Clayton State University

IT Approval & Procurement

October 28-30, 2013

**Observations: Large / Contract Review Purchase**

1. Informal discussions get forgotten about – don’t get clear picture of what is needed
2. No manual / flowchart / documentation on how to complete process –you know because you’ve been here 18 years
3. Department has to “pass-through” legal contract discussion to vendors
4. Opportunity for errors
5. Can fall through cracks if someone is out
6. Long lead time 7/24 – 10/23 example (3 months)
7. Requester has to “call in” to see where request is in process (no view)
8. Difficulty in finding direction (requester)
9. Forms shipped around inter-campus mail
10. Outside entities affect requirements of process

**Observations: Small Device / Non-Contract Review Purchase**

1. End user / requestor may not be the same person
2. No way to check status of request
3. Every purchase request approved by CIO when department is spec’ing
4. Time consuming process
5. Process lead-time can be greater than quote shelf-life
6. 5-week IT approval PC receipt
7. Lots of paper shuffled around
8. Purchase Requests walked to East Campus
9. Multiple ways to submit a purchase requests; Are all requestors aware?
10. Process can be circumvented by P-Card
11. Small software purchases may not be supported in current structure
12. May need more communication tech decision risks
13. Is Steve reconfiguring every request?
14. Requests to Steve, free-form e-mail ; works better when you talk to Steve
15. No back-ups when some roles are out of the office
16. Actions do not occur until paper lands on someone’s desk

**Brainstorming Ideas**

**Early Formal IT Involvement**

1. Identify Super User for assistance
2. Implement Business Analyst as procurement coach
3. Implement Project Team at the beginning of the process (IT, Finance, Procurement, etc.)
4. Make sure Procurement is contacted; confirmation of discussion and date
5. Tell Procurement what you want and let them come back with what to do
6. Get CID involved for academic software
7. Assign OIT contact/approver for project or purchase
8. Get formal IT approval prior to solution selection
9. Formalize discussions with IT staff
10. Have a list of criteria OITS looks for
11. Obtain required info up front from vendor for Purchase Requisition packet

**User Guide / Question Tree**

1. Better item identification for inventory tracking; user should provide
2. List of site-wide software licenses, or licenses that could be expanded cost effectively
3. Limit amount on IT purchases with a P-Card
4. HUB should consult and ask questions to provide accurate quotes
5. Develop a Request for Spec questionnaire for PC/laptop; user-based questions
6. Create a form for how computer will be used, identify requirements
7. Online training for those responsible for procurement
8. Communications: Online training, quizzes, examples
9. Create a flowchart
10. Flow decision chart for contract / bid / sole source
11. Accompanying interactive flowchart with hyperlinks to forms
12. Cognitive flexibility hypertext; decision tree to help proposers with the process
13. Communications: Clear instructions on required exhibits
14. Communications: Clear criteria

**Workflow**

1. Web-based status tracking (Pizza Hut concept)
2. Procurement tracking system that allows for attachments and approval tree
3. Create status dashboard
4. Automate work flow
5. Use an electronic packet
6. Electronic Purchase Request packet
7. Online contract tracking system (status report)
8. Process status: provide request receipt & expected response time

**Operations**

1. Online / electronic versions of documents: Purchase Requisition, Contract tracking
2. Stop wasting paper – use PDFs
3. E-paper flow of all these forms; everybody gets a scanner

**Recommendations**

1. Talk with Dell on having them honor quotes that have not expired
2. Change accounting process so small purchases can be easily tracked for replacement plans
3. Predictive ordering
4. Inventory of standard products; take from stock and General Ledger transfer when put into use
5. Demo units to show products to customer
6. Delegate CIO approval of small, state-contract purchases
7. Purchasing needs more than one person to create Purchase Orders, or more purchasing expertise
8. Have Contract people, not the end user, contact the vendor
9. Streamline/centralize contract review with fewer players
10. End user should not review contract
11. Institution needs full-time legal department to assist campus with negotiations

**Ideas put on Hold**

1. Add contract terminology explanation for novices: “Hold Harmless, Limits of Liability”, etc.
2. Create an online tracking system (status report) for contracts
3. “Submitted by” field on the Purchase Request for the Requestor, not just the Budget Manager for contact