

TechDirect User's Guide for ProDeploy Client Suite

Notes, cautions, and warnings

 **NOTE:** A NOTE indicates important information that helps you make better use of your product.

 **CAUTION:** A CAUTION indicates either potential damage to hardware or loss of data and tells you how to avoid the problem.

 **WARNING:** A WARNING indicates a potential for property damage, personal injury, or death.

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Overview of ProDeploy Client Suite in TechDirect

Welcome to ProDeploy Client Suite!

Dell's ProDeploy Client Suite offers [various services](#) that help you deploy PCs with greater speed and less effort.

TechDirect is central to the process. TechDirect is a self-service portal that enables you to manage every detail of your deployment with an unprecedented level of control. You can use TechDirect to:

- Specify how you want your systems to be configured in the factory and deployed onsite.
- Check the status of your orders from Dell processing through shipment to onsite installation.
- Get notifications for key milestones such as arrival of new orders and order shipment.
- View asset reports, upload files related to your deployment, and manage data sanitization activity.

If you want to learn more about these features before you make a purchase, you can use TechDirect's preconfigure capability to "try before you buy" and experience the service set-up process based on sample orders.

The following sections of this document describe how to use TechDirect to manage your ProDeploy Client Suite orders. You will learn how to access TechDirect, create projects, provide your requirements, and much more.

Accessing ProDeploy Client Suite in TechDirect

To access ProDeploy Client Suite features in TechDirect, you have three options:

Option 1: Self-register in TechDirect

Go to techdirect.com and select the link for ProDeploy Client Suite. On the **ProDeploy Client Suite** learning page, click **Get Started** to open a registration form and enter your contact information.

If you are not a Dell EMC partner, leave the default answer of "**No**" in the field labeled as **Dell EMC Partner**. After you complete and submit the form, you will be shown the ProDeploy Client Suite's **Preconfigure** page where you can create sample orders and get the *'try before you buy'* experience. Also, an email will be sent to your email address with a link to set a password for your TechDirect account. After you set the password, you will be asked to complete additional registration information to enable you to use all the services available in ProDeploy Client Suite.

If you are a Dell EMC Partner, select "**Yes**" in the field labeled as **Dell EMC Partner** to ensure that your account is given partner-specific features, such as an option to add end-customers. This reveals additional registration fields. After you complete and submit the registration form, an email will be sent to your email address with a link to set a password for your TechDirect account. After you set the password, you will be shown the **ProDeploy Client Suite** home page. At this point, you can start creating end-customer relationships. See [Managing end-customers as a Dell EMC partner](#) for more information.

Option 2: Place ProDeploy Client Suite orders

Alternatively, you can simply place orders with ProDeploy Client Suite and an account will be pre-registered based on the email contact on your orders. After your orders are placed, you will receive an email with a link directing you to TechDirect.

If the email address on your orders is part of an existing TechDirect account, the link will redirect you to the TechDirect home page. Click **Sign In**, enter your existing TechDirect user credentials, and then select the **ProDeploy Client Suite** link.

If the email address on your orders is not part of an existing TechDirect account, an account will be pre-registered for you. In this case, the link in the notification email will take you to a form to create a password for your new account. After you sign in, accept the site terms of use, then select the ProDeploy Client Suite link. For security reasons, this link will expire after 24 hours. If the link expires, you can follow the [password resetting process](#) to complete registration.

Option 3: Dell EMC Partner-initiated accounts

Finally, if you are purchasing through a Dell EMC partner, we recommend you wait for your partner to establish an account for you. After your partner has registered, you will receive an email with a link directing you to TechDirect. At that point, you may login or finish your account setup depending on whether you have an existing TechDirect account as described above in option 2.

Once you are logged into TechDirect, from the ProDeploy Client service page use the **Select Partner** menu to select the partner's name. You can then view or do work in that partner context. Within the **Select Partner** feature, you can also select **My Projects** to view or do work for orders you place directly with Dell.

Adding users

If others in your company need access to the features in TechDirect or if they will be email contacts on future orders that need to be routed to your account, you may add them as users in TechDirect. For information on adding users, see [Adding TechDirect users](#).

Managing end-customers as a Dell EMC partner

To manage end-customers as a Dell EMC partner, use the following instructions:

Establishing end customers before placing orders

From the **ProDeploy Client Suite** page in TechDirect, on the **Projects** tab, open the **Select Customer** menu and then select **Add Customer**. Next, select the **Preconfigure** action tile. You will then be taken through a series of screens asking for the end customer's contact and company information, and permission level. Follow the prompts to complete this information. The permission level definitions are:

- **No Access:** Select this option if, as a Dell EMC partner, you want to complete the ProDeploy Client Suite activities in TechDirect for your end customer's orders, and do not want the end customer to have access to the orders in TechDirect.
- **Read-Only:** Select this option if, as a Dell EMC partner, you want to complete the ProDeploy Client Suite activities in TechDirect for your end customer's orders, and want the end customer to be able to view their orders.
- **Read/Write (Full):** Select this option if, as a Dell EMC partner, you want the end customer to complete the ProDeploy Client Suite activities in TechDirect.

After you have completed this process, you can then select the end customer by name in the **Select Customer** menu to manage their service requirements. If the end customer is set for **Read/Write** access or **Read-Only** access, an email is sent to the primary contact with a link to access TechDirect. See [Accessing ProDeploy Client Suite](#) for more information.

Assigning orders to your customers

As a Dell EMC partner, if you have placed orders, they will appear in your TechDirect account waiting to be assigned to an end customer. To assign your orders, go to the **ProDeploy Client Suite** page in TechDirect. On the **Orders** tab, select **Manage Customer Orders**.

You will next see a page with orders that need to be assigned. Select the orders that you want to assign, and then click **Continue**. You will then be presented with an option to select an existing end customer if you have already setup customer relationships in TechDirect. Otherwise, you will see an option to create a new customer. Follow the prompts to complete the order assignment. In the case of a new customer, you will be taken through a series of screens asking for the end customer information as described under [Establishing end customers before placing orders](#). Repeat these steps to assign orders to different end customers as necessary.

