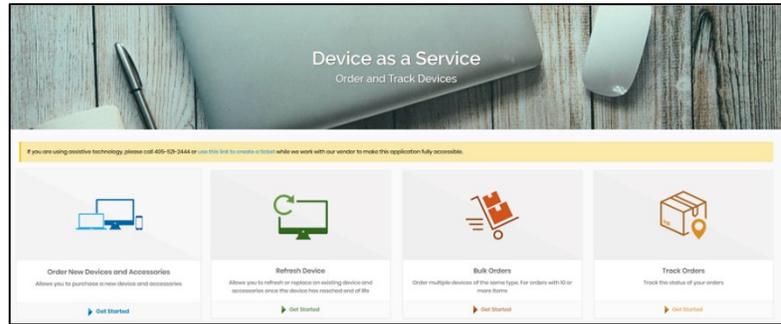


3. Select **Order New Devices and Accessories** to order a device for an employee who does not already have a device or **Refresh Device** to refresh or replace an existing device. Either option takes you to the [DSO portal](#).

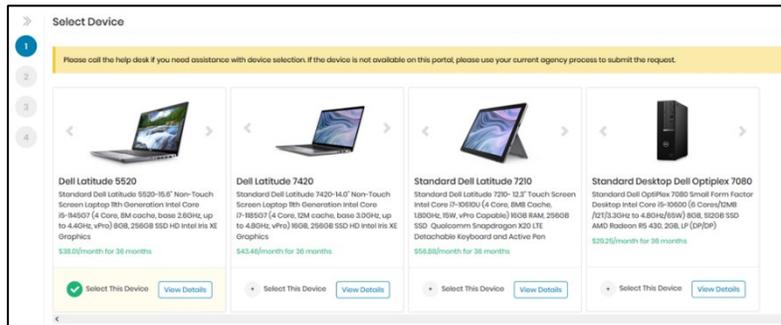


Ordering, refreshing or replacing a device

- From the DSO portal, there are three options for ordering devices: 1) **Order New Devices and Accessories** allows you to order a device for an employee without a device, typically a new hire; 2) **Refresh Device** allows you to refresh or replace an existing device; 3) **Bulk Orders** allows you to order 10 or more devices for a larger group of employees. Select the option that best fits your needs.



- Select the device that you want to purchase. The price and lease duration for each device is shown below it. Select **View Details** to see more details for each device. The total charges appear at the bottom of the screen.



- For device refreshes or replacements, select your current device in the Existing Device field, and choose the desired Destruction Type.

The screenshot shows a form with two dropdown menus. The first is labeled 'Existing Device' and has a search icon and the value 'DKVQL03'. The second is labeled 'Destruction Type' and has the value 'Free Disk Wipe'.

- If the current device is not found, proceed as if ordering a new device. However, your existing device still needs to be added to the list. Contact the [OMES Service Desk](#) to open a ticket to add the device. You will need to provide the following information:
 - Device serial number (usually located on the back of the device).
 - Type of device (laptop, tablet or desktop).
 - Model (e.g., Latitude).
 - Manufacturer (e.g., Dell).
 - State of OK asset tag number.
 - Assigned username and network ID.
 - Agency number.
 - Agency work address.

- In the **Select Accessories** section, select any necessary accessories, including docking stations, monitors, mice and video adapters. The accessories shown are compatible for the selected device. If no accessories are needed, leave this section blank.

- Once you have selected the desired device and accessories, select **Next**.

- Requestor Information** opens. Ensure information is correct. The requestor should be the one with knowledge of what is required for the request. For example, if a new employee needs a device, the requestor would typically be their supervisor.

- In the **Requested For Information** section, enter the required information for the employee who will use the requested device. If you know your purchase order number, enter this in the **PO #** field. If you do not know or have your purchase order number, leave this field blank. Once the information has been entered, select **Next**.

- If the request is a bulk order for 10 or more devices, the Bulk Order Attachment section appears at the bottom of the page. Select **Download Template** to download the bulk order attachment. Complete the form and attach it by selecting **Select a file**. Once attached, select **Next**.

