

BFA Administrative Detail: #30-15

Procurement of Stationery Supplies and IT Hardware and Accessories

1.0 PURPOSE

To manage the purchasing of stationery work supplies and IT Hardware.

2.0 BACKGROUND

To provide Staff and Faculty (Users) necessary supplies such as stationery and teaching aids delivered to their homes, not directly from suppliers, but from CSUCI Shipping & Receiving. Divisions will be asked to estimate the total volume of such supplies to last from now until the end of the school year and place a request with their business unit's analyst or designated point person (Requestor) for such orders.

Users will follow the regular IT Procurement Process for IT Hardware and Accessories; however, the User will be required to collect the equipment from Shipping & Receiving.

3.0 Procedure:

Step 1:

For stationery and teaching supplies, Users should assess the amount of supplies needed until the end of the school year and submit a request to purchase those supplies to their unit's Business Analyst. Users should supply the delivery address to which they want the goods sent, and any specific delivery instructions.

Step 2:

The Business Analyst (Requestor) will aggregate purchases from all Users in their business unit or area of responsibility and place the bulk order with Staples. In conjunction with this action, the Requestor must complete a Stationery Supply Shipping Form (see attached) for each user and email these forms to Shipping & Receiving. The process for ordering IT Hardware and Accessories remains the same, the difference is that Users will collect these items from Shipping & Receiving rather than having them delivered.

Frequency

To minimize the number of transactions, and given the limited staff members operating on campus, see schedule below:

Shipment of stationery items, etc., will be limited to once per two weeks beginning on March 25, 2020.

For IT Hardware and Accessories, the shipment frequency will be once per month on the 15th or the last working day prior to the 15th should the 15th fall on a weekend.

The following matrices will guide you through the purchasing roles and responsibilities for the most common purchases:

STATIONERY AND WORK TOOLS PURCHASES						
TASK	USER	ANALYST	PROCUREMENT	SUPPLIER	SHIPPING RECEIVING	
Request Stationery &/or Work Tools	X					
Compile Bulk Order for All Users in Business Unit		X				
Place Bulk Order with Staples Using P-Card		X				
Manage P-Card Limits			X			
Send Notice to Shipping & Receiving Stating: - Staples Order Reference - Who Receives What Items - Delivery Details Per Individual User - Any specific delivery instructions		X				
Ship to Central Warehouse				X		
Receive Goods					X	
Package Goods & Label for Collection by FedEx					X	
Ship to Users via FedEx					X	

IT EQUIPMENT & ACCESSORIES PURCHASES						
TASK	USER	ANALYST	IT	PROCUREMENT	SUPPLIER	SHIPPING RECEIVING
Request IT Equipment	X					
Contact Chris Murphy - IT Procurement		X				
Obtain Quotes			X			
Provide Requestor Final Quote			X			
Quote Attached to Requisition		X				
Submit Requisition in PeopleSoft		X				
Submit Ticket in Team Dynamics for IT Purchase		X				
Buy Equipment				X		
Ship to Central Warehouse					X	
Receive Goods in PeopleSoft						X
Prepare Equipment for Use			X			
Send Prepared Equipment to Shipping & Receiving			X			
Package equipment & Label for Collection						X
Notify Requestor that item is ready for use			X			
Notify User that item is ready for collection		X				
Sign for & Collect Equipment	X					

4.0 DEFINITIONS

None

5.0 CONTACTS

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REVISION TRACKING

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Review / Approval History

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