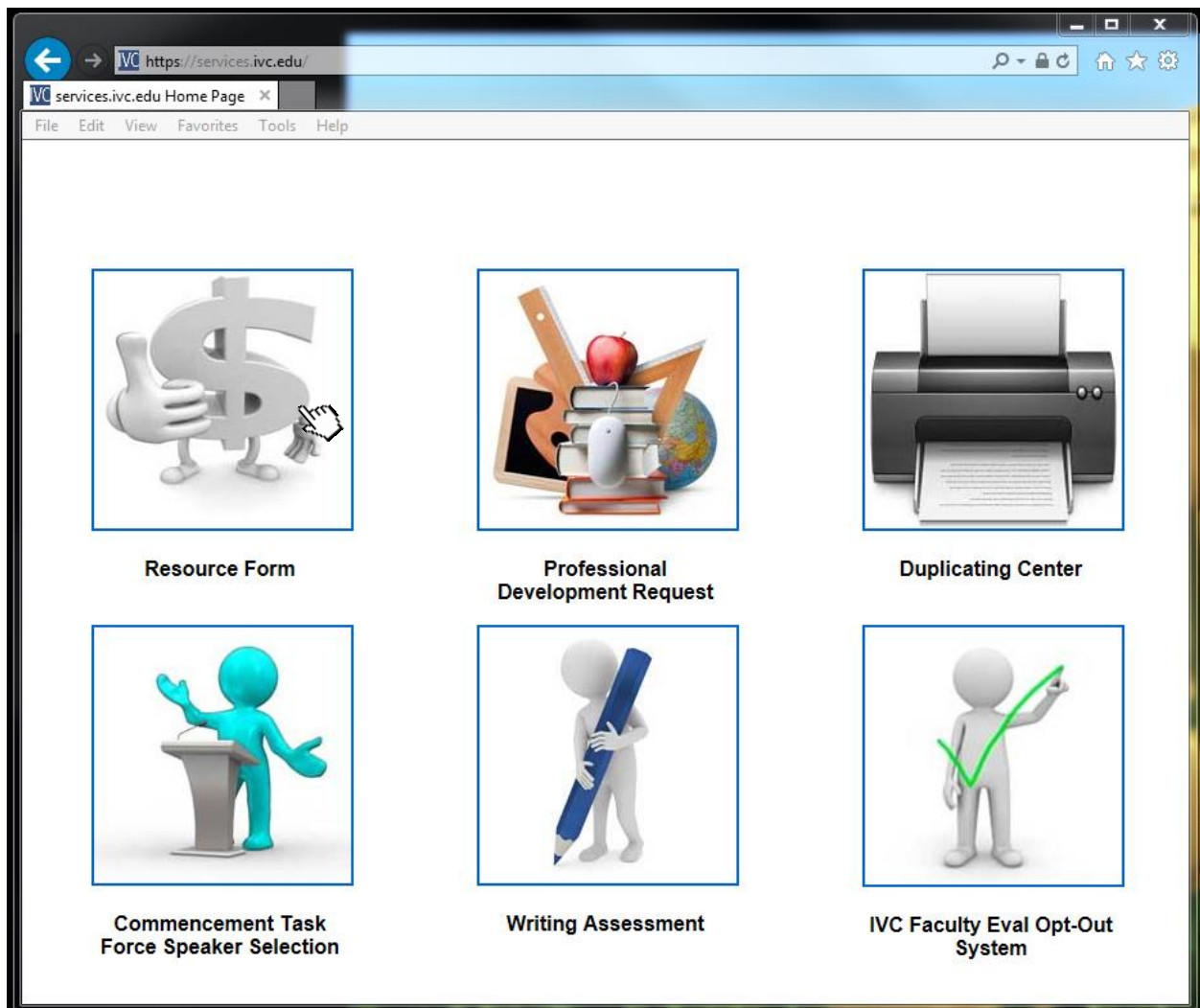# Getting Started

Open one of the browser of preference, i.e, (Internet Explorer 10+, FireFox 22+, Chrome 7+, Safari 5+)