As order assignments are complete, if the end customer is set for **Read/Write** access or **Read-Only** access, an email is sent to the primary contact with a link to access TechDirect. See [Accessing ProDeploy Client Suite](#) for more information.

Creating a new Project

ProDeploy Client Suite orders and requirements are managed in TechDirect using a tool called a project. A project helps you efficiently manage and track your orders and their requirements as a group.

NOTE: Before you start a project from the ProDeploy Client Suite home page in TechDirect, you may need to select a relationship using the available drop-down menu.

- If you are a Dell EMC channel partner and want to work on an end-customer's orders, you must select the customer's name from the **Select Customer** drop-down menu. If you want to work on your own orders, you must select **My Projects** from the **Select Customer** drop-down menu.
- If you are not a Dell EMC channel partner, but have placed some of your orders through a channel partner, you must select the channel partner's name from the **Select Partner** drop-down menu to work on the orders that you have placed through them. If you want to work on your orders, that are placed with Dell directly, you must select **My Projects** from the **Select Partner** drop-down menu.
- If you have placed all your orders directly with Dell, you need not worry about selecting a relationship and start creating a project.

There are two options for starting a new project:

Option 1: Preconfigure a Project

Preconfigure is a feature that allows you to create projects without a real order. This could be for learning purpose or to prepare real service requirements before placing orders; your preconfigure work can be reused with real orders.

To start a new preconfigure project, go to the **ProDeploy Client Suite** home page in TechDirect ([How to access TechDirect](#)), select the **Preconfigure** link, and then select the **Create New** link.

You will then see a screen to enter a **Ship-To** country, a ProDeploy Client Suite offer, and the Dell systems that you plan to order. Depending on your selections, you may also see options to choose add-on services. This information is used to create sample orders that you will then include in the preconfigure project. If your goal is learning only, the sample order data need not be accurate. If your goal is to reuse your preconfigure work with real orders, then you should enter data that reflects your planned orders such as selecting the actual system model that you intend to order.

After you have entered the data and selected to continue, you will see a screen that displays the sample orders based on your inputs. Select the sample orders that you want to use, and then enter a name and an optional description for your preconfigure project.

Option 2: Create a Project using real orders

If you have placed real ProDeploy Client Suite orders with Dell, they will appear in your account waiting to be assigned to a project. Go to the **ProDeploy Client Suite** home page in TechDirect ([How to access TechDirect](#)) and select the **Create Project** link.

You will then see a screen that displays your unassigned orders. Select the orders that you want to use, and then enter a name and an optional description for your project.

To select all orders at once, use the check box displayed above the orders numbers in the order table header. If you need to select a subset of orders from a long list, use the search feature to enter a keyword relevant to the desired orders, for example, part of the order number, model name, or service level; this will filter the list and allow you to select only those orders.

NOTE: You cannot select multiple orders with different ProDeploy Client Suite service levels; the orders in a project must be of the same service level.

Next steps

After you have selected orders and named your project, select the action to continue. You will then be shown a series of screens to enter your service requirements to complete your project. For more information, see [Completing a Project](#).

Completing a Project

After you [create a new Project](#), you will see a series of questions about your service requirements. To complete a Project, provide your answers and use the action features that are available at the bottom of the page to progress through each screen.

The following is an outline of questions that you may see.

NOTE: The exact questions may vary depending on the ProDeploy Client Suite service level and other details of your orders.

NOTE: You will have an opportunity to change your answers before you submit your Project.

Do you want System Build services?

The first question that you will see is whether you want any of the system configuration services available with ProDeploy Client Suite. This includes firmware configuration, operating system imaging, asset labels, and asset reports. [Learn more about System Build services](#)

NOTE: These services may add time to your order ship date because Dell must wait for your requirements and then convert your requirements into instructions for our fulfillment centers before your systems are shipped.

The possible response options that may be displayed and their descriptions are as follows:

- ***I do not want System Build services.*** Select this option if you do not want any System Build services. In this case, your Dell systems will arrive with standard settings according to your original order configuration.
- ***I want System Build services; configure my orders exactly the same.*** Select this option if you want one or more of the available Build services, and all orders should have the same requirements.

NOTE: Any previously saved Build profiles matching your orders will be presented at this point. You can select an existing profile or create a new one.

[Learn more about Profiles](#)

- ***I want System Build services; configure my orders differently.*** Select this option if you want to use one or more of the available Build services, and you want to apply different requirements across the orders.
- ***I am not ready to decide.*** Select this option if you are not sure if you want Build services. You will be able to learn about these services and make a decision later in the process.

Do you want onsite set up and Deploy services?

For ProDeploy and ProDeploy Plus orders, the next question that you will see is whether you want a certified professional to unbox and set up your systems onsite. ProDeploy Plus orders are also entitled to data migration and sanitization. [Learn more about Onsite Deploy services](#)

NOTE: Dell will ship your systems to the address on the order. You are responsible to ensure the systems are present at the agreed deployment location (Dell will work with you to finalize a deployment plan later in the process).

The possible response options that may be displayed and their descriptions are as follows:

- ***I do not want Onsite Deploy services.*** Select this option if you want to set up your systems on your own.
- ***I want Onsite Deploy services at a single location.*** Select this option if you want all the systems in your project to be set up at a single location. You will provide the location information later in the process.
- ***I want Onsite Deploy services at multiple locations.*** Select this option if you want the systems in your project to be set up at more than one location. A field will appear for you to enter the number of locations. Later in the process, you will see a matching number of deploy profiles to enter the address and requirements for each location. [Learn more about Profiles](#)

- ***I am not ready to decide***: Select this option if you are not sure if you want Onsite Deploy services. You will be able to learn about these services and make a decision later in the process.

Would you like us to guide you?

