Franklin County
Data Center

LINK

Linking Information Needs and Know-how

LINK.FranklinCountyOhio.gov

As part of the Franklin County Data Center's efforts in providing excellent customer service, we have created this application manual to assist with the understanding of the Data Center's Procurement Application and Process. It is our goal to partner with you, the customer, to process reliable and cost effective IT purchases in a timely and transparent manner.

3/21/2014

Contents

Who Can Access LINK?

Any Franklin County employee can access the LINK system from any location or device. The application is optimized to be used on a PC or Mac within the latest browsers (e.g. Internet Explorer 9 and above, Chrome, and Firefox). The URL is http://link.franklincountyohio.gov.

Support Information

Should users have any trouble with the system, they may contact Data Center Customer Service:

Phone: 614-525-DATA (3282)
Email: CSC@FranklinCountyOhio.gov
http://datacenter.franklincountyohio.gov/

Logging In

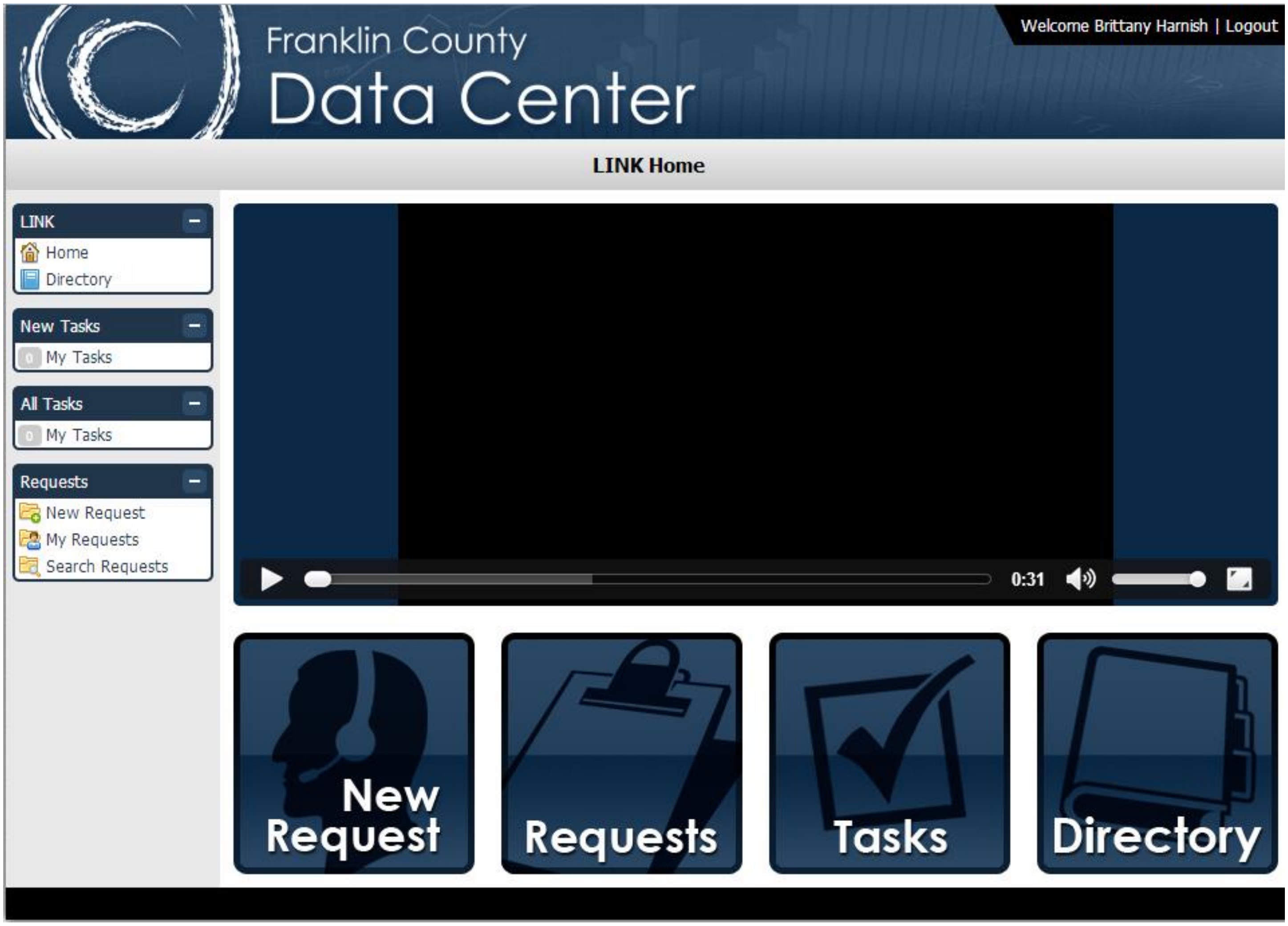
The LINK system requires users to have an account to place an order; this promotes a higher level of security and allows the Data Center to serve the user better. If a user is a Franklin County employee who is **NOT** a member of one of the agencies listed below, he or she may log into the system using his or her regular Franklin County PC (Active Directory) credentials. The user's account will be automatically generated from the log in.

If a user's agency **IS** listed below, he or she will have to undertake an extra step to create an account. A user account consists of basic contact information, a username, and password. The user will select his or her agency and enter the corresponding agency password in order to create the account. An agency password is put in place to prevent spam accounts from being created.

AGENCY (Must Create a LINK Account)	AGENCY PASSWORD
Auditor (Real Estate staff who do not have a fcdcdom1 account)	audr6
Central Ohio Community Improvement Corporation	cocic72
Child Support Enforcement	csea9
Engineer	engr21
Franklin County Board of Developmental Disabilities	mrdd27
Job and Family Services	jafs24
Law Library	lawl64
MORPC	morpc26
Metro Parks	parks25
Municipal Court	muni49
Office on Aging	agin28
Recorder (employees who are not on Franklin County Data Network)	rcdr34
Soil & Water	soil37
Solid Waste Authority	swaco67

Should a user forget his or her password and enter it incorrectly in the system, LINK will present the user with a "Forgot Password" option that will assist with resetting the password.

LINK Homepage



LINK stands for "Linking Information Needs and Know-how."

The Home Screen serves as the launching pad to what are called the "modules" of the LINK application. For user convenience, large icons of the most popular modules in the system are displayed below the welcome video. The left pane allows the user to navigate all business options. This is the user's main screen to access any section of the LINK application.

