



INFORMATION TECHNOLOGY SERVICES

USING ITS CHECKLISTS

Friday, 07 September 2018

NEW CHECKLISTS



1. ITS Software/Service Checklist for PCard Purchases
2. ITS Software/Service Checklist for Requisitions

<http://fla.st/its-checklists>

(cAsE sEnSiTiVe)

All are version #: **20180215**



REVIEW PROCESS



ITS reviews requisitions and PCard purchases of software, IT services and servers/storage solutions to ensure that there are:

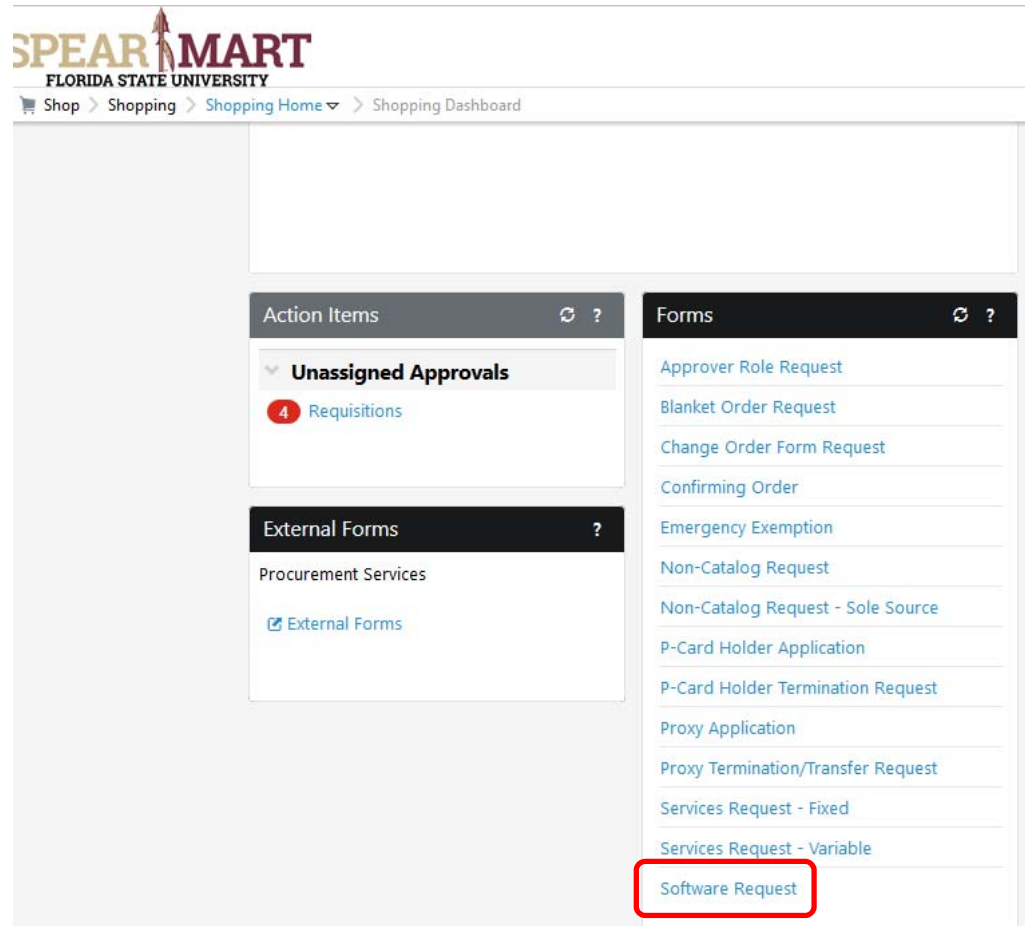
- No security or integration challenges with the purchase
- Opportunities for efficiencies and cost savings



FOR REQUISITIONS



- Preference is to use [Software Request](#) link in the Forms navigation bar in the Shopping Dashboard



The screenshot shows the SPEAR MART Florida State University Shopping Dashboard. The breadcrumb trail is Shop > Shopping > Shopping Home > Shopping Dashboard. The main content area is divided into two columns. The left column has a header 'Action Items' with a refresh and help icon. Below it is a section for 'Unassigned Approvals' with a red circle containing the number '4' and a link for 'Requisitions'. Below that is a section for 'External Forms' with a help icon and a link for 'External Forms'. The right column has a header 'Forms' with a refresh and help icon. Below it is a list of various request types: Approver Role Request, Blanket Order Request, Change Order Form Request, Confirming Order, Emergency Exemption, Non-Catalog Request, Non-Catalog Request - Sole Source, P-Card Holder Application, P-Card Holder Termination Request, Proxy Application, Proxy Termination/Transfer Request, Services Request - Fixed, Services Request - Variable, and Software Request. The 'Software Request' link is highlighted with a red rectangular box.



FOR REQUISITIONS (CONT)



- The Software Checklist is embedded in the Requisition request form:

SOFTWARE CHECKLIST ?

Will the software/service require authentication (user name and password)?

- No – no authentication required
- Yes – but user names/passwords are provisioned by the administrator/user of the software/service
- Yes – it uses FSUID and password and this is already in place
- Yes – it will use FSUID and password, but my unit will need to work with ITS to implement this

Will the software/service (S/S) store information?