10. On the billing page, select a **billing location** and **county** from their respective dropdowns. Ship to Location is set to **Same as Billing**. If you unselect this option, select a different **Ship to Location**. If the location is not listed, select **Location Not Listed** and enter a location manually.

- **Note:** NTT handles the Ship to Location for bulk orders.

11. In the **Select Approvers** section, the manager is listed as one of the approvers. Select an **Agency Buyer** from the dropdown. Both of these approvers will receive an approval email once the request is submitted. When ready, select **Next**.

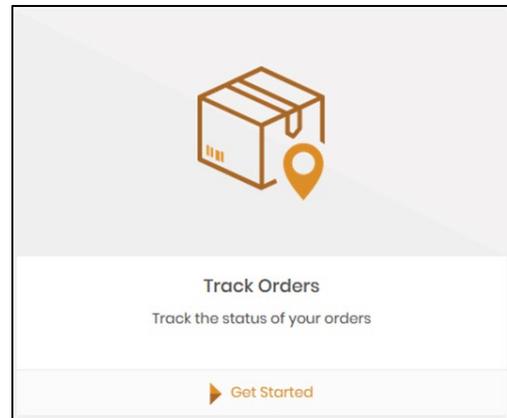
- **Note:** Bulk orders do not require a manager's approval. Instead, select an **Agency Buyer** from the dropdown. The agency buyer will receive an approval email once the request is submitted. Select **Next**.

12. Review the **Summary** page information and ensure it is correct. Select **Submit**.

13. Once the request is submitted, the approving manager receives an email requesting approval.
 - The approving manager can request changes from the requestor, which sends an email to the requestor and moves the request to the saved bucket until the record is updated.
 - A purchase approver must approve all one-time purchases before they are submitted to the approving manager.
14. If the approving manager approves the request, the agency buyer receives an email requesting approval.
15. If the agency buyer approves the request, the DSO portal creates a CRM ticket to facilitate the order.
16. If either the approving manager, agency buyer or the purchase approver decline the request, then the portal sends a rejection email to the requestor and cancels the request.

Tracking orders

1. On the [DSO portal](#) homepage, select **Track Orders**.



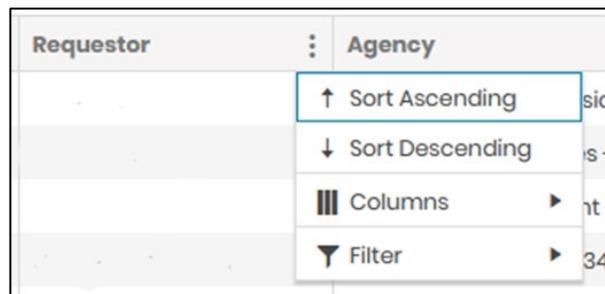
2. Locate your order by sorting or filtering by the various options on the screen, such as Requestor, Agency or Agency Buyer.



3. For example, select the column header **Requestor** to sort the requestor column alphabetically.



4. To filter a column, select the three vertical dots next to the desired column header and then select **Filter**.



5. In the first blank field in the filter window, enter the criteria and select **Filter**. For example, if you are filtering by the requestor, enter the name of the requestor exactly as it was typed, including capitalization and spelling.

Filter window showing two criteria: "Is equal to" with the value "John Doe". The window includes a "Filter" button and a "Clear" button.

6. When you have located the desired request, select **Request ID** to access that request.

Dropdown menu showing "Request ID" and the value "DSO00002808".

7. On the page that opens, you can view the request's summary, charges, status history and approval history.

Request summary page for "DSO00001199: Order New Devices and Accessories". The status is "Approved". The page includes tabs for "Summary", "Charges", "Status History", and "Approval History".

8. The **Order History** section provides a quick glance into the request's status.

Order History section showing a timeline of events: "Order Submitted" (3/16/2021 10:10 PM), "Order Approved" (3/16/2021 10:10 PM), "Create CDM Device" (6/03/2021 9:08 AM), "Create Cherwell Ticket" (6/06/2021 6:04 PM), "Add Charges" (Pending), and "Pending".