FRESN☁STATE

Discovery. Diversity. Distinction.

INSTRUCTION MANUAL FOR END-USERS

IT PURCHASE REVIEW SYSTEM

Table of Contents

Background Information

The Information Technology Purchase Review (ITPR) form and process was created to help purchase requesters make well-informed purchasing decisions for IT products and services, address the University's obligations to comply with existing laws, policies, and standards, and make best use of campus IT resources.

The ITPR form must be completed prior to the purchase or acquisition of any IT-related product or solution, regardless of funding source or total cost. The ITPR form was designed to be dynamic, and the number and types of questions displayed changes based upon specific responses about the purchase, the product/solution and its intended use.

Based upon responses provided in the ITPR form, a more in-depth assessment may be required to address:

- Accessibility
- Information Technology Reviewer
- Information Security and Privacy
- Technology Integration and Support
- Procurement and Contracting

ITPR System

Login Process

1. Go to the Forms Application Landing Page: https://forms.fresnostate.edu/

    - Click on "**Login**" button (Figure 1) in the top-right corner of the webpage.
    - Enter your email username and password and click on campus "**Login**" button (Figure 2)

Figure 1 – Login

Figure 2 – Campus Login

Forms Application Menu Options

1. You will be taken to the Forms Application page where you can:
    - Click on **"e-forms"** to request a new review
    - Click on **"My Forms"** to view the status of an existing request
    - Click on **"My Workitems"** to print a certificate of completion for any review which has a status of **"complete."**
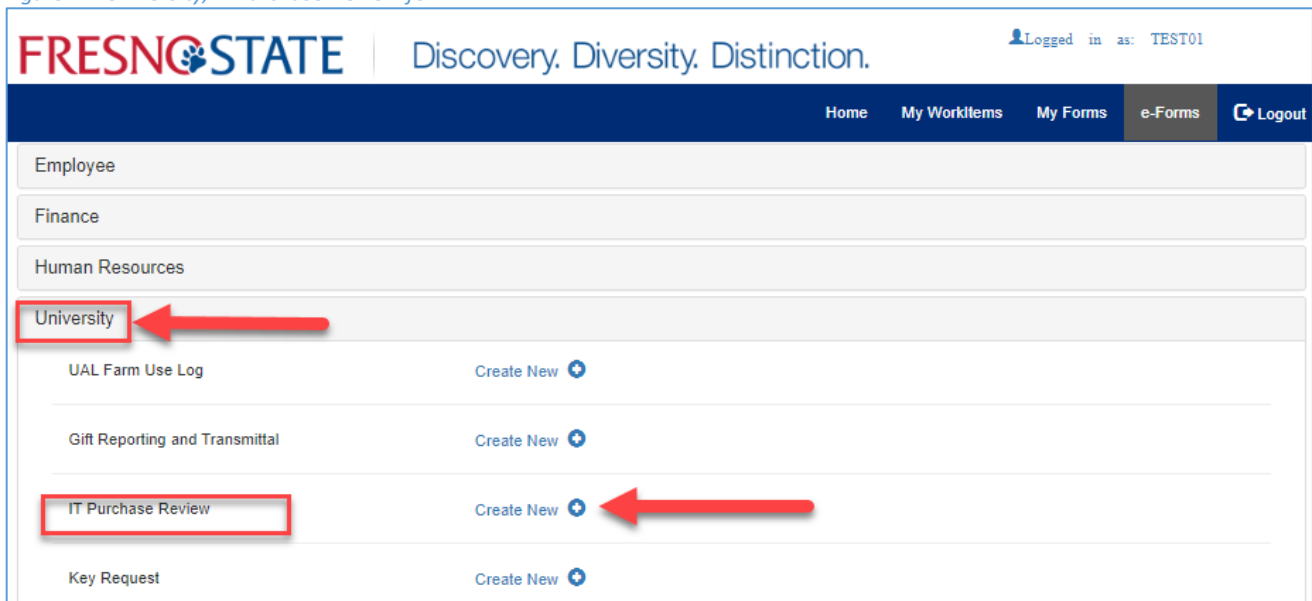
e-forms to request a new review

1. Click on **"e-Forms"** (Figure 3)

2. Click on the "**University**" section (Figure 4).
3. Find "**IT Purchase Review**" and click "**Create New**". A new IT Purchase Review form will open (Figure 4).

Figure 4 – University, IT Purchase Review form

IT Purchase Review form content

1. The form is dynamic and the number and types of questions asked will vary depending on how you answer various questions.