After the questions on System Build and Onsite Deploy services, you may be asked if you want to be guided through each individual service item one by one to provide your requirements. The choice is yours.

Completing your Project with guided assistance

If you opt to be guided, you will see an additional series of screens with questions adapted to your previous answers and the ProDeploy Client Suite service level of your orders. Most screens will display an individual service item, for example system imaging, and a few response options, for example, I want Dell's default image versus I want to provide my own image.

When you opt to use a given service, you may be presented a form to provide detailed requirements. For example, if you opt for an asset label, you would see a form to either pick a standard label or design your own. If there are any previously saved forms that match your orders, those will be presented, in which case you can select an existing form or create a new one.

[Learn more about individual ProDeploy Client Suite service options and how to complete their forms in TechDirect](#)

Use the action features that are available at the bottom of the screen to proceed. Whenever a new form is displayed, you must either complete the form or use the skip option to continue. If you need to stop the guided session for any reason, click the **Save and Exit** option; in this case, when you return to the Project later, you will resume from your last step.

If you answer all the questions in the guided session without skipping any items, you will then see a screen summarizing your selections. Take a moment to review your selections. If you are satisfied, select the confirm action.

NOTE: If you opted to provide a system image, you will also see a link to a **file transfer application**; use this link when you are ready to send your system image to Dell.

After you have confirmed your selections, you will then see a final screen with **Terms and Conditions**. Read the terms carefully. If you agree, select the action to agree and submit.

Next steps

At this point, you have completed the project setup process in TechDirect.

- For preconfigure projects, you will be presented with the **Request a quote?** form. If you want to request for a quote based on the current preconfigure project, fill out the form and click **Request Quote** or click **Don't Request** if you do not want to request a quote. You will be presented with the **Preconfigure** home page where further options are available.

NOTE:

- If you did not request a quote for the preconfigure project while submitting the project, you can still request a quote for it on the **Preconfigure** home page under the list of submitted projects.
 - If you requested a quote for the preconfigure project, the date on which the quote was requested is displayed for that project under the list of submitted projects on the **Preconfigure** home page. A Dell representative will contact you to provide a quotation of the project.
- For projects based on real orders, you will be shown a page where you can monitor the downstream activity of your completed project. If you opted to provide your own system image, ensure that you send it using the **file transfer** link displayed during the Project completion process. [Learn more about what happens after Project submission](#)

Completing your Project without guided assistance (alternate path)

If you opt not to be guided (or the guided option was not offered, you did not answer all the questions, or you were not satisfied after reviewing your selections and you decided to go back), you will see a screen summarizing your current answers with features to continue providing your requirements. [Learn how to complete a Project without guided assistance](#)

Completing a Project using alternate path

After you answer the initial questions about Build and Deploy services described in [Completing a Project with guided assistance](#), you may be shown a screen that summarizes your current answers with features to continue providing your requirements. This will occur if you opt not to use the guided feature or it was not offered, if you did not answer all the questions in a guided session, or if you were not satisfied after reviewing your selections and you decided to go back.

At this point, your objective remains the same: complete your requirements. To this end, you should focus on a few key elements that are displayed on the screen: **Profiles** and the **Submit Project** button.

Introducing profiles

Your requirements are collected into one or more *profiles* inside your project. A profile is a feature for organizing groups of related requirements. Profiles come in two service categories: Build and Deploy. [Learn about profile categories](#).

Your profiles will appear under tabs of each category: a **Build profile(s)** tab and a **Deploy profile(s)** tab.

NOTE: A **Deploy profile(s)** tab is available only if your project is for ProDeploy or ProDeploy Plus orders.

Each profile will have a system-generated name by default. A caret feature is displayed next to each profile to show or hide its contents. Use this feature to view a profile when there are more than one profiles listed; only one profile can be viewed at a time.

Notice the profile status

Pay special attention to the status displayed to the right of the profile name. A profile will be in one of the two possible statuses:

- **Need Inputs:** One or more service items in the profile need your input.
- **Ready:** All services in the profile have sufficient inputs.

To complete your project, all profiles must be in the **Ready** status. For ProDeploy and ProDeploy Plus orders, make sure that you check the status of profiles on both the **Build** and the **Deploy** tabs.

Provide your requirements

Your requirements need to be completed for each service item that is displayed under your profiles. For example, a Build profile will hold items such as system image and asset label; Deploy profiles will hold items such as deployment address and work instructions.

Use the action menu at the far right of each service line item to get started. In most cases, you will see an option to indicate that you do not need the service (or will use Dell defaults) and an option to create a new service (or indicate that you want the service).

If you opt to create a new service, you will be presented with a form to provide detailed requirements. For example, if you opt for an asset label, you would see a form to either pick a standard label or design your own.

If there are any previously saved forms that match your orders, the action menu will also include an option to reuse existing items instead of creating a new item.

The status of each service line item is displayed near the action menu. Each service line item must be in the **Ready** status for the overall profile to achieve the **Ready** status.

When viewing a profile's services, use the item's name hyperlink to open saved details and continue making edits. If you want to create a new form or decide that you do not want a given service, use the appropriate option in the action menu to update your needs.

[Learn about individual ProDeploy Client Suite service options and how to complete their forms in TechDirect](#)

Managing profiles and orders

Build profiles

Each Build profile displays an action menu with options to create a new profile or decline all build services. If you have any previously saved build profiles matching your orders, the menu will also display an option to use an existing profile.

When a build profile is in the **Ready** status, it will display an optional feature to submit the profile individually. This allows Dell to start processing your requirements and then release your orders to the factory while you complete other profiles.

Build profiles also include an option to move orders into different profiles or out of the project. You will find this feature with the profile's orders, which are displayed below the service list.

Deploy profiles

Below the deploy profiles tab, you will see a feature to create a new deploy profile; this allows you to add deployment locations. Adjacent to it, you will see a feature to decline all onsite deploy services if you want to install your systems on your own.

