

IT PROCUREMENT PROCESS UPDATE

Peter Mosinskis, Director of IT Strategy

2016-03-22



Channel Islands



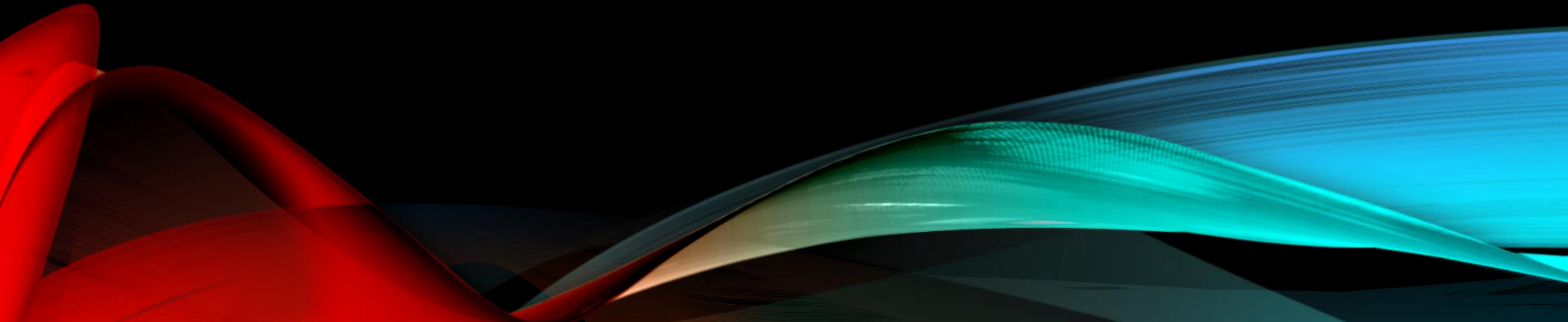
AGENDA

- 2 Key Takeaways
- Process walkthrough

TAKEAWAY #1: STARTING AN IT-RELATED PROCUREMENT



AN **RGS IS NO LONGER**
THE START OF THE
IT PROCUREMENT PROCESS



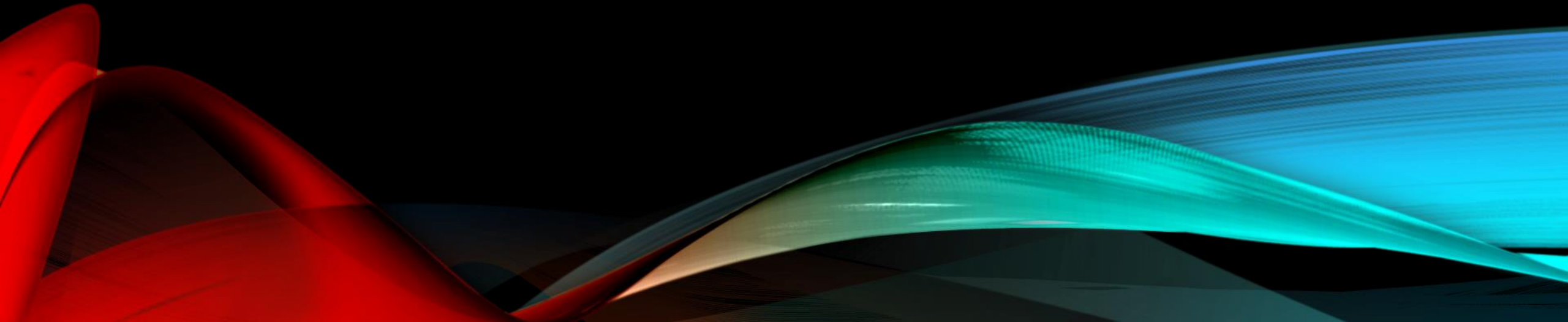
NEW STARTING POINT:

[WWW.CSUCI.EDU / TC / PURCHASING](http://WWW.CSUCI.EDU/TC/PURCHASING)



TAKEAWAY #2: CLASSES & CRITERIA

and newly defined IT procurement classes



STANDARD VS. CUSTOM PROCUREMENTS



STANDARD (tier 1)

Common items for which quotes already exist:

- Desktops
- Laptops
- Accessories
- Standard software

CUSTOM (tier 2)

New, non-standard products & services:

- Non-standard computer equipment or software
- New systems & services
- Upgrades to major systems
- CO-mandated systems
- Requiring new/custom quote

CRITERIA FOR CUSTOM PROCUREMENTS

MAJOR

- Over \$5K (or over \$10K for 2+ years)
- Over 60 IT hours to implement

MINOR

- Under \$5K
- Under 60 IT hours to implement

PROCESS FOR STANDARD IT PROCUREMENTS

Incorporates new forms & ticketing for
increased visibility



STEP I

Gather information from the vendor,
and submit a Custom IT Procurement Request

REQUESTOR TASKS:


- Get quote from **T&C Quotes** page
- Generate an RGS for the quote
- Submit IT Procurement Request online

[WWW.CSUCI.EDU / TC / PURCHASING](http://WWW.CSUCI.EDU/TC/PURCHASING)

BEGIN AN IT PROCUREMENT REQUEST

Begin a standard IT procurement » (myCI login required)

STANDARD REQUEST

 Channel Islands

search services, kb and questions

Peter Mosinskis

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[Service Catalog / Request a Standard IT Procurement](#)

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Request a Standard IT Procurement


BETA - This service will assist you in procuring STANDARD IT equipment, products or services.

Requestor * 

Name of the person submitting this procurement request.



Peter Mosinskis


Requesting Division * 

The division making this procurement request

Technology and Communication

Vendor Name *

Product Name  *

The name of the product being procured

Product Version Number

Choose all product categories that apply

- ☐ Kiosk / Self-Service Equipment
- ☐ Mobile device (tablet, smartphone)
- ☐ Mobile or web-based application
- ☐ Scientific Equipment
- ☐ Software (New or Upgrade)
- ☐ Software Maintenance
- ☐ Storage (hard drives, Flash drives)
- ☐ Television
- ☐ Video Projector
- ☐ Other

Cost  *

Enter the dollar amount (including tax) for this procurement, or enter "N/A" if not applicable.

Please attach the quote and RGS * 

Please attach the vendor quote and Request for Goods and Services (RGS). You may download quotes for standard University equipment at www.csuci.edu/tc/purchasing/quotes.htm.

On Windows, use the Ctrl key (or Shift + Ctrl) to select multiple files from the file browser window. On Mac, use the ⌘ key (or Shift + ⌘) to select multiple files from the file browser window.

Browse...

No file chosen

Request

STEP 2

Complete minor Technical Review



STEP 2 TASKS

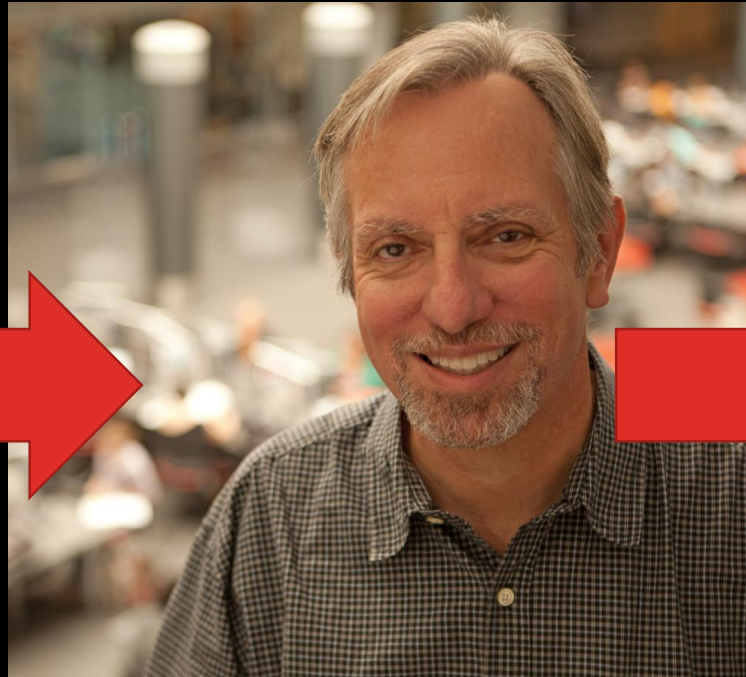
- **T&C** completes minor Technical Review
- Sign off by Manager of User Services

