Creating a New IT Purchase Authorization Request

This article covers how users can create and submit a new IT Purchase Authorization Request.

1. Log in to the IT Service Desk through the direct link or from the campus portal.

Log in to the IT Service Desk.

View detailed instructions on how to log in to the IT Service Desk.

2. Click on Other Services.

Click on **Other Services** in the IT Request Forms section.

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3. Select IT Purchase Authorization.

Services

Request for IT services to be performed

Items

IT Purchase Authorization
IT Purchase Authorization
▼ preview

Electronic & Information Technology (E&IT) Purchase Review

This form must be completed by the purchase requester, reviewed for compliance with CSU policy, and approved by an IT/ATI subject matter expert prior to proceeding with the purchase.

For guidance and resources to assist you with the electronic and information technology procurement process, please refer to the IT Purchasing Site. Questions should be directed to dl-itpurchasing@fullerton.edu.

4. Enter Product/Service Information.

💡 Hover your mouse over the question mark/info button next to a field to see if that field is mandatory.

Product or Service Information

(A) * Supplier name ⑦

Reynholm Industries

(B) * Supplier website ⑦

www.reynholm.co.uk

(C) Manufacturer

Dell

(D) * Total or Annual Cost ⑦

50000

(E) * Please select primary funding source for this purchase ⑦

● State Fund(s) ○ ASC ○ ASI ○ Philanthropic Foundation ○ IRA Funds

⚠️ When entering a Total or Annual Cost, do not use any symbols such as a comma or dollar sign (e.g. $50,000). Periods are okay (e.g. 5000.95).

A. Enter the name of the vendor/supplier of the product/service.
B. Enter the website of the vendor/supplier.
C. Enter the manufacturer of the product/service (if different from the vendor/supplier).
D. Enter the total cost of the purchase from this vendor.
E. Select the primary source of funding to be used for this purchase.

4.1. Click Add Attachment to attach relevant documentation such as the vendor quote.

Product or Service Information

✱ Supplier name ⑦

Reynholm Industries

✱ Supplier website ⑦

www.reynholm.co.uk

Manufacturer

Dell

✱ Total or Annual Cost ⑦

50000

✱ Please select primary funding source for this purchase ⑦

◉ State Fund(s) ○ ASC ○ ASI ○ Philanthropic Foundation ○ IRA Funds

Use the attachment button below to upload quote and/or other necessary documentation

Add Attachment

When you are ready to add your attachments (e.g. vendor quote, software license end user agreement, VPAT, etc), click **Add Attachment**.

> ❗ Failing to attach required documentation will slow down the processing of your request so be sure to attach all relevant documentation.

5. Select all categories for the product/service you are purchasing.

Select all categories of products or services included as a part of the proposed purchase
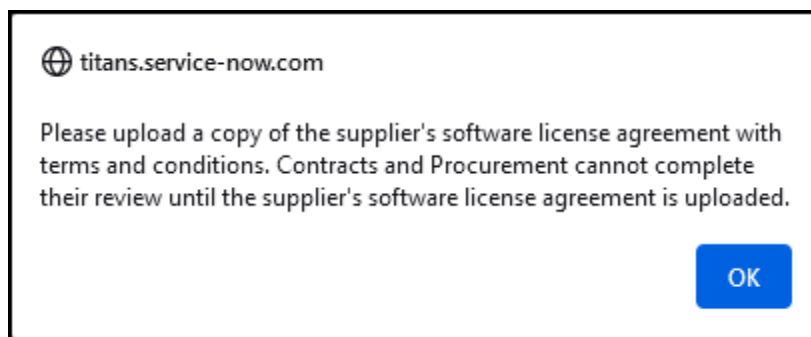
Categories

- ☑ Hardware (desktops, laptops, monitors, tablets, desktop printers)
- ☐ Networking Gear, Servers
- ☐ Servers
- ☐ Server Operating System Software (MS Windows Server, Red Hat Linux)
- ☐ Server Application Software (Oracle, MS SQL)
- ☐ Network Printer / Copier
- ☐ Audio Visual (projectors, projector screens, TV)
- ☐ Digital Camera / Video Camera
- ☐ Surveillance Camera
- ☐ Desktop Software
- ☑ Cloud-based Software or Service (Web Hosting, Online Services)
- ☐ Software Subscriptions
- ☐ IT Consulting / Professional Services
- ☐ Maintenance Contract/Renewal
- ☐ LMS LTI
- ☐ Other

Place a checkmark next to each category that applies to the product(s)/service(s) included in your purchase.

