**State of Wisconsin**

**Department of Administration**

# Approver Guide for Information Technology (IT) and Private Consultant Services Purchasing over $150,000

*Job Aid: 150K System Approver Guide*

Updated July 24, 2018

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**Note:** If you have a pop-up blocker installed in your browser, be sure that it is turned off while filling out the information for the creation of your request. If you click the back button in your browser with the pop-up blocker on, you may not be prompted to save your progress, which could result in losing information you had previously entered.

**Note:** You will be automatically logged out after your screen has been idle for 20 minutes. Be sure to save your information often to avoid losing anything.

## ACCESSING THE 150K SYSTEM

At this time, the Information Technology (IT) and Private Consultant Services Purchasing Over $150,000 System, or 150K System, is only available to State agencies.

- **STEP 1:** Sign up for an account.

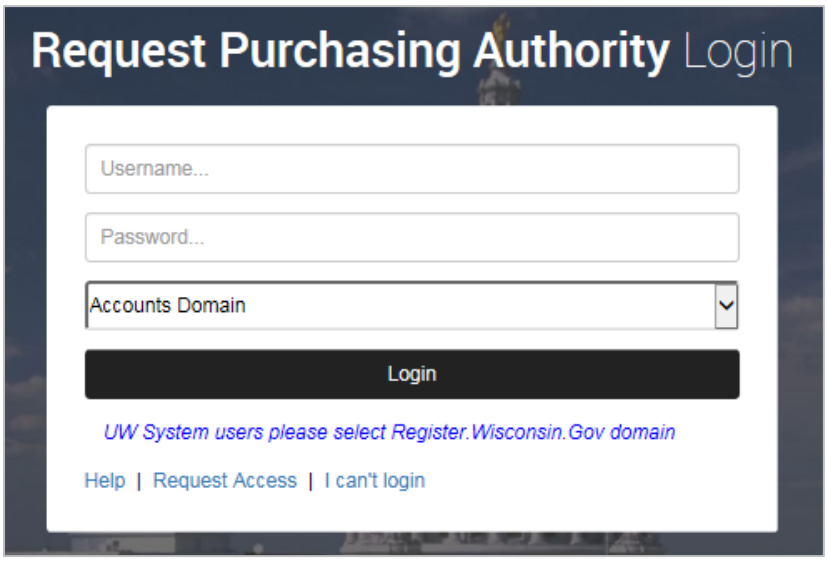
  To access the 150K System, you will need to first sign up for an account. To do this, send an email to DOAWisPro@wisconsin.gov with the following information:

  - Your name
  - Your IAM username
  - The name of your agency
  - Be sure to reference "150K System" in your email

  A 150K System administrator will confirm that you should have access to the system and will email you when your account is set up.

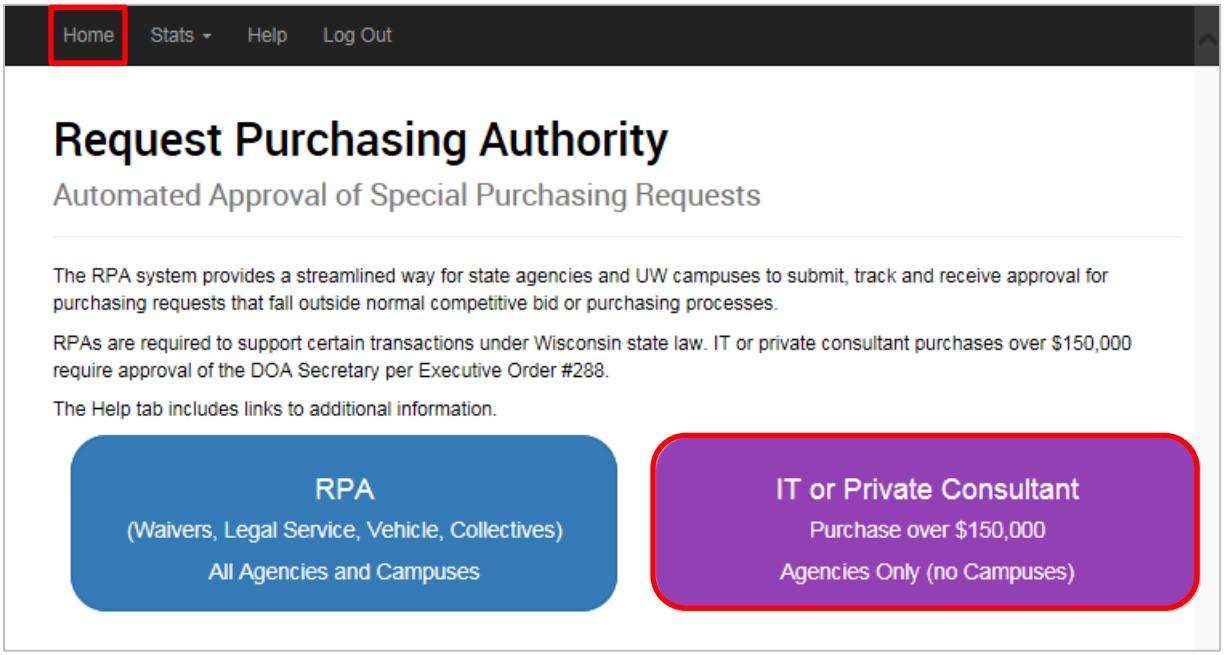
- **STEP 2:** Login to your account.

  Navigate to the website at https://rpa.wi.gov and login with your IAM username and password and make sure **Accounts Domain** is selected from the dropdown menu.




Once you've successfully logged in, you will be taken to the combined RPA Automation and 150K System homepage. If you have access to both systems, you will see both the RPA and 150K system buttons (as seen on