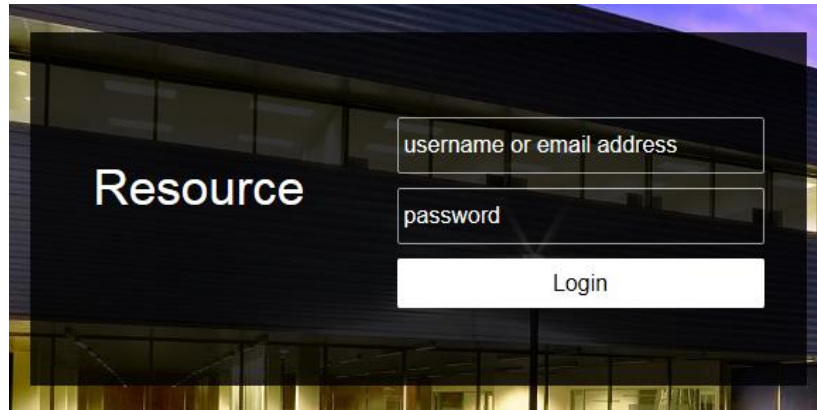After the browser has loaded, type in the Universal Resource Locator (URL) https://services.ivc.edu/

The site will look like:

To access Resource Form, Click on the image "Resource Form"
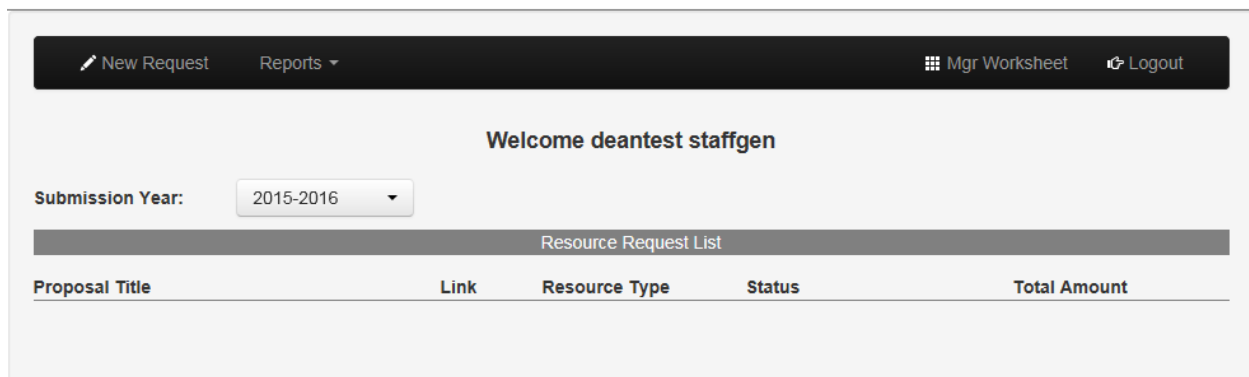
Once the browser has loaded, a Login page will appear.

Enter your personal "Username" and "Password" to access Resource Forms.
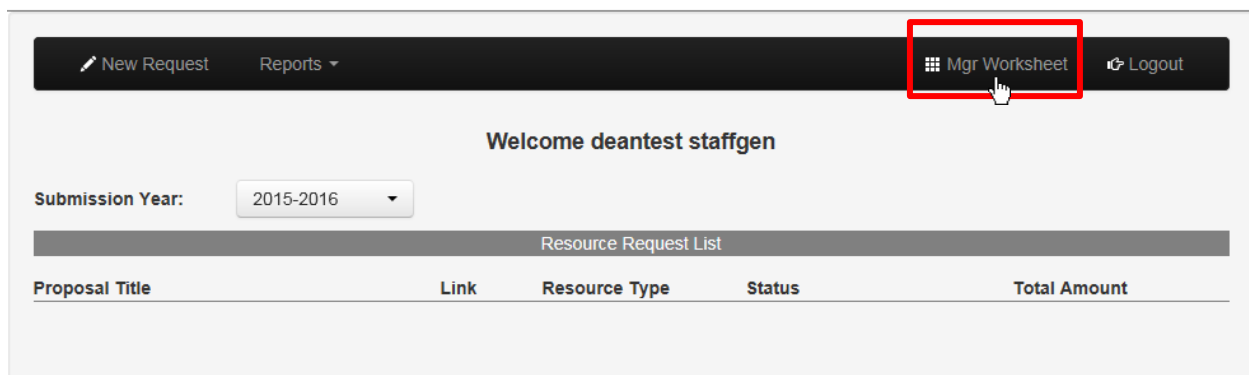
Click "Log In"

