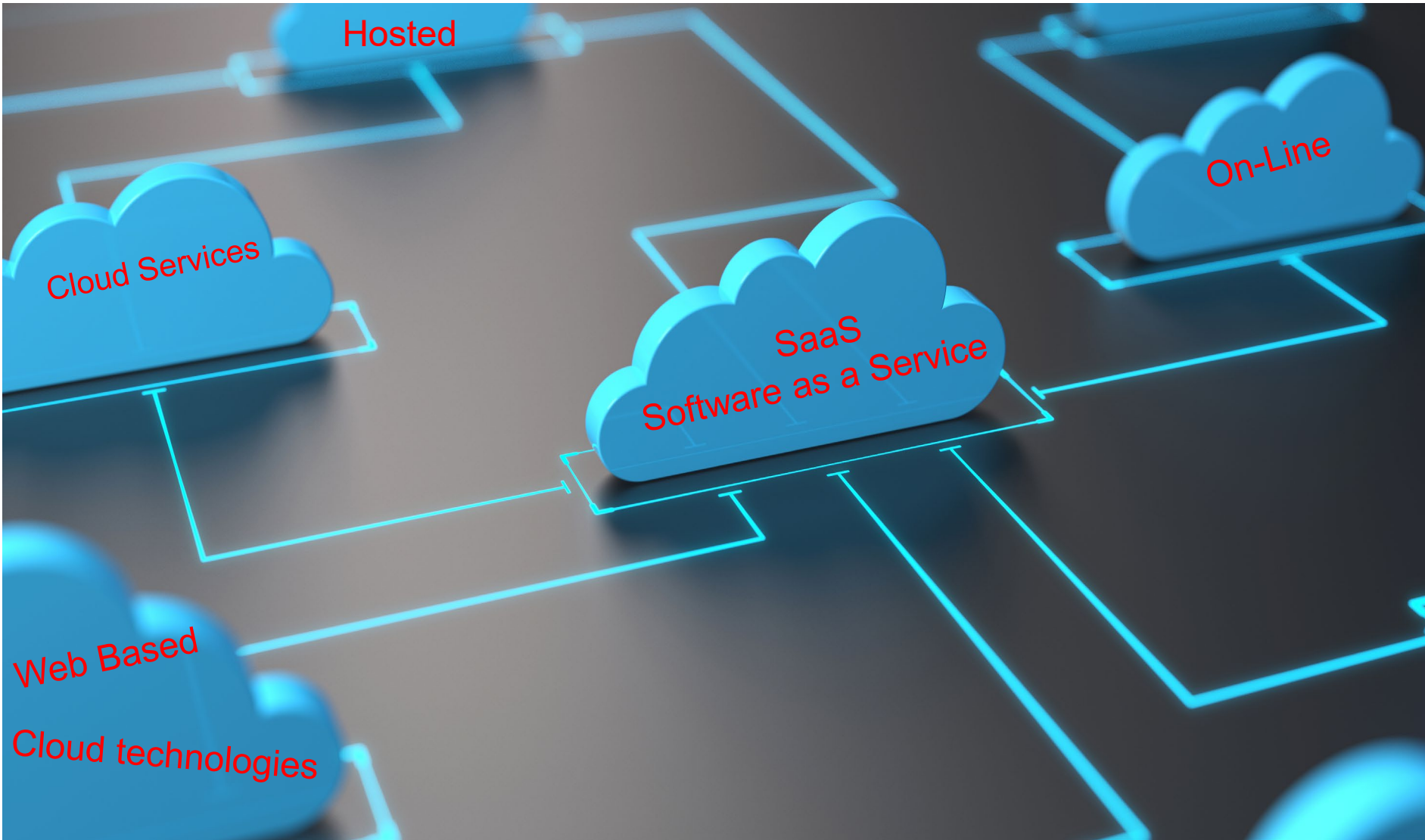




NAVIGATING THE SOFTWARE AND WEB HOSTED REVIEW AND PURCHASE PROCESS



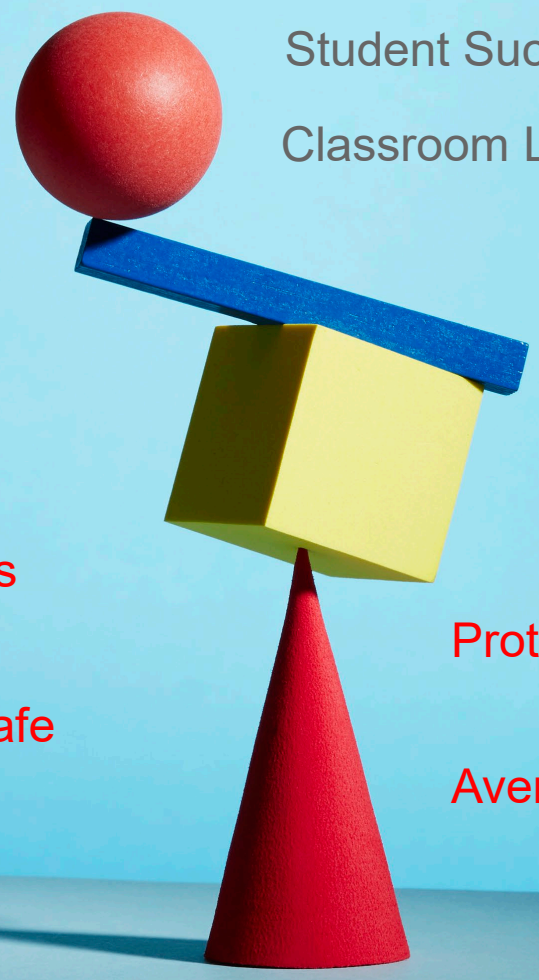
Software and Web Based Services





Campus Wide Needs
Department Operations

Student Success & Retention
Classroom Learning



Accessible Solutions

Keep UB network safe

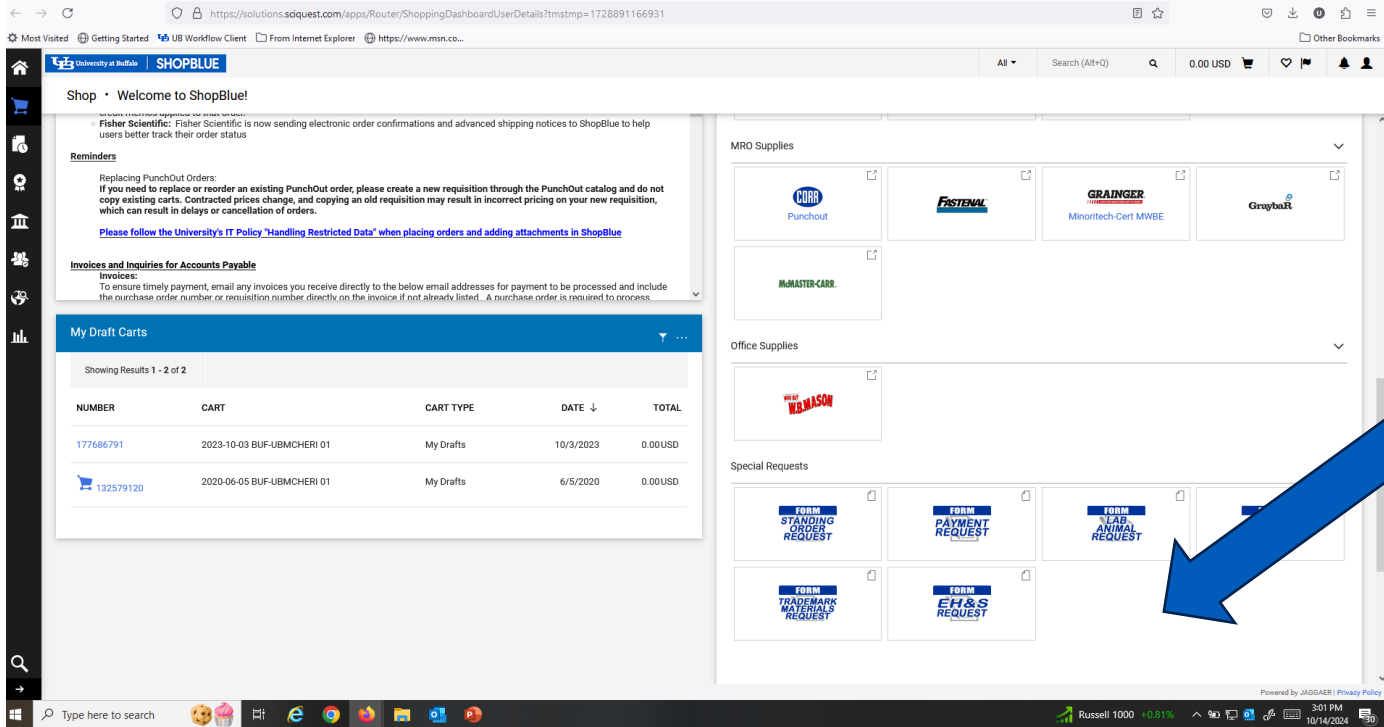
Protect UB Data

Average Data Breach costs \$4.88 Million





Step 1: Complete & Submit Service Form



The screenshot shows the ShopBlue user interface. On the left, there is a sidebar with navigation