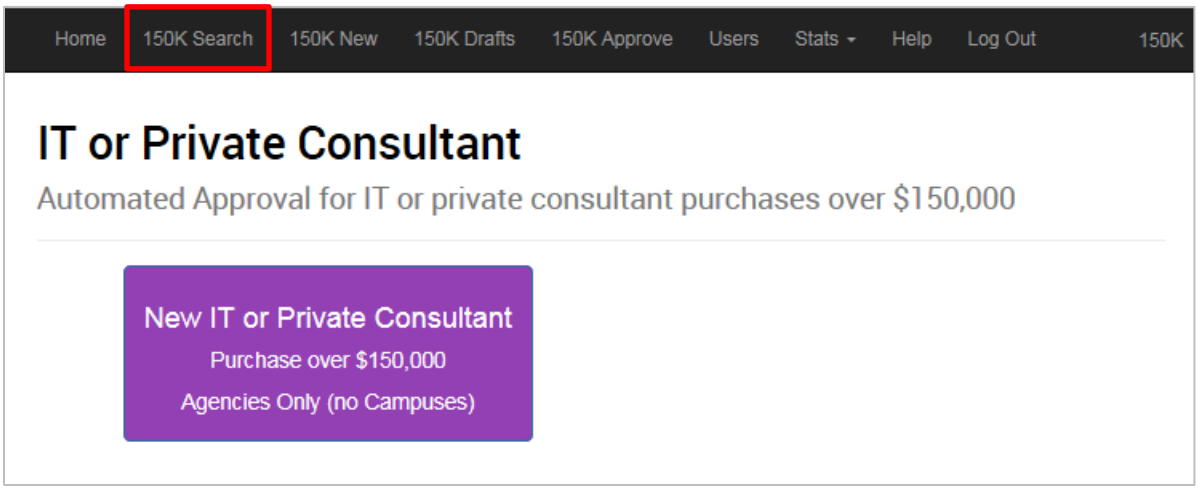
the following page); if you only have access to one of the systems, you will only see the button for that system. For the purpose of this guide, we will focus exclusively on the 150K System.



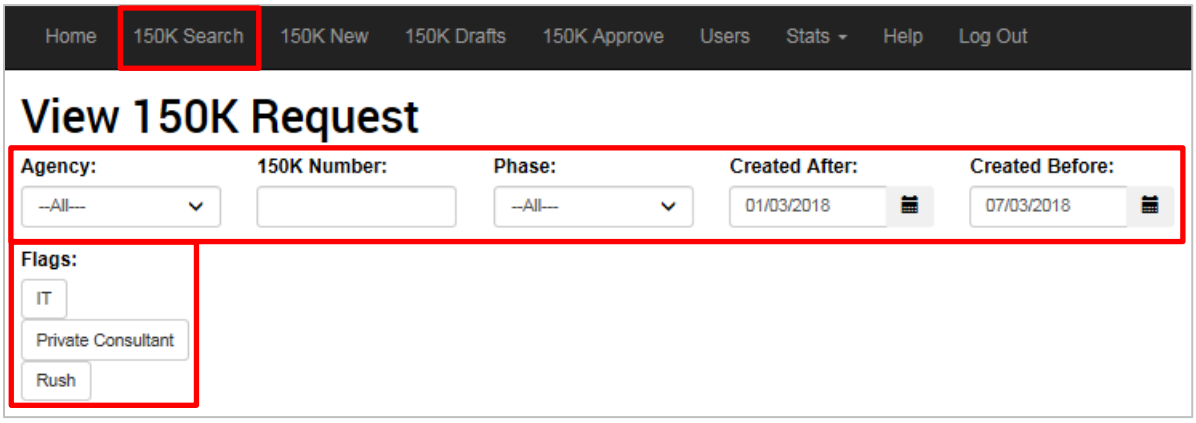

To return to this page at any time, click the **Home** tab at the top of the window. Click the purple button labeled **IT or Private Consultant Purchase over $150,000** to access the 150K System.

## SEARCHING FOR REQUESTS

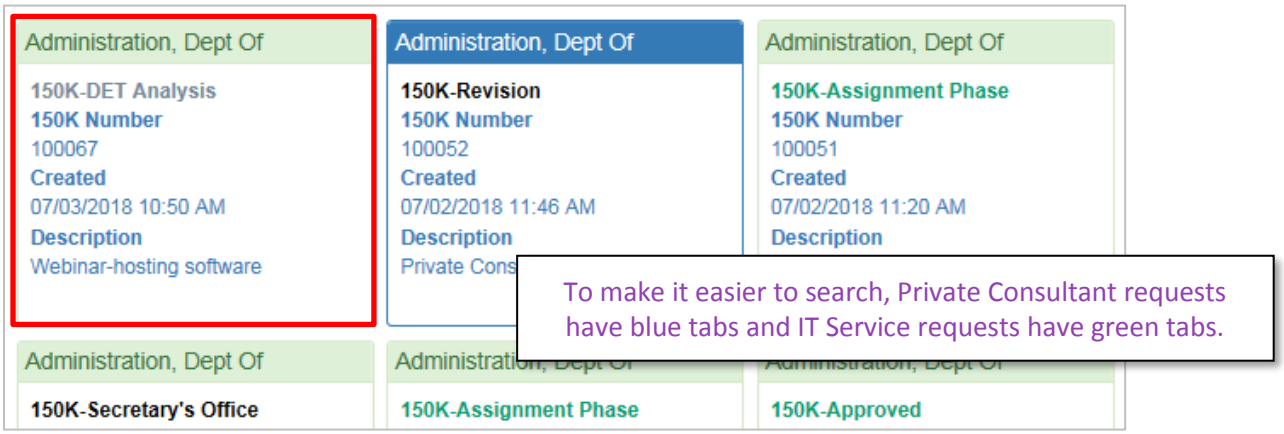
- **STEP 1:** Navigate to the 150K System homepage, as seen below. Click **150K Search** tab at the top of the page.



- **STEP 2:** Enter your search criteria. Select the filters you wish to use.
  - **Agency:** Selecting an agency in the dropdown menu will filter your search results by the agency that submitted the request.
  - **150K Number:** Once a request has been submitted, it is automatically assigned a 6-digit 150K Number. If you know the assigned number, you can quickly locate the request by using this filter.
  - **Phase:** Select the current phase of the request. Phases include: Agency Draft, Revision, Assignment, SBOP Analysis, SBOP Approval, DET Analysis, DET Approval, SBO Analysis, SBO Approval, Secretary's Office, Approved, Denied, and Withdrawn.
  - **Created After** and **Created Before:** You may search for a request submitted before and/or after a particular date.
  - **Flags:** You can filter the search results by the flags associated with the request, either IT (which appear in green squares) or Private Consultant (which appear in blue squares), or if it was marked as Rush in the Assignment Phase.



