

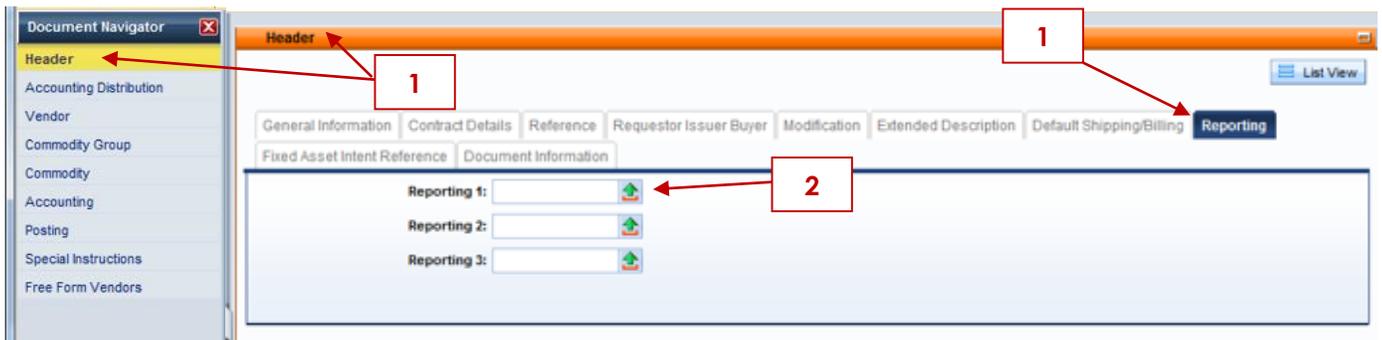
# IT Services Purchase Approval Process

## ❖ ALL COUNTY TECHNOLOGY PURCHASES REQUIRE REVIEW AND APPROVAL BY IT SERVICES.

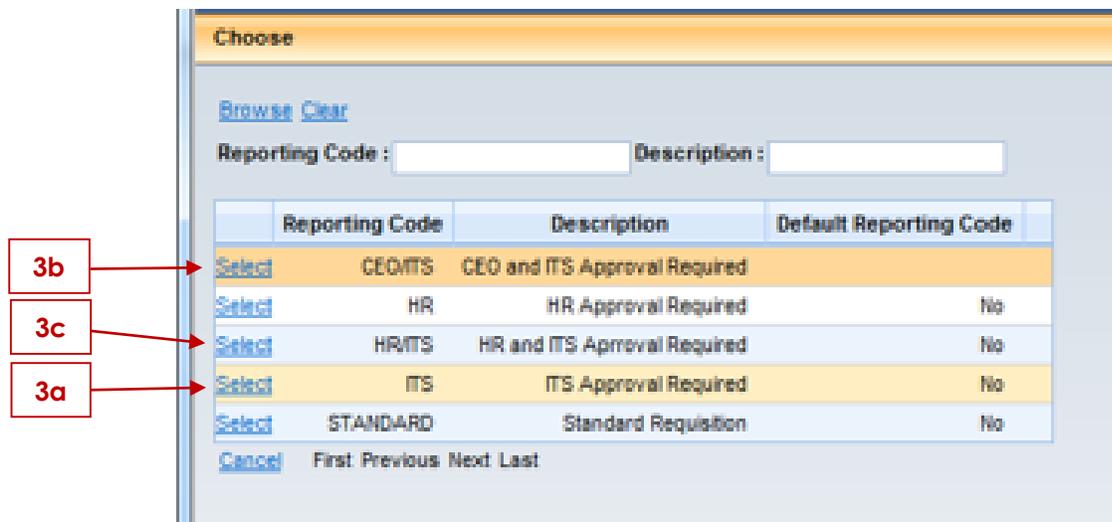
To submit an IT Services Approval request, follow the VCFMS Step Action Table instructions for the type of purchase request you are submitting in the VCFMS system (RQS, DO, RAP). Perform the steps below to have IT Services review and approve your technology related request.

