

INS & OUTS OF PURCHASING IT EQUIPMENT

Daniel Brown, Procurement & Contract Services, Technology Buyer

April 27, 2021



INS & OUTS OF PURCHASING IT EQUIPMENT

This is a cross-functional process with a lot of different players, 2 different but simultaneous request systems, and a lot of required pieces of documentation.



TODAY'S 5 KEY TAKE AWAYS

- 1) Why CI follows this process;
- 2) What types of technology are excluded (or included);
- 3) Ability to initiate IT purchases;
- 4) What to expect in the days following the submittal of a request; and
- 5) Key points of contact

TAKE AWAY #1: WHY CI FOLLOWS THIS PROCESS



- Better planning
- Well defined and tracked approval steps
- Inventory management
- Ensure compliance
- Minimize risks-Contractual, security, accessibility, and data risks.
- Better data analysis & Reporting

TAKEAWAY #2: INCLUDED TECHNOLOGY

- Printers
- Scanners
- License Subscriptions/Software as a Service (SaaS)
- Computer Hardware (Monitors, Tablets, Laptops, Desktops.)
- Software
- Equipment Over \$5,000
- Equipment that requires purchase of additional Wi-Fi Services
- Contracts and Agreements Requiring Authorized Signature
- Services
- CO Mandated Software

TAKEAWAY #2: EXCLUDED TECHNOLOGY

USE P-Card for the following:

- External storage devices
 - CD / CD-ROM
 - DVD / DVD-ROM
 - USB flash drive
 - External hard disk drives
- Input devices
 - Keyboard
 - Pointing devices
 - Mouse
- Wireless Devices
 - Wireless Adapter Card
 - Wireless Music Bridge
- Power cord
- Microphone
- Computer speech recognition devices
- Webcam
- Output devices
 - Speakers
 - Digital camera
 - Graphics Card
 - Ethernet cables
 - Expansion Device
 - Docking Station
 - Ethernet Cable

<https://www.csuci.edu/procurement/services/documents/csuci-pro-card-handbook-2017.pdf>

TAKE AWAY #3: HOW YOU, THE REQUESTOR, INITIATES THE PROCESS *REQUISTION & TEAM DYNAMIX SUBMISSION*

**Best Practice is to complete
these simultaneously**



+



=



*Requires Special Access to
CFS & PPL

Only Requires myCI
Access

TAKE AWAY #3: HELPFUL HINTS TO INITIATE RGS

1. Acquire all necessary supporting documentation and include these with the RGS from the start.

Include the following within Comments Section

- Attach Expense Authorization Forms for purchases over \$2.5k (BFA) or \$5k (other divisions) require a completed form signed by your VP.
- Attach Quotes, Agreement (Order form, Signature page, terms and conditions, etc.), Scope of work, and/or other relevant attachments (e.g. Cares Approval, Grant approval)
- Enter TD Ticket #
- In addition to entering your name on the RGS, enter:
 - "requested by:" followed by the *First* and *Last* name.
 - "CI Contact" followed by the *First* and *Last* name.
 - "delivery location is" followed by the campus delivery location



TAKE AWAY #3: HELPFUL HINTS TO INITIATE RGS

2. The RGS includes a lot of important information. Be sure to review before submitting.



Verify the following information is correct

- Accounting string
- Category codes
- Receiving requirements are active (**ALL IT hardware needs to be received**)
- All **line items** on the RGS have correct quantity for each item.
- Do not worry about tax or recycle fees (procurement will complete)

TAKE AWAY #3: INITIATE TEAM DYNAMIX (TD) REQUEST

1. Determine whether to use Standard IT, or Custom IT Procurement Request Form



Standard	Custom
Common items for which quotes already exist on our IT webpage.	Non-standard products & services not included on our IT webpage.
<ul style="list-style-type: none">• Desktops• Laptops• Printers• Tablets• iPads• Standard software	<ul style="list-style-type: none">• New software & services• Renewals of existing software & services• Major upgrades to software• CO-mandated software• Requests for new/custom quotes on non-standard hardware

TAKE AWAY #3: INITIATE TEAMDYNAMIX (TD) REQUEST

2. Complete the form and attach all required documentation from the start.



Standard	Custom
Answer 11 questions on form <ul style="list-style-type: none">• RGS # required	Answer 15 question on form <ul style="list-style-type: none">• RGS # required
Attach electronic copy of quote from the IT website	Attach electronic copy of quote Attach vendor's VPAT
	Respond to ITPIA questions. Once complete it will auto update ticket

TAKE AWAY #4: PROCESS TIMELINES

Standard IT Procurements

- Faster TD approval time.
- Average time: 1-3 Bus. days until it reaches buyer's queue.
- Average time: 3-5 Bus. Days until PO is dispatched and item is ordered.
- Shipping Times: Normally 3-5 days after order has been processed.

Custom IT Procurements

- Requires more thorough TD approval and therefore takes time.
- Average time: Custom IT Hardware- 10-14 business days
- Average time: Software- Renewal- 7-14 business days
- Average time: Software- New Agreements (Complex)- 14 business days- 2 months depending on complexity of agreement and vendor communication/negotiation.