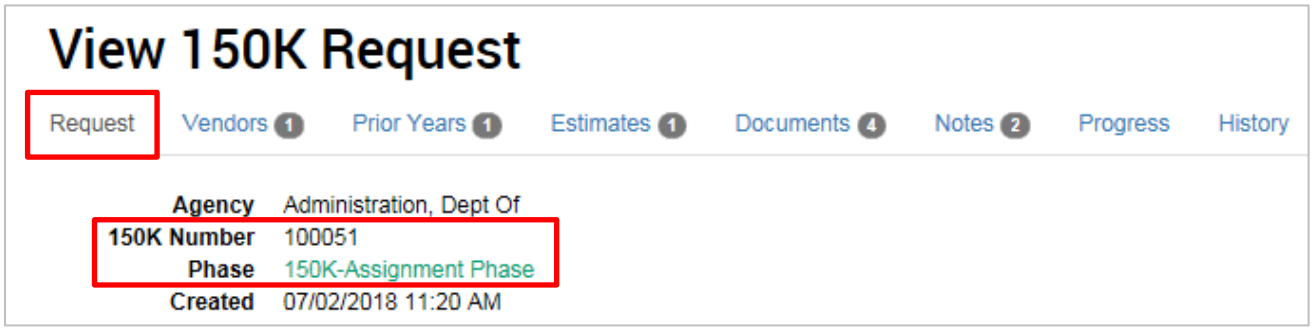

- **STEP 3:** Once you have identified the request you need to review, open it by clicking anywhere within its square.



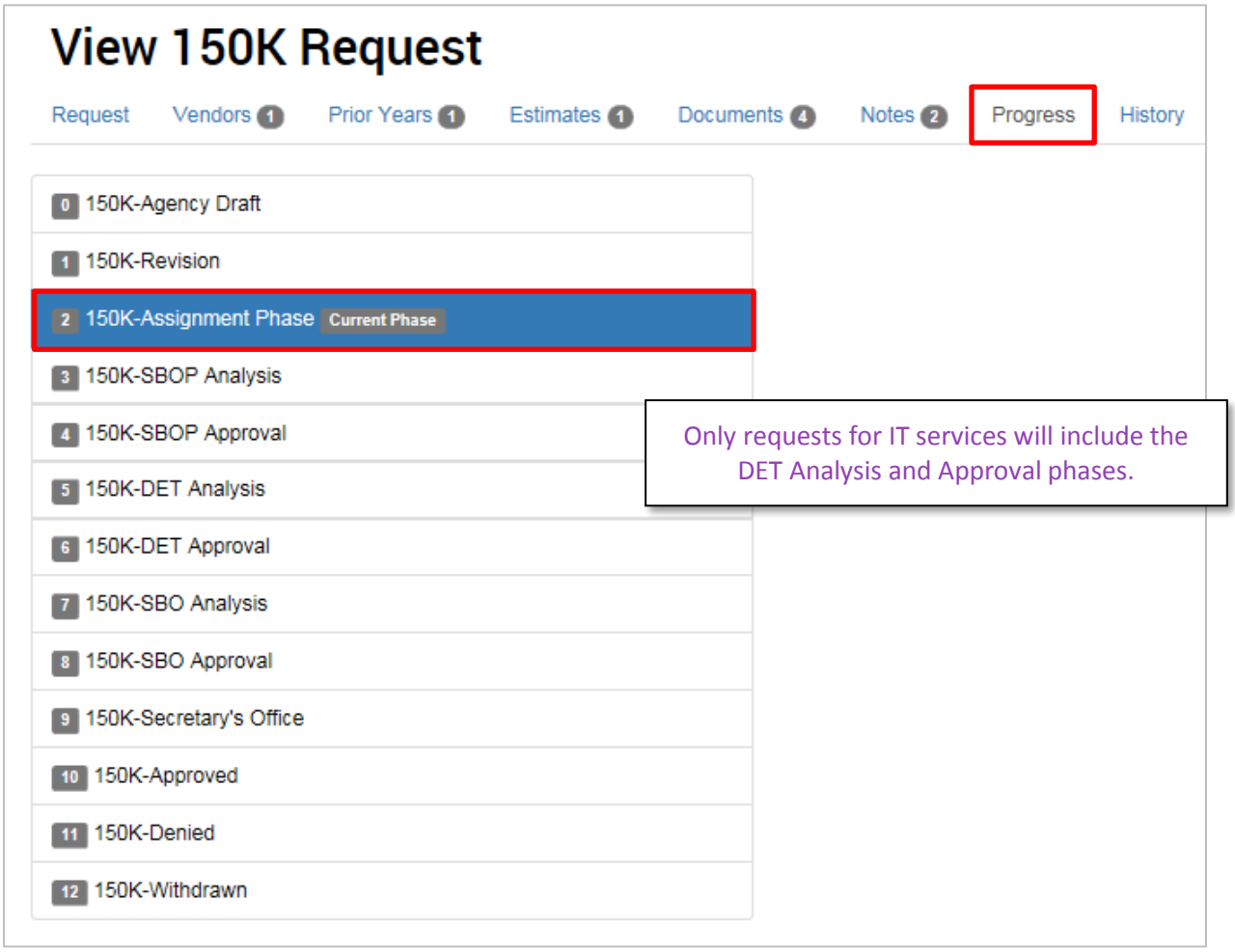
## REVIEWING A SUBMITTED REQUEST

There are several tabs of information that you may view when reviewing a request. Each tab has a different set of information relevant to the request. The number of tabs displayed will depend on the information that was included in the initial request.

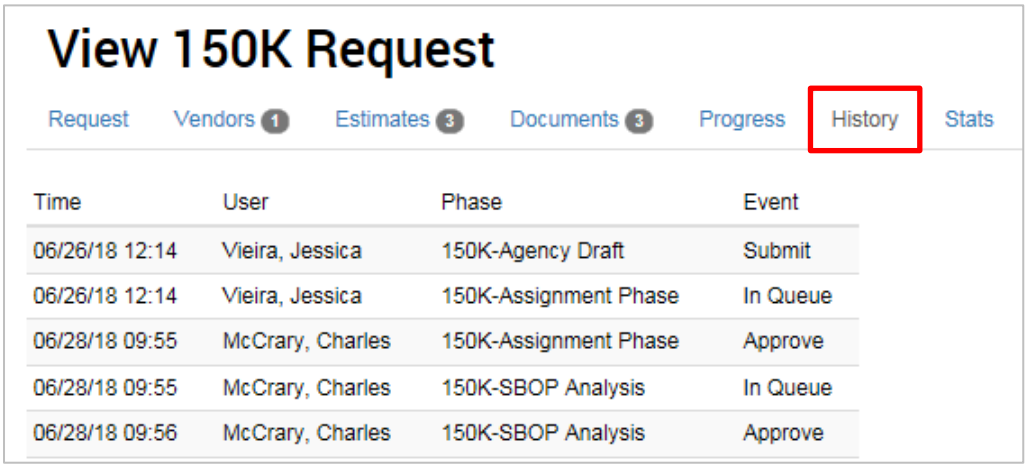
- **Request:** This tab contains a summary of all the information provided in the request and shows the automatically assigned **150K Number** and the **Phase** the request is currently in.