### IT Services Purchase Approval Request

1. On the Header Page, navigate to the Reporting Tab.
2. Click the Pick List Drop Down Button  on Reporting 1 line:



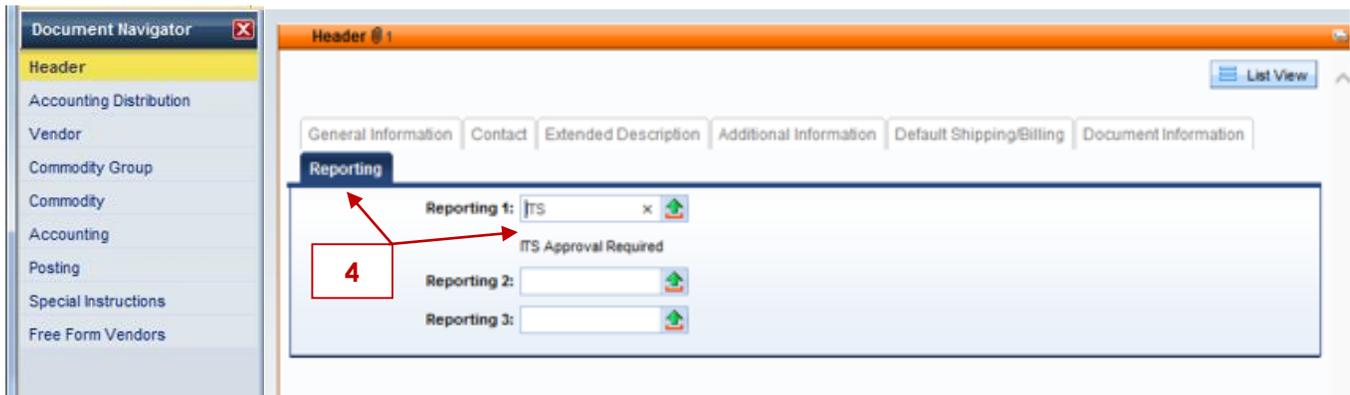
3. From the Choose Screen menu options, Choose one of the following below by Clicking on the **BLUE Select** text:
  - a. **ITS Approval Required** (for technology related products and services)
  - b. **CEO and ITS Approval Required** (for technology related products requiring CEO Approval):  
**NOTE: ALL iPads/Tablets REQUIRE CEO Approval. Cellular devices over \$300 REQUIRE CEO Approval.** Approval can be obtained through your CEO Analyst, and approved through VCFMS workflow.
  - c. **HR and ITS Approval Required** (for professional service contracts), as shown below:



**NOTE: If the IT Services Purchase Approval Request REQUIRES CEO Approval (ie: iPads/Tablets and cell phones over \$300) and the ITS Approval option was chosen, the request will be rejected, requiring the request to be resubmitted with the correct reporting code.**

## IT Services Purchase Approval Process

4. The ITS Approval Required option chosen will populate Reporting Line 1, on the Reporting Tab. Your request will then be routed for IT Service's review via VCFMS workflow.



