

Procurement Process

Guide

Overview

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

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 requires specifications which include a description of the product, scope of work, terms & conditions, rates, invoicing schedule, costs included in price, etc. These items will also assist with completing the IT Procurement Review (ITPR) as some of these required specifications are entered into the ITPR.

Software/Hardware Purchases

Submit Service Request thru ITSS

- Standard IT purchases (could be Desktop, Laptop, iPad)
 - No ITPR needed
- All other IT purchases (other than Desktop, Laptop, iPad)
 - Scott Kodai
 - Yes, ITPR & VPAT needed.

Software/Hardware Purchases

- ITPR (Information Technology Procurement Review):
- <https://support.csuchico.edu/TDClient/Requests/ServiceDet?ID=10028>
 - IT provisions and supplemental terms will be determined by Information Security as part of the ITPR process.
- Justification for Sole Source or Sole Brand required for any purchase over \$50K.

Service Agreements

- Also require ITPR annually.
- All service agreements are required to be renewed yearly unless part of a multi-year agreement).
- 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

- If any services are critical, please communicate with Jessica Westbay in Procurement and she will work to get the 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

- Accessible via CSYou.
- <https://csyou.calstate.edu/groups/csp/contractstore/Lists/contracts/currentcontracts.aspx>

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 interested in with the search box below. (NOTE: Search results may produce both individual contracts as well as lists; contracts are designated by the following icon: )

Search this site... 

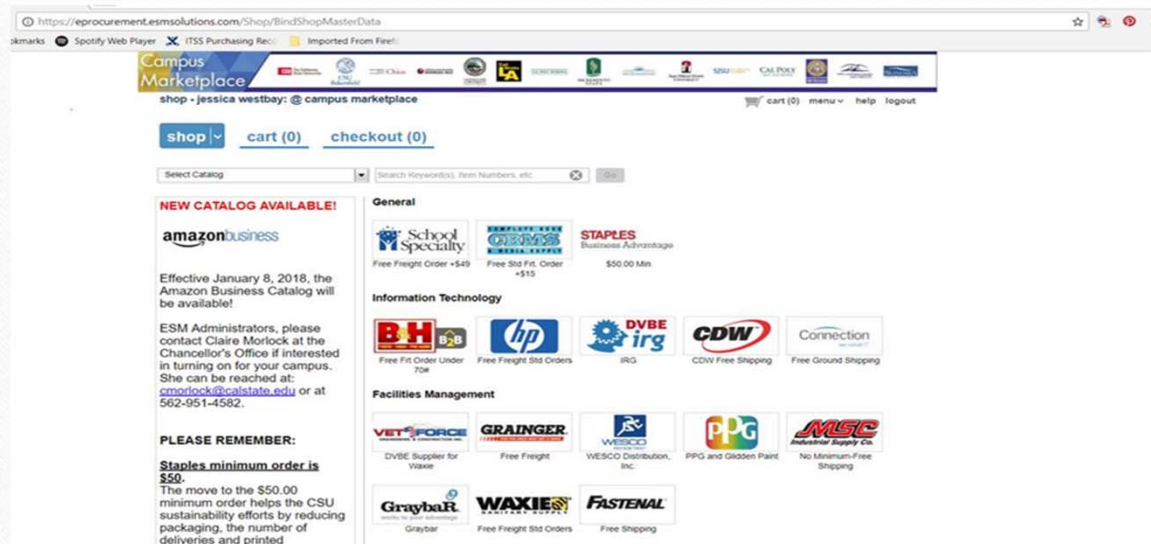
<input type="checkbox"/> Vendor	Product/Service	Store Category	Agreement #	Term Begin	Term End
Academic Search	Executive Recruitment	Human Resources	3974	3/6/2013	12/31/2018
Account Control Technology	Collection Services	Financial Services	40590	1/1/2005	6/30/2018
Accurate Background	Background check services	Human Resources	4064	10/15/2014	6/30/2019
Adobe	Software	Software	160179	9/1/2016	8/31/2019
AGB Search	Executive Recruitment	Human Resources	3099	9/28/2011	12/31/2018
Agilent Technologies	Hewlett-Packard & Agilent Purchases	IT Equipment	G8173	1/13/1995	
Agility Recovery Solutions, Inc.	Authorized Agility Recovery Ready Suite	Other Services	7-1	7/1/2016	6/30/2017
AIP Publishing LLC	Base Package and Society Subscription	Library E-Resources	150305	1/1/2016	12/31/2016

Contract Store

- A list of companies with competitive bids put forth by the Chancellors Office.
- 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.

Marketplace

- Website: <http://www.csuchico.edu/purc/CampusMarketplace.shtml>



Marketplace

- 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

- Marketplace Transfer Cart Authorization Form to designate Procurement Card holder (Shannon Grubert IASC) as submitter.
- <http://www.csuchico.edu/fin/forms1/pdf/PURC-Transfer%20Cart%20Authorization%20Form-secure.pdf>



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**Transfer Cart
Authorization Form**

Non-Procurement-Card holders may purchase using Campus Marketplace by transferring transactions to a designated Procurement-Card holder who agrees to receive and process their orders. This form is intended to establish link between a specific cart originator (Shopper) and associated Procurement-card holder (Submitter).