⚠️ It's important to select the correct category (or categories) for a request to ensure that it is sent to the correct IT approvers and processed properly. If you are not sure which category to select, contact dl-itpurchasing@fullerton.edu.

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5.1. Make a note of any pop-up windows that appear.

When you place a checkmark next to certain categories, you will see a pop-up window that includes additional requirements/documentation for your request. Be sure to follow the instructions in order to ensure your request is processed as quickly as possible.

5.2. If you select Other, you will need to type in an explanation.

If none of the categories apply to your purchase, you may choose **Other** and then type an explanation of the product/service you are using.

Remember you can contact dl-itpurchasing@fullerton.edu if you are unsure which category to pick.

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6. Describe the Usage for the product/service.

6.1. Enter a description of the purpose of the product/service.

Enter the purpose of the product/service: what does it do? how will it be used? Be as descriptive as possible.

6.2. Indicate if the product/service/hardware will be used to store, transmit, or process credit card information or impact the security over credit card information.

⚠️ This question is **NOT** asking if you will be using a credit card/p-card to **purchase** the product/service/hardware.

This question is asking if the product/service/hardware will in any way **interact** with credit card information which requires specific security protocols to process.

> ✱ Will this product, service, or hardware be used to store, transmit or process credit card information or, in any way, affect the security over said information? ⑦
>
> ▼
>
> *This includes, but is not limited to, eCommerce(online) and In Person transactions. (Please answer according to the product being purchased, not the payment method being used to pay for the product.)*
>
> No ⌄

6.3. Select who will use this product/service.

This product will be used by (Please check all that apply)

A. ☐ One or more students in an academic setting

B. ☐ For individual use by one or more University employees whose accessible technology accommodations are not applicable to this procurement at this time

C. ☐ University employees whose accessible technology accommodations are unknown

D. ☐ The general public / Campus wide

Place a checkmark to indicate which population will use the product/service.

A. **One or more students in an academic setting** (e.g. one or more students will use this product/service in a classroom or lab or instructional setting)
B. **For individual use by one or more University employees whose accessible technology accommodations are not applicable to this procurement at this time** (e.g. one or more specific employees will be using this product/service and accessibility needs are either being met or are not needed)
C. **University employees whose accessible technology accommodations are unknown** (e.g. more than one employee will be using this product/service and you do not know if these employees require accessibility accommodations to use the product/service)
D. **The general public/Campus wide** (e.g. the product/service will be made publicly available on the campus website or the product/service will be made available to all students and employees)

6.4. Indicate if other departments or groups on campus may be interested in using this product.

> 💡 It is helpful for the IT department to know if the product has relevance for other users on campus. This allows IT to recommend products when they receive inquiries as well as determine if a campus-wide license or group licenses would be beneficial.

What departments or groups would be interested in using the product?

Other training departments and trainers may find this product useful

7. Enter Hardware Purchase information (if applicable)

7.1. Enter the Hardware/Equipment Type and the Maintenance Support Plan information.

Hardware Purchases

A ＊ Hardware / Equipment type ⑦

Dell Latitude 7420 14"

B ＊ Maintenance support plan description ⑦

Dell product support and warranty will be purchased

A. Enter the name of the hardware that you are purchasing (e.g. Apple iPad Pro).

B. Enter the maintenance support plan for the hardware. In other words, who will fix any issues with this hardware or replace it if it is broken? (e.g. Apple Care support plan)

7.2. Enter the quantity of each type of hardware category will be purchased. Then enter the total cost of the hardware portion of your request.

