



Discovery. Diversity. Distinction.

# INSTRUCTION MANUAL FOR REVIEWERS

## IT PURCHASE REVIEW SYSTEM

## TABLE OF CONTENTS

### Table of Contents

<b>Background Information .....</b>	<b>3</b>
<b>ITPR System .....</b>	<b>3</b>
Login Process.....	3
Forms Application Menu Options .....	3
e-forms to request a new review.....	4
IT Purchase Review form content.....	4
IT Purchase Review Dashboard – Submitter can check In Process review .....	6
IT Purchase Review Dashboard – Submitter can Access/print certificates of completion .....	6
Submitter can access the Certificate of Completion .....	7
IT Purchase Review Dashboard – Reviewer Process.....	7
Email notification(s).....	7
IT Purchase Review Dashboard – Take Action on the Request .....	8

## 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

A screenshot of the Campus Login form. The form has fields for Username and Password, both highlighted with red boxes. Below these fields is a checkbox labeled "Warn me before logging me in to other sites." and a red arrow pointing to the Login button. At the bottom, there is a security warning: "For security reasons, quit your web browser when you are done accessing services that require authentication!"

### 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

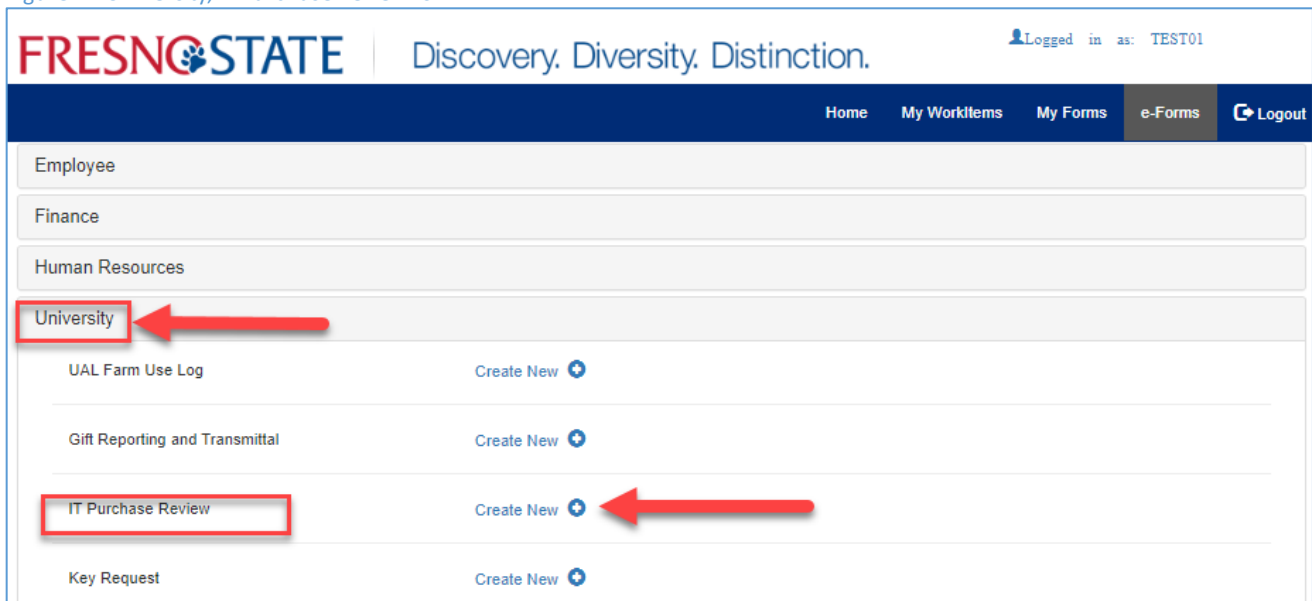
1. Click on “**e-Forms**” (Figure 3)