User Accounts

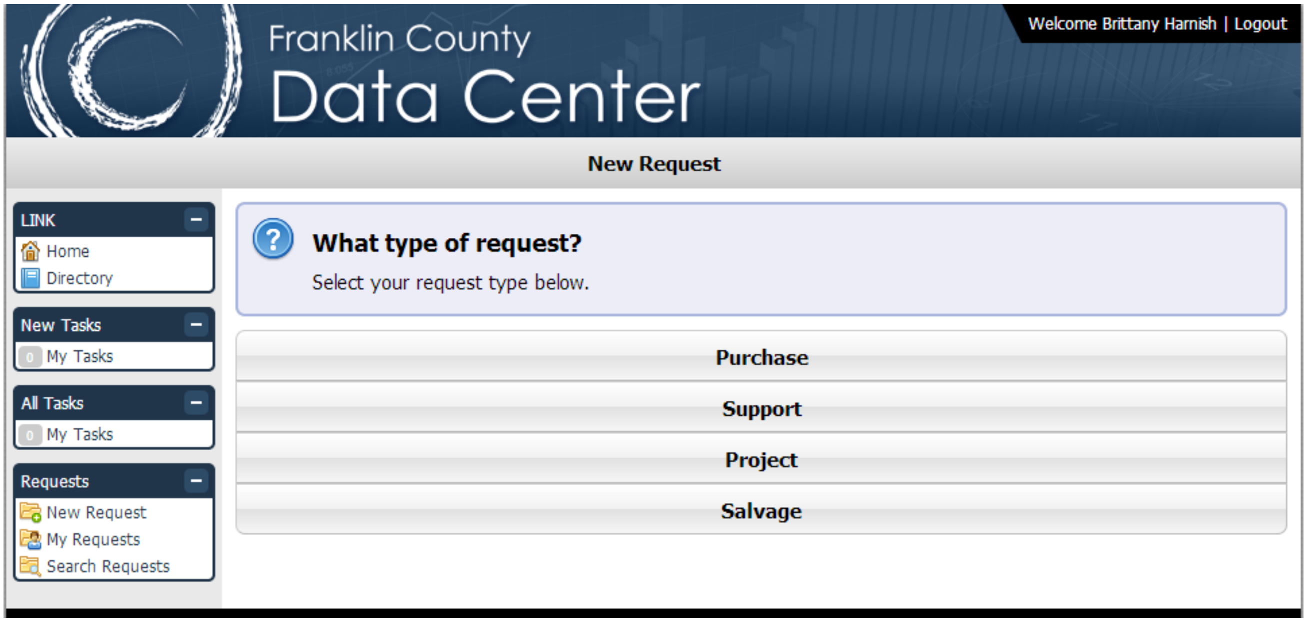
LINK users can edit and customize their accounts with a profile photograph of their choice and a customized flag icon. Users can access their account page by clicking their name at the top right of the application screen, or through the LINK Directory.

LINK Directory

The Link Directory is a searchable listing of all LINK users by agency. Selecting a user from the search results will open a details page. The user's details include contact information, profile picture, designated flag, and to which LINK groups the user belongs.

NOTE: If users open their details page, they may edit any of the information there with the exception of their agency. Passwords cannot be changed from the Profile page.

Making a New Purchase Request



The Data Center's purchasing process enables agencies to acquire the technology-related items necessary to perform their duties in the service of Franklin County. The LINK system allows users to become more involved in the purchasing process and provides greater transparency overall. To initiate a request within the LINK system, users can click on the large "New Request" icon on the home screen or the "New Request" link in the left pane navigation.

Who Can Request a Purchase?

Any county employee with a LINK account can request a purchase. Each agency has a designated authorizer who will be contacted to approve the request. If the authorizer is the originator of the request, the order will be put through without any additional authorization required from the agency.

Hardware

Users will have the option to select hardware for purchase. Hardware includes such items as computers, tablets, phones, and peripherals. The types of hardware available will be routinely updated as new products become available from our vendors, or as hardware becomes outdated. Should a desired item not be listed, the user may select the "Other Hardware" option to make a request. If choosing this option, however, the user will need to be detail-oriented in the notes section to ensure that the proper request is made.

Software

Users will have the option to select various software packages for purchase. The types of software available will be routinely updated as new products become available from our vendors, or as software becomes outdated. Should a desired item not be listed, the user may select the “Other Software” option to make a request. If choosing this option, however, the user will need to be detail-oriented in the notes section to ensure that the proper request is made. When selecting a software item, users should specify whether it will be a new purchase or an upgrade of existing software, as this may affect pricing.

Service Contract

A service contract is a legal agreement that outlines the details of services and repairs to an item. It can be applied to both hardware and software. This contract differs from a warranty, as there may or may not be a charge for it. It also typically provides more coverage for the item and generally covers a longer period of time. Service contracts can change as the Data Center contracts with new vendors, or if an item becomes outdated. As service contract options are not listed individually, users must be descriptive in the notes section in order to ensure that the proper contract is established.

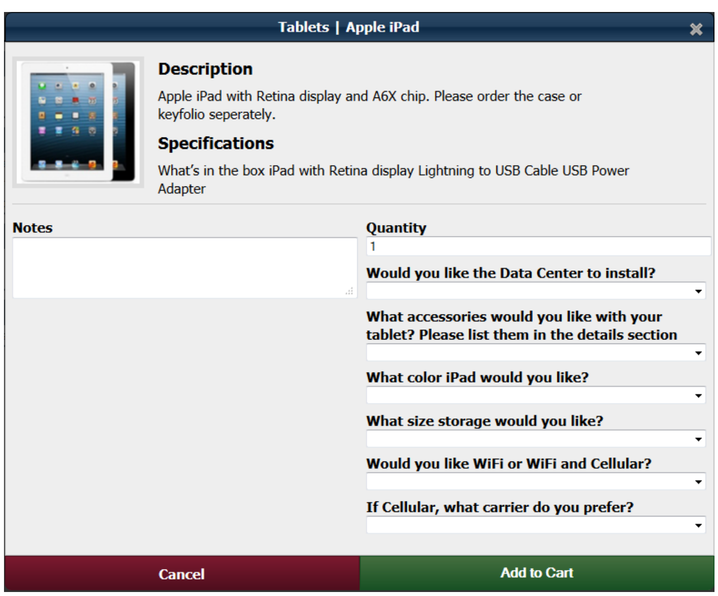
The Details of Your Order

Searching

Users may search for any item under the hardware or software purchasing categories. They may search by “Type” and/or “Keyword.” The results will display below the search box.

Adding to Cart

Once users find an item that they want, they can click on it to bring up a details box. This will show them more information, as well as offer a place for them to enter notes about the item they want to request and the quantity needed. Some selections also require users to answer questions associated with the item in order to refine the request. Select “Add to Cart” to add an item to the shopping cart. Items in the cart will display in the right-hand corner of the screen.