Please indicate the quantity to be purchased for each of the applicable items below

PC (personal computer)

30

Laptop

Monitor

Tablet

Printers

Hardware total cost

30000
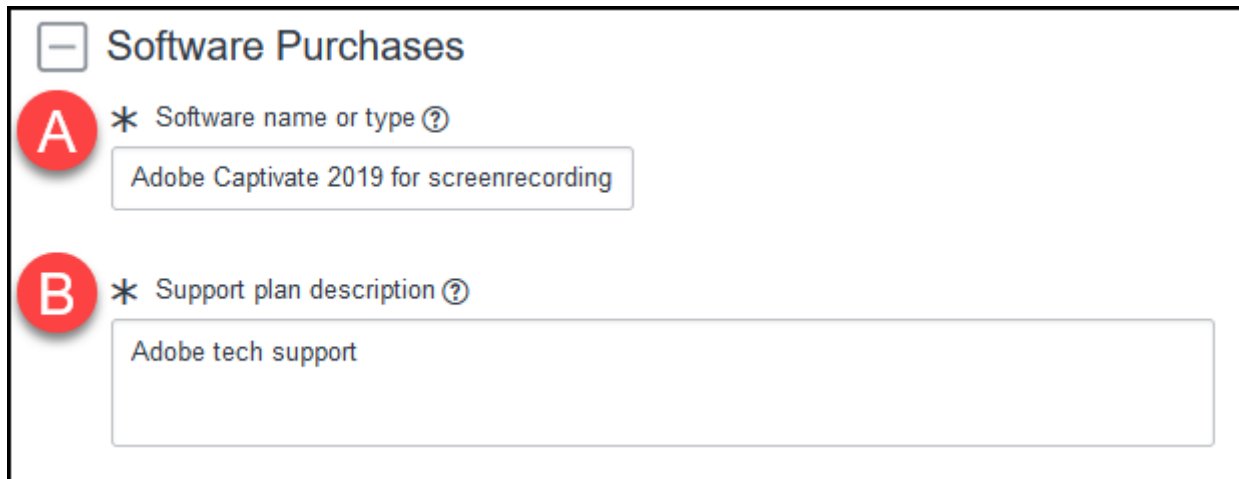
Enter the number of each type of hardware that you are purchasing. Then enter the total cost of the hardware that you are purchasing.

> 💡 If you are ordering a type of hardware not listed (e.g. audiovisual equipment, etc), you can leave each of the fields blank and simply enter a Hardware total cost.

8. Enter Software Purchase information (if applicable)
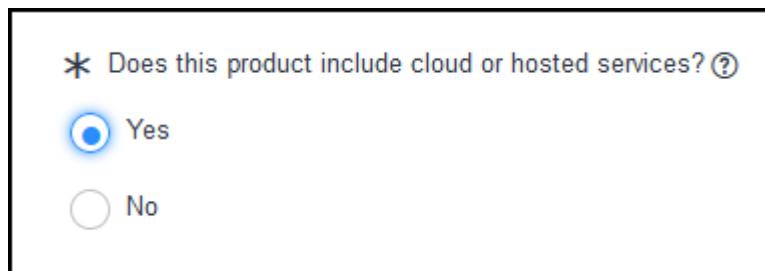
8.1. Enter the Software name/type and the Support Plan information.

A. Enter the name of the software that you are purchasing (e.g. Adobe Captivate 2019). It may also help to expand on the name to describe what type of product it is (e.g. Adobe Captivate 2019: a product for creating elearning content).
B. Enter the support plan for the software. In other words, who will fix any issues with this software? (e.g. Adobe Tech Support)

8.2. If prompted, select whether your software includes cloud/ hosted services

Cloud or hosted services are those not provided with a physical server.

8.3. If your software includes cloud/hosted services, select the type

of data that will be used with your product/service.

Specify the type of data that will be used with your cloud/hosted product/service.

If you are not sure which data classification applies, click **Show Data Classifications** for additional detail.

8.3.1. If you select Level 1 or 2 Data, you will see a notation that the Information Security Office will follow up with you to collect more details. There is also a chart to determine the acceptable type of documentation to provide to the ISO.

A. You will see a notation that the CSUF Information Security Office (ISO) will contact you for additional details.
B. In the displayed chart you will see acceptable documentation that the ISO will need depending on the data classification and number of records.

8.3.2. If you select Level 3, place a checkmark to acknowledge that only Level 3 data will be used.

8.4. Indicate whether the software/service requires a login and whether the software/service supports single sign-on (SSO) authentication.

A. Indicate if users will need to login to access the software/service using a web-based interface (e.g., signing in to Google.com to use Google Docs).
B. Indicate if the software/service supports single sign-on (SSO) authentication.
C. If you choose Yes for the SSO authentication, indicate which types of SSO the vendor supports.