Once logged in, the browser will load into:

Next, go to the top right hand corner and click on the "Mgr Worksheet" tab.

The Administration page will appear as shown:

Finding the Right Proposal

The Administration page has six tabs that allow the user to filter and narrow down proposals. Going left to right, the tabs are Status, Assigned To, Resource Type, Program Type, Funding Source, and One Time. View the options that are applicable to your proposal by clicking on the drop arrow under each option.

Once the drop down menu appears, highlight and click on the desired option. The menu will collapse and only your selection will be visible.

Next, after completing each tab, move to the Refresh Button.

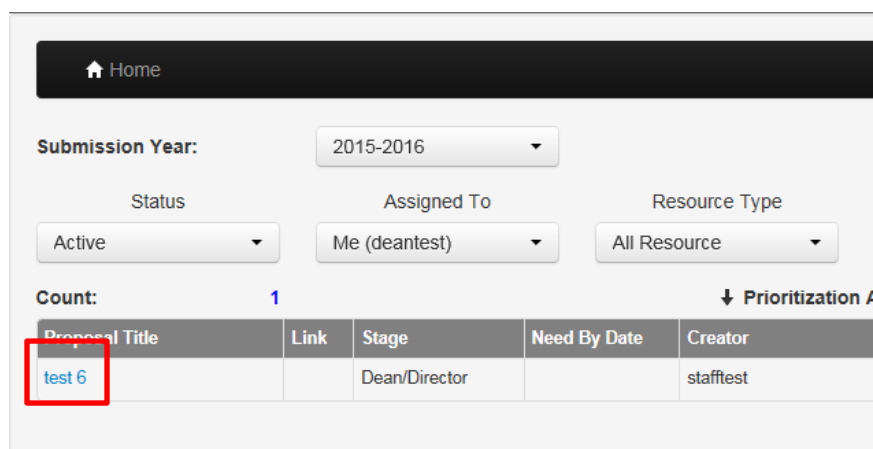Click the "Refresh" button to filter the proposals:

Once you have clicked the "Refresh" button, a list of proposals that fit your criteria should show.

To see details of the proposal, double click on the proposal name under the header Proposal Title

Your proposal should look similar to the example below:

🖨 Print

test 6

General Info

Creator Name:	*stafftest*		Submission Year:	*2015-2016*
Creator Title:	*IT Test Account*	Date:	*10/2/2015*	Need By:
School/Division:	*Tecnology Services*	CC:		
Proposal Title:	test 6			
Description:	*testing 6*			
Program Information:	*New Program/Strategic Initiative*			
Resource Type:	**Other**			

Worksheet

testing 6	*Total Amount:*

Funding Source

☑ General	☐ College Work Study	☐ Lottery
☐ ASIVC	☐ Community Education	☐ Parking
☐ Basic Aid	☐ DSPS	☐ Perkins
☐ Basic Skills Initiative	☐ EOPS/CARE	☐ PPIS
☐ BFAP	☐ EWD	☐ SSSP
☐ CalWORKs/TANF	☐ Foundation	☐ Student Equity
☐ Capital Outlay	☐ Grants	☐ Student Material Fees
☐ CDC	☐ Health	

Briefly explain the rationale behind selecting the funding sources above.