- **Vendors:** This tab displays the vendors that were entered into the request. If no vendors were added, this tab will not display.
- **Prior Years:** This tab displays information about requests entered in previous years. If no prior year information was entered, this tab will not display.
- **Estimates:** This tab displays cost estimates for all years that were provided.
- **Documents:** This tab shows a list of documents uploaded with this request as well as a printable version of the request itself and the request's approval letter (which will continue to be built throughout the approval process). All documents may be downloaded or printed.
- **Notes:** This tab displays any notes that have been added to the request. If no notes have been added, this tab will not display.
- **Progress:** This tab lists all the stages of approval that the request must complete to be successful. The stage the request is currently in will be highlighted and will list **Current Phase** to the right of it. Necessary phases depend on the type of request (e.g., IT requests must also be approved by DET). Additionally, a request may be sent back to the **150K Revision Phase** if more information is required before it can be approved. Once it passes through the **150K Revision Phase**, it will bypass the **Receiving** phase.

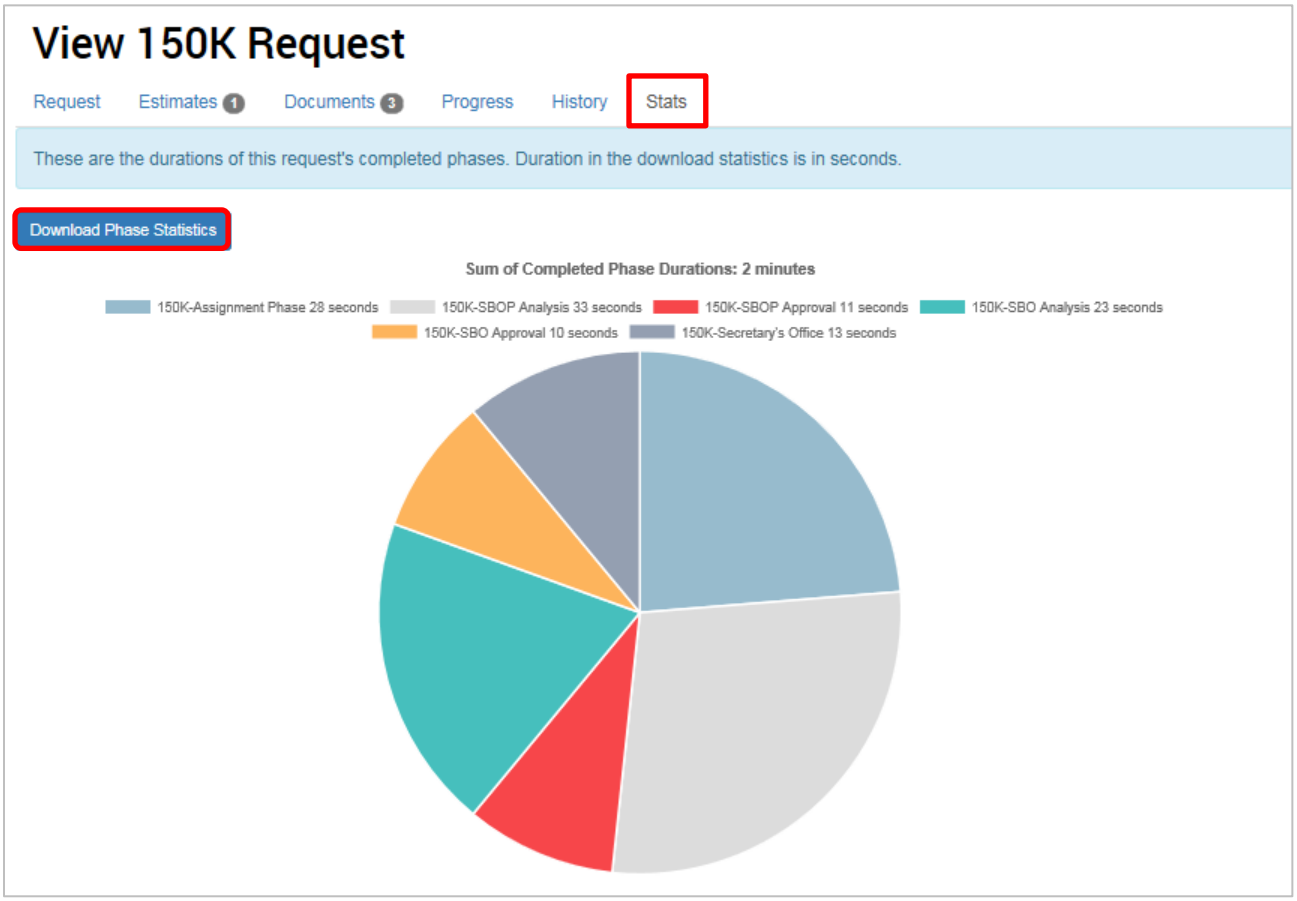



- **History:** This tab shows a list of everyone who has interacted with the request through the system. For each interaction, it will list the date and time, the person's name, the phase the request was in during the interaction, and the action ("event") that was completed.




| Time | User | Phase | Event |
|---|---|---|---|
| 06/26/18 12:14 | Vieira, Jessica | 150K-Agency Draft | Submit |
| 06/26/18 12:14 | Vieira, Jessica | 150K-Assignment Phase | In Queue |
| 06/28/18 09:55 | McCrary, Charles | 150K-Assignment Phase | Approve |
| 06/28/18 09:55 | McCrary, Charles | 150K-SBOP Analysis | In Queue |
| 06/28/18 09:56 | McCrary, Charles | 150K-SBOP Analysis | Approve |

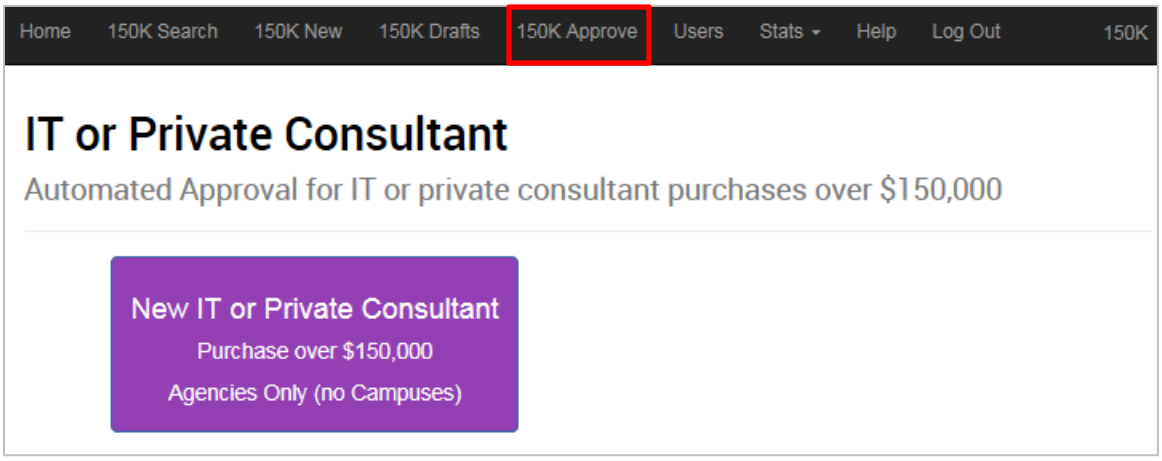
- **Stats:** Once the request moves through the Assignment Phase, the **Stats** tab will become available and will show a pie chart of the amount of time the request has spent in each phase. Users can download this information using the **Download Phase Statistics** button.