NOTE: When there are more than one deploy profiles, you must select which orders in the project should use a given profile. This can be done using the check box on the order list that appears under each profile's service list.

For orders with more than one system quantity, the order list will include a feature to specify if you want the profile to use only a subset of the units of that order; doing so means you will need to assign the remaining units from that order to another profile.

Beneath each deploy profile's order list, you will find a feature to remove the entire profile in case you added too many profiles.

Build and Deploy profiles

When a profile is opened, an edit feature appears next to the system-generated profile name. Use this feature to apply a recognizable nickname. This can be especially useful for build profiles, which you may want to reuse later with future orders.

If you previously opted not to use Build or Deploy services and your project is not yet submitted, the profile will display a link to undo that choice; if you choose this option, you can start a new profile and select services for it.

Submitting your Project or Build Profile

After all profiles are in the **Ready** status, use the **Submit Project** button to complete your Project. You will then see a screen summarizing your selections. Take a moment to review your selections. If you are satisfied, select the confirm action.

After you have confirmed your selections, you will then see a final screen with **Terms and Conditions**. Read the terms carefully. If you agree, select the action to agree and submit.

At this point, you have completed the project setup process in TechDirect.

- For preconfigure projects, you will be presented with the **Request a quote?** form. If you want to request for a quote based on the current preconfigure project, fill out the form and click **Request Quote**. This feature enables you to provide any Dell customer number or contact details of Dell salesperson that you may have, and tell us about your order plans. Dell will use this information to find the best resource to contact you to discuss the next steps. Click **Don't Request** if you do not want to request a quote. You will be presented with the **Preconfigure** home page where further options are available.

NOTE:

- If you did not request a quote for the preconfigure project while submitting the project, you can still request a quote for it on the **Preconfigure** home page under the list of submitted projects.
 - If you requested a quote for the preconfigure project, the date on which the quote was requested is displayed for that project under the list of submitted projects on the **Preconfigure** home page. A Dell representative will contact you to provide a quotation of the project.
- For projects based on real orders, you will be shown a page where you can monitor the downstream activity of your completed project.

NOTE: If you submitted an individual build profile by itself, you will still need to use the **Submit Project** feature to complete the overall project after your other profiles are in the **Ready** status (this is the only way to submit your deploy profiles).

[Learn about what happens after project submission](#)

Resolving issues with submitting Project

If you are not satisfied with your selections on the review screen, use the option to go back and update your requirements.

If you click **Submit Project** and an error message appears, make the necessary updates based on the message and try again. Your profiles may not all be **Ready** or you may have multiple deploy profiles and your orders are not completely allocated.

Post project submission activities

Related topics: [How to track Projects](#) and [How to track individual orders](#)

Preconfigure Projects

After submitting a preconfigure project, you will be presented with the **Request a quote?** form. If you want to request for a quote based on the current preconfigure project, fill out the form and click **Request Quote** or click **Don't Request** if you do not want to request a quote. You will be presented with the **Preconfigure** home page where further options are available.

NOTE:

- If you did not request a quote for the preconfigure project while submitting the project, you can still request a quote for it on the **Preconfigure** home page under the list of submitted projects.
- If you requested a quote for the preconfigure project, the date on which the quote was requested is displayed for that project under the list of submitted projects on the **Preconfigure** home page. A Dell representative will contact you to provide a quotation of the project.

If your goal is only to learn, you can choose not to request a quote. At this point, you would have experienced the same project setup process that you would follow with real orders.

If your goal is to reuse your preconfigure work with real orders, you can request a quote from Dell. This feature enables you to provide any Dell customer number or contact details of Dell salesperson that you may have, and tell us about your order plans. Dell will use this information to find the best resource to contact you to discuss the next steps.

Meanwhile, you can safely use the preconfigure actions to create more preconfigure projects or delete them from your account. The deletion process will leave any completed profiles and service items intact for use with future projects and orders.

Projects with real orders

Submitting a project or build profile that is assigned to real orders will display the **Track Projects** page, where you can monitor the downstream activities of your service delivery.

For [System Build services](#): Dell validates your requirements, creates fulfillment instructions, and then releases your orders to the factory to enable system build and shipment.

For [Onsite Deploy services](#): Your Dell Engagement Manager contacts you to set up a deployment plan.

Providing a system image

If you opted to provide a system image, make sure that you send it using the [file transfer application](#) displayed during project completion.

NOTE: Your orders cannot be released for factory build until your image is received.

Submitted projects become locked

Submitted Projects and profiles display a lock symbol to indicate that they cannot be edited. Dell can move your Project back into an editable state on your request, but only if the orders in the Project have not yet been released to the factory build process.

Managing and tracking Projects

You can manage and track Projects using the action links on the TechDirect's ProDeploy Client Suite home page.


[Learn how to access ProDeploy Client Suite in TechDirect](#)

Preconfigure projects

From the **ProDeploy Client Suite** home page, click the **Preconfigure** link to find your preconfigure projects. By default, you will see any active (incomplete) Projects. Use the **Filter by status** feature if you want to find submitted projects.

For each listed Project, you will see the Project's name as a hyperlink; click this link to view the Project details and complete the Project.

[Learn how to complete a Project](#)

For each Project, you will also see an action menu  with options to view a summary or delete the Project. Submitted projects will also display a request quote feature if you plan to use your preconfigure work with real orders.

Use the **Create New** action to create more preconfigure Projects.

Incomplete Projects with real orders


From the **ProDeploy Client Suite** home page, select the **Manage Projects** link to find incomplete Projects assigned to real orders. Use a project's name hyperlink to view the details and complete the Project.

[Learn how to complete a Project](#)

Submitted Projects with real orders

From the **ProDeploy Client Suite** home page, select the **Track Projects** link to find submitted Projects that are assigned to real orders. By default, you will see a list of submitted Projects. Use the **Filter by status** feature to list Projects by the following statuses:

- **Active:** Project is incomplete, waiting to be submitted.
- **Submitted:** Project has been submitted, but is not yet marked **Ready to Close**.
- **Ready to Close:** Dell has marked the project as ready to be closed, but the customer has not closed it.
- **Closed:** The customer has marked the Project as closed.

