IT Procurement Process Guide

Piecing It All Together With You
What Is Our Mission?

• Supporting the Campus
  – We help you obtain software, hardware and AV products so business can move forward

• Support the Department
  – We work with our vendors to keep our hardware standards level with today’s world
What is IT Procurement?

- IT Procurement is the act of obtaining
  - Equipment such as Computers (e.g. HP, Apple)
  - Supplies such as Software (e.g. Adobe, EAB)
  - Materials such as AV items (e.g. Projectors)
  - Network such as Wireless and Security
Piecing It All Together With You

• Fulfilling the needs of your team
  – We use state-approved vendors with the broadest selections, best pricing, and shipping options

• Obtaining the materials for your success
  – We provide you with all documents necessary to move forward with a purchase

• Business as usual
  – You will be notified once the items arrive to set an installation time frame
Partners in Our Mission

- HP
- SCW
- CDW-G
- B&H
- SHI
- Gov Connection

Columbus State University
## Procurement Quick Reference Guide

### 6 Easy Steps

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<th>Step</th>
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| 1    | Prepare the Proposal  
Visit the link below to view and get estimated costs.  
Hardware Standards Link  
Software Standards Link |
| 2    | Get Department Funding Approval  
Submit the request through departmental channels to get director approval to purchase. |
| 3    | Submit the eQuest for Quote  
Once department has approved, the Department administrator may submit a quote request through eQuest. UITS will receive the request and return a quote within one to three business days for standard software or hardware. (Notification included if a CARF is required) |
| 4    | Part 1: Submit the Quote for ELT Approval  
Once the quote and supporting documents are received, the Department administrator may initiate the ELT Approval.  
Part 2: Submit Quote, Contract, Terms & Conditions, Signature Requirements for CARF Approval  
All contracts, terms & conditions, and signature requirements will need a Contract Approval & Routing Form (CARF) by the Office Of Legal Affairs, Ethics, and Compliance. (You will be notified via eQuest if required for Software) |
| 5    | Submit Through ePro  
Department administration submits the quote through ePro for budget approval. Attach the ELT Approval and CARF as required. The ePro request is sent through the approval channels, and the budget is checked. Process of the request can be tracked through ePro. |
| 6    | The Set Up  
After the order is placed with the vendor, the technology equipment arrives and is set up within approximately 4-6 weeks by UITS, depending on shipping time, project requirements, and/or user availability. |

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**COLUMBUS STATE UNIVERSITY**
Your Journey Starts Here

• Consider this
  – Is the product already used by another department at CSU?
    • If so, consider consolidating the products
    • Review the **Standard Software** list for current applications
  • Obtain approval from **your** Dean and/or Department Chair
    – Before proceeding to the next stage of the process
      estimate IT Hardware Cost
    • Review the **Standard Hardware** list
Your Journey Starts Here

• Submit a request for a quote
  – A quote request should be submitted through eQuest. (eQuest link found on your MyCSU page) Any quotes received through other methods will be converted to eQuests for you
  – IT Requisitions submitted in ePro without an eQuest requesting a quote from UITS, will be placed on hold and/or denied by the purchasing office until an eQuest has been completed
Your Journey Starts Here

• Include any special requirements in your request that need consideration.
  – Will the product require annual maintenance or additional licensing cost?
  – Are there any additional cost for installation? Does it require travel?
  – Will you need training to use and maintain the product?
  – Will there be special consideration needed for IT integration for software use on the CSU Network?
  – Will there be special consideration needed for IT integration for hardware install?
Your ELT Approval Starts Here

- Complete the ELT Approval form at (https://purchasing.columbusstate.edu/)
  - Click on the Pre-Approval Purchasing Form link above
  - Fill in all fields in the form
    - You are the requestor
    - The Operational Approver and the appropriate ELT Approval Member will be specified by your Dean or Department
  - Once the form is complete, click “Begin Signing”
  - Attach documents (quote, justification provided by UITS)
  - Print or download a copy of your form
  - Click Finish
Your ELT Approval

• An approval email will be generated when completed
  – The email sender is "Anna Brooks via Docusign"
  • The subject is "Completed: Please Docusign: Pre-Approval Purchasing From for (requester's name)"
  – Download and save signed ELT Approval

• Please do not submit a requisition without the pre-approval form attached. Purchase orders will not be created and sent to the supplier if the pre-approval form is not attached
Your Journey Continues Here

- Does the item have terms and conditions that must be met? Is there a contract? Are there any documents requiring a signature from CSU and the Vendor?
  - If the answer is yes, you must submit a CARF
  - Depending on any legal issues that need to be addressed, please be advised that this process may take 1-2 weeks
Your CARF Starts Here

• C.A.R.F – Contract Approval and Routing Form

• Visit the Office of Legal Affairs, Ethics, and Compliance site (https://generalcounsel.columbusstate.edu/contract_approval_form.php)
  – Complete all required fields within the form
  – Attach all required documents
    • Include a copy of the quote, contract, and W-9 form (provided to you by UITS through your eQuest submission
  – Click Submit Form
  – You will receive an email acknowledgement of the denial or approval

• If the submission is approved, you can submit an ePro requisition
Your Requisition Documentation

• Requisitions in ePro must have attached
  – A signed ELT Approval form
  – A current quote approved by UITS that will not expire prior to completion of the purchase
    • W-9 if new CSU Vendor (received with quote via eQuest)
  – A signed and approved CARF
    • Required for any purchase with a contract, terms & conditions, and/or a document requiring a CSU signature
  – The approved DocuSigned Contract, Terms & Conditions, and/or document from the Office Of Legal Affairs, Ethics, and Compliance’s office with the official CSU and Vendor signature as required
Your ePro Starts Here

- ePro – PeopleSoft eProcurement
  - Log into Peoplesoft
    fprod.gafirst.usg.edu on campus or via VPN/Desktop Remote
    - Select Navigator
    - Select eProcurement
    - Select Requisition
    - Select Special Requests
    - Proceed to fill in all fields in the form
    - For each item entered, check the Send to Supplier, Show at receipt and Request New Item checkboxes near the bottom of the page
    - Click Add to Cart
    - Verify all information entered and click Checkout

- Select all items and click Mass Change to fill in your account information
- Click on the Add more Comments and Attachments link above the text box at base of the page
- Choose a Comment entry and attach your documents (listed on prior slide)
- Click OK
- Select Send to Supplier and Show at Receipt once more
- Click Save and Submit
Your Journey Pauses Here

- Purchasing will notify you if there are issues with your ePro requisition
- UITS will notify you when your order arrives
- UITS will receive the hardware items in ePro and assist you with installation arrangements
- UITS will assist with software installs and will need access to product licensing information
- Invoices should be forwarded to Accounts Payable
  - By UITS or by you, if you a received a copy directly from the vendor
Ready To Start Your Journey?

• Contact the UITS Procurement Team
  – Submit an eQuest
  – Send us an email
  – Call us

• Team Members
  – Barbara Smith - Manager, Budget & Procurement
    • Tracey Lemmons, Purchasing & Procurement Specialist
    • Jessica Macon, Purchasing & Procurement Specialist
Your Journey Is Complete.

Enjoy your products.