Both standard and custom computers are delivered to shipping & receiving. Packages are only opened after all PO line items have been received. Then they are sent to ITS for imaging and asset tagging. Before being delivered to the intended staff.

TAKE AWAY #4: PROCESS TIMELINES

- Spikes in volume occur at the beginning & end of each semester. End of FY/Spring Semester is busiest. Please plan accordingly and follow end of fiscal year deadlines.
 - September and December- Best time to order.
 - If you need to purchase something by a specific date, allow for 3 months lead time for a custom IT procurement.
 - Priority will be placed on all requisitions submitted in accordance with deadlines and documentation requirements. Those received after will be processed as time permits.
- * Receiving on Site: Please work with the vendor to have product on site by June 15, 2021 to ensure receiving is completed in FY20/21
- If further assistance is needed, please email: purchasing@csuci.edu

TAKE AWAY #4: END OF FISCAL YEAR DEADLINES

Requisitions	April 1 – May 26, 2021
Requisitions over 50K or require a Contract/Bid	Fri, April 30, 2021
Receiving on Site *	No later than June 15, 2021
Change Orders - Require a Requisition - (No Exceptions)	April 1 – June 11, 2021

DO'S AND DON'TS- IT REQUISITIONS

- **Do** : Submit your RGS with plenty of time for Procurement (Negotiation of Agreement, Purchase Order, Agreement Completion) and ITS (Team Dynamix Process) to process.
- **Don't**: Submit your RGS days before the expiration of a service/contract or similarly request the purchase of IT hardware with impossible time deadlines.
- **Do**: Reach out to the procurement@csuci.edu with any questions or to check status of orders at reasonable time intervals (Include any necessary information when reaching out to procurement including the RGS#, Team Dynamix #, quotes, or agreement).
- **Don't**: Reach out to individual buyers asking them to speed up the process or for status updates on a daily basis.

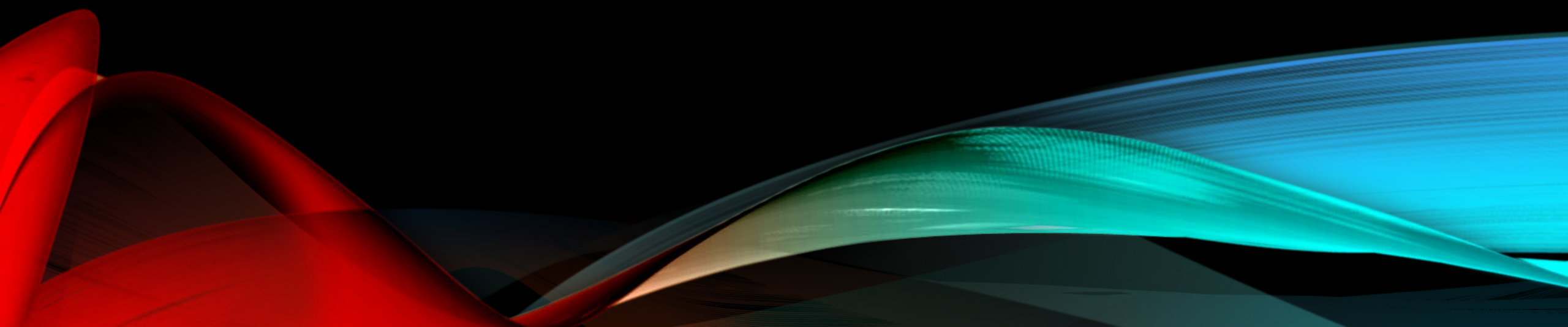
Continued.....

DO'S AND DON'TS- IT REQUISITIONS

- Do:** Make sure to verify if your request is a renewal vs. a new agreement. Verify if you are paying an invoice for a current agreement, being charged for a whole new service agreement, or are renewing an expiring agreement.
- Don't:** Assume that every software purchases is a renewal.
- Do:** Send all related signature documents such as order forms, agreements, and quotes to procurement for review and to sign off on.
- Don't:** Sign off on any documents and send to vendor. This applies to the requestor as well as the approver, faculty, or leadership positions. Procurement can only sign off on legally binding documents.

TAKEAWAY #5: KEY POINTS OF CONTACT

IT Procurement Process is shared between ITS and Purchasing



Key Contacts

ITS TD Administrators

Melissa Bergem

melissa.bergem@csuci.edu

805-437-3557



Asha Ramachandra

asha.ramachandra@csuci.edu

805-437-1693

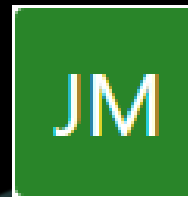


ITS CFS Administrator

Josue Magana

josh.magana@csuci.edu

805-437-8593



Key Contacts

ITS Review Board

Shawn Bochat

Shawn.bochat@csuci.edu



Data Review

Daniel Martinez

daniel.martinez@csuci.edu



Accessibility Review

Herb Aquino

Herb.aquino@csuci.edu



Infrastructure Review

Carlos Miranda

Carlos.Miranda@csuci.edu



Security Review

Key Contacts

Purchasing IT Buyers

Daniel Brown

Daniel.brown@csuci.edu

Purchasing@csuci.edu

Rhonda Florick

Rhonda.Florick@csuci.edu