STEP 3

VP of T&C Approval



APPROVAL VIA EMAIL & WEB PAGE



A screenshot of the Channel Islands web portal. The page is titled 'Workflow Step Approval' and 'Procurement Request Details'. It shows a 'Procurement Request' with ID 1097114 and status 'SiteImprove'. The 'Approval Step Details' section shows the step '3-VP T&C Approval' with 'Approver(s)' listed as 'Peter Mosinkis'. On the right side, there are two buttons: a green 'Approve' button and a red 'Reject' button. Below these is a 'Requestor' section showing a profile for 'Peter Mosinkis' with email 'Peter.Mosinkis@csuci.edu'. The top navigation bar includes links for Home, Projects/Workspaces, Services, Knowledge Base, News, Calendar, and Questions. A search bar is also present.

STEP 4

T&C gives go-ahead to requestor & procurement

STEP 4 TASKS

- T&C notifies requestor with “all clear”
- T&C send document “package” to Procurement
 - Vendor quote
 - RGS

STEP 5

Procurement Review & Approval



STEP 5 TASKS

- Procurement signs off on document “package”



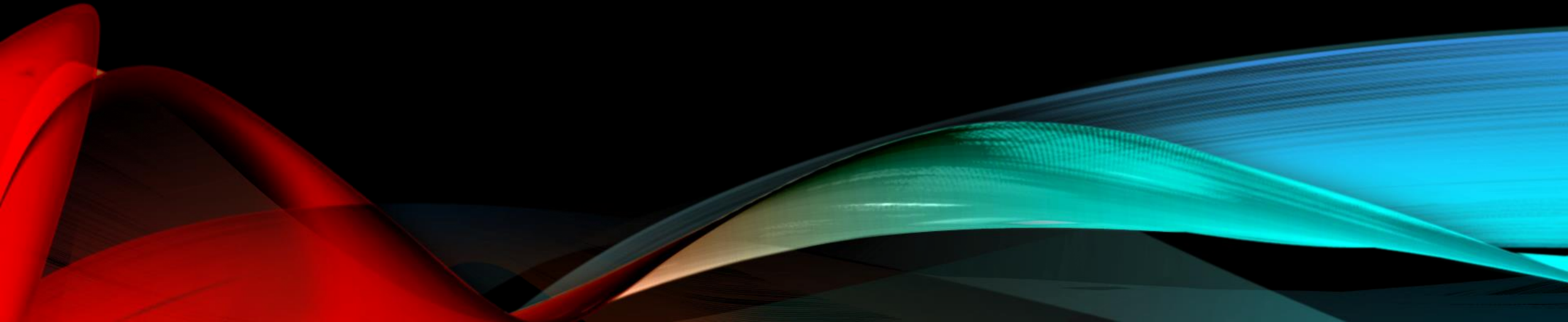
Quote



RGS

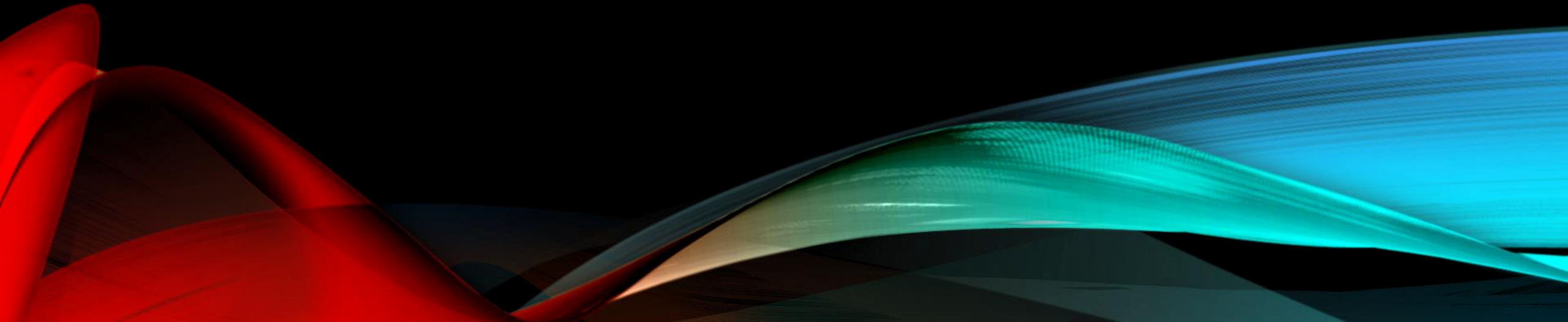
STEP 6

Procurement issues Purchase Order (PO)



QUESTIONS?