## ANALYZING AND APPROVING REQUESTS

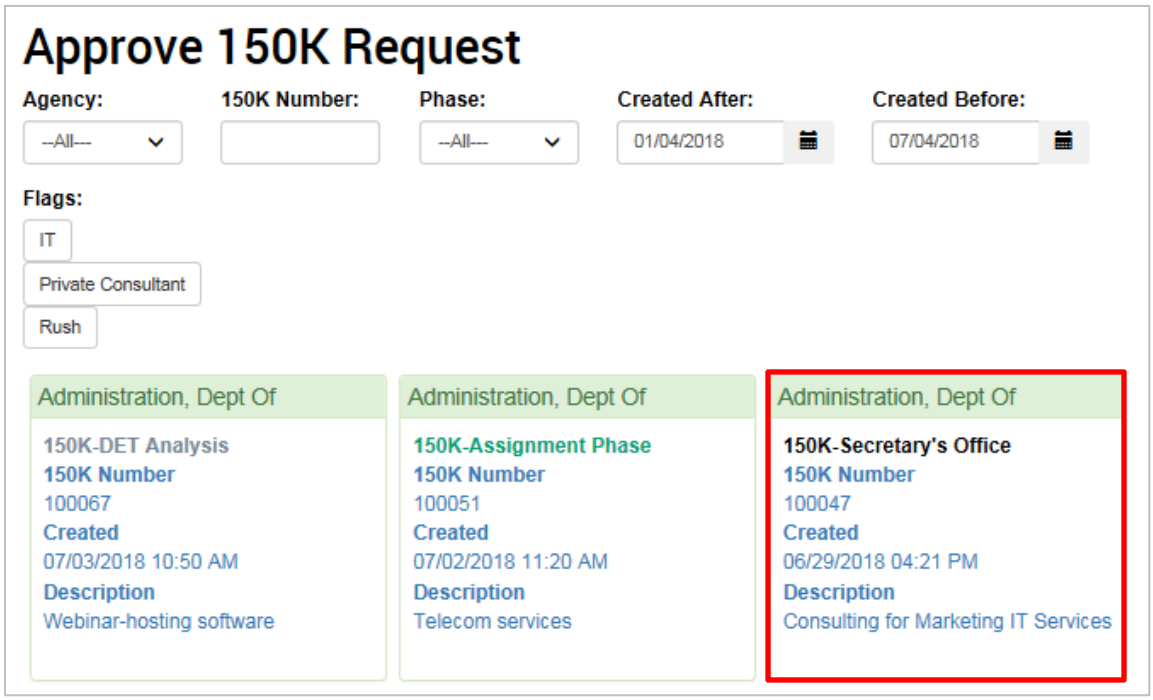
As a Phase User with an Analysis or Approval role in the 150K System, you have the ability to edit and approve different portions of requests that have been submitted to the website.

- **STEP 1:** Navigate to the 150K System homepage, as seen below. Click **150K Approve** tab at the top of the page.



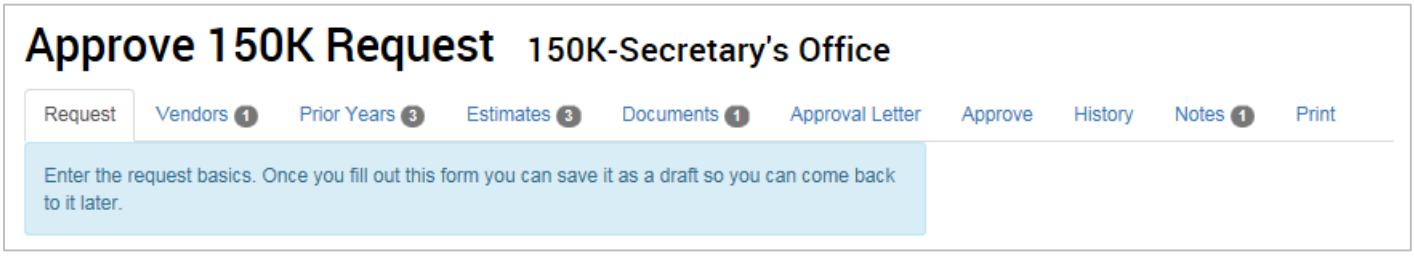
- **STEP 2:** Enter your search criteria. Select the filters you wish to use to fine tune your search results. For step-by-step instructions on how to search with filters, refer to the previous section.

- **STEP 3:** Open the desired request by clicking anywhere within its square.