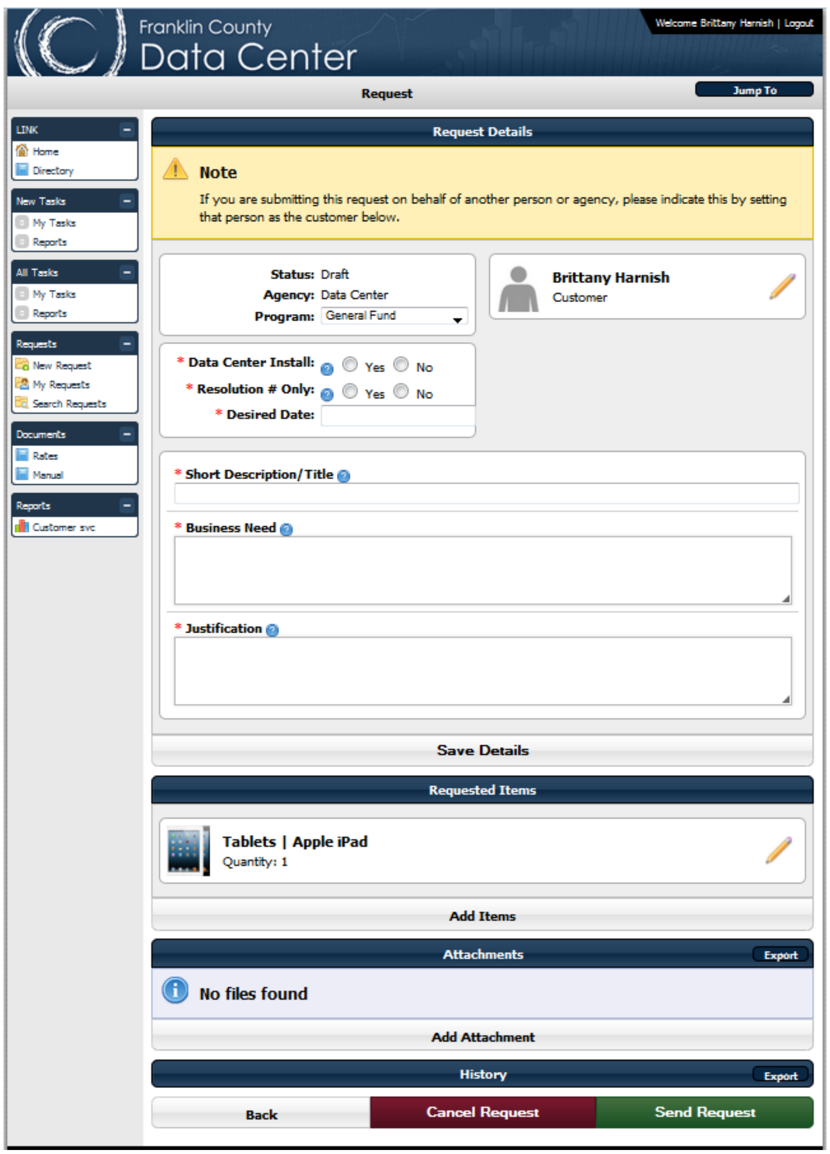


While users are able to include multiple items – or multiple quantities of a specific item (e.g. 2 wireless keyboards) – in a request, the system permits users to order only one item type per request. For example, users cannot choose “Other Hardware” twice in one order. If a user selects “Other Hardware” and provides details for one item, and then chooses it again with details for another item, the second “Other Hardware” selection will supplant the first one in the Shopping Cart.

Finalize Order

After all products are added to the shopping cart, the user selects “Finalize Order” to be taken to the next step. If the user does not want the item, or no longer wishes to continue with the order, he or she may select “Cancel Order.”

Once the user has chosen to finalize an order, LINK automatically creates a draft copy of the order. The user either must select “Cancel Order” or complete the order to delete the draft copy from their “My Requests” page.



Desired Date

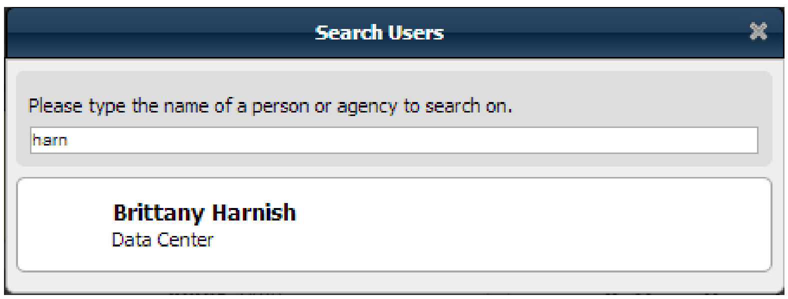
The “Desired Date” is a required field. This is the date by which a user would prefer to have the request closed.

Program

The majority of users will not have to change the status of their program; however, if a user belongs to an agency that will be paying for the purchase through a funding source other than the General Fund, he or she will need to make that selection.

Customer

The customer is the individual for whom the request is being submitted. Users who are ordering an item for themselves will not need to edit this field. If a user is requesting an item on behalf of another employee, however, he or she will need to change the Customer. In order to do so, the user will click on the pencil icon within the Customer field. A “Search Users” box will appear, in which the user will type the name of the person for whom he or she is ordering the item, or their agency. The results list will automatically populate from the LINK Directory. Clicking on the user’s name will update him or her as the Customer.



Additional Questions

In order for us to determine the exact needs of the customer, users are required to answer two questions when placing a request: whether they expect the Data Center to install the item, or whether they simply need the resolution number for the purchase.

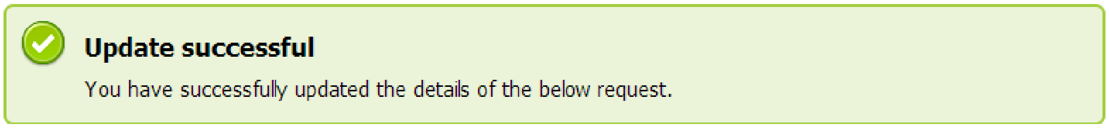
Additional Details

It is our goal to complete our customers’ requests as quickly and transparently as possible. To do so, we need the customer to fill out the Short Description/Title, Business Need, and Justification thoroughly. These are required fields essential to the purchasing process. The Short Description/Title has a 25 character limit.