icons. The main content area is titled "Shop · Welcome to ShopBlue!". It includes a "Reminders" section with instructions on replacing PunchOut orders and following the university's IT policy. Below that is a "My Draft Carts" section with a table of draft carts.

NUMBER	CART	CART TYPE	DATE ↓	TOTAL
177686791	2023-10-03 BUF-UBMCHERI 01	My Drafts	10/3/2023	0.00USD
132579120	2020-06-05 BUF-UBMCHERI 01	My Drafts	6/5/2020	0.00USD

On the right side of the interface, there are sections for "MRO Supplies", "Office Supplies", and "Special Requests". The "Special Requests" section contains several form icons, including "FORM STANDING ORDER REQUEST", "FORM PAYMENT REQUEST", "FORM LAB/ANIMAL REQUEST", "FORM TRADEMARK MATERIALS REQUEST", and "FORM EH&S REQUEST". A large blue arrow points to the "FORM LAB/ANIMAL REQUEST" icon.

Step 2: Buyer Review – Bid or No Bid

 **University at Buffalo**

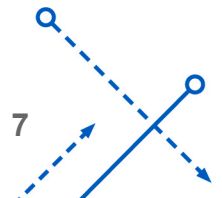
SHOPBLUE



Buyer Creates a Sourcing Event and begins bid process with end-users



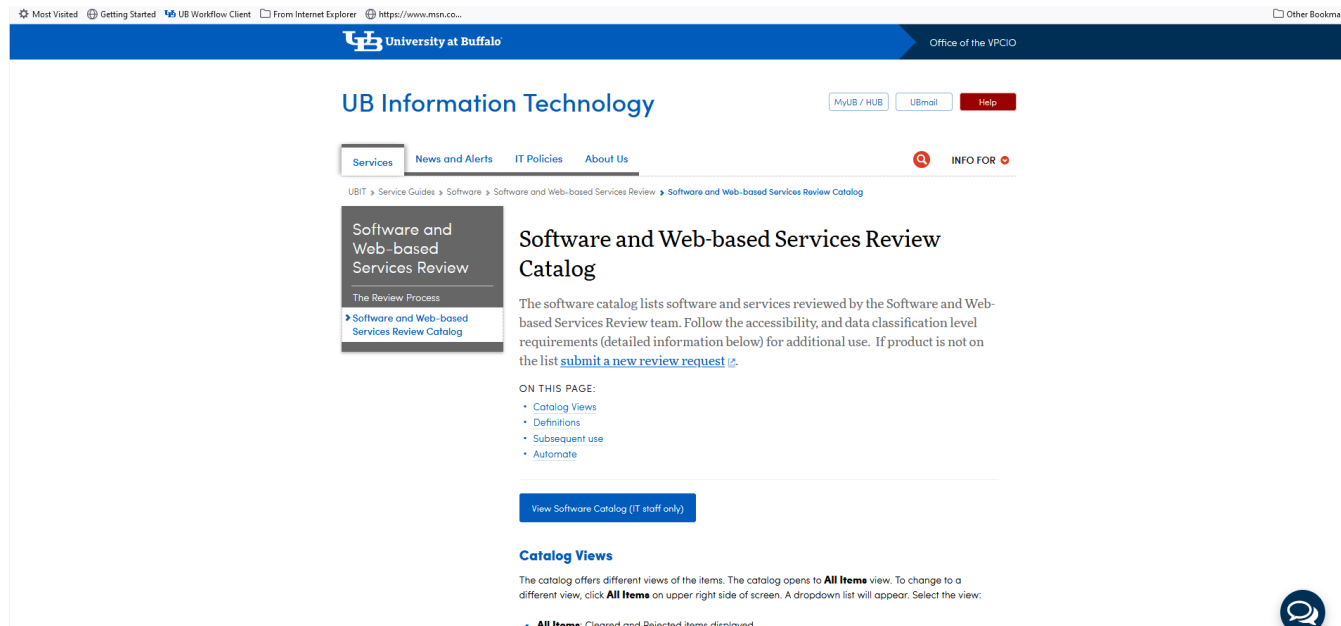
Buyer approves initial review step and sends request to the IT Review/Accessibility Step