For **Ready to Close** Projects, you will see an action menu  with an option to close the Project. Use this action if you agree that Dell has completed the requested services for all orders in your Project.

[Learn how to track individual orders](#)

Tracking individual orders

To view the status of a particular order, go to the **Track Projects** page and find the Project containing the order of interest. To find a project, you can enter the order number of that project in the search field.

[Learn more about the Track Projects page](#)

Then, select the caret feature next to the Project name hyperlink. This will display all orders in the Project. For each order, you will see a *Build status*, and also a *Deploy status* if the order service level is ProDeploy and ProDeploy Plus.

Build status

The following represent the status of your [System Build services](#) from requirements gathering to system delivery:

- **Need Inputs:** Awaiting customer to submit the system build requirements (Build profile).
- **Processing your inputs:** Customer has submitted the system build requirements (Build profile); Dell is processing them.
- **Preparing to Build:** Dell has released the order to be built in the factory.
- **In Transit:** Order has completed the factory build and started the shipping process.
- **Delivered:** Systems on the order have been delivered.

For **In Transit** and **Delivered**, the status name will appear as a hyperlink; click the link to view the shipping details.

Deploy status

The following represent the status of your [Onsite Deploy services](#) from requirements gathering to system set up:

- **Need Inputs:** Awaiting customer to submit the onsite deployment requirements (Deploy profile).
- **Inputs complete:** Customer has submitted the onsite deployment requirements (Deploy profile); Dell is processing them.
- **In Progress:** Onsite deployment service for the order has started.
- **On hold:** Onsite deployment service for the order has started, but then stopped.
- **Complete:** Onsite deployment service for the order is complete.

For **In Progress** and **Complete**, the status name will appear as a hyperlink; click the link to view asset-level deployment details.

Learning about services

Learn about the different ProDeploy Client Suite service items you may see in TechDirect, how they are organized, and how to complete your requirements for them.

Build versus Deploy categories

Your requirements are collected into one or more *profiles* inside your project. [Learn how to create a new project](#)

A profile is a feature for organizing groups of related requirements. Profiles come in two categories, Build and Deploy:

- **Build:** Represents services that are applied to your systems during the factory build process before they are shipped.
- **Deploy:** Represents services that are performed onsite as part of the system installation process.

Completing service forms

Whenever you complete new forms for a given service during project setup, take note of the following general features:

- **Nickname:** By default, your forms will be given a system-generated name, but you will see an optional feature to provide a recognizable nickname, which can be helpful over time if you want to reuse existing forms for future orders and projects.
- **Save progress, Edit, and Mark as Complete:** If you are completing forms using the [alternate path](#) for project setup, you can save progress as you go and mark complete after you have answered all the questions. If you have marked a form as complete and the project is not yet submitted, you will see an **edit** link on the form if you need to make updates.

Individual Build service items

The following are the system build service items that you may see in TechDirect depending on your ProDeploy Client Suite service level and the answers that you provide as you complete your project.

Provisioning

NOTE: This service is only available for ProDeploy and ProDeploy Plus orders, but may be purchased separately and combined with an order which has Basic Deployment service level.

NOTE: The Provisioning service may not be available in certain countries, for example, China.

What are provisioning services?

Software-based services that help automate the tasks to setup a computer device. For example, tasks like connecting to domains, granting privileges, and software installation.

Do I need provisioning?

The choice is yours. If you would like to systematically install applications and system management files on your systems, provisioning is a good option for you.

How do I provide provisioning details?

If you have a supported provisioning solution, Dell can preload your system management files in the factory to reduce deskside provisioning time. You'll just need to provide a few specifications and upload your provisioning files to Dell. To get started, choose **Dell Provisioning for VMware® Workspace ONE™** and complete the required forms.

① **NOTE:** This service requires a Workspace ONE license. If you do not have one, contact your Dell Engagement Manager.

① **NOTE:** Delays in providing your provisioning files will impact your order ship date.

System Image

① **NOTE:** This service is only available for ProDeploy and ProDeploy Plus orders, but may be purchased separately and combined with an order which has Basic Deployment service level.

What is a system image?

A snapshot of the operating system, applications, and data that you want to install on your systems. For example, image file formats include WIM and Ghost, such files can be created using Dell ImageAssist and other imaging software available in the market.

Do I need to provide a system image?

The choice is yours. Your systems will ship with a default operating system and drivers. If that meets your needs, simply accept the default. Alternatively, Dell can install your own system image during the fulfillment process to reduce the software installation steps during onsite deployment: you only need to provide some details about the image and upload the file to Dell.

How do I provide a new system image?

When creating a new system image form in TechDirect, you must select the type of image you want to use: Static image, Static Dell ImageAssist image, Dynamic Dell ImageAssist image, or SCCM Prestaged Media/MDT Lite Touch. A **Help me Choose** link is available to clarify the different types of images.

You will then be presented with a series of questions, one at a time; complete each item until no further questions are displayed.

① **NOTE:** If you choose to create a Static or Dynamic Dell ImageAssist image, you will be provided with an option to download Dell's ImageAssist tool. For information on the operating systems and recommended frameworks that support ImageAssist, see the *ImageAssist Static User's Guide For Single Platform* or the *ImageAssist Dynamic User's Guide For Multiple Platforms* at Dell.com/ServiceabilityTools.

① **NOTE:** For Dynamic and SCCM/MDT options, you will first be presented information about the required imaging tools and instructions for creating your image.

If you have not yet created your image or it was not created as instructed, you should stop working on the form, create the image offline, and then resume in TechDirect to complete the form.

After you are ready to send your system image to Dell, use Dell's [file transfer application](#).

① **NOTE:** If you choose to provide your own system image, it must be received and processed before your orders can be released for factory build.