Save Details

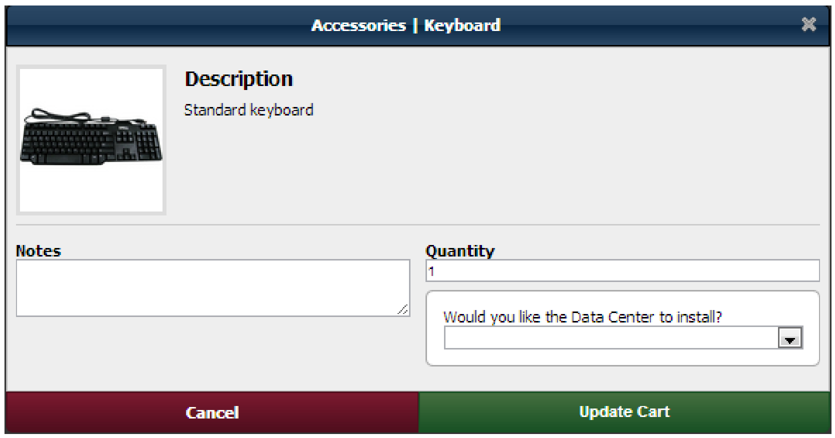
When the section for additional details has been completed, it is important for the user to click “Save Details” to save that portion of the form. If a user continues to fill out the remainder of the form without saving the details, he or she will not be permitted to “Send Request” until that section has been saved.

Once the user has selected “Save Details,” a notification will appear at the top of the screen informing him or her that the details were updated successfully. The color of the “Save Details” button will transition from green to white as well.



Requested Items

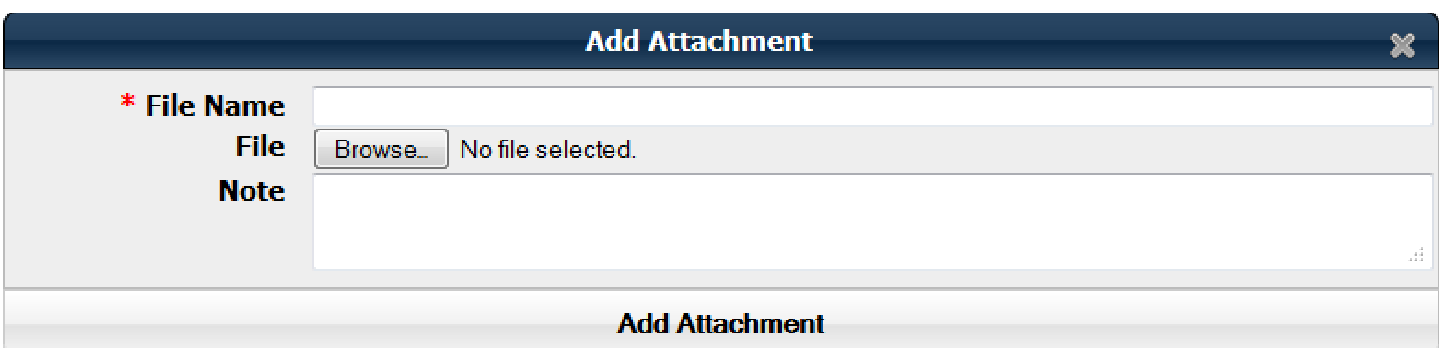
This section lists the items and quantity that the user is requesting. If the user wishes to update the notes, quantity, or associated questions for an item, he or she can do so by clicking on the pencil icon associated with that item. Users can save the changes made within the update box by selecting “Update Cart,” or they can discard them by clicking “Cancel.”



Attachments

It is Franklin County’s purchasing policy to obtain pricing quotes for items. If the quote is coming from a State Term Contracted Vendor, then one quote is acceptable. If not, the Data Center is required to obtain 3 quotes for an item and select the optimal one. Customers are welcome to submit their own quotes in this area, or the Data Center would be happy to obtain them on the customer’s behalf.

This section also can be used to upload any files that are pertinent to this request (e.g. Deployment List, Email Communication, etc.). The LINK application accepts multiple file types: doc, docx, xls, xlsx, ppt, pptx, tiff, jpg, gif, pdf, and txt. Notes can be added to attachment submissions as well.



History

The History section is an automatically generated portion that records the activity of the request by date order. Customers can see the progress of their requests in real time through the History log. This section also is exportable into PDF and Excel formats, or the user may email the history.

Pricing Information

Users may notice that their shopping cart is full of items, but the LINK system does not give them a total cost at the time of submission. That is because the prices in the market vary by each day, or even each hour. Also, the price that some vendors are willing to give to a government entity is different from the price they promote. As a result of these variables, the Data Center informs the customer of the request total after the quotes and, if necessary, Data Center service costs are estimated.

Drafts

The LINK system allows users to create draft requests that they may finish and submit at a later time. The moment that a user selects "Finalize Order," a draft request is created and stored in the system. If the user has a draft waiting and selects "New Request," LINK will remind the user that a draft is available for completion, or the user may continue with a "New Request."

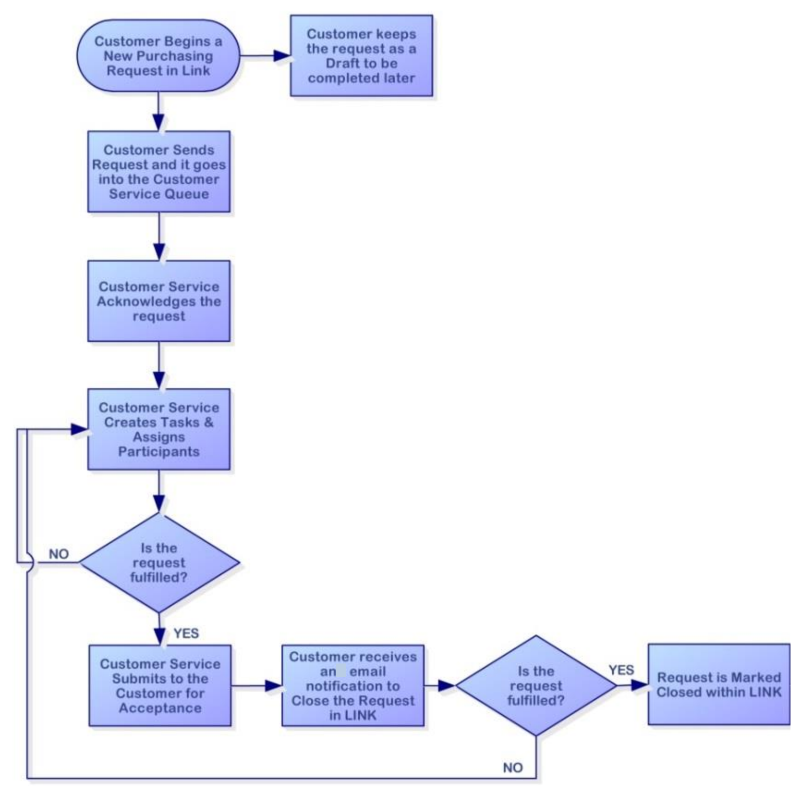
To remove a draft, the user must go into the draft request under "My Requests" and either cancel or submit it.