Figure 3 – e-forms



2. Click on the “**University**” section (Figure4).
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



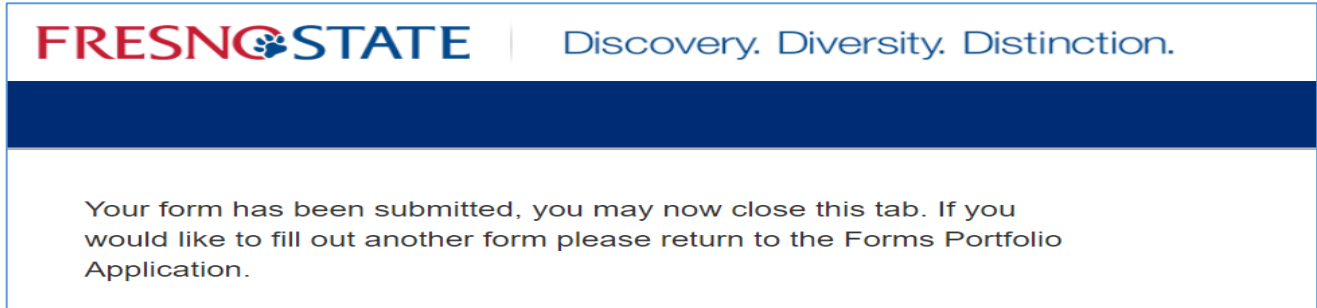
## IT Purchase Review form content

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

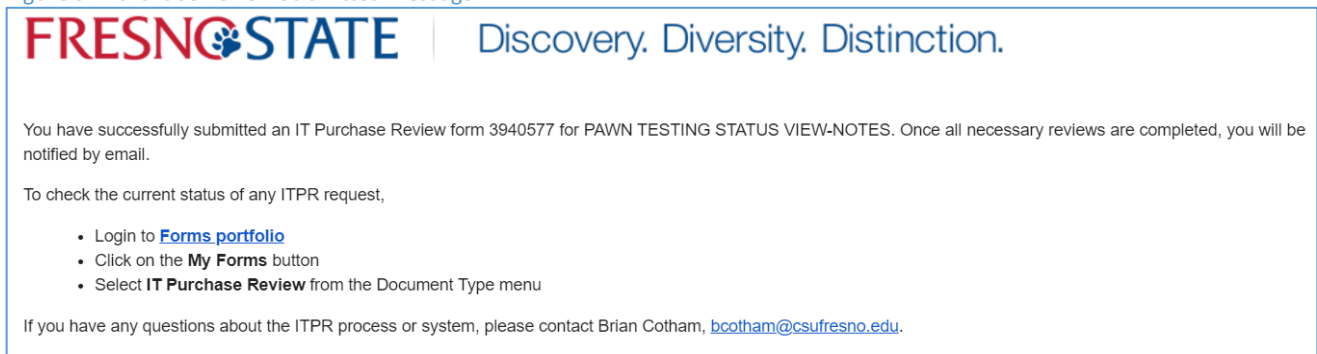
- A “Submitted Popup Message (Figure 5) will display once your form has been successfully submitted.

Figure 5 – Submitted Popup Message



- 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.

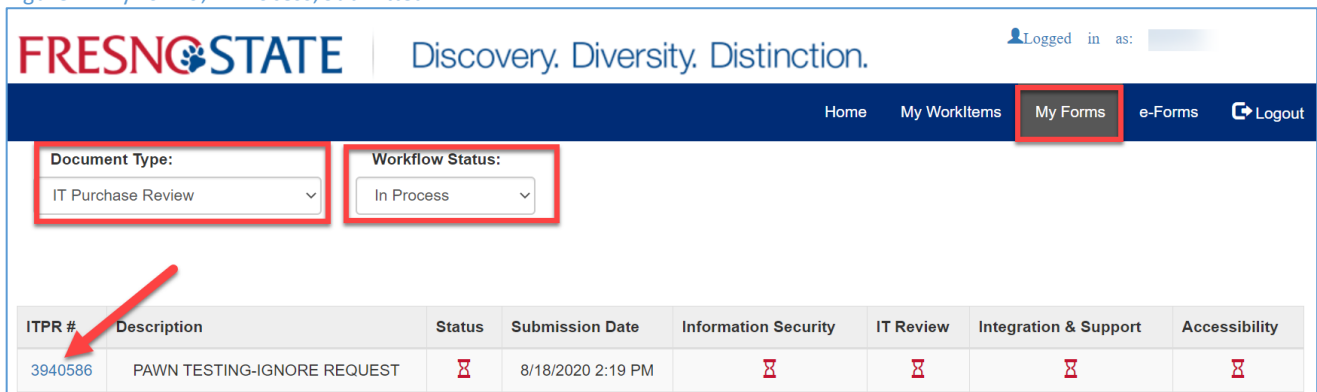
Figure 6 – Purchase Review Submitted Message



