FSU | INFORMATION TECHNOLOGY SERVICES

ITPRF APPROVER INSTRUCTIONS

Request Review

When a request is ready for review, the applicable IT Manager, ITS Manager and ELT Member (based on the submitter's DeptID) will receive an email entitled *Approval Needed for IT Purchase Request #ITPR-RequestNumber*. All requests can also be accessed through the Approver Dashboard.

Via email:

1. The email's *Task Name* line identifies which step in the process you have been asked to review. Select the **Click here to complete task** link.

Approval Needed for IT Purchase Request #ITPR-0000035

FSU — INFORMATION TECHNOLOGY SERVICES
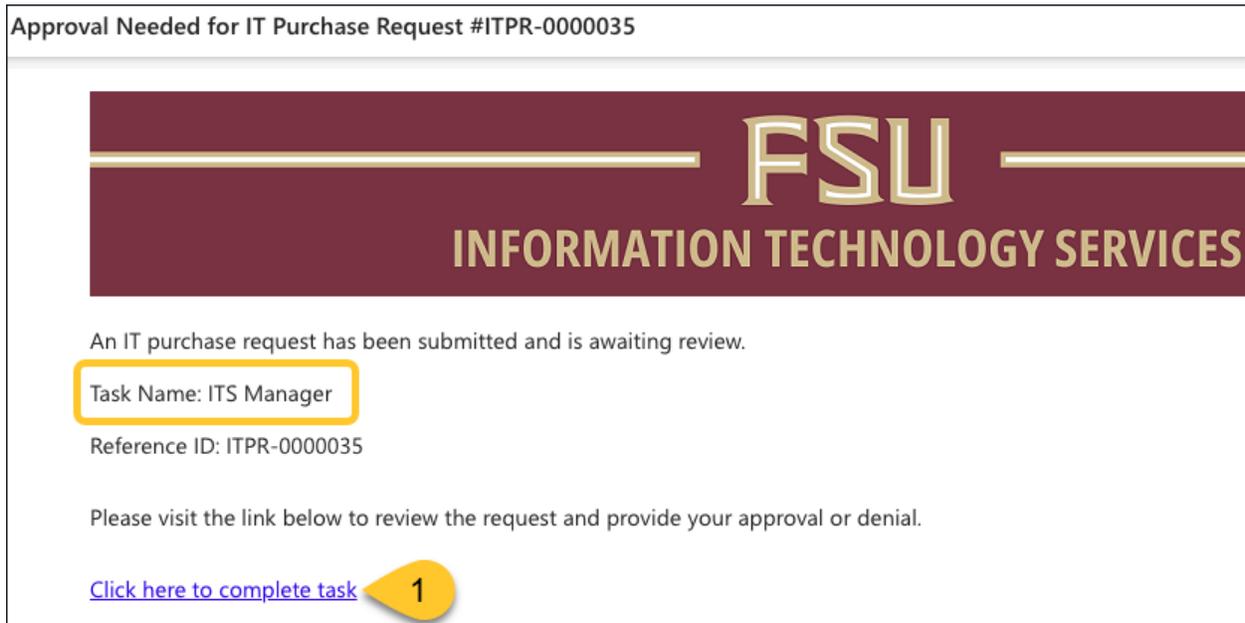
An IT purchase request has been submitted and is awaiting review.

Task Name: ITS Manager

Reference ID: ITPR-0000035

Please visit the link below to review the request and provide your approval or denial.

Click here to complete task ◄ 1

2. Log in with your FSUID and password.

3. Scroll to review the information in the *Request Detail* box provided by the requestor. Review the information based on the *Requested Amount*:
   a. $0 to $24,999.99
   b. $25,000.00 to $149,999.99
   c. Over $150,000.00

IT Purchase Request

ITPR-0000035

Current Flow Step IT Manager

Requestor

Submitted For FSU Employee n/a

Priority Level Standard

Request Detail

Requested Amount	$12,345.00
Budget Department	108000 / Information Technology Service
Budget Fund	110 / E&G General Revenue
Grant Project	n/a

4. To review attachments, select the **Documents** button.

Purchase Method   n/a

Documents (2)   Comments

Reject	Pushback	Approve	Admin

5. Select the attachment you would like to view.

6. Select the **View Selected Document**. A new window will appear with the document. Microsoft Office documents will require a download to view.

7. Select the **Comments** button to view comments from other approvers; or, if a resubmission, to confirm changes made by the requestor.

8. Add any comments in the *New Comments* text box. Comments entered in this text box are visible only to approvers.

9. Select the **Save** button to save your comment. The comment history will remain throughout the approval workflow.

NOTE: If you are pushing back a request, this is a helpful place to explain why.