Success Screen

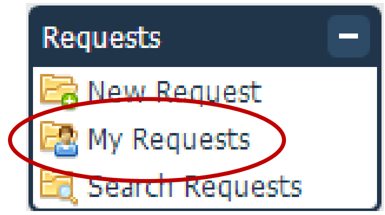
Once users have submitted a request successfully, they are presented with a "Success Screen." The "Success Screen" also gives users an option to have a receipt emailed to them. The LINK system does not automatically send a receipt email, as users are able to view the status of their request(s) in real time through the LINK system. Should they want to, however, users can elect to send a receipt to themselves or any other recipient (such as their manager or fiscal officer).

LINK Workflow

Below is an example of a simple workflow within LINK:



The Status of "My Requests"



Users will be able to utilize the LINK system in order to track the progress of their request once it has been submitted and to receive real time updates regarding the status of their purchase. Users can click on the "My Requests" link to see all requests that they have created—both drafts and submitted requests.

Definitions of Status

Draft – A request that has been started by a customer that has not been submitted to the Data Center. If a customer starts a request, LINK will automatically save it as a draft to be completed at later time. When a customer returns to the system to submit a request, LINK will ask to continue with the most recent Draft. To clear Draft requests, the customer can go into the details page and "Cancel" the Draft request.

New – A request that has been marked as "New" has been submitted by the customer but no tasks have been started yet.

Acknowledged – A task that has been acknowledged.

In Progress – Requests with a status of "In Progress" have had at least one task completed.

In Review – An "In Review" status means that there are no outstanding tasks for a request. This also indicates to Customer Service that the request is ready to be reviewed. Customer Service then determines if more tasks are needed to complete the request or if it is ready to be sent to the customer for acceptance.

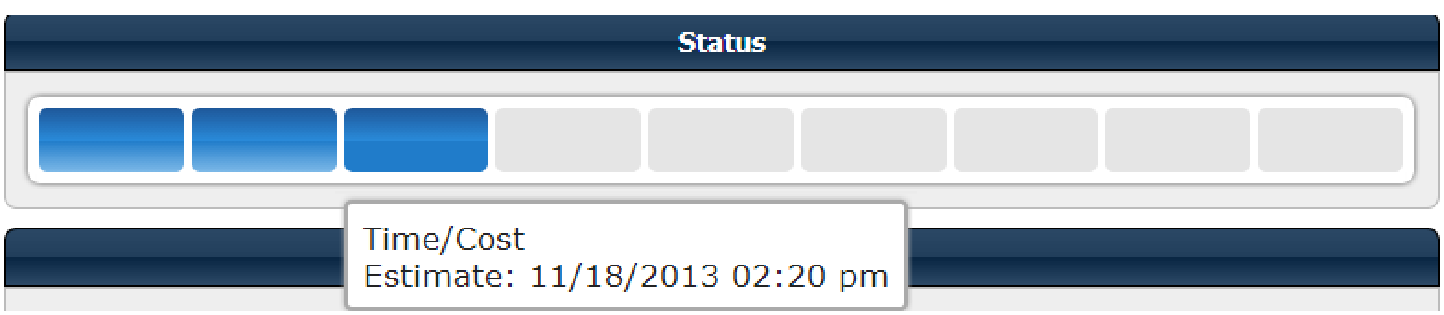
Complete – LINK applies a "Complete" status to a request when Customer Service sends the request to the customer for acceptance. The customer will receive an email when this status is applied.

Closed – A request can only be "Closed" when the customer gives acceptance. Through LINK, the customer can accept the request as completed. Customer Service also has the capability to close a request on behalf of the customer.

Canceled – The customer and Customer Service have the ability to cancel any request. LINK requires a note to be added whenever this function is performed.

Request Status

When a user enters into the details page of a submitted request, the "Status" section will outline the progress of that request. A tiled status bar will indicate which tasks have been completed, and which are in progress or have yet to be assigned. A completed task will be indicated by a blue tile, whereas a current or future task will appear as a gray tile.



The status bar on each request consists of nine standard automatic tasks: Review Purchase, Quotes/Estimates, Time/Cost, Customer Approval, Data Center Approval, Obtain Purchase Order, Order/Ship/Deliver, Deploy/Install, and Customer Acceptance. Users are able to add manual tasks as well, which will increase the number of tiles on the status bar. A manual task is distinguished from an automatic task by appearing as a different shade of blue. Whatever the user inputs for the task name is what title will display for that task, with the name formatted however the user entered it. When the user's cursor hovers over a tile, the task name will be indicated, as well as the date and time it was requested.

Request Details

Expected Date

After the request is submitted and reviewed by the Data Center's Customer Service Team, they will enter an "Expected Date." This is the date by which we expect to complete the request. If this date is different from the customer's required date, it will be communicated to the customer or the customer can see that date within the request details in the LINK system.

Business Justification

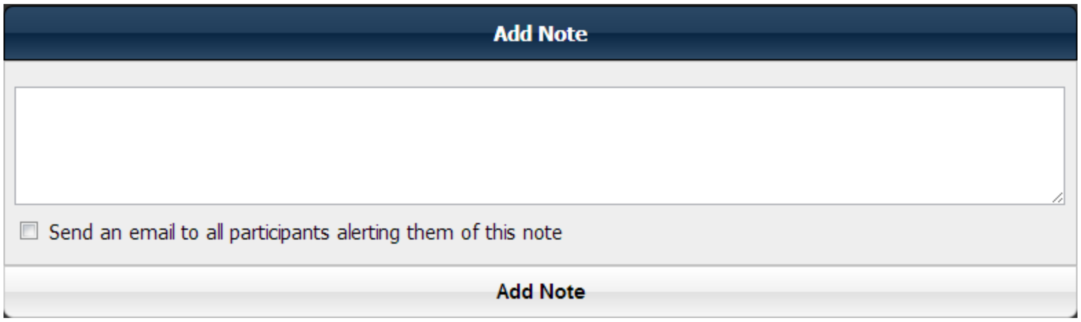
This section contains the Short Description/Title, Business Need, and Justification that the customer input when submitting the request. With the exception of Customer Service, who can edit the Short Description/Title at any point in the order, users are unable to edit this section after the request has been submitted. Any updates that Customer Service makes to the Short Description/Title will be automatically saved; they do not need to click the "Save Details" button to commit those changes. The Business Justification section is a collapsible field; users can click on the Business Justification header to expand it to see the details, or to collapse it to hide all entries.

