

Procurement Process Guide





Overview

- Software/Hardware Purchases
 - Service Agreements
 - Contract Store
 - Marketplace
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Software/Hardware Purchases

- ▶ Getting a requisition ready for Procurement & Contract Services
 - ▶ Department responsible for obtaining quote(s)
 - ▶ Multiple quotes required for any purchases ranging in price from \$15K - \$50K
 - ▶ Purchases exceeding \$50K require a bid, unless purchasing through an existing Chancellor's Office contract via Contract Store (See slide 7).
 - ▶ Software/Software as a Service: Procurement requiring more specifications which are to include a better description of the product, scope of work, terms & conditions, rates, invoicing schedule, costs included in price, etc.

Software/Hardware Purchases

*If you are purchasing Software/Hardware - approvals are centralized through ITSS
Submit Service Request thru ITSS*

- ▶ Standard IT purchases (could be Desktop, Laptop, IPAD)
 - ▶ Scott Kodai will approve
 - ▶ No ITPR needed
- ▶ All other IT purchases (other than Desktop, Laptop, IPAD)
 - ▶ Brooke Banks approves
 - ▶ Yes ITPR & VPAT needed
- ▶ ITPR (Information Technology Procurement Review):
- ▶ <https://support.csuchico.edu/TDClient/Requests/ServiceDet?ID=10028>
- ▶ IT provisions and supplemental terms: Orders are to be reviewed by Mark Hendricks before being submitted as requisitions. (He will determine what provisions are to be included/excluded)
- ▶ Justification for Sole Source or Sole Brand required for any purchase over \$50K



Service Agreements

- ▶ Also require ITPR
- ▶ All service agreements are required to be renewed yearly.
- ▶ All service providers are now required to have insurance on file with Risk Management.
 - ▶ Procurement will request/obtain appropriate documentation from vendor once requisition is submitted.
 - ▶ Procurement asks that departments advise the vendor of insurance requirement and provide a vendor contact to Procurement as a proactive measure to ensure timely dispatch of purchase order.




Service Agreements


- ▶ Procurement would like to align as many service agreements as possible with fiscal schedule.
 - ▶ If any services are critical, please communicate with Jessica Verardi in Procurement and she will work to get the new year purchase order dispatched in a timely manner.
- ▶ An important reminder that no one on campus has delegated signature authority to sign or enter into any contract other than Buyers in Procurement and Contract Services, as indicated by the Chancellor's Office.

Contract Store

- ▶ A list of companies with competitive bids put forth by the Chancellors Office
- ▶ Accessible via CSYou
 - ▶ <https://ds.calstate.edu/?svc=csyou.calstate.edu&re=%2fTools%2fFinancial%2fPages%2fdefault.aspx>
- ▶ Business done with any of the companies listed in the Contract Store do not require a bid, regardless of contractual/purchase amount.
- ▶ Use of Contract Store is not required, but encouraged, as it generally provides lowest price available since contracts were awarded via competitive bidding process.

Welcome to the CSU Contract Store

The CSU Systemwide Contract Store is your single point of access to systemwide or multicampus contracts. Use the Key Filters on the left to browse the store's categories or perform a global search for the products or services you are interested in. (NOTE: Search results may produce both individual contracts as well as lists; contracts are designated by the following icon: )



| Vendor | Product/Service | Store Category | Agreement # | Term End |
|--|--|---------------------|------------------|------------|
| Academic Search | Executive Recruitment | Other Services | 3974 | 3/5/2016 |
| Account Control Technology | Collection Services | Financial Services | 40590 | 6/30/2015 |
| Adobe | Software | Software | 4136 | 7/31/2016 |
| Adobe Systems Inc | Design Web Premium and Master Collection | Software | 3610 | 7/31/2015 |
| AGB Search | Executive Recruitment | Other Services | 3099 | 9/27/2014 |
| Agilent Technologies | Hewlett-Packard & Agilent Purchases | IT Equipment | G8173 | |
| AIP Publishing LLC | Base Package and Society Subscription | Library E-Resources | 4517 | 12/31/2014 |
| Airgas USA, LLC | Lab, Industrial, Medical Gases | Other Commodities | 60316 | 5/30/2015 |
| Allied Van Lines/Berger Transfer & Storage | Household Moving and Relocation Services | Other Services | CSUDH2009MEA11 | 11/30/2017 |
| Allied Van Lines/Nor-Cal Moving Services | Household Moving and Relocation Services | Other Services | CSULB2003MEA0104 | |
| Ambrose Video Publishing, Inc. | Ambrose Video Databases | Library E-Resources | 4430 | 10/31/2014 |
| American Association for the Advancement of Science (AAAS) | Science AAAS, Science Online | Library E-Resources | 4432 | 12/31/2014 |
| American Chemical Society (Regents of UC) | American Chemical Society Journals | Library E-Resources | 4497 | 12/31/2014 |
| American Council Of Learned Societies | ACLS Humanities e-Books | Library E-Resources | 4523 | 12/31/2014 |
| American Mathematical Society | MathSciNet | Library E-Resources | 4428 | 12/31/2014 |
| American Physical Society | APS Journal Collection | Library E-Resources | 4438 | 12/31/2014 |
| AmerisourceBergen Drug Company | Pharmaceutical Drugs | Other Commodities | 1-12-65-50 | 3/31/2016 |
| AMF Support Surfaces dba Restex | Mattresses and replacement covers | Other Commodities | 2842 | 6/30/2014 |
| Amigos Library Services Inc. | Project Muse & Standard Collection | Library E-Resources | 4434 | 12/31/2014 |
| AMP Intelligent Solutions | CMS Oracle/PeopleSoft & BI Consulting | CMS/BI Consulting | 3468 | 12/30/2017 |
| Annual Reviews | Annual Reviews - Science Collection | Library E-Resources | 4425 | 12/31/2014 |
| Another Source | Recruitment Services | Other Services | 4570 | 6/1/2017 |
| Apple Inc. | Software Demonstration License Agreement | Software | TBD | 6/1/2018 |
| AppleOne Employment Services | Temporary Personnel Services | Other Services | 2988 | 12/31/2014 |
| Arpin Van Lines, Inc. | Household Moving and Relocation Services | Other Services | CSULB2008MEA0261 | |
| ARTstor | ARTstor Digital Library | Library E-Resources | 4488 | 12/31/2014 |
| Association For Computing Machinery | ACM Digital Library | Library E-Resources | 4420 | 10/31/2014 |
| AT&T Corporation | Land & Wireless Network Services | IT Equipment | M2509 | 12/15/2016 |

Marketplace

- Website: <http://www.csuchico.edu/purc/CampusMarketplace.shtml>
- Resembles Amazon where products are cataloged in one centralized location, making the shopping process easier.
 - Many catalogs and vendors to choose from.
- Customers can put items in cart.
 - Checkout payment method only accepts procurement cards
 - Non-procurement card holders will be able to shop and add product to their cart then have a procurement card holder access their cart at a later time and checkout on their behalf.
 - Marketplace Transfer Cart Authorization Form to designate Procurement Card holder (Kristen Lemire IASC) as submitter.
 - <http://www.csuchico.edu/fin/forms1/pdf/PURC-Transfer%20Cart%20Authorization%20Form-secure.pdf>