Without an email:

1. Visit the IT Purchase Request Form - Approver Dashboard to access your approver dashboard.
2. Log in with your FSUID and password.
3. Filter the requests in the *Filter By:* window to see requests that are currently waiting for review, have been escalated or have been completed.
4. Select a reviewable request to be taken to the form summary page.

5. On the right side of the dashboard, in the *Assignment Details* window, select **Go to Assignment** to be taken to the specific request.

6. Scroll to review the information in the *Request Detail* box provided by the requestor. Review the information based on the *Requested Amount*:
   a. $0 to $24,999.99
   b. $25,000.00 to $149,999.99
   c. Over $150,000.00

IT Purchase Request

ITPR-0000035

Current Flow Step IT Manager

Requestor

Submitted For FSU Employee n/a

Priority Level Standard

Request Detail

Requested Amount	$12,345.00 6
Budget Department	108000 / Information Technology Service
Budget Fund	110 / E&G General Revenue
Grant Project	n/a

7. To review attachments, select the **Documents** button.

Purchase Method	n/a

7 ▶ Documents (2)   Comments

Reject   Pushback   Approve   Admin

8. Select the attachment you would like to view.
9. Select the **View Selected Document**. A new window will appear with the document. Microsoft Office documents will require a download to view.

10. Select the **Comments** button to view comments from other approvers.

11. Add any comments in the *New Comments* text box.
12. Select the **Save** button to save your comment. The comment history will remain throughout the approval workflow

NOTE: If you are pushing back a request, this is a helpful place to explain why.

Selecting a Response

Pushback

1. Select the **Pushback** button.

Purchase Method	n/a		
Reject	1	Pushback	Approve

2. Select where to push the request back to from the dropdown menu:
    a. IT Managers can only push the request back to the requester.
    b. ITS Managers must choose to push the request back to the IT Manager or the requester.
        i. If pushed back to the IT Manager, the IT Manager can only provide additional comments viewable to other approvers. If further changes are needed, the IT Manager must push the form back to the requester for edits and resubmission.
    c. ELT Members must choose to push the request back to the IT Manager, the ITS Manager or the requester.
        i. If pushed back to the IT or ITS Manager, they can only provide additional comments viewable to other approvers. If further changes are needed, they must push the form back to the requester for edits and resubmission.
3. Select at least one pushback reason.
    a. If *Other* is selected, additional comments must be added for further explanation of the push back.
    b. Additional comments are not required for the other Pushback Reasons, but can be provided.

4. Select the **Confirm** button.

A confirmation notification will appear, advising that the workflow for this position has been completed. The requester will receive an email letting them know who their request has been pushed back by and the reasoning. You will receive a new email if/when the requester resubmits their request.

Denial

1. Select the **Reject** button to deny the request.

2. At least one rejection reason must be selected:
    a. If *Other* is selected, additional comments must be added for further explanation of the denial.
    b. Additional comments are not required for the other Reject Reasons, but can be provided.
3. Select the **Confirm** button.

A confirmation notification will appear, advising that the workflow for this position has been completed. The requester will receive an email letting them know who their request has been denied by and the reasoning. The denied workflow cannot be reopened or edited.

Approval

Select the **Approve** button to approve the request. A notification will appear confirming that the workflow has been completed for this step. The requester will receive an email with their Budget Manager copied, confirming that their request has been approved.

Reviewing a Resubmitted Request

1. Follow steps 1-3 in the Request Review section.
    a. To confirm you are reviewing a resubmitted request, the *Resubmitted* field of the form summary page will show the date and time the request was resubmitted. The original time and date the form was submitted will be displayed in the *Created* field.

2. Select the **Comment** button to review all notes to confirm that the requested changes were made.
3. Follow steps 4-9 in the Request Review section to complete the review process until the form is ultimately approved or denied.

24-Hour Notice(s) for Unreviewed Requests

- If a request has not been reviewed in 24 hours, the applicable approver will receive an email with the subject *24 HOUR NOTICE Approval Needed IT Purchase Request #ITPR-_____*.
- Select the email link to review the submitted form.
- The approver will continue to receive 24-hour notices until an action has been taken on the request.

24 Hour Notice Approval Needed IT Purchase Request #ITPR-0000056

FSU INFORMATION TECHNOLOGY SERVICES

High Priority

An IT purchase request has been waiting for review for 24 hours. Please visit the link below to review as soon as possible.

Task Name: ELT Approval

Reference ID: ITPR-0000056

Click here to open task ELT Approval

If you need assistance, please contact:
Samantha Early
Program Manager