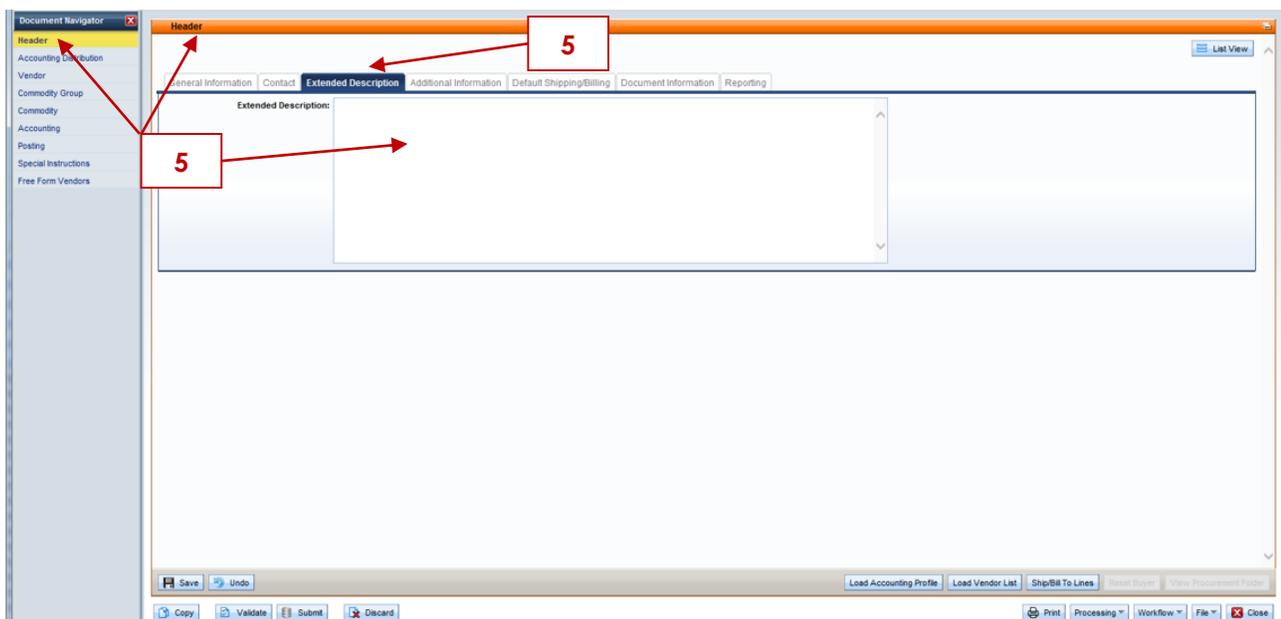
The screenshot shows the 'Reporting' tab in a software interface. On the left is a 'Document Navigator' with a tree view containing: Header, Accounting Distribution, Vendor, Commodity Group, Commodity, Accounting, Posting, Special Instructions, and Free Form Vendors. The main area is titled 'Header @ 1' and has tabs for 'General Information', 'Contact', 'Extended Description', 'Additional Information', 'Default Shipping/Billing', and 'Document Information'. The 'Reporting' tab is active, showing three reporting lines. 'Reporting 1' is set to 'ITS' and has 'ITS Approval Required' selected below it. A red box with the number '4' is drawn around the 'Reporting 1' dropdown and the 'ITS Approval Required' text, with red arrows pointing to each. 'Reporting 2' and 'Reporting 3' are empty.

**NOTE: Projects over \$50,000 REQUIRE ITC APPROVAL prior to IT Services Approval. The APAQ Process MUST BE COMPLETED and ITC APPROVED PRIOR to Entry into VCFMS.**

You may contact your IT Service's Account Manager for assistance with the REQUIRED Automated Project Assessment Questionnaire (APAQ) Forms. In some isolated cases, regardless of request amount, IT Services will recommend ITC Approval, typically when the project has County-wide potential/impact or existing County resources are not being leveraged. Upon ITC Approval of the APAQ Forms, the department can then submit their IT Services Purchase Request, attaching the approved APAQ forms in the Header Panel. The department's request will be reviewed by IT Services and communicated via VCFMS workflow.

Once an ITC Project has been approved, please note on all future IT Services Approval requests the associated ITC project name.

5. At the Header Page, on the Extended Description Tab, REQUIRED is a DETAILED DESCRIPTION of the hardware, software or services for your Request, providing the REASON/JUSTIFICATION for the purchase in the Extended Description field:



The screenshot shows the 'Extended Description' tab in the same software interface. The 'Document Navigator' on the left is the same. The main area is titled 'Header @ 1' and has tabs for 'General Information', 'Contact', 'Extended Description', 'Additional Information', 'Default Shipping/Billing', 'Document Information', and 'Reporting'. The 'Extended Description' tab is active, showing a large empty text area. A red box with the number '5' is drawn around the 'Extended Description' tab and the text area, with red arrows pointing to each. At the bottom of the window, there are buttons for 'Save', 'Undo', 'Copy', 'Validate', 'Submit', 'Discard', 'Lead Accounting Profile', 'Lead Vendor List', 'Shp/Bil To Lines', 'Print', 'Processing', 'Workflow', 'File', and 'Close'.

## IT Services Purchase Approval Process

- Complete the Commodity and Accounting screens for EACH item being requested, following the VCFMS Step Action Table instructions in order to have the requisition request approved through GSA Procurement.
- On the Header Page, attach the REQUIRED vendor quote or invoice (ie: Compuwave, CDW, etc.) by clicking on the FILE Button on the bottom of the screen, to open the Drop Down Menu.