Request Amount: $0.00   **Approved Amount:**

Planning

AUR-Strategy

Transaction History

10/02/2015 2:33 PM
stafftest submitted

10/02/2015 2:33 PM
ykim160@ivc.edu send back to Draft stage
testing

10/02/2015 2:32 PM
vptest staffgen Saved rating : 0
vptest staffgen: Move forward to SPAC
llkjhhg

10/02/2015 2:31 PM
deantest staffgen Saved rating : 0
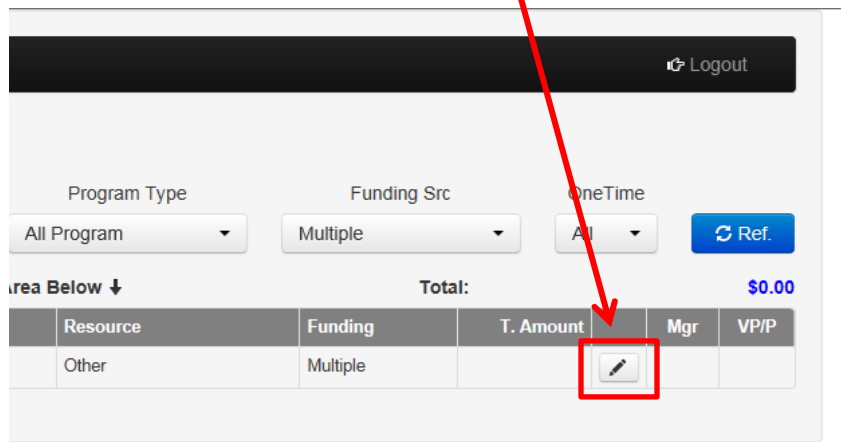*deantest staffgen: Move forward to VP/President*
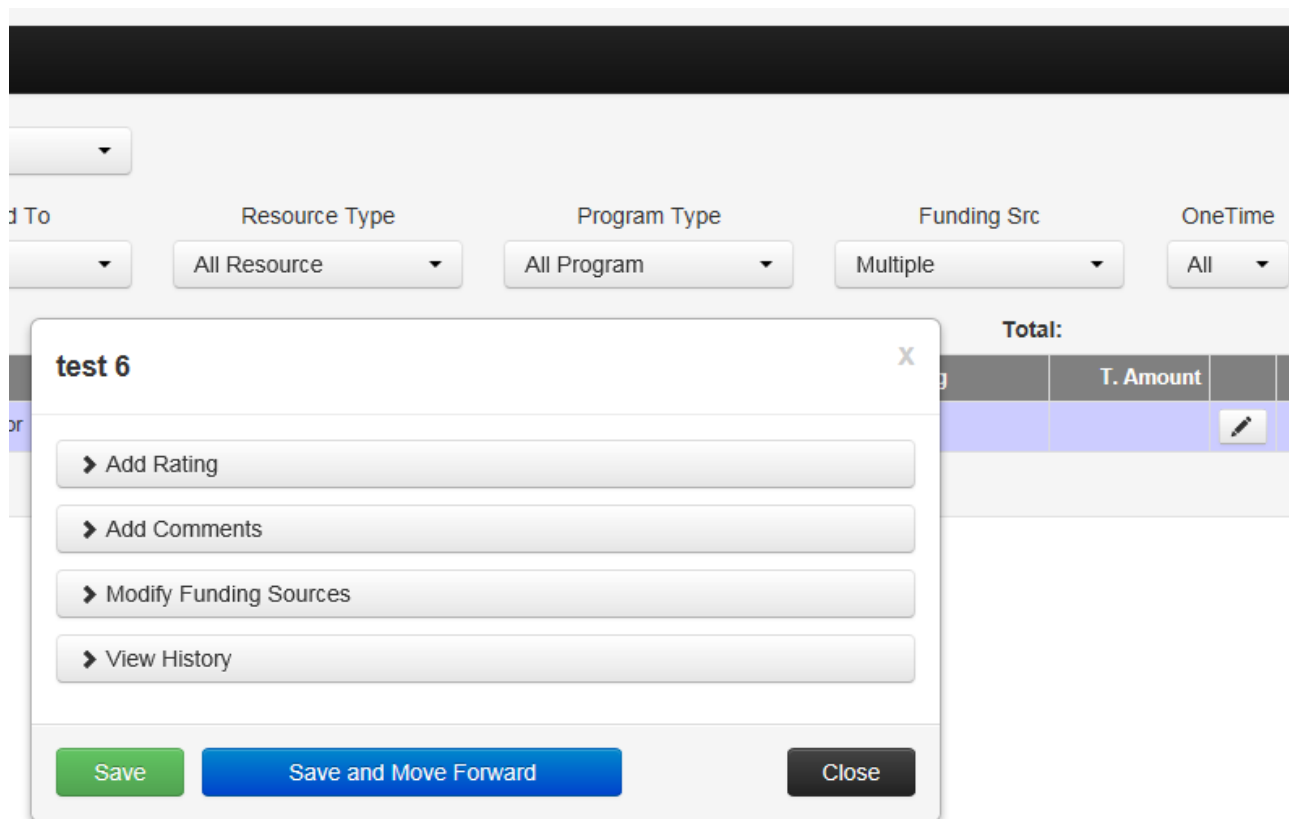*kii9ii*