2. The form includes the following sections:
   - General Purchase Information (included for all reviews)
   - Product or Service Description (included for all reviews)
   - Accessibility (included if applicable)
   - Information Security (included if applicable)
   - Integration and Support (included if applicable)
   - File Uploads (included if applicable)

3. Click the **"Submit"** button
   - A "Submitted Popup Message (Figure 5) will display once your form has been successfully submitted.
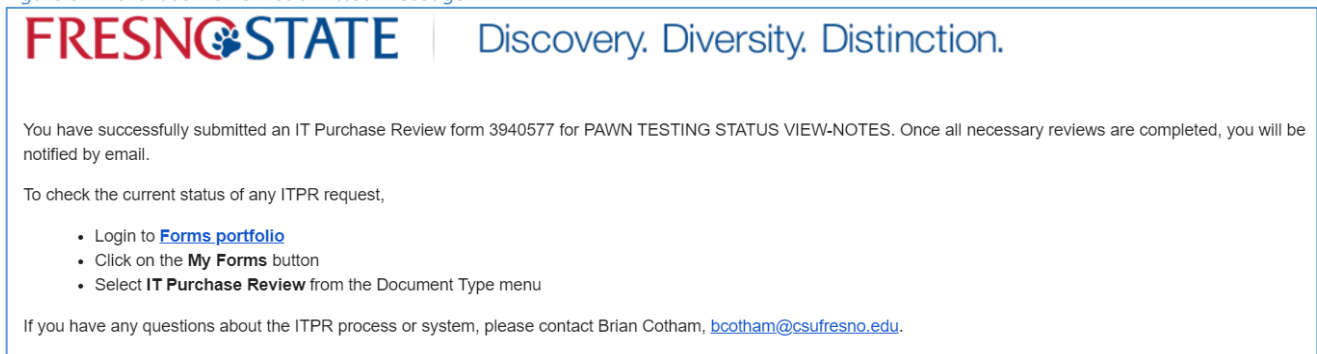
Figure 5 – Submitted Popup Message

FRESNOSTATE | Discovery. Diversity. Distinction.

Your form has been submitted, you may now close this tab. If you would like to fill out another form please return to the Forms Portfolio Application.
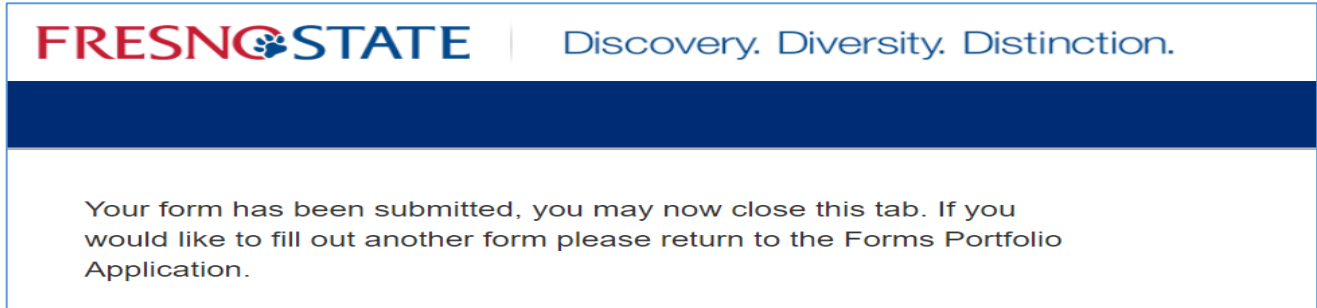
- Once you have completed the form you will receive an email notification message "Purchase Review - Submitted" (Figure 6), which will include a link to Forms Application page.
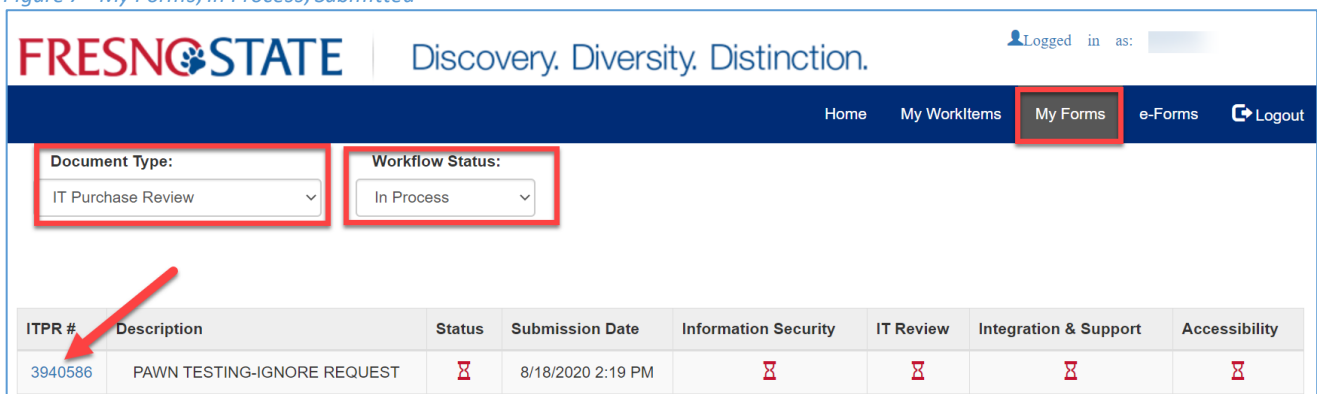
Figure 6 – Purchase Review Submitted Message

FRESNOSTATE | Discovery. Diversity. Distinction.