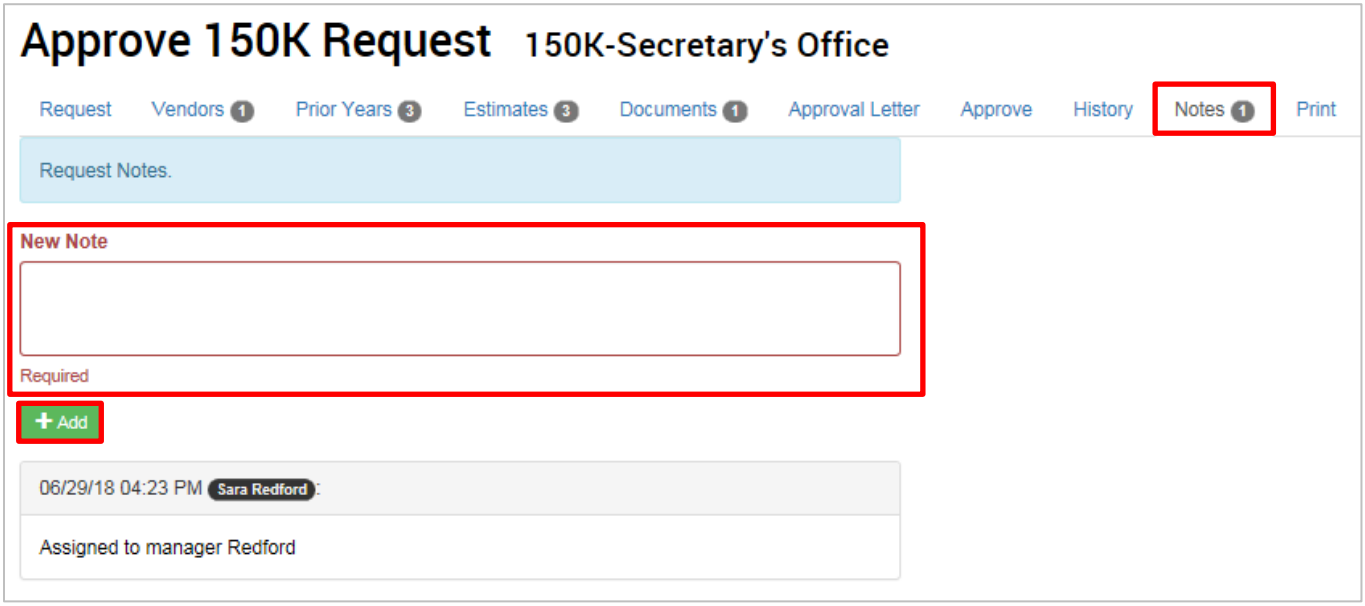

- **STEP 4:** Review the request.

  After opening the request, several tabs will display for your review.




If needed, you may add a **Rush Flag** to the request by navigating to the **Request** tab and clicking the white **Non Rush** button to changes it to a green **Rush** button. Be sure to click **Save** before leaving the page.

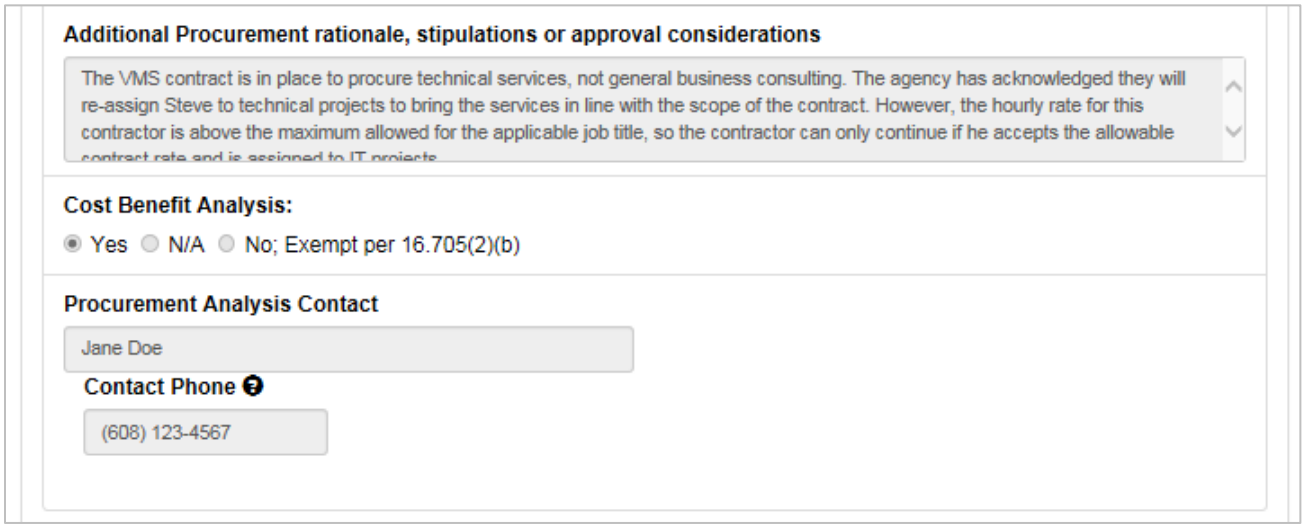
On the **Notes** tab you may add any additional information you would like to include with the request. Enter the information in the **New Note** box and click the **+ Add** button to save it to the request. Note that once you have entered a note, you cannot delete it.




➢ **STEP 5:** Review and update the Approval Letter.

The **Approval Letter** tab is used to create the request's approval letter. Users responsible for analysis in each approval phase will need to review and respond to the relevant section (i.e., SBOP Analysis is responsible for the Procurement Impact Analysis, DET Analysis is responsible for the Technical Impact Analysis, and SBO Analysis is responsible for the Budget Impact Analysis).

Each **Analysis** section has three statements that the user must respond to. Initially, all responses default to **x No** and the user must click on them to change the response to **+ Yes**.

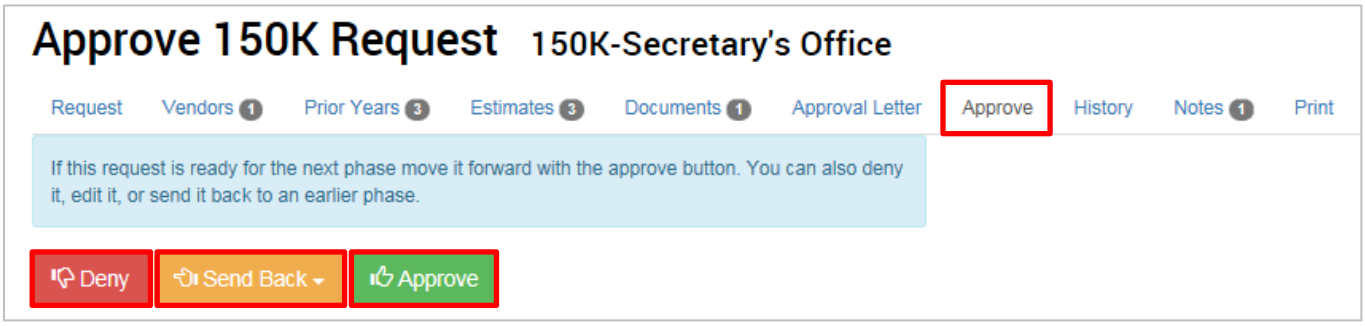



After responding to the statements, users may enter information into the **Additional [Procurement, Technical, or Budget] rationale, stipulations or approval considerations** textbox. SBOP Analysis will also include information regarding Cost Benefit Analysis and SBOP will be responsible for entering information into the **Contractor(s)** field. Finally, Analysis users will enter their name and contact number before clicking **Save & Continue**.

➢ **STEP 6:** Make an approval decision.

Navigate to the **Approve** tab and click the **Deny**, **Send Back**, or **Approve** buttons as appropriate. The request will immediately be sent once one of the approval buttons are clicked; if a button is clicked unintentionally, you will need to contact an administrator for assistance.