10/02/2015 2:19 PM
stafftest submitted

Rating Resource Request

To rating resource request, click on the pencil icon to the right of the proposal title:
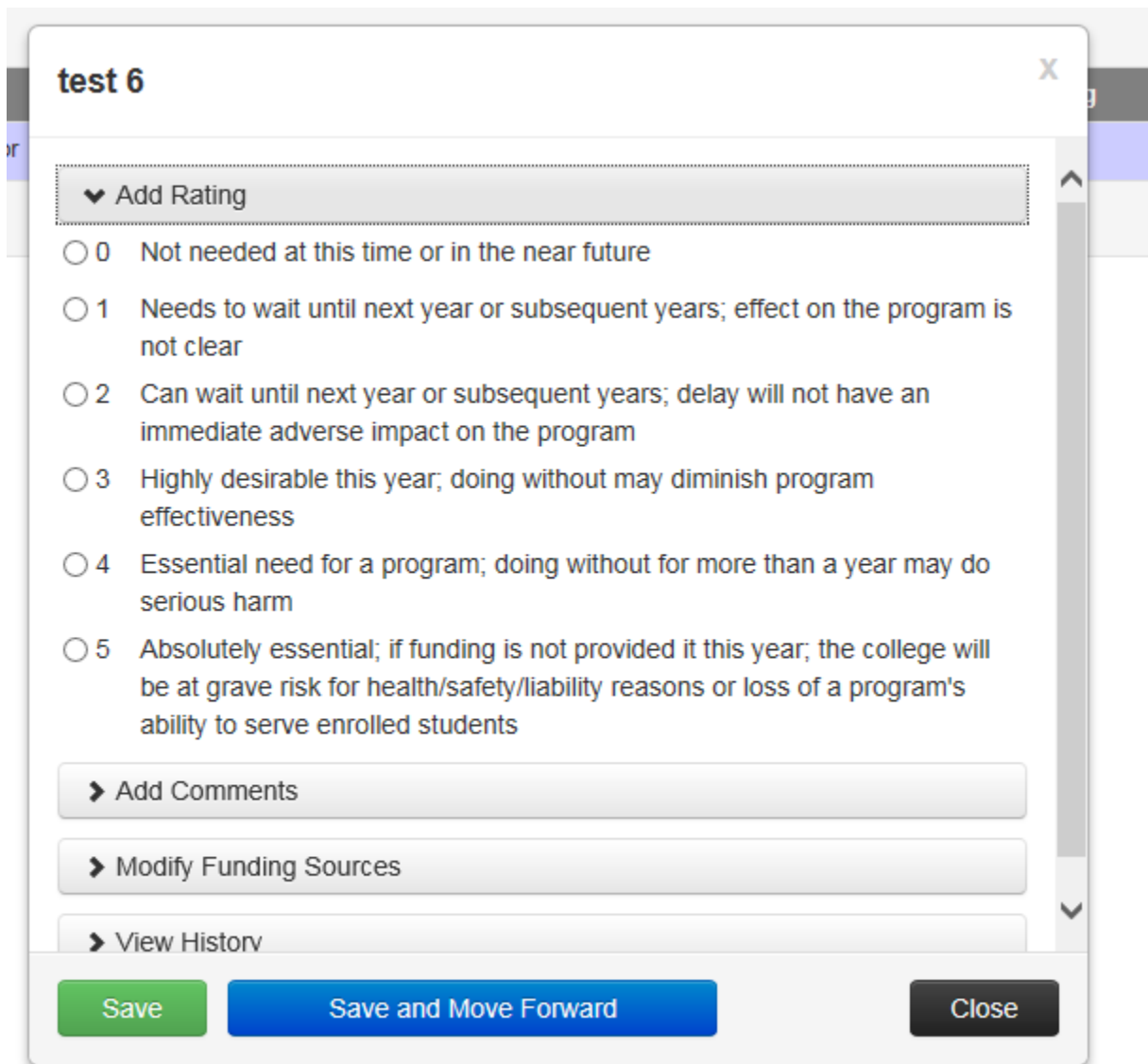