My Forms to view the status of In Process request

1. Go **“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



## IT Purchase Review Dashboard – Submitter can check In Process review

A submitter 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.

- 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: 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	✗	✓	N/A	⌚

## IT Purchase Review Dashboard – Submitter can Access/print certificates of completion

1. Go “**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

FRESNO STATE | Discovery. Diversity. Distinction. | Logged in as: [User]



Home My WorkItems **My Forms** e-Forms Logout

Document Type: IT Purchase Review

Workflow Status: 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 APPROVERS	📄	7/29/2020 4:46 PM	✓	✓	✓	✓
3940486	TEST SECURITY REVIEW	📄	7/29/2020 2:29 PM	✓	✓	N/A	✓

### Submitter can access the Certificate of Completion

Once a review has been fully completed, the status indicator shown in the Status column will change to Complete (  ). To access the Certificate of Completion for any review, click the (  ) 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



The screenshot shows the 'Certificate of Completion' page for ITPR #3940572. The page header includes the Fresno State logo and the tagline 'Discovery. Diversity. Distinction.' with a 'Logged in as:' indicator. The navigation bar contains links for Home, My WorkItems, My Forms, e-Forms, and Logout. The main content area displays the title 'Certificate of Completion' and the ITPR number 'ITPR #3940572: [REDACTED] TESTING IGNORE'. Below this, it lists submission details: Submitted: 8/11/2020 3:41 PM, Completed: 8/11/2020 4:42 PM, and Created By: [REDACTED]. A horizontal line separates this from a list of approvals: Integration and Support: APPROVED on 8/11/2020 4:18 PM, IT Review: APPROVED on 8/11/2020 4:41 PM, Information Security: APPROVED on 8/11/2020 4:16 PM, and Accessibility: APPROVED on 8/11/2020 4:10 PM.

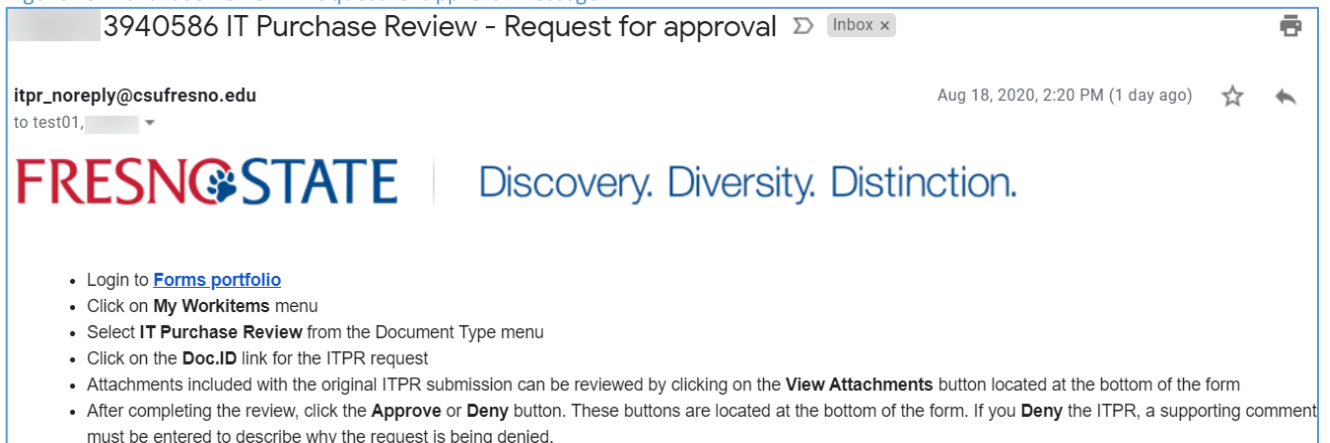
### IT Purchase Review Dashboard – Reviewer Process

#### Email notification(s)

The IT Purchase Review system will dynamically trigger and send up to a maximum of five separate emails based upon how an end-user completes the survey. Reviewers may receive more than one email (e.g. IT Liaison might receive one email for “Generate Quote” and another for “IT Liaison Review”).

