

Equipment Request System (ERS) User Manual

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This is a picture driven training guide. Text will be provided explaining each screen shot and arrows and shapes will mark important information.

Screen Shot #1: Locating ERS Form

To access the Equipment Request System, log into the FMC4ME intranet site and select the Equipment Request System from Operations Support, under the My Applications section or click this link --> ERS

Screen Shot #2: Adding Link to Favorites

Once on the page, you can add to your favorites for easy access, by clicking on “Favorites” and then selecting “Add to Favorites”

Once you select “Add to Favorites” you will have to enter a name for the Equipment Request System website. Once you enter the name you can press the “OK” button and save this favorite in the favorite folder. You can also select the “New Folder” to make a new folder to put your favorite in.

Screen Shot #3: Log in Screen

You may receive the below login box when you enter the Equipment Request System. If this box appears, complete the fields with your Network Login Account (AD) information.

NOTE: You may need to enter your Domain information (FMCLX) before your user name (example: FMCLX\321654). Your password will be the same as logging into your pc.

Screen Shot #4: Log in Screen (Cont.)

The first time you enter the Equipment Request System, you will be asked to enter your Employee ID number.

NOTE: This below verification will only take place the first time you enter the system. Instances after that will take you directly to the first Main Menu Screen.

When you are prompted for your Employee ID, select OK.

Next, enter your Employee ID and confirm it in the provided fields. Then hit submit

Once submitted a box will appear with your name. Confirm this information is correct and select OK.

***IMPORTANT:** FMS Employees are not authorized to share their network account logins and passwords with anyone, per the Electronic Security and Awareness Policy.

Equipment Request Form Authorization:

All employees with an Active Directory account will have access to this form. There is an approval structure in place, but everyone has authority to submit a request.

Screen Shot #5: Main Menu

Request Equipment: Provides access to the various types of equipment requests available such as FMS IT Equipment, Puerto Rico Equipment, etc.

Request Services: Provides access to the various types of service requests available such as Equipment Relocation, Equipment Disposal.

Support Documents: Provides access to the various type of support options available such as ERS User Manual All of the buttons on the Request Database Main Menu page are hot buttons that link to additional pages and forms.

Once Request Equipment is selected you will be taken to the Request Menu

Screen Shot #6: Request Menu

FMS IT Equipment: Non-Corporate employees use this form to order any IT equipment (ex. Desktop, printer, software, chairside accessories, etc).

Puerto Rico Equipment: Puerto Rico employees use this form to order any IT equipment, Due to standards and taxes (ex. Desktop, printer, software, chairside accessories, etc). Currently Active and same process as FMS IT Equipment Request demonstrated below

Based on the company entity you are part of and the equipment being requested, please select the correct option from the list.

FMS IT Equipment Request

After selecting the FMS IT Equipment form, you are presented with the Home Page (shown below).

Screen Shot #7: FMS IT Equipment Home

Use the Create New Request button to start a new request for IT Equipment. Use the Search All Requests to search the entire database for a specific request. You will have options of searching by Employee ID, First Name, Last Name, Location ID, and Request Number. Use the View Current Equipment button to see a listing of all equipment currently in the Product Catalogue. This will just provide a view of the details and pricing information of all equipment without having to submit a request. Use the View Current Vendors button to see a listing of all the vendors we order from and their SAP vendor numbers. Use the outstanding Request table to view and process action items. (click on View Button to see the actual Request) Use the Completed Request table to view closed out requests that you have submitted. (click on View Button to see the actual Request)

After selecting the Create New Request option, you are taken to the Employee Information Screen.

Screen Shot #8: Employee Information

Your information should populate. Use the Search Button to search or change the Employee information (do not manually type information, unless the populated information comes back incorrectly). You will need to select the correct employee type (Employee or Contactor) to pull the correct information. Note: The Recipient Employee Information section is for the details of the Employee Receiving the requested equipment (not necessarily the employee submitting the request).

Your location information should also populate. Use the Search Button to search or change the Shipping information (do not manually type information, unless the populated information comes back incorrectly). You will need to select the correct location type (Clinic or Other) to pull the correct information. Note: The Shipping information section is for the details of the Location Receiving the equipment.

IMPORTANT: You must provide information for the fields with an asterisk, if you do not enter the information you will not be able to continue to the next page.

Once all required fields have been completed select Next Page.

Screen Shot #9: Equipment List

You will then be presented with the list of all approved equipment. Please use the labeled tabs at the top of the table to navigate to your desired category (shown with a red box around them below).

Select the equipment needed by clicking the check box at the far left of the item. You may view/select all accessories associated with that item by clicking view in the accessories column. You can also view a picture of the equipment by clicking Show in the Picture column. You may navigate between tabs and select multiple items.

Note: Quantities will be updated on the next screen.

Comments: If you need to add a comment about your selection or need a non-standard item that is not listed, please click the comment button at the bottom left and enter the information in the provided text box. If need be, you will be contacted on the information provided in this section.