Requested Items

This section is a list of the items that the customer has requested. The LINK user may on click the product to open a new section to see more details. Notes can be added to the product details as well. To save the updates, simply click outside of the details screen and the changes automatically will be saved.

Notes after the Request Has Been Submitted

"Request Notes" are very important to the success of the request. This is the communication tool to use to relay anything related to the request. Data Center team members, as well as the customer, can enter a note at any point during the request. It is the responsibility of each participant to read through the notes to understand where the request is in the process. A user entering a new note has the option to email it to all request participants as well.

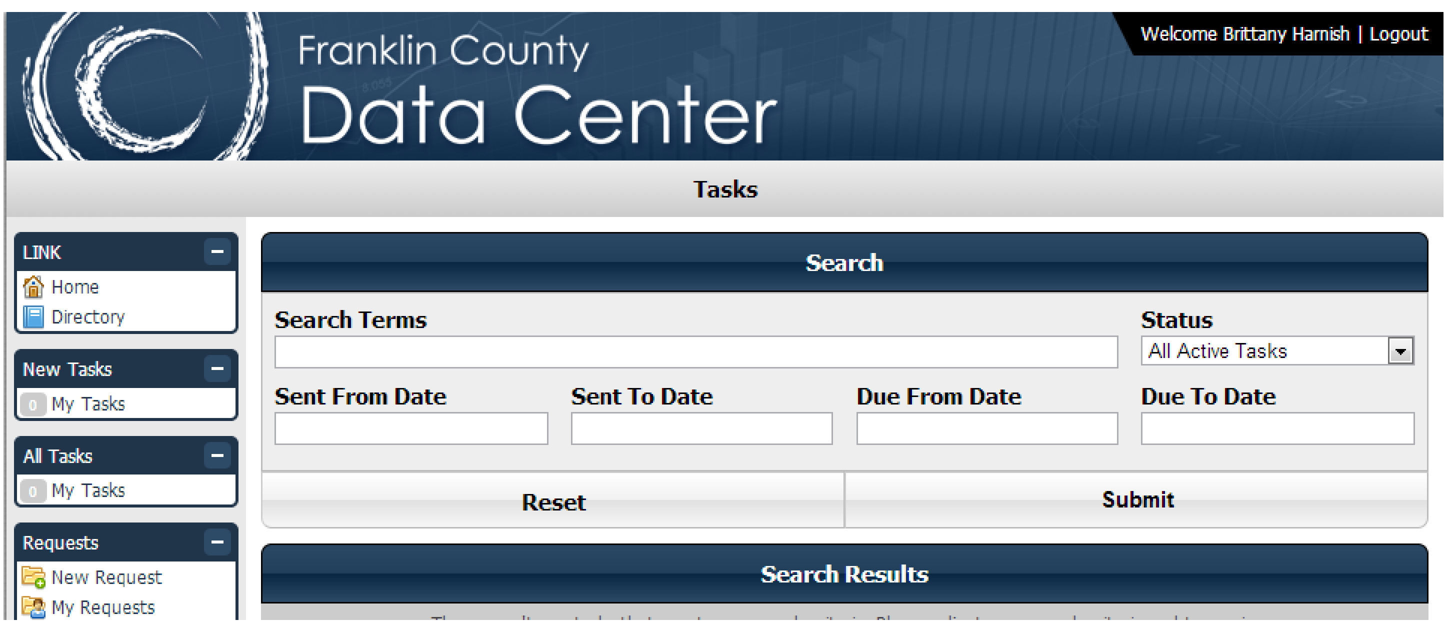


Participants

Participants are the team that will be receiving tasks to complete the request. Generally it will be Data Center staff members listed here, as well as the customer or key agency staff members that could have a task assigned to them. Data Center Customer Service will be responsible for adding a participant to the request. Participants can be added at any time. The customer will be able to see the team members that will be completing his or her request through the request details in the LINK system. The Participants section is a collapsible field; users can click on the Participants header to expand it to see all request participants, or to collapse it to hide all entries.

Tasks

Tasks are created by LINK Administrators and Data Center Customer Service, or they are automatically generated by the system. Tasks are typically created for other Data Center staff, but a customer also can be assigned to a task. If the Data Center requires some approval or a decision to be made, we can generate a task for the customer to complete. The customer will be notified of the task via email and a visual indicator will appear within the LINK system. Under the box labeled “New Tasks,” there is a counter to let the user know if he or she has any outstanding “New Tasks” that need to be handled. Clicking “My Tasks” will take the user to a page that lists all tasks requiring action from him or her within the Results table. Users can narrow tasks using the search function. They can perform a keyword search, filter results by status (All Active Tasks, New, In Progress, or Completed), and apply date searches.



Within each request's details page is a section that lists all tasks related to the request, as well as information regarding to whom each task is assigned, the status of the task, and the requested and completed dates. The colors displayed within the tasks list correlate to task due dates and times. Completed tasks or tasks that have not passed their due date do not have a color associated with them. Tasks that are past their due date by zero (0) to 2 hours are shaded in yellow within the request details page. Incomplete tasks that are past their due date by 2 to 4 hours are shaded in orange on the request details page. Tasks that are overdue by more than 4 hours are shaded in red on the request details page. Due dates and times for tasks are automatically calculated by the system based on the request submission date and time.

Tasks Export

Task	Assigned to	Status	Requested Date	Completed Date
Review Purchase	Customer Service	Completed	12/02/2013 03:38 pm	12/02/2013 03:27 pm
Server Team Review & Quotes	Server Team	Completed	12/04/2013 10:27 am	12/02/2013 04:28 pm
Quotes/Estimates	Customer Service, Fiscal	Completed	12/04/2013 10:27 am	12/06/2013 07:25 am
Time/Cost	Customer Service	New	12/06/2013 09:25 am	

Requested Files after the Request Has Been Submitted

As mentioned earlier, it is Franklin County's purchasing policy to obtain pricing quotes for items. If the quote is coming from a State Term Contracted Vendor, then one quote is acceptable. If not, the Data Center is required to obtain 3 quotes for an item and select the best option.

If the customer has not attached necessary documents or if the Data Center has obtained the pertinent files, the Data Center will attach them here.

The LINK application accepts multiple file types: doc, docx, xls, xlsx, ppt, pptx, tiff, jpg, gif, pdf, and txt.