Software Export Compliance

① **NOTE:** For the orders that include Provisioning or System Image or Connected Configuration services, you must fill the export compliance form.

What is export compliance?

Certification that any software installed as part of your ProDeploy Client Suite services complies with regulations that govern the export of software from one country to another.

Do I need to provide export certification?

If you have opted to provide your own system image or to use Dell's Connected Configuration services, export certification is required to ensure that the software packages you provide to Dell can be shipped internationally as required by Dell's fulfillment process.

How do I provide export certification?

Read the standard terms and select one of the following options:

- Select **I agree to the Standard Export Terms** if your software meets the standard terms and you are authorized to agree.

- Select **I prefer to download the Standard Export Terms** if you want an outside resource to review the terms and email your response to Dell. If you select this option, the page displays a link to download a PDF file that contains the Standard Terms and the Dell Trade Compliance email address. You will need to download the PDF, have an authorized user complete it, and then send the completed form to the designated email address.
- Select **I wish to view the Detailed Export Terms** if your image does not meet the standard terms. In this case, the screen will refresh and display the Detailed Export Terms. Read the terms to continue. If you agree to the terms, select the **I agree** option. You will then see a form to provide details for each software title in your image that uses elevated encryption.

System BIOS firmware or UEFI

What is system BIOS?

BIOS (Basic Input/Output System), or for newer systems UEFI (Unified Extensible Firmware Interface), is the firmware that manages the hardware devices on your system; it includes customizable settings such as boot order and screen brightness.

Do I need to provide BIOS settings?

The choice is yours. Your systems will ship with the default firmware settings optimized for each model. If that meets your needs, accept the default. Alternatively, if your organization requires specific settings, you can provide them using the form.

How do I provide BIOS settings?

You do not need to specify every setting, but only the ones that are important to you. By default, the form shows settings commonly configured by other customers. You will also see a link to view a complete list of all available settings. Browse the categories or use the search box to find settings that you want to customize.

As you find settings that you want to customize, select the desired values and click the **Add** button below each group of settings. The added settings appear above in a **Current Custom Settings** section. After you have configured the settings that you want, you can review them and remove any that you do not want to keep.

System Asset Label

What is a system asset label?

A system asset label is a sticker placed on your Dell system with information to help your company catalog inventory. Label information can include details such as order number, manufacture date, and processor speed.

Do I need a system asset label?

The choice is yours. Dell does not place labels by default. If you want a label for inventory purposes, opt for this service and complete the form to provide your requirements.

How do I provide system asset label settings?

If you want a system label, use the form to select from a list of predefined templates or design your own. If you opt to design your own, you will see three sections. Use the **Label type** section to select your label size, the **Label Content** section to select data fields and the **Label Placement** section to select the label location.

NOTE: Standard label placement varies by system, including a top placement on notebook systems. To configure labels and choose their location, select 'Use an online form' option and follow the steps.

Ship Box Label

What is a ship box label?

A ship box label is a custom sticker placed on your shipping box with system specific information, order specific information or both that helps you receive, identify, and track your assets.

Do I need a ship box label?

The choice is yours. Dell does not place labels by default. If you want a ship box label for inventory purposes, opt for this service and complete the form to provide your requirements.

How do I provide ship box label settings?

If you want a ship box label, use the form to select the information that you want on the ship box label.

NOTE: The ship box labels are larger in size as compared to the system asset labels and may be placed at any location on the shipping box.

Online First Article

NOTE: This service is not available for all Dell systems.

What is an Online First Article (OFA)?

A service that enables you to remotely connect to a live system configured with your system image and BIOS settings, so that you can identify and resolve any concerns before your orders ship.

Do I need this service?

The choice is yours. If you opt for this service, Dell will notify you with login details after your OFA is ready for review.

NOTE: This service will add time to the system ship date because Dell must set up the test system and then wait for your audit before releasing your orders to the factory. It is important that you complete your audit in a timely manner to avoid shipping delays.

How do I select to use this service?

Use the relevant selection feature to indicate that you want the service when you see this option presented during project completion.

Standard Asset Report

What is a Standard Asset Report (SAR)?

An asset report contains information about your orders that can help you catalog your inventory such as order number, manufacture date, and processor speed. The ProDeploy service includes a Standard Asset Report, which is emailed to the address provided with the order as your systems ship. If you opt for this service, historical reports are also available in TechDirect.

Do I need this service?

The choice is yours. Dell does not send reports by default. If you want a report for inventory purposes, you can opt for this service.

How do I select to use this service?

Use the relevant selection feature to indicate that you want the service when you see this option presented during project completion.

Connected Configuration

NOTE: This service is only available for ProDeploy Plus orders.

NOTE: The connected configuration feature is not available for Brazil.

What is Connected Configuration?

Dell's Connected Configuration service enables you to keep an instance of your Microsoft SCCM or MDT image inside our Dell facilities. You can store and maintain your image via a secure connection and complete configuration tasks traditionally performed only when the system is present on your network, such as adding users to Active Directory and domain join. In addition, you can change BIOS settings, partition your hard drive, and add third-party software, so that your systems arrive ready to use out of the box.

Do I need this service?

The choice is yours. If you use SCCM or MDT and would like to remotely configure your Dell systems before they ship, Dell can work with you to set up a distribution point inside our facilities.

NOTE: The set up process may last a few weeks and your orders will not be released until set up is complete.

How do I setup this service?

Complete the form questions. A Dell specialist will then engage to discuss further steps including the testing process.

NOTE: The last section of the online form involves downloading a document, completing it offline, and then uploading the finished document.

Additional Services

What are Additional Services?

These are services that are not part of ProDeploy Client Suite, but may be purchased separately and combined with ProDeploy Client Suite orders. In some cases, these services may be product-specific.

Do I need this service?

The choice is yours. We encourage you to discuss any service needs that are not met by ProDeploy Client Suite with your Dell service and sales representatives.