A new menu will appear:

Selecting "Add Rating" will give you the following submenu:

This section will allow you to prioritize the proposal on a scale of 0 to 5. Proposals rated 5 are considered the most important and should be addressed right away.

NOTE: Hitting "Save" will save your work, but also close the menu. You will have to select the pencil icon on the Manager Worksheet to reopen it. Do not select "Save and Move Forward" until you completely done modifying the proposal as that will send the proposal to the next level of approval.

Once a rating is selected, move onto the next section by clicking on the "Add Comments" tab. A text box will open up where suggestions, reviews, or general comments can go.

test 6   X

> Add Rating

✔ Add Comments

[   ]

> Modify Funding Sources
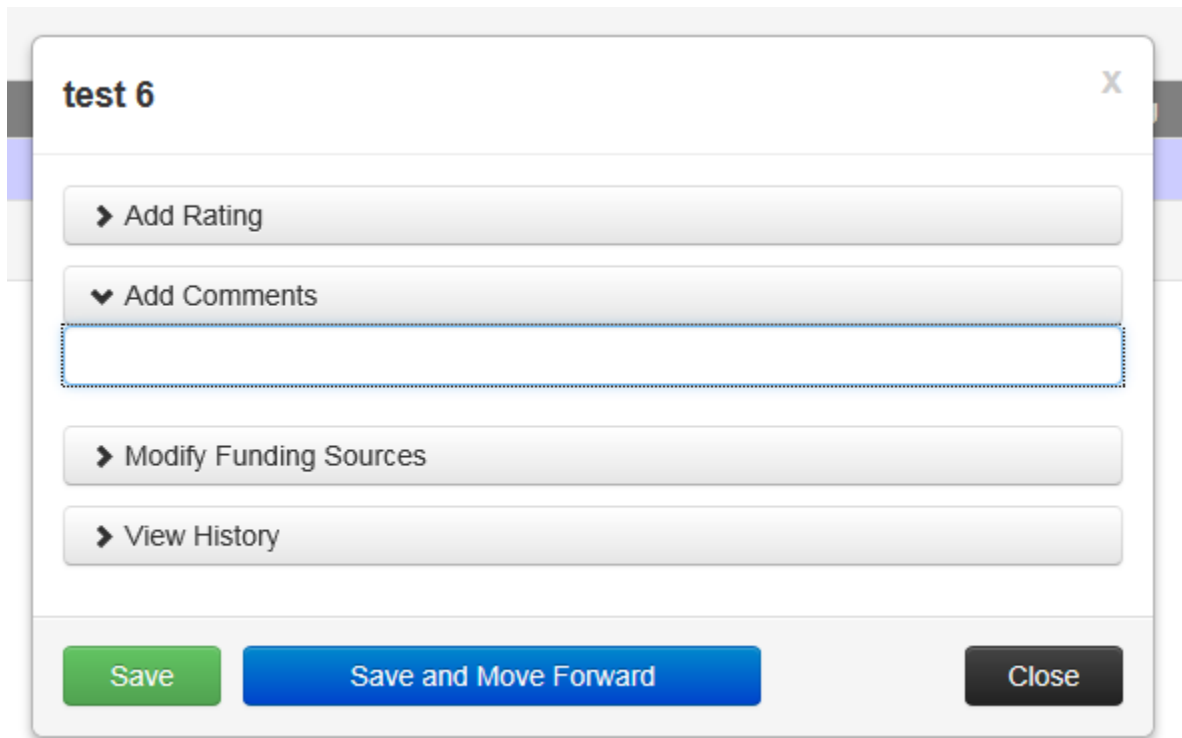
> View History

Save   Save and Move Forward   Close

NOTE: Do not select "Save and Move Forward" until you completely done modifying the proposal as that will send the proposal to the next level of approval.

The next tab, labeled "Modify Funding Sources," allows the user to either modify or select the funding source of the project.
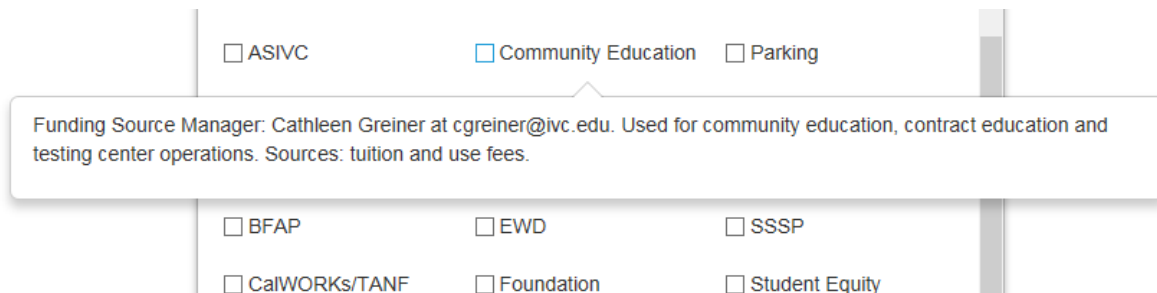
test 6   X

❯ Modify Funding Sources

☑ General	☐ College Work Study	☐ Lottery
☐ ASIVC	☐ Community Education	☐ Parking
☐ Basic Aid	☐ DSPS	☐ Perkins
☐ Basic Skills Initiative	☐ EOPS/CARE	☐ PPIS
☐ BFAP	☐ EWD	☐ SSSP
☐ CalWORKs/TANF	☐ Foundation	☐ Student Equity
☐ Capital Outlay	☐ Grants	☐ Student Material Fees
☐ CDC	☐ Health	

Briefly explain the rationale behind selecting the funding sources above.