PROCESS
FOR **CUSTOM** (NON-STANDARD)
IT PROCUREMENTS



STEP I

Check procurement threshold

CRITERIA FOR CUSTOM PROCUREMENTS

MAJOR

- Over \$5K (or over \$10K for 2+ years)
- Over 60 IT hours to implement

MINOR

- Under \$5K
- Under 60 IT hours to implement

RESULTS OF **CUSTOM** PROCUREMENTS

MAJOR

- Contact your **Division Project Coordinator (DPC)**
- Requires approval of division VP, IT Policy & Planning Committee (ITPPC), and VP T&C
- Bi-annual submission cycle
- See www.csuci.edu/tc/projects

MINOR

- Proceed with Step 2

DIVISION PROJECT COORDINATORS (DPCS)

Primary Division liaisons for IT projects & procurements

Academic
Affairs:

**Andrea
Skinner**

Business &
Financial
Affairs:

**Anna
Pavin**

Office of the
President:

**Melissa
Remotti**

Student
Affairs:

**Ed
Lebioda**

University
Advancement
:

**Christopher
Abe**

Technology &
Comm.:

**Peter
Mosinskis**

STEP 2

Gather information from the vendor,
and submit a Custom IT Procurement Request

REQUESTOR TASKS:

- Get **VPAT** from Vendor (if appropriate)
- Get quote & contract from Vendor
- Complete IT Procurement Impact Assessment (ITPIA) online
- Submit IT Procurement Request online

IT PROCUREMENT IMPACT ASSESSMENT (ITPIA)

<http://go.csuci.edu/ITPIA>

IT Procurement Impact Assessment

This form is used to help assess the impact of new technology products or services that are procured by CI. Fields marked with a * are required.

Once you submit the form, it will be sent to Technology & Communication for review.

Please contact Peter Mosinskis, Director of IT Strategy, at peter.mosinskis@csuci.edu with any questions about this assessment.

Email Address*

Product Name*

Please describe the type and number of users for this project:*

	Less than 20 users	21 or more users
Students (current or prospective):	<input type="radio"/>	<input type="radio"/>
Employees (faculty or staff):	<input type="radio"/>	<input type="radio"/>
Visitors or General Public:	<input type="radio"/>	<input type="radio"/>
Other Users:	<input type="radio"/>	<input type="radio"/>


[WWW.CSUCI.EDU / TC / PURCHASING](http://WWW.CSUCI.EDU/TC/PURCHASING)

BEGIN THE CUSTOM IT PROCUREMENT REQUEST

[Begin a Custom IT Procurement »](#)

(myCI login required)

CUSTOM PROCUREMENT REQUEST

 Channel Islands

search services, kb and questions

Q

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[Service Catalog](#) / [Request a Custom \(non-standard\) IT Procurement](#)

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Request a Custom (non-standard) IT Procurement

BETA - This new T&C process is being tested and validated. Request a custom (non-standard) IT procurement.

Requestor * ?

Enter the name of the person requesting the IT product or service

Peter Mosinskis

Q

X

Requesting Division * ?

Select the requesting division using the magnifying glass icon.

Technology and Communication

Q

X

Describe the purchase type ? *

Choose the appropriate purchase type

☐ New product/service

☐ Renewal of existing product/service

Vendor Name ? *

Enter the name of the product or service vendor

Competing Products *

What competing products were reviewed as part of the selection process for this procurement? If none, please write "N/A".

Cost *

Enter the dollar amount (including tax) for this procurement, or enter "N/A" if not applicable.

Please attach the following files: vendor contract, quote and VPAT. *

Please attach each of the required documents: vendor contract, quote and VPAT.

On Windows, use the Ctrl key (or Shift + Ctrl) to select multiple files from the file browser window. On Mac, use the ⌘ key (or Shift + ⌘) to select multiple files from the file browser window.

Please contact the T&C Help Desk at 805-437-8552 or email helpdesk@csuci.edu with any questions about these documents, or visit www.csuci.edu/tc/purchasing/ for more information.

Browse...