How do I setup this service?

After aligning your needs with your Dell service and sales representatives, a simple form will be made available in your project. The form includes a free text box and a file upload feature to type or attach your customized requirements.

Individual deploy service items

The following are the onsite deploy service items that you may see in TechDirect depending on your ProDeploy Client Suite service level and the answers you provide as you complete your project.

Deployment address

What is a deployment address?

The physical location where you want your systems to be set up.

Do I need to provide a deployment address?

A deployment address is required if you have opted to use onsite deploy services.

NOTE: Dell will ship your systems to the address on the order. You are responsible to ensure that the systems are present at the deployment location.

How do I provide a deployment address?

Use the form that is presented during project setup to provide the physical address.

NOTE: You will need a separate deploy profile for each different deployment location that you need for the orders in your project.

Deployment contact

What is a deployment contact?

The person who should be contacted to coordinate onsite deployment activities at the designated location.

Do I need to provide a deployment contact?

A deployment contact is required if you have opted to use onsite deploy services.

How do I provide a deployment contact?

Use the form that is presented during project setup to provide the primary contact information. You may also provide a secondary contact.

Site instructions

What are site instructions?

Site instructions are the instructions that the onsite technician should know about the deployment site, for example, instructions for parking and building access.

Do I need to provide site instructions?

Site instructions are required if you have opted to use onsite deploy services to ensure that the onsite technician understands the requirements of the deployment site.

How do I provide site instructions?

Use the form that is presented during project setup.

Work instructions

What are work instructions?

Instructions on what you want the onsite technician to do during system setup. The form includes credentials for accessing your network, a review of the standard instructions, and options to provide any additional steps that you require.

Do I need to provide work instructions?

Work instructions are required if you have opted to use onsite deploy services to ensure that the onsite technician understands how you want your systems to be deployed and has the necessary access.

How do I provide work instructions?

Use the form that is presented during project setup.

Data migration

NOTE: This service is only available for ProDeploy Plus orders in conjunction with onsite system installation service.

What is data migration?

The onsite technician will migrate data and personalized system settings from your legacy systems to your new systems based on your requirements. Dell uses the Dell Migration Tool to migrate data from legacy systems to new systems.

Do I need this service?

The choice is yours. If you opt to use this service, you will need to ensure that your legacy systems are present at the deployment location.

How do I provide data migration requirements?

Use the form that is presented during project setup.

Data sanitization

NOTE: This service is only available for ProDeploy Plus orders in conjunction with onsite system installation service.

What is data sanitization?

Data Sanitization service enables you to delete all files from your legacy systems using a remote console in TechDirect. We save records of every wiped system, which provides your organization with certified records of data removal. [Learn more about Data Sanitization](#)

Do I need this service?

The choice is yours.

How do I provide data sanitization requirements?

Use the relevant selection feature to indicate that you want the service when you see this option presented during project completion.

Installation packaging removal

ⓘ | NOTE: This service is only available when purchased as an add-on service with ProDeploy or ProDeploy Plus orders.

What is installation packaging removal?

The onsite technician will move the system packaging material and clean-up the deployment area.

Do I need this service?

The choice is yours.

How do I provide my requirements?

Use the form that is presented during project setup.

Application Installation

ⓘ | NOTE: This service is only available when purchased as an add-on service with ProDeploy or ProDeploy Plus orders.

What is application installation?

The onsite technician will install up to three software applications as part of your deployment service.

Do I need this service?

The choice is yours.

How do I provide application installation requirements?

Use the form that is presented during project setup.

ⓘ | NOTE: Ensure that the source software and licenses are present at the deployment location.

Additional Services

What are Additional Services?

Services that are not part of ProDeploy Client Suite, but may be purchased separately and combined with ProDeploy Client Suite orders. In some cases, these services may be product-specific.

Do I need this service?

The choice is yours. We encourage you to discuss any service needs that are not met by ProDeploy Client Suite with your Dell service and sales representatives.

How do I setup this service?

After aligning your needs with your Dell service and sales representatives, a simple form will be made available in your project. The form includes a free text box and a file upload feature to type or attach your customized requirements.

Managing files and reports

In some cases, you may need to upload or download documents and other files using your TechDirect account. For example, there may be a reason to upload supplemental documentation for your ProDeploy Client Suite services for reference purposes.

To manage such files, go to the **ProDeploy Client Suite** home page in TechDirect ([How to access TechDirect](#)) and select any of the following links: **Create Project**, **Manage Projects**, **Track Projects**, or **Preconfigure**.

On these pages, you will see a **Files & Reports** link. Select this link to access the following features:

- **Upload files**

Use the **Upload File or Report** link to upload files. This feature allows you to categorize your file, provide a name and description, and browse to the local file for upload. Keep your browser window open while the file is uploading. You will see a success message when the upload is complete. At that point, click **save progress** and then click **mark as complete** to finish.

- **View and download files**

In the **Uploaded Files and Reports** section, you will see a list of uploaded files. Each file line item will display details such as *file size* and a *file name* hyperlink; click the link to download the file.

- **Request a Standard Asset Report**

In the **Request Standard Asset Report** section, you will see a feature to search for asset reports. Enter a date to find reports within a 14-day range preceding the date you entered. If data is found, your browser will display a link to download the report. The search process may take a few minutes.

NOTE: Asset reports will only be available if you have previously placed ProDeploy Client Suite orders and opted to receive Standard Asset Reports. Also, asset report data is available for a maximum of 90 calendar days from the order date.

Managing Data Sanitization service

NOTE: Data Sanitization service is available with ProDeploy Plus purchases only. No Data Sanitization process leaves a hard drive or computer as free from residual data as a new product. Dell makes no recommendations regarding your security needs or representations regarding the effectiveness of one method of Data Sanitization over another. It is your responsibility to protect any confidential or sensitive information available on your hard drives and systems recovered by Dell.