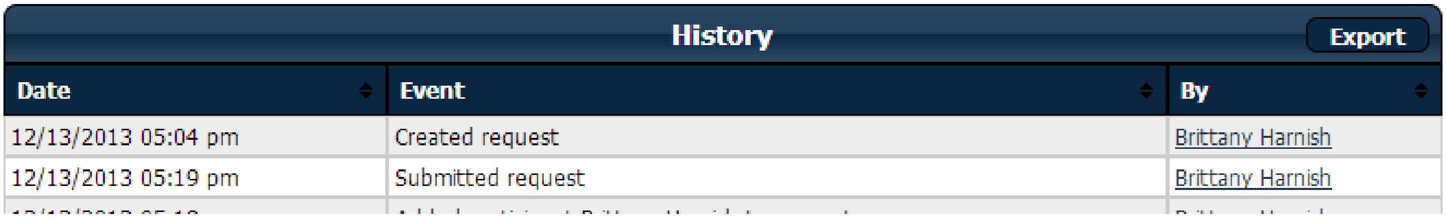
Attachments Export

Date	File	By	Note
12/18/2013 08:25 am	SHI Quote for Keyboard	Brittany Harnish	
12/18/2013 08:25 am	Some Vendor Quote for Keyboard	Brittany Harnish	

Add Attachment

History after the Request Has Been Submitted

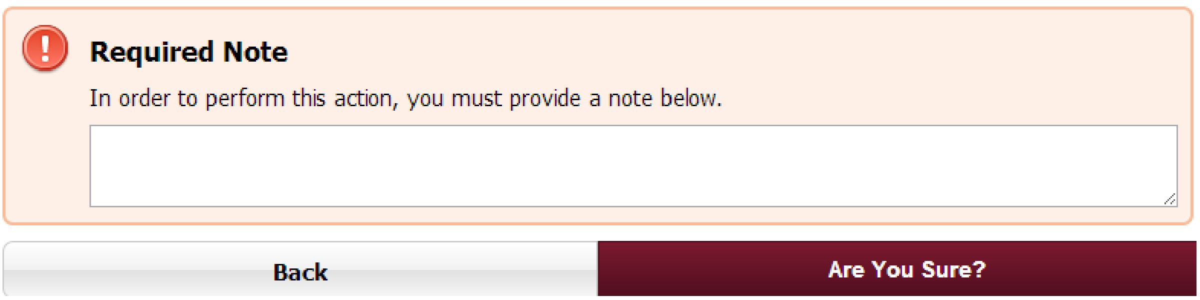
The History section is an automatically generated portion that records the activity of the request by date order. The history log includes such items as task creation and completion, request acknowledgements, and participant additions. Customers can see the progress of their request in real time by referencing the History. This section is a collapsible field; users can click on the History header to expand it to see all records, or to collapse it to hide all entries. The History section is exportable into PDF and Excel formats, or users may choose to email the request history.



History		Export
Date	Event	By
12/13/2013 05:04 pm	Created request	Brittany Harnish
12/13/2013 05:19 pm	Submitted request	Brittany Harnish

Canceling a Request

A customer can cancel a request at any time by navigating to the request through the "My Requests" page in the LINK system. Once the customer is in the request details section, he or she can select the "Cancel Request" button located at the bottom of the screen to withdraw the order. The user is required to enter a note to accompany the cancellation. Once the note has been entered, the user will click "Are You Sure?" to cancel the request. If the user decides not to cancel the request when this screen has been reached, he or she can click "Back" to abandon the cancellation.



Closing a Request

Once the request is completed by the Data Center, Customer Service will send a task to the customer asking if the request was completed to his or her satisfaction. The customer must then confirm that the request is complete and can be closed by clicking the "Approve" button at the bottom of the request details page. Once the customer confirms completion, a survey will be sent to the customer to fill out and the request will be marked as "Closed" within the LINK system. If the request outcome is not satisfactory, the customer can select the "Deny" button to inform Customer Service that the request is not complete.