You have successfully submitted an IT Purchase Review form 3940577 for PAWN TESTING STATUS VIEW-NOTES. Once all necessary reviews are completed, you will be notified by email.

To check the current status of any ITPR request,

- Login to **Forms portfolio**
- Click on the **My Forms** button
- Select **IT Purchase Review** from the Document Type menu

If you have any questions about the ITPR process or system, please contact Brian Cotham, bcotham@csufresno.edu.

My Forms to view the status of In Process request

1. Click on "**My Forms**" (Figure 7) to view the status of an existing request
2. In the Document Type drop down select "IT Purchase Review" and select Workflow Status "In Process" (Figure 7).
3. Click on ITPR # to view the form that was submitted (Figure 7).

Figure 7– My Forms, In Process, Submitted

FRESNOSTATE | Discovery. Diversity. Distinction.   Logged in as:

Home   My WorkItems   My Forms   e-Forms   Logout

Document Type:
IT Purchase Review

Workflow Status:
In Process

ITPR #	Description	Status	Submission Date	Information Security	IT Review	Integration & Support	Accessibility
3940586	PAWN TESTING-IGNORE REQUEST	⧗	8/18/2020 2:19 PM	⧗	⧗	⧗	⧗

IT Purchase Review Dashboard - Checking In Process review

You can check the status of any review by clicking the "Review" button in the IT Purchase Review Dashboard. Depending on how various questions in the survey are answered, a

- Information Security
- IT Liaison Review (this task was previously known as the "IT Review")
- Integration & Support
- Accessibility

Status indicators, Not Applicable (N/A), In-Progress (⧗), Deny (✖), and Complete (✔), are shown for each possible tasks/reviews (figure 8).

Figure 8 - IT Purchase Review Dashboard Status Listing

Document Type:	Workflow Status:						
IT Purchase Review	In Process						

ITPR #	Description	Status	Submission Date	Information Security	IT Review	Integration & Support	Accessibility
3940586	PAWN TESTING-IGNORE REQUEST	⧗	8/18/2020 2:19 PM	✖	✔	N/A	⧗

IT Purchase Review Dashboard - Access/print certificates of completion

1. Click on "**My Forms**" (Figure 8) to access/print certificates of completion.
2. In the Document Type dropped down select "IT Purchase Review" and select Workflow Status "Complete" (Figure 8).
3. In the Status column click on done button (⊞) (Figure 8).

Figure 8– My Forms, Complete, Done

FRESN◉STATE | Discovery. Diversity. Distinction.

👤Logged in as:

Home My WorkItems My Forms e-Forms Logout

Document Type:	Workflow Status:						
IT Purchase Review	Complete						

ITPR #	Description	Status	Submission Date	Information Security	IT Review	Integration & Support	Accessibility
3940577	PAWN TESTING STATUS VIEW-NOTES	✖	8/12/2020 12:59 PM	✖	✔	✔	✖
3940573	PAWN TESTING IGNORE-1 DENY	✖	8/11/2020 3:46 PM	Completed	✖	✔	✖
3940572	PAWN TESTING IGNORE	⊞	8/11/2020 3:41 PM	Completed	✔	✔	✔
3940570	PAWN TESTING IGNORE	⊞	8/11/2020 3:38 PM	N/A	N/A	N/A	N/A
3940489	TEST ALL APPOVERS	⊞	7/29/2020 4:46 PM	✔	✔	✔	✔
3940486	TEST SECURITY REVIEW	⊞	7/29/2020 2:29 PM	✔	✔	N/A	✔

Certificate of Completion

Once a review has been fully completed, the status indicator shown in the Status column will change to Complete (![icon]). To access the Certificate of Completion for any review, click the (![icon]) icon and the system will display a webpage which shows various details of the review.

The Certificate of Completion page (Figure 9) can then be printed or saved as a PDF (if Adobe Acrobat Pro, or similar solution, is installed), and must be included when submitting a requisition/order to the University or Foundation Purchasing office.

Figure 9– Certificate of Completion