[Save]   [Save and Move Forward]   [Close]

Hovering over each of the funding sources will give a description of the manager in charge of the funds and what said funds are traditionally used for.
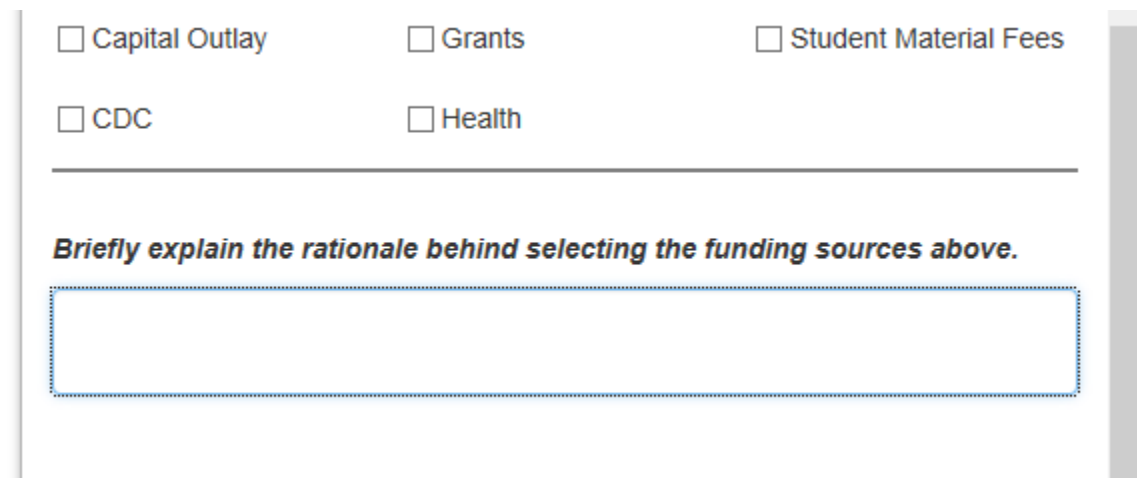

Scroll down after the funding source has been determined and checked. You will see a text box asking for the rationale behind selecting said funding source.

After the reason has been inputted, move onto the next tab labeled "View History."

NOTE: Do not select "Save and Move Forward" until you completely done modifying the proposal as that will send the proposal to the next level of approval.

"View History" will display detail transactions history for rating and comments others have given to the project. It will also include a time stamp of when it was submitted.
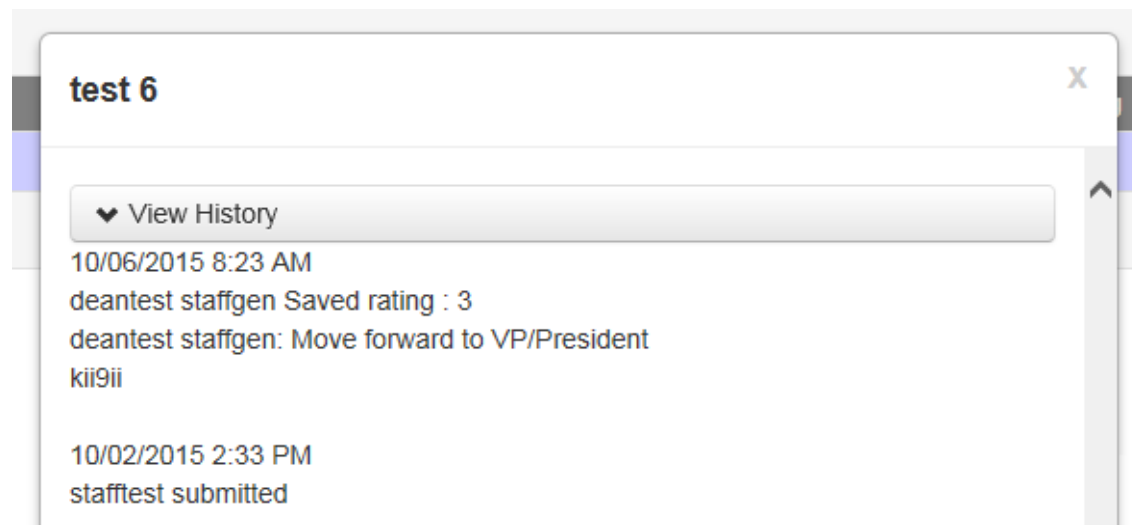
Once all tabs have been reviewed and confirmed, select the blue "Save and Move Forward" tab. This will save all the work and submit it for the next level of review.