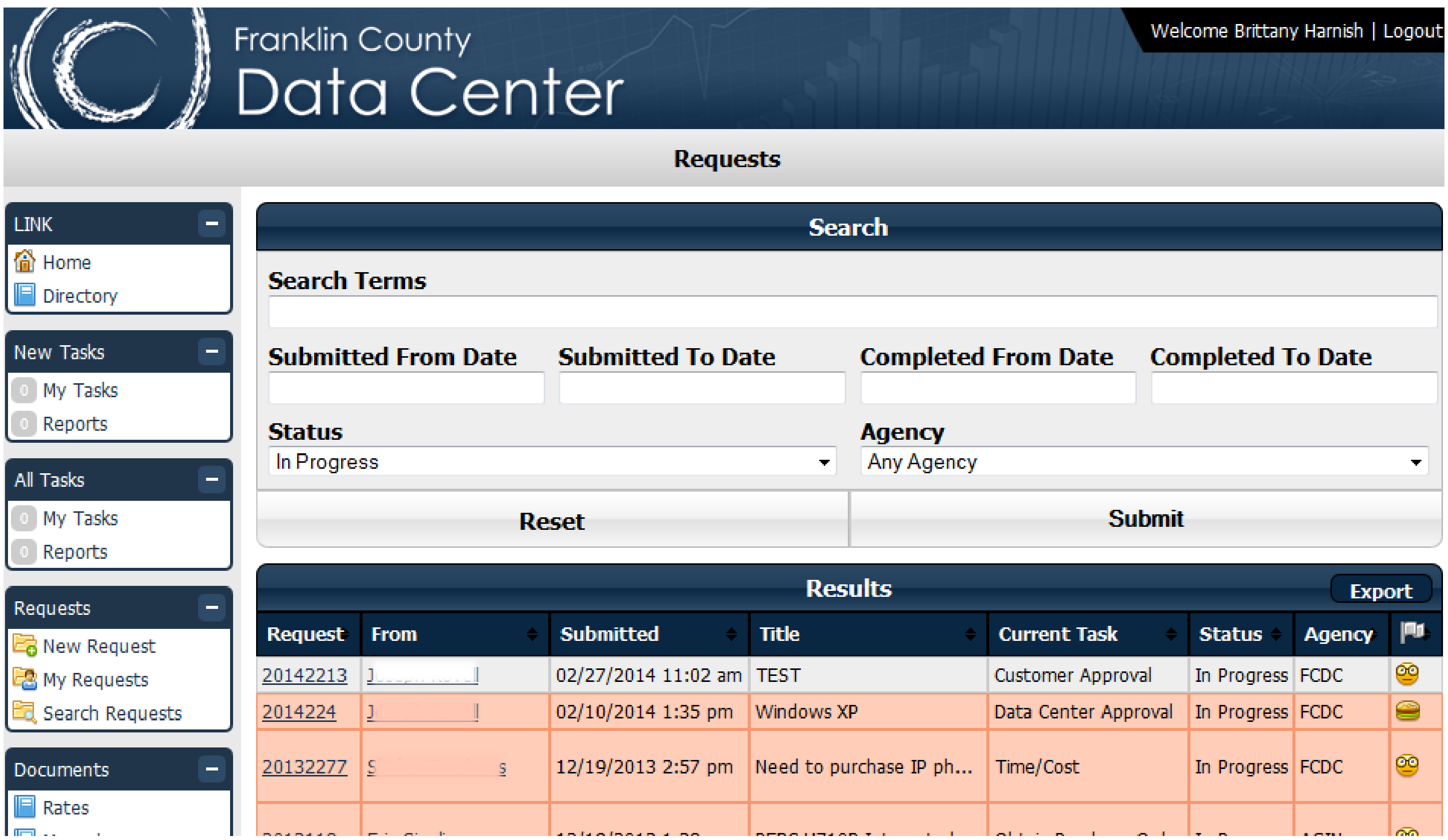
Customer Survey

Customer satisfaction is important to the Data Center. We want to ensure that we are providing the highest quality of service that we can. To help us achieve this goal, the customer will be sent a survey following the close of each request to provide valuable feedback regarding his or her experience.

Search Requests

Users are able to search all requests through the "Search Requests" link. Clicking on the link will direct users to the Search page. All "In Progress" requests are initially presented in the Results table. The colors displayed within the request results list correlate to request due dates and times. Completed requests or requests that have not passed their due date do not have a color associated with them. Requests that are past their due date by zero (0) to 2 hours are shaded in yellow within the results list. Incomplete requests that are past their due date by 2 to 4 hours are shaded in orange within the results list. Requests that are overdue by more than 4 hours are shaded in red in the results list. Due dates and times for requests are automatically calculated by the system based on the request submission date and time.

Users can narrow search results through several functions. The Search Terms field is a keyword search that allows users to narrow results based on a particular word or character string contained within the request. Users can enter partial terms as well (e.g. “purch” to search for “purchase,” “purchased,” “purchasing,” etc.). Users also can search date ranges pertaining to when the request was submitted or completed. They have the option to narrow their search to request status as well: Any Status, Acknowledged, Canceled, Closed, Draft, In Progress, or New. Users can restrict search results to a specific agency, if desired.



Technical Support

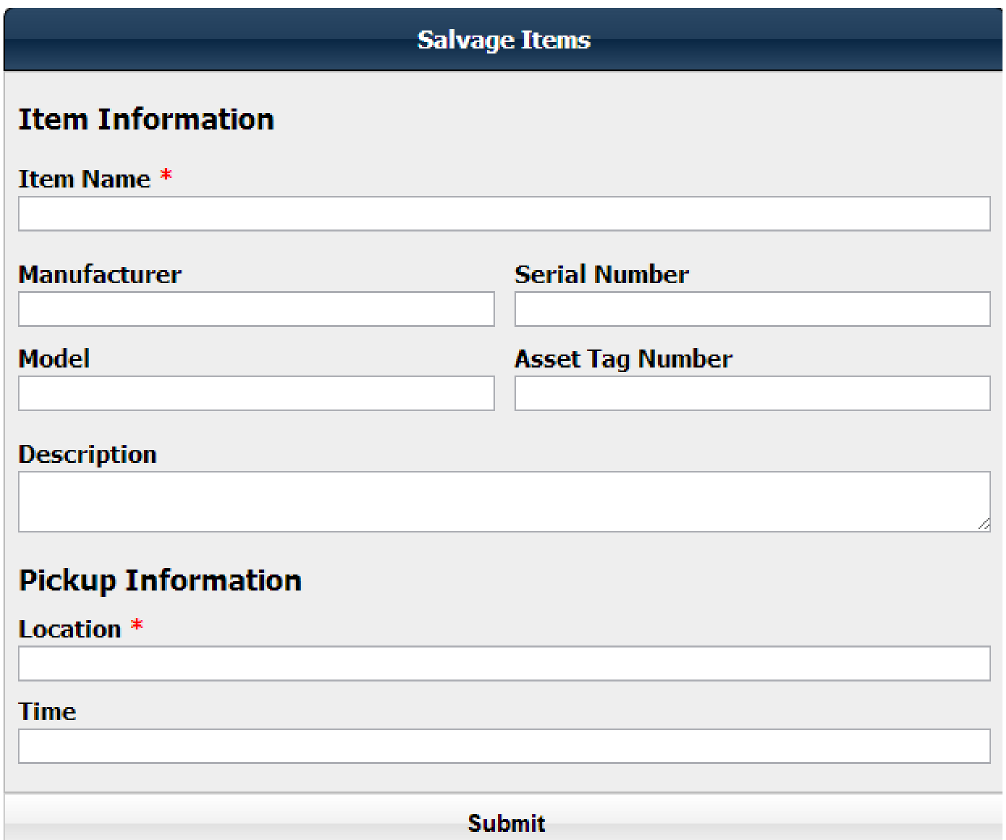
Under the “New Request” page there is an option to request support. Currently, the page contains contact information for the Data Center Customer Service Department. It is our vision for the LINK system to have a full service application in the future that will accept Technical Support requests online and have an area for the customer to see the real time status of those requests.

Starting a New Project with the Data Center

Within the "New Request" page there is an option to request a new project. Currently, the page contains links to contact information for Data Center business services and project team members. Customers may contact them directly for any project needs or basic inquiries about the Data Center's services. A link to the Project Request form on the Franklin County Employee Intranet Portal is displayed as well. It is our vision for the LINK system to have a full service application in the future to accept new project requests online, as well as have an area for the customer to see the real time status of those requests.

Salvage

As new equipment comes in, disposal of old and obsolete equipment is necessary. The Data Center provides this service through the salvaging of old equipment, the preparation of designated items for disposal, and the maintenance of an inventory of the items disposed. Should an agency need to salvage items, the user may complete the form that is available on the LINK system. This is located in the "New Requests" section under the heading of Salvage. Once the user has provided the necessary information and selected "Submit," the Data Center will process the request and salvage the equipment. It is our vision that the LINK system will have a full service application in the future that will accept multiple salvage items within one request, as well as have an area for the customer to see a log of salvaged items.



Salvage Items

Item Information

Item Name *

Manufacturer

Serial Number

Model

Asset Tag Number

Description

Pickup Information

Location *

Time

Submit