Header

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General Information | Contact | Extended Description | Additional Information | Default Shipping/Billing | Document Information | Reporting

Document Name: [Text Box]  
Record Date: [Text Box]  
Budget FY: [Text Box]  
Fiscal Year: [Text Box]  
Period: [Text Box]  
Document Description: [Text Box]  
Document Short Description: [Text Box]

Accounting Profile: [Text Box]  
PCard ID: [Text Box]  
PCard Exp: [Text Box]  
Procurement Folder: [Text Box]  
Procurement Type ID: [Text Box]  
Procurement Type: [Text Box]  
Tracking Number: [Text Box]  
Warehouse: [Text Box]

Actual Amount: \$0.00  
Closed Amount: \$0.00  
Closed Date: [Text Box]  
Open Amount: \$0.00  
Ref Amount: \$0.00

Total of Header Attachments: 0  
Total of All Attachments: 0

Save | Undo | Load Accounting Profile | Load Vendor List | Ship/Bill To Lines | Reset Buyer | View Procurement Folder

Copy | Validate | Submit | Discard | Print | Processing | Workflow | File | Close

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- When the FILE Drop Down Menu is expanded, select the Attachments option (Paperclip  Icon):

Related Actions

Archive  
SendPage  
Download Document  
Attachments

Processing | Workflow | File | Close

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- The Attachments Screen will then open. Click on the **BLUE Upload** text:

Attachments

File Name	Type	Date	User ID	Primary State
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First Prev Next Last

[Upload](#) [Search](#) [Download](#) [Delete](#) [Restore](#)

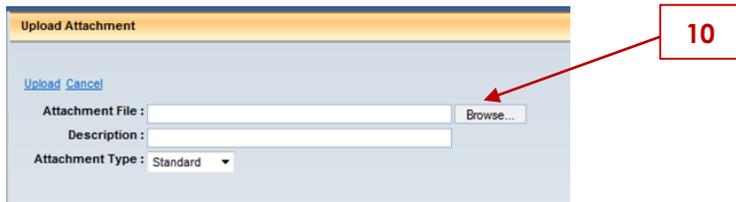
File Name : Description :  
Type :  
Date :  
User ID :  
Primary State :

[Return to Document](#)  
[View Attachment History](#)

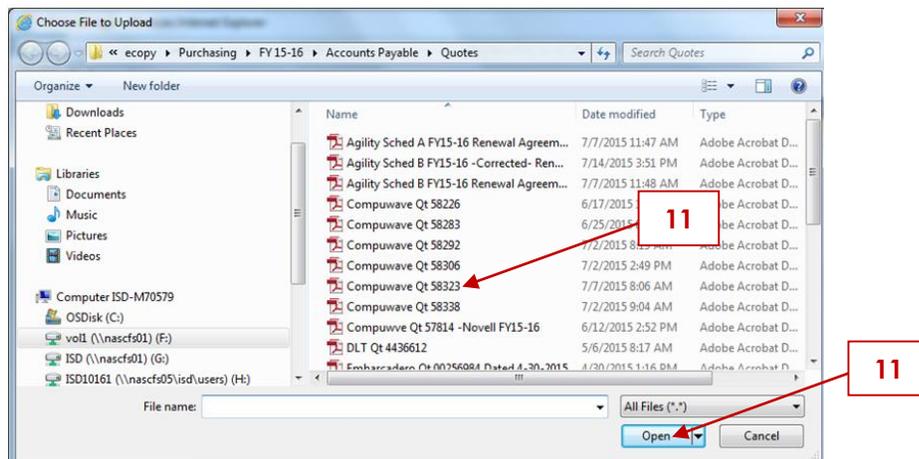
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# IT Services Purchase Approval Process

10. The Upload Attachment Screen will then open. Click on the Browse Button:



11. On the Choose File to Upload Screen, Select your file and Click on the Open Button:



12. Your chosen file will populate in the Attachment File field on the Upload Attachment Screen. Click the **BLUE Upload** text to upload the file.



13. Your chosen file is now uploaded in the **Orange** shaded area. Click on the **BLUE Return to Document** text to process your purchase request.