Step 3: ShopBlue email notifies Dept IT Node about pending request

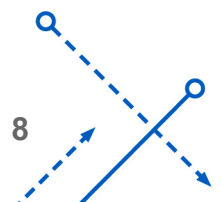
Role of Department IT Staff

Can you use an Existing Tool



The screenshot shows the University at Buffalo website's 'Software and Web-based Services Review Catalog' page. The page header includes the University at Buffalo logo and 'Office of the VP/CIO'. Below the header, there are navigation tabs for 'Services', 'News and Alerts', 'IT Policies', and 'About Us'. A search bar with 'INFO FOR' is visible. The main content area features a sidebar with 'Software and Web-based Services Review' and 'The Review Process' sections. The main heading is 'Software and Web-based Services Review Catalog'. The text below the heading states: 'The software catalog lists software and services reviewed by the Software and Web-based Services Review team. Follow the accessibility, and data classification level requirements (detailed information below) for additional use. If product is not on the list [submit a new review request](#).' Below this, there is a section titled 'ON THIS PAGE:' with links for 'Catalog Views', 'Definitions', 'Subsequent use', and 'Automate'. A blue button labeled 'View Software Catalog (IT staff only)' is present. At the bottom, there is a section titled 'Catalog Views' with a paragraph explaining that the catalog opens to the 'All Items' view and that users can click 'All Items' on the upper right side of the screen to change the view. A list item below reads: '• All Items: Cleared and Rejected items displayed.'

If not, submit VAR form.





Step 4: Concurrent IT and Accessibility Reviews





Step 5: Purchasing Process



SOFTWARE AND WEB-BASED SERVICES FORM DEMO

<https://www.buffalo.edu/administrative-services/managing-procurement/shopblue-system.html>

<https://usertest.sciquest.com/apps/Router/ShoppingDashboardUserDetails?tmstmp=1728779870635>

Office Supplies

 Proftech-Certified MBE	
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Special Requests

FORM STANDING ORDER REQUEST	FORM BLANKET ORDER REQUEST	FORM EH&S REQUEST	FORM SERVICE REQUEST
FORM LAB ANIMAL REQUEST <small>STANDING ORDER</small>	FORM PAYMENT REQUEST	FORM TRADEMARK MATERIALS REQUEST	Service Request Form Ready for testing
Standing Order Request	Blanket Order Request	EH&S Request	Lab Animal Order Request
Payment Request	Trademark / Artwork Request	Change Request Form	Supplier Request FORM
John Iacono Incorporated Test Link	Event Service Form	Technology Service Form	

Instructions



UB's Software and Web-based Services Review is required to comply with federal and state regulations, SUNY and UB (University at Buffalo) policies, and industry best practice. The goal is to identify potential problems before software is acquired or used to avoid serious consequences. Our team of experts stay current on compliance requirements for accessibility, data security and business impact. The team consists of members from VPCIO staff and the Electronic and Information Technology Accessibility Officer.

What kind of software requires a review?

- Desktop applications
- Third party add-ins/plugin-ins
- Web-based services (hosted software)
- Server-based software requiring installation on UB servers
- Any service or software accessed by students or the public via UB or third-party websites
- Any software that contains or exchanges Personal Identifiers (PID) or HIPAA data
- Any upgrade from current on-premises to cloud-based services or
- Any modules or services added to an existing approved tool
- Software Open source
- Freeware
- Shareware
- no-cost products (provided free from a supplier)
- Trial or demo versions that require installation on UB systems

If your request is approved by the Software and Web-based Services Review Step, the request will return to the buyer to begin the procurement process.
If your request is not approved by the Software and Web-based Services Review Step, the buyer will reject or return the purchase request to the Department approver.