No file chosen

Please check to approve the following statement: *

Please fill out and submit the IT Procurement Impact Assessment, which can be found at <http://go.csuci.edu/itpia>

☐ I have submitted the IT Procurement Impact Assessment form, located at <http://go.csuci.edu/ITPIA>

Request

STEP 3

Contract Review & Technical Review



STEP 3 TASKS

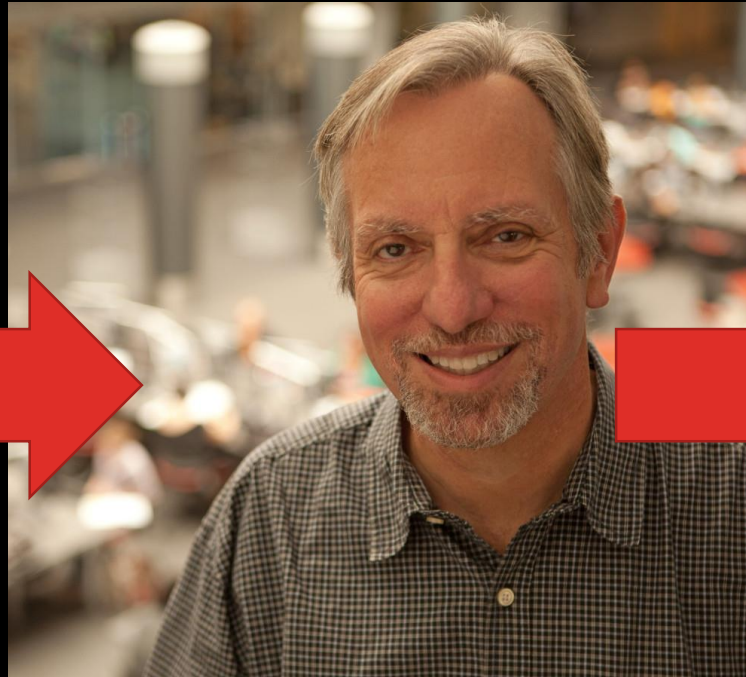
- **Procurement** completes Contract Review
- **T&C** completes Technical Review:
 - Accessibility (including testing if necessary)
 - Security
 - Data
 - Infrastructure
- **Requestor** creates EEAAP with help from T&C (if necessary)

STEP 4

VP of T&C Approval



APPROVAL VIA EMAIL & WEB PAGE



A screenshot of the Channel Islands web portal. The page is titled 'Workflow Step Approval' and 'Procurement Request Details'. It shows a 'Procurement Request' with ID 1097114 and the name 'SiteImprove'. The description states: 'SiteImprove is web governance software that helps manage the CI web site through by supporting quality assurance, accessibility, SEO, and web server responsiveness.' The 'Approval Step Details' section shows the step as '3-VP T&C Approval', the approver as 'Peter Mosinkis', and the description as 'Approval of procurement by VP T&C'. On the right side, there are two buttons: a green 'Approve' button and a red 'Reject' button. Below these is a 'Requestor' section showing a profile for Peter Mosinkis with the email Peter.Mosinkis@csuci.edu. The top navigation bar includes links for Home, Projects/Workspaces, Services, Knowledge Base, News, Calendar, and Questions. A search bar is also present.

STEP 5

T&C gives go-ahead; Requestor issues RGS



STEP 5 TASKS

- T&C notifies requestor with “all clear”
- T&C send document “package” to Procurement
 - VPAT, ITPIA, Quote/Contract
 - If applicable: accessibility test results, EEAAP & Accessibility Roadmap
- **Requestor** issues RGS

STEP 6

Procurement Review & Approval



STEP 6 TASKS

- Procurement signs off on document “package”