9. Fill out the VPAT (Voluntary Product Accessibility Template) details (if applicable)

Depending on your selections above, the VPAT section will appear if it is required.

9.1. Read through the instructions/options for the VPAT.

Read through the instructions in the VPAT section to assist in determining the best option to select.

There is a link to the blank VPAT form which you can forward to the vendor/supplier to obtain a VPAT.

View the VPAT section of the IT Purchasing website for more information and resources on VPATs.

9.2. Select the VPAT option that applies to your request.

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9.2.1. I have the VPAT attached

If you select **I have the VPAT attached**, you can use the Add Attachment button to attach the VPAT file (PDF is preferred).

💡 You can use the **Add Attachment** button at the top or bottom of the IT Purchase Authorization form to attach documentation, including the VPAT.

9.2.2. I need to collect the VPAT and will submit it when available

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If you select I need to collect the VPAT and will submit it when available, you will see a notation that you will receive an email asking you to return to this form with the VPAT when it is completed.

> ⚠️ Your IT Purchase Authorization request will not move forward in the approval process until a VPAT is attached to the request.
>
> If you are ultimately unable to obtain a VPAT for your request, please contact dl-itpurchasing@fullerton.edu.

9.2.3. I am unable to find a supplier that meets these standards

If you select I am unable to find a supplier that meets these standards, you will see a notation that you will receive an email requesting that you submit an Equally Effective Alternate Access Plan (EEAAP).

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10. Click Proceed to Checkout when you have completed filling out the form and adding attachments.

Manage Attachments (3): 📄 THIS IS A TEST QUOTE.pdf [rename][view] 📄 THIS IS A TEST SOFTWARE LI... [rename][view]
📄 THIS IS A TEST VPAT (COMPLI... [rename][view]

IT Purchase Authorization

Electronic & Information Technology (E&IT) Purchase Review

This form must be completed by the purchase requester, reviewed for compliance with CSU policy, and approved by an IT/ATI subject matter expert prior to proceeding with the purchase.

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Order this Item	
Price	$50,000.00
Delivery time	15 Days

[Proceed to Checkout]

Shopping Cart
Empty

[−] Product or Service Information

✳ Supplier name ⓘ

Reynholm Industries

✳ Supplier website ⓘ

www.reynholm.co.uk

Manufacturer

Dell

✳ Total or Annual Cost ⓘ

50000

After you have completed the form and added all of your required attachments, click **Proceed to Checkout**.

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11. Modify the Requested For field to the name of the Responsible Person and enter any additional comments/ instructions.

A. Select the name of the Responsible Individual for this product/service. This is the person who will actually be using the product/service. Often this is the person who asked you to purchase the product/service for the department.
B. Enter any special instructions or additional comments about this purchase that you would like to include.

💡 The person in the Requested For field will receive a copy of this request after you submit it.

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12. Click Checkout.

Click **Checkout** when you are ready to submit your order.

13. The request is submitted! Make a note of the REQ and RITM numbers.

You can use the REQ number or the RITM number when contacting the IT Help Desk or an IT Subject Matter Expert to follow up on this request.

13.1. You will receive an email confirmation of your order within a few minutes.

IT Purchase Authorization - Reynholm Industries opened (RITM133002)

Helpdesk <helpdesk@fullerton.edu>
To Moss, Maurice
Cc Ramirez, Hector; Tadesse, Berhanu

↩ Reply   ↩ Reply All   → Forward   ...

Mon 7/19/2021 9:56 AM

RITM133002 has been submitted and is with the appropriate Subject Matter Expert (SME) for review. You can track the status of your request at any time by logging into the self-service portal or by clicking the link below.

Please note: If your purchase request requires a VPAT and you opted to upload it at a later time, the request will remain dormant until you've uploaded it.

If you have questions or require further assistance, please follow up with the SME by replying to this email.

Click here to view Requested Item: LINK

Note that the IT Subject Matter Experts who have been assigned to this request are listed in the CC field.

Need More Help?

For technical assistance, please contact the IT Help Desk at helpdesk@fullerton.edu or 657-278-7777.

For assistance with the IT Purchasing process, contact the IT Purchasing Team at dl-itpurchasing@fullerton.edu.