Exception List: If you need an item that is a standard item, but is not showing up on your approved equipment list, please click the Exception List and you will be taken to another view with ALL equipment listed. If equipment is selected from the Exception list, additional approval will be required before the item is processed. A pop up will explain this.

Once you are satisfied with your selections, continue on by selecting the Add to Cart Button.

Note: you can come back to this screen if you need additional equipment.

IMPORTANT: If you are having any issues or you cannot find a specific item you need, please Submit a Remedy ticket or select the Support button at the top right hand side of the page (shown with a red arrow below). You will be taken to a page where you can submit your issues and we will be in touch to help resolve.

Screen Shot #10: Accessories

As mentioned above, you can view/select accessories by clicking View in the Accessories column. All accessories associated with an item (such as mouse, keyboard, laptop battery, etc) will be listed in this view. The accessories that are available for individual order for a desktop are shown below as an example.

IMPORTANT: You do not need to select these individual accessories when ordering a full system. The systems are defaulted to come with all accessories.

From here you may add your selected accessories to your Cart, or return to the Equipment List without any new accessories selected.

Screen Shot #11: Equipment Shopping Cart

Once you have your equipment selected and click Add to Cart, you will be taken to the Equipment Shopping Cart page.

Your quantity will default to 1 in the Quantity column. You may update this by manually typing in the quantity needed.

You may remove an item by clicking the Remove button next to the equipment to be deleted. A pop up will appear for you to confirm your decision.

If you need to add additional equipment, click the Add Equipment button on the bottom left and you will be taken back to the Equipment List to select the needed items. The items already selected will remain selected and in your shopping cart for when you return.

NOTE: The text in the bottom left, above the add equipment button, and the Request Total will update as you update/add equipment in the shopping cart.

Equipment Shopping Cart Continued on the next page.

Screen Shot #12: Equipment Shopping Cart (cont)

When you are satisfied with your selection, you will need to answer the question of "Replacing existing equipment?"

before you can continue to the next page.

If you select Yes that the new equipment is replacing existing equipment, you will need to provide the serial number or service tag of the current equipment in the box that appears. You will then be able to select Next Page to continue on.

If you select No that all the equipment selected will be new additions to the clinic, you will be able to select Next Page and continue on.

If you have selected a desktop or laptop, once you hit Next Page the below pop up will appear. You will need to answer yes or no if you will be using any of these specific applications on the new equipment.

NOTE: You may navigate forwards and backward using the Previous Page and Next Page buttons on each page. You can also track your progress using the status bar at the top right of each page. These are also hot buttons to quickly jump to a specific page in the request process.

Screen Shot #13: Request Summary

After the shopping cart you are taken to the Request Summary. You will be given a view of the entire request for verification.

First confirm the shipping information is correct. If you have any additional comments about the location, please enter that in the comment section provided. If the shipping information needs to be edited, please select the edit button and you will be taken back to the Employee Information page to make adjustments.

Next confirm that the correct equipment and quantities were selected. If you need to make adjustments to this section, please select the return to cart button and you will be taken back to the Equipment Shopping Cart page to make adjustments.

Once you are satisfied with the request, and all required information is completed, you have the option to print the request by selecting the Print button and then Submit by choosing Submit Request.

NOTE: your unique Request Number is provided in the Request Information section. This will also be emailed to you.

Screen Shot #14: Request Submitted

Once you Submit your request, a pop up will appear with your Unique Request Number. This number will also be sent to you in an email notification.

FMS IT Equipment Request Approval Process

Once a Request is submitted, it is sent to the appropriate manager to be approved.

The approving manager will be notified through email and see that Action is required on a specific request when logged into the Main Menu page of the Equipment Request Form.

To Approve a specific request, select View Open Requests from Home Page. Click the View button next to the request from the View Open Request Page.

You will be taken to the Request Summary Page of the request and presented with an Approval Information Section.

Select one of the following options:

Approved: The request is approved and will be sent to Unified Service for order placement.

Denied: The request is denied and will be closed out with no further progress.

More Information: More information is needed to make an approval/denial decision. Comments will be required for this status and the request will be sent back to the user for corrective action. Once corrected and submitted again, it will return to the manager for approval/denial.

Then Select the Submit Decision Button

FMS IT Equipment Request Status

To obtain the status of an IT Equipment Request that you have submitted, follow the link in your confirmation email, or access the Equipment Request Form page and select FMC IT Equipment Request from the First Main Menu page.

You will be brought to Your Main Menu page with all of your outstanding and completed Requests that you have submitted. You can see the Current Status of your request in the Current Status column and go back and view the request by selecting the View button.

IMPORTANT: You may go back and update/change any request until it has been approved and moved to Awaiting Order Placement Status. After that point, you will need to have a Remedy ticket submitted for your request to be changed.

You may also search for the status of a request that was not submitted by you, by selecting the Search All Requests button. You may search by Employee ID, First Name, Last Name, Location ID, and/or Request Number. You will be able to view the details and status of any request that meets your search criteria.