VPAT



Contract



ITPIA



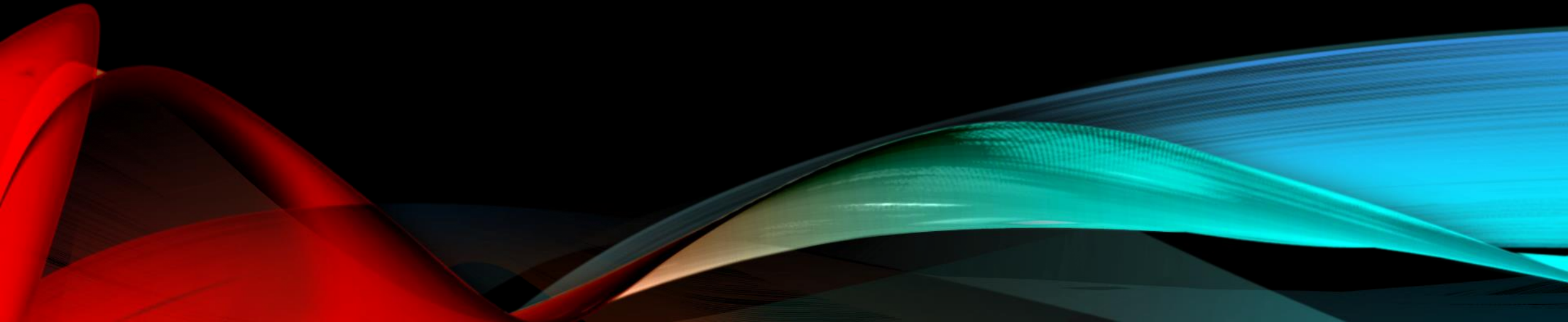
EEAAP



ACCESSIBILITY
ROADMAP

STEP 6

Procurement Issues Purchase Order (PO)





STEP 7

Product launch =
“Project” launch

STEP 7: PROJECT LAUNCH!

- T&C kicks off new project to configure & implement product/service (if appropriate)

www.csuci.edu/tc/projects

- Requestor starts providing service according to EEAAP



LET'S PARTY!


QUESTIONS?

WWW.CSUCI.EDU / TC / PURCHASING

peter.mosinskis@csuci.edu or
call 805-437-8587

Procurement & Logistical Services

New Vendor Data Record (Form 204)

 Channel Islands <small>CALIFORNIA STATE UNIVERSITY</small>		VENDOR DATA RECORD (204 Form) <small>Required in lieu of IRS W-9 when doing business with the State of California</small>	Vendor #: _____ <small>For CSUCI Use Only</small>																																				
		<input type="button" value="Clear Form"/>																																					
Section 1 Return To:	California State University Channel Islands Procurement & Logistical Services Email: purchasing@csuci.edu or Fax: (805) 437-8436		PURPOSE: Information contained in this form will be used by state agencies to prepare information Returns (Form 1099) and for withholding on payments to nonresident payees. Prompt return of this fully completed form will prevent delays when processing payments. (See Privacy Statement on reverse)																																				
Section 2 Name and Address	Vendor's Legal Business Name or Sole Proprietor's Full Name (as shown on your income tax return):																																						
	DBA, Trade, or Single Member LLC Name (if applicable):		Phone:																																				
	Mailing Address (Street and Number or P.O. Box #):		Fax:																																				
	City, State and Zip Code:		Email:																																				
Section 3 Vendor Entity Type	<input type="checkbox"/> Individual <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Exempt (Non-Profit) <input type="checkbox"/> Government Entity <input type="checkbox"/> Limited Liability Company (LLC) <input type="checkbox"/> Estate/Trust																																						
	<input type="checkbox"/> Single Member LLC (check IRS tax classification below): <input type="checkbox"/> Individual (provide SSN/EIN for individual (not LLC), individual's name on line 1 section 2, and LLC name on line 2 section 2) <input type="checkbox"/> Corporation (provide EIN for LLC, provide LLC name on line 1 section 2. Do not provide individual's name or SSN) <input type="checkbox"/> Multiple Member LLC (check IRS tax classification below): <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation (for either type, provide EIN for section 2.																																						
Taxpayer Identification Number	Individual/Sole Proprietor – Social Security Number/ITIN <table border="1" style="display: inline-table;"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table> or <table border="1" style="display: inline-table;"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table> Number (FEIN):																																						



Procurement & Logistical Services

New Vendor Data Record (Form 204)

Identified Risks:

- Lost Forms

- Sharing Personal Information: SSN

- Email: From Vendor → Requestor → AP → Procurement Buyer/Student

Action Items:

- Continue to Improve Internal Process/Procedures

- Communicate to our Customers

- Grace Period – 32 Days

Goal:

- Protect/Secure Personal Information

- Paperless

- Email: **Purchasing@csuci.edu**

Fine Print: Fax (Is still available)

Procurement & Logistical Services

New Vendor Data Record (Form 204)

Contact Information:

Purchasing@csuci.edu

Phone: 805/437-8592

Fax: 805/437-8436



Channel Islands
CALIFORNIA STATE UNIVERSITY