Service setup

If you purchased ProDeploy Plus and opted for remote Data Sanitization service, during the onsite deployment, the technician will install the Data Sanitization tool on each legacy system that is to receive remote Data Sanitization service. The technician requires administrative access to the systems, and the systems must be connected to the internet to complete the Data Sanitization service.

Initiating service

After the Data Sanitization Tool is installed on your legacy systems using the Dell Migration Tool, and an internet connection has been established, the systems will appear in a Data Sanitization console on TechDirect's ProDeploy Client Suite home page ([How to access TechDirect](#)). To view your systems, go to the console. Systems ready to have the Data Sanitization process initiated are reflected as **ready** in the Data Sanitization console. You may initiate Data Sanitization on a single system or a group of systems.

Before initiating the service for Data Sanitization, ensure that the following conditions are met:

- The systems should have power supply and internet connectivity throughout the process.
- The systems must have a display/monitor to view notifications.
- Any external drives should not be connected to the system upon initiating the Data Sanitization process.
- The systems should not be on a network where the systems could boot to the PXE server.
- Secure boot must be disabled in BIOS before initiating the Data Sanitization process.

Service completion and reporting

When the Data Sanitization process starts, the system is disconnected from TechDirect; these systems appear as **In Progress** in the console. After completion, the Data Sanitization application will automatically be removed from the system and a summary report is available in the console, including the number of Data Sanitization software uses remaining. If the process completed successfully, the summary is consolidated in a downloadable certificate of completion. If issues are encountered, you may initiate a retry; if problems persist, check for network connection issues, or engage Dell Support Services for assistance.

The following are the different statuses that you may see for a given system:

- **Ready:** The system is online and connected to the Data Sanitization console. Data Sanitization can be initiated.
- **Scheduled:** The system is currently scheduled for a Data Sanitization process.
- **Scheduled - Offline:** Data Sanitization is scheduled, but the system is not connected to your Data Sanitization console.
- **In Progress:** Data Sanitization has been initiated. The status will be updated after the system reconnects to the console.
- **Complete:** The Data Sanitization process was successful.
- **Failed:** Data Sanitization was initiated on the system, but a failure has occurred. Either one or zero attempts are remaining.
- **Failed (Asset offline during scheduled sanitization):** The system did not have an active network connection at the scheduled time.

- **Failed (not all drives were successfully sanitized):** All drives were not successfully sanitized. Zero attempts are remaining.

NOTE: The Data Sanitization service must be completed on your systems within thirty (30) days of the new system installation.

Getting support

Contact us

If you need help at any point during the ProDeploy Client Suite service delivery process, use the **Contact Us** link in the TechDirect portal to email us your questions. Use the form to provide your contact details, the relevant subject, and your comments. Your Dell Engagement Manager or a support specialist will reply by email or call you to discuss your concerns.

Post deployment 30-days support for ProDeploy Plus purchases

ProDeploy Plus service includes 30 days of post-deployment support in addition to any services that are covered in your system warranty.

Contacting Dell by phone

Find the Express Service Code (ESC) for the system, go to dell.com/support and use the **Contact Us** link to find the appropriate phone number based on your region. When prompted by the automated telephone system, enter your ESC to route the call to the appropriate Technical Support team.

 **NOTE: Enter the ESC even if the issue is related to Data Sanitization on your old system.**

Submitting a service request

Log in to techdirect.com. On the **Dashboard** page, from the **Services** menu, click **Technical Support**. Next, click the **Create New Service Request** link, enter the issue details, and submit. You will receive a call from Dell Technical Support to resolve the issue.

Adding users and resetting passwords

Adding TechDirect users

You can add other users in your organization to your TechDirect account to enable them to use the ProDeploy Client Suite features or to enable orders placed with their email address, for example, procurement team, to be automatically associated with your account.

To add users, login to your TechDirect account with administrative privileges and go to **Utilities > Administrator Control Panel**. From there, click the **Technicians** tab and then click **Add Technician**. Enter the user's information and follow the action prompts to review and submit. At this point, an email is sent to the user with the login information.

Resetting passwords

If you have forgotten your TechDirect login details, you can reset your password. The password reset process can also be used to complete registration if you have lost a new registration email containing your login details.

On the TechDirect home page, click **Sign in** and then click **Forgot Password?**. Next, enter the primary email address registered with TechDirect and click **Submit**. An email with a link to reset your password is sent to the primary email address. Click the link and follow the prompts to enter the new password and submit.

NOTE: The password reset link expires after 24 hours. If the link has expired, repeat the earlier process to send a new password reset email with a new link.

ProDeploy Client Suite Features

The following table summarizes the features that are available with each ProDeploy Client Suite offer:

Table 1. ProDeploy Client Suite Features

Stage	Features	Basic Deployment	ProDeploy	ProDeploy Plus
Pre-Deployment	Single point of contact for project management	✓	✓	✓
	TechDirect portal for configuration details and updates	✓	✓	✓
	Deployment engineer develops implementation plan		✓	✓
	Dell Technology Service Manager engagement via ProSupport Plus			✓
Deployment	Connected Configuration*			✓
	Provisioning for VMware® Workspace ONE™	Add-on	✓	✓
	Load an image: WIM, Ghost, ISO, or ImageAssist	Add-on	✓	✓
	Configure BIOS settings	✓	✓	✓
	Apply asset tag and shipping box label	✓	✓	✓
	Standard asset reports	✓	✓	✓
	Onsite installation of client system available 24x7		✓	✓
	Project documentation with knowledge transfer		✓	✓
	User settings and data migrated to new systems			✓
	Data sanitization** on retiring client systems			✓
Post-deployment	30 days post-deployment support			✓
	Training credits for Dell EMC Education Services			✓

* This feature is not available for Brazil.

** For more information, please see the Dell Media Sanitization Statement. Dell makes no recommendations regarding the customer's security needs or representations regarding the effectiveness of one method of data removal over another. It is the customer's responsibility to protect any confidential or sensitive information contained on its hard drives recovered by Dell.