An email notification “Purchase Review - Request for approval” message (Figure 10), which will include a link to Forms Application page and instructions to take action on an ITPR request.

Figure 10– Purchase Review – Request for approval message



The screenshot shows an email notification titled '3940586 IT Purchase Review - Request for approval' from 'itpr\_noreply@csufresno.edu' to 'test01'. The email body features the Fresno State logo and tagline. Below this, a list of instructions is provided: Login to [Forms portfolio](#), Click on **My Workitems** menu, Select **IT Purchase Review** from the Document Type menu, Click on the **Doc.ID** link for the ITPR request, Attachments included with the original ITPR submission can be reviewed by clicking on the **View Attachments** button located at the bottom of the form, and After completing the review, click the **Approve** or **Deny** button. These buttons are located at the bottom of the form. If you **Deny** the ITPR, a supporting comment must be entered to describe why the request is being denied.

## IT Purchase Review Dashboard – Take Action on the Request

Updating task/review status to complete

1. Click on the [Forms portfolio](#) link in the email notification.
2. Click **“My Workitems”** (Figure 11) to take action on the ITPR Request
3. In the Document Type dropped down select **“IT Purchase Review”** (Figure 11).
4. Click on the **“Doc.ID”** link (Figure 11).for the ITPR request

Figure 11– My Workitems, ITPR, Doc.ID

The screenshot shows the Fresno State My Workitems dashboard. At the top, there's a navigation bar with links for Home, My Workitems, My Forms, e-Forms, and Logout. Below the navigation bar, there's a section for Document Type, where 'IT Purchase Review' is selected. A search bar is also present. Below the search bar, there's a table with columns: Doc.ID, Submitted By, Date Submitted, Document Type, and Description. The table contains one entry with Doc.ID 3940586, Submitted By Pawn, Date Submitted 2020-08-18, Document Type IT Purchase Review, and Description Process ID: 3940586 | Submitted By: [redacted] Submitted On: 8/18/2020 | Description: PAWN TESTING-IGNORE REQUEST. A red arrow points to the Doc.ID 3940586. Below the table, there's a pagination bar showing 'Showing 1 to 1 of 1 entries' and buttons for Previous, 1, and Next.

Doc.ID	Submitted By	Date Submitted	Document Type	Description
3940586	Pawn	2020-08-18	IT Purchase Review	Process ID: 3940586   Submitted By: [redacted] Submitted On: 8/18/2020   Description: PAWN TESTING-IGNORE REQUEST

5. Attachments included with the original ITPR submission can be reviewed by clicking on the **“View Attachments”** button (Figure 12) located at the bottom of the form. Make sure you enabled the popup blocker on your browser to view attachments.
6. Comments can be reviewed by clicking on the **“View Notes”** button (Figure 12) located at the bottom of the form.
7. After completing the review, click the **“Approve”** or **“Deny”** button (Figure 12). These buttons are located at the bottom of the form.

Figure 12– ViewAttachments, Approve, Deny buttons

The screenshot shows the bottom of the IT Purchase Review form. There are four buttons: Approve, Deny, View Attachments, and View Notes. The Approve and Deny buttons are highlighted with a red box.

Denying a request will require a deny comment (Figure 13) with reasons for the denial. Click **“Save changes”** button and **“Close”** button.

Figure 13– DenyComment

The screenshot shows the Deny Comment form. It has a title bar 'Task Status' with a close button. Below the title bar is a large text area for the deny comment. Below the text area, there's a label '250 characters remaining'. At the bottom right, there are two buttons: Close and Save changes. A red arrow points to the Save changes button.