- No – no information will be stored by the S/S
- Yes – the information is already being automatically collected from other FSU systems
- Yes – the information will be manually entered by someone in my unit
- Yes – the S/S can automatically collect the information but my unit needs to work with ITS on this

Indicate the type of information to be stored in the software/service, as defined in the [University Information Classification Guidelines](#).

- Not applicable, answered "No" to previous question
- Private
- Protected
- Public



FOR REQUISITIONS (CONT)



- If the embedded Checklist is not used (e.g., another Requisition form is initially selected), the Checklist will be uploaded via a Comment to the Requisition during the review process:

Add Comment

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s):

- Natalie S. Toellner (Prepared by) <ntoellner@fsu.edu>
- Hansen W. Meyer <hans.meyer@fsu.edu>
- Kenneth C. Johnson <ken.johnson@fsu.edu>

[add email recipient...](#)

20180301-Please complete the attached ITS Software/Service Checklist (the Checklist is attached to the Comment in the Requisition, NOT in the email notification of the Comment). YOU MUST USE THIS NEW VERSION OF THE CHECKLIST. After completing it, save it to your computer, then click on the ADD COMMENT button (above), and add the saved checklist as an attachment to the new comment. AS NOTED IN LINE #5 OF THE CHECKLIST, the comment Email

301 characters remaining

Attach file to this document (optional):

Attachment Type

File

File Name

Software Checklist

File

[Browse...](#)

ITS_Software_Checklist_for_Requisition.pdf

Add Comment

Close



FOR REQUISITIONS (CONT)



- After completing the Checklist, upload via a Comment to the Requisition, and make sure Kenneth C. Johnson and Hansen W. Meyer are added email recipients (click on [add email recipient...](#) link to search)

Add Comment

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s):

- Natalie S. Toelmer (Prepared by) <ntoelmer@fsu.edu>
 - Kenneth C. Johnson <ken.johnson@fsu.edu>
 - Hansen W. Meyer <hans.meyer@fsu.edu>
- [add email recipient...](#)

MUST HAVE SOME VERBIAGE HERE...

969 characters remaining

Attach file to this document (optional):

Attachment Type

File Name

File COMPLETED_CHECKLIST.pdf

Add Comment

Close



FOR REQUISITIONS (CONT)



- Make sure some verbiage is added to the text box (such as “Completed Checklist attached”)

Add Comment

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s):

- Natalie S. Toellner (Prepared by) <ntoellner@fsu.edu>
- Kenneth C. Johnson <ken.johnson@fsu.edu>
- Hansen W. Meyer <hans.meyer@fsu.edu>

[add email recipient...](#)

MUST HAVE SOME VERBIAGE HERE...

969 characters remaining

Attach file to this document (optional):

Attachment Type

File

File Name

SOMETHING HERE...

File

[Browse...](#)

COMPLETED_CHECKLIST.pdf

Add Comment

Close



FOR REQUISITIONS (CONT)



- Finally, YOU MUST enter a File Name in the File Name text box (such as “Completed Checklist”)

and...

Add Comment ×

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s):

- Natalie S. Toellner (Prepared by) <ntoellner@fsu.edu>
- Kenneth C. Johnson <ken.johnson@fsu.edu>
- Hansen W. Meyer <hans.meyer@fsu.edu>

[add email recipient...](#)

MUST HAVE SOME VERBIAGE HERE...

969 characters remaining

Attach file to this document (optional):

Attachment Type File

File Name SOMETHING HERE...

File Browse... COMPLETED_CHECKLIST.pdf

Add Comment

Close



FOR REQUISITIONS (CONT)



- o ...of course, actually browse and find the completed checklist.

Add Comment

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s):

- Natalie S. Toellner (Prepared by) <ntoellner@fsu.edu>
- Kenneth C. Johnson <ken.johnson@fsu.edu>
- Hansen W. Meyer <hans.meyer@fsu.edu>

[add email recipient...](#)

MUST HAVE SOME VERBIAGE HERE...

969 characters remaining

Attach file to this document (optional):

Attachment Type

File Name

File COMPLETED_CHECKLIST.pdf

Add Comment

Close



FOR PCARD PURCHASES



- **Follow the normal procedures for using a PCard**
- For software or services, download and complete the Checklist from <http://fla.st/its-checklists>
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FSU | INFORMATION TECHNOLOGY SERVICES

HOME SERVICE CATALOG TRAINING SECURITY & PRIVACY FSU SERVICE CENTER

Checklists

- ITS Software/Service Checklist for PCard Purchases
- ITS Software/Service Checklist for Requisitions
- ITS Server/Storage Checklist for Requisitions
- More Information



FOR PCARD PURCHASES (CONT)



- The completed Checklist must be emailed to:

PCard-Review@fsu.edu

- FAILURE TO SEND THE COMPLETED FORM TO PCard-Review@fsu.edu MAY RESULT IN A DELAY IN OBTAINING APPROVAL FOR THE PURCHASE!



ITS CHECKLISTS



1. For Software/Service Requisitions, use the [Software Request](#) link in SpearMart
2. Complete all sections of the Checklist!
3. Carefully follow the instructions on **line #5** of each Checklist. **Failure to follow the instructions on line #5 may result in a delay in obtaining approval of the purchase.**
4. Instead of saving a blank copy to your computer, you should always download blank Checklists (and get the current **More Information**) from this site:

<http://fla.st/its-checklists>

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