Department or Group Contact Information



Select Node

Supplier Contact



Supplier Contact Information

Existing Supplier

Enter Supplier ★

If you've contacted the supplier, please provide the supplier contact information below

Supplier Contact Name

Supplier Contact Email Address

Supplier Contact Phone Number



Product Information

Describe the product or service you are requesting to purchase ★

500 characters remaining

[expand](#) | [clear](#)

Select type of purchase ★

If this request is a renewal, please provide previous purchase order or contract number

How many agreement/contract years? ★

Who will use the product or service? Check all that apply.

- Students
- Faculty
- Staff
- Researchers/PI
- Community Members/ Non-UB Staff
- UB Affiliated departments and programs

What is the total cost of the supplier quote or multi-year agreement?

Please upload any supplier quotes, emails, and/or proposals received below

Internal Attachments ★

[Add](#)

Description ★	Unit Price ★	Quantity ★
<input type="text"/>	<input type="text"/>	<input type="text"/>

254 characters remaining

[expand](#) | [clear](#)

Description	Unit Price	Quantity
-------------	------------	----------



Simple Advanced


Search for products, suppliers, forms, part number, etc.



1 Item Select All

Evertrue Incorporated · 1 Item · 25,000.00 USD

SUPPLIER DETAILS   S002 : 330 CONGRESS ST 2ND FLOOR, BOSTON, MA 02...

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
 Technology Service Form					

ITEM DETAILS

1	Description - Year 2 license 12/01/2024-11/30/2025	25,000.00	Qty: 1	25,000.00
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ITEM DETAILS

Commodity Code

00000000-0000000-536000

Default

Summary

Details

For

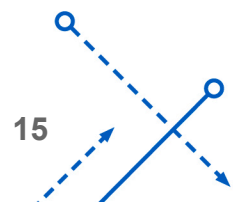
Nina Anders

Name

2024-10-15 BUF-NINAAANDE 01

Total (25,000.00 USD)

Subtotal	25,000.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
	25,000.00



- Summary
- Taxes/S&H
- PO Preview
- Comments/Business Purpose
- Attachments **1**
- History

General	Shipping	Billing
Cart Name 2024-10-15 BUF-NINAANDE 01 Description no value Priority Normal Prepared by Nina Anders Prepared for Nina Anders Owner Phone +1 716-645-4575 Campus University at Buffalo (28030) Department Purchasing and Contract Services (1107) Business Purpose no value ● Required	Ship To Attn: Nina Anders Contact Line 2 University at Buffalo Bldg: Crofts Hall Room: 224 North Campus Buffalo, NY 14260 United States Delivery Options Ship Via Best Carrier-Best Way Requested Delivery Date no value F.O.B. DESTINATION Freight Terms Freight charges NOT allowed Supplier pays freight	Bill To University at Buffalo Accounts Payable 716-645-2676 apinvoice@business.buffalo.edu 206 Crofts Hall Buffalo, NY 14260 United States Credit Card Info No credit card has been assigned. Billing Options Accounting Date no value

Purchasing Information

UB Document Commodity & Buyer

Buyer Commodity	Buyer Name	Buyer Email Address	Buyer Phone Number
no value ● Required	no value ● Required	no value ● Required	no value ● Required

Additional Purchase Details

Summary

Draft

✘ **Correct these issues.**
 You are unable to proceed until addressed.

- Required: Business Purpose
- Required: Buyer Commodity
- Required: Buyer Name
- Required: Buyer Email Address
- Required: Buyer Phone Number
- Required: Account-SUNY

Please update fiscal year to 2024 in the Fiscal YR-SUNY field

Total (25,000.00 USD)

Subtotal	25,000.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Total	25,000.00

What's next for my order?

Next Step: Missing Approver Catch-All

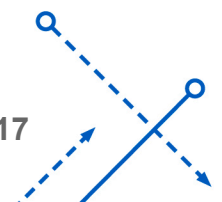
Approvers: AdminDeni, Linda
AdminMaute, Michael
AdminMeadows, Ali
AdminScibetta, Bethany

Workflow: ...





Recommendations for Technology Purchases



The background features a complex network of white lines and arrows. Solid lines intersect at various angles, while dashed lines form loops and paths. Small white circles are placed at several points where lines meet or end, suggesting nodes or starting/ending points in a network or flow diagram.

QUESTIONS?

How did we do?

Take the Session Survey on your smart device using the QR Code on your schedule."

Each Business Day attendee will receive a schedule with a printed QR code.