- **Deny:** This will deny the request.
- **Send Back:** This button will open a dropdown menu for you to select the specific phase the request needs to be returned to. If the request has errors and must be sent back to the agency that submitted it, select **Agency Revision**.
- **Approve:** This will approve the request and it will be automatically sent to the next phase for approval.



## CHARTS & GRAPHS

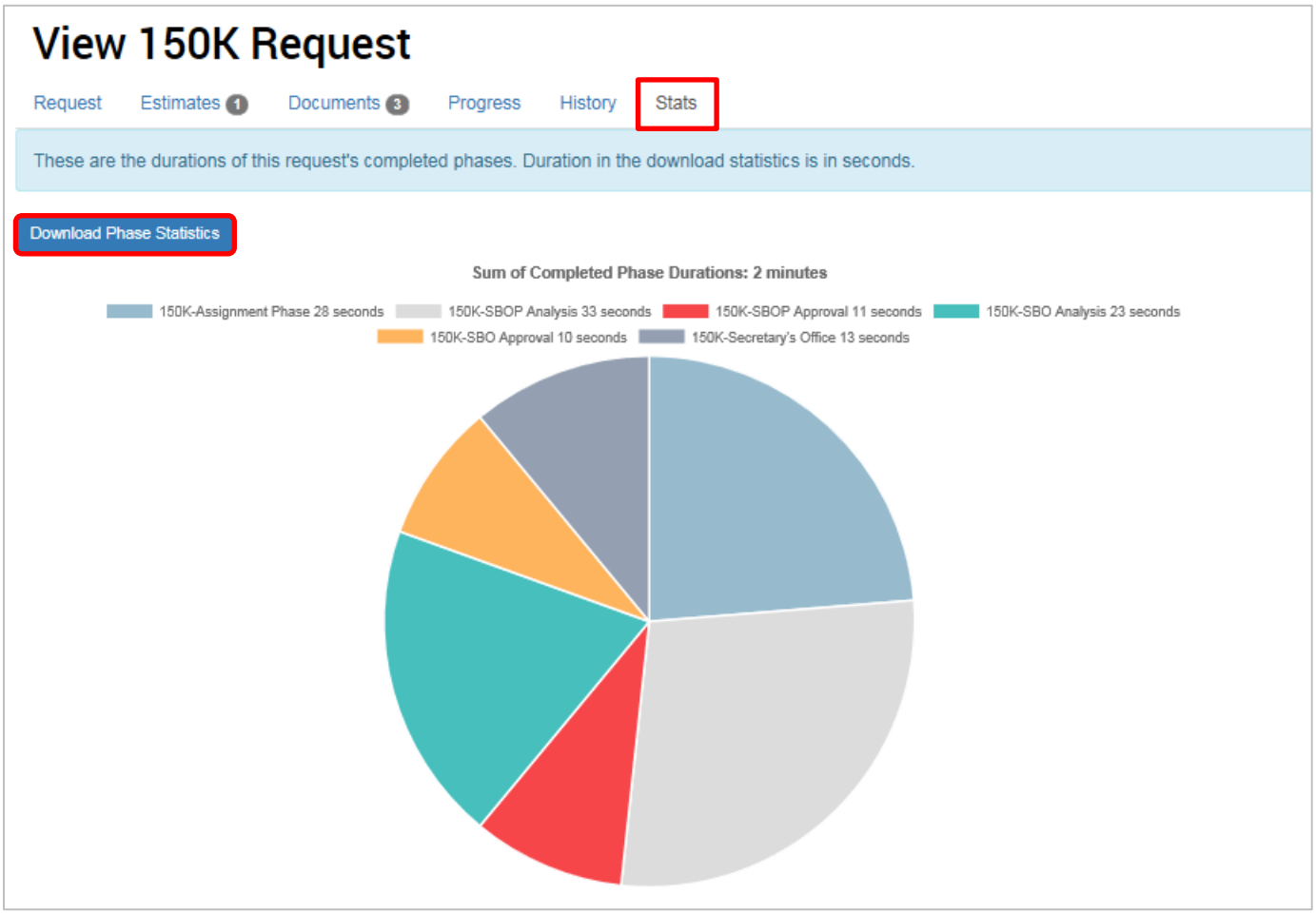
Statistics may be generated to show the average time requests spend in each of the approval phases. This data may be generated for an individual request or for all requests as a whole or by phase.

**Stats for an Individual Request**

- **STEP 1:** Navigate to the 150K System homepage. Click the **Search Requests** tab at the top of the page.

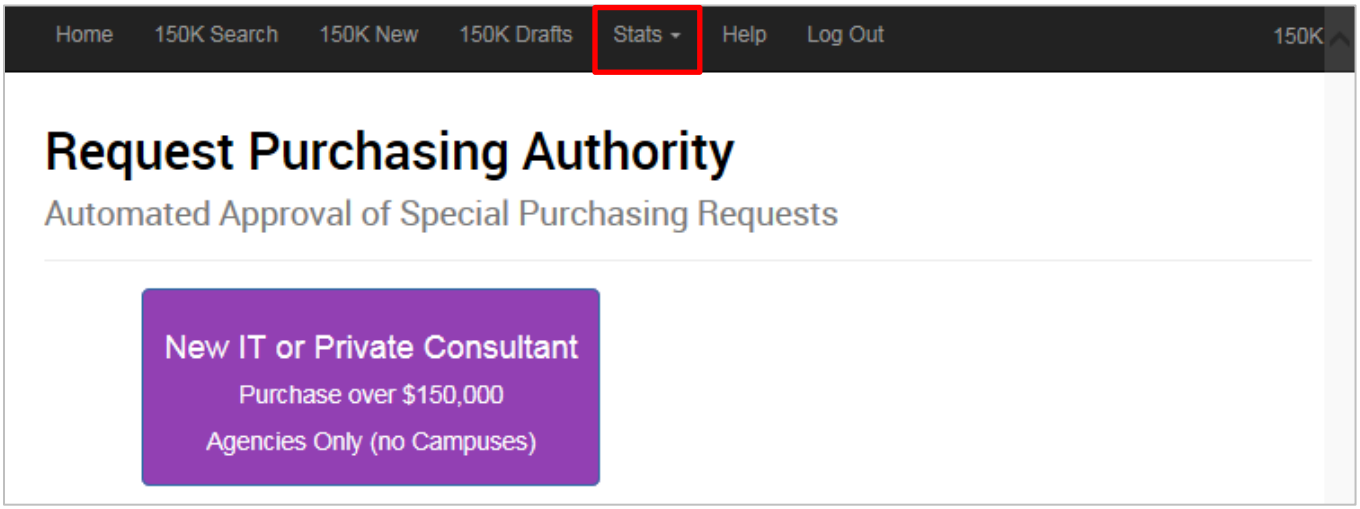
- **STEP 2:** Search for and click on the desired request (must be past the Assignment Phase for the Stats tab to be accessible). For step-by-step instructions for this task, see the **Searching for Requests** section.

- **STEP 3:** Click on the **Stats** tab. You may download this information to your computer by clicking the **Download Phase Statistics** button.

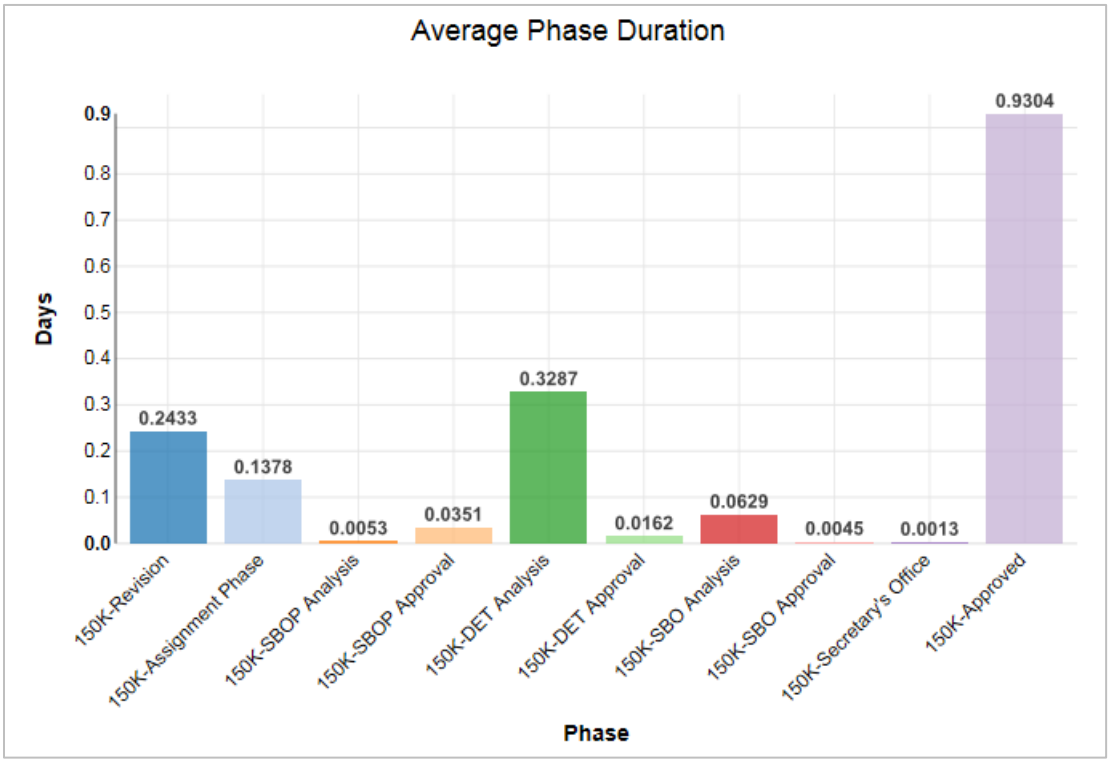


**Stats for All Requests**

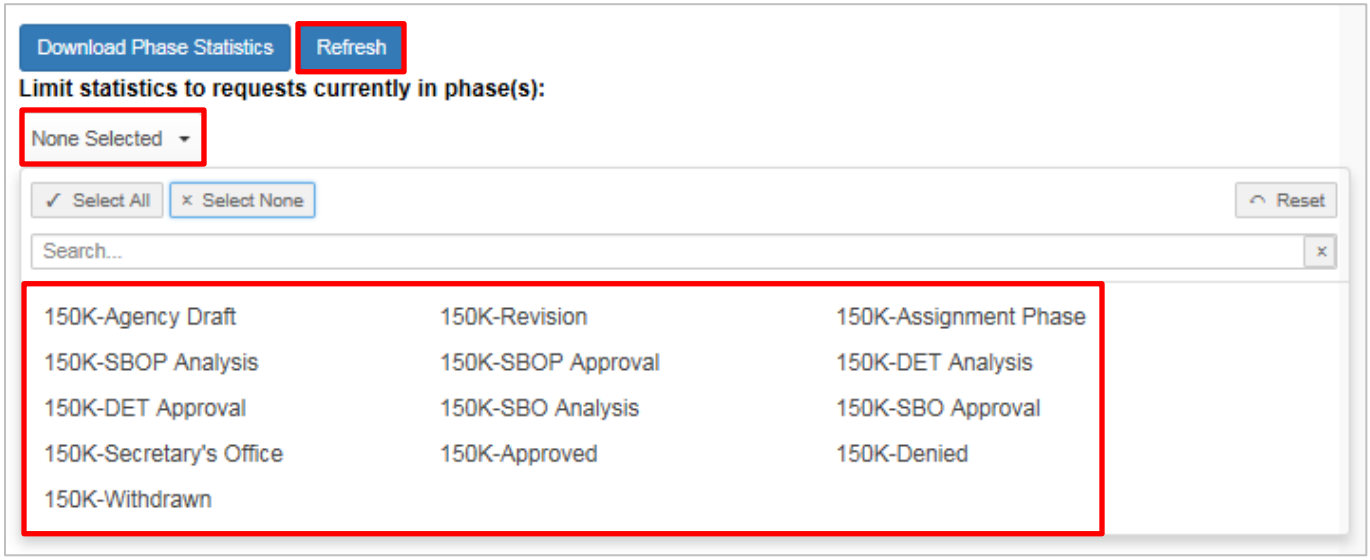
- **STEP 1:** Navigate to the 150K System homepage. Click the **Stats** tab at the top of the page and select **150K Average Phase Duration** from the dropdown menu.




Once selected, you will be shown a bar graph displaying the average length of time requests spend in each phase. By default, the graph will display results for all phases within the system, including those for the RPA portion of the system.



- **STEP 2:** Limit statistics to specific phases. At the bottom of the graph, y ou are able to filter the results by phase. Click the **None Selected** button to view the phase filters. Select as many of the phases as you would like and click **Refresh**.




This will show a bar graph displaying the average length of time 150 System requests spend in each phase. If desired, you can further filter the results to only include specific phases using the steps above. Click **Download Phase Statistics** to save or print an Excel sheet of the results.