Overview

The new form allows for end users to ideally complete one form for purchasing software where as previously multiple separate forms were needed to be completed. This new process is intended to removed the need for duplicate entry of data.

For example, previously a user may have had to complete a Non-standard IT form, an Alternate procurement request form, a contract request form, and then complete a non-catalog form or payment request form to order the product.   This new process attempts to combine these forms into one form and allow for all approvals to be completed, contract signatures completed and a PO completed from one initial request.

IT Non-standard form complete and submitted → Approvals: Dept, IT, Procurement → Contract and PO creation

Contents

New Items

Videos: https://und.yuja.com/V/Video?v=5001200&node=17106770&a=366512516&autoplay=1

https://und.yuja.com/V/Video?v=5000880&node=17105981&a=1658267817&autoplay=1

For new IT purchases, users would log into UND Marketplace and select the Non-Standard IT Request form on the forms and links page.

The users would start by completing the form like any other form on Jaggaer. Below is a quick overview of the form and the pages. Complete the form as best as able. If there are any questions within the approval workflow those approvers have an opportunity to ask clarifying questions or return the request as needed.

The red outline displays the pages of the form. Each page my have multiple sections with questions as indicated in the blue outline.

The form has multiple fields and some of the key ones are identified below.

Initial Questions
- Is the total cost for this purchase greater than or equal to $10,000?
    - This indicates the total cost for the initial purchase plus any renewals or extensions.

- Procurement Method
    - Catalog
        - Software or IT items purchased on a catalog in Jaggaer.
    - RFP/Bid ($10K or greater)
        - Select this option for RFPs or Bid.
    - RFI
        - Select this option if you're request a RFI (Request for Information)
    - Existing Agreement/Cooperative agreement
        - Select this option if the IT item is being purchased under an existing UND/NDUS/State or other cooperative agreement.
    - Alternate Procurement ($10K or greater)
        - Select this if the purchase is an alternate procurement request.

- o Exemption ($10K or greater)
    - Select this option of the IT item falls under a procurement exemption.
- o <$10K non-catalog purchase
    - Select this option if the total cost is less than $10K.

*Contact for procurement if unsure which option to select or unsure how to calculate the total cost.

- Are contract signatures required?
  [See Contact Signature section.](#)

Business Case

- This section covers all IT related questions as well as the initial items to be purchases.

  **Note that this for <u>always</u> results in a purchase order and <u>does not</u> pay an invoice. Any IT invoices will need a PO for payment.

- Depending on which procurement method was chosen additional pages may populate to assist with processing this request further.

  Other Pages
- Instructions on additional page questions are provided in other sections in this document.

  Review and Submit

- This is the page to add this form to your cart.
- Once the form is in your cart you can either complete the requisition document as needed or assign to a requester.

  ** It is asked to not combine the IT request with other items in your cart.

Renewal process

Video: https://und.yuja.com/V/Video?v=5000907&node=17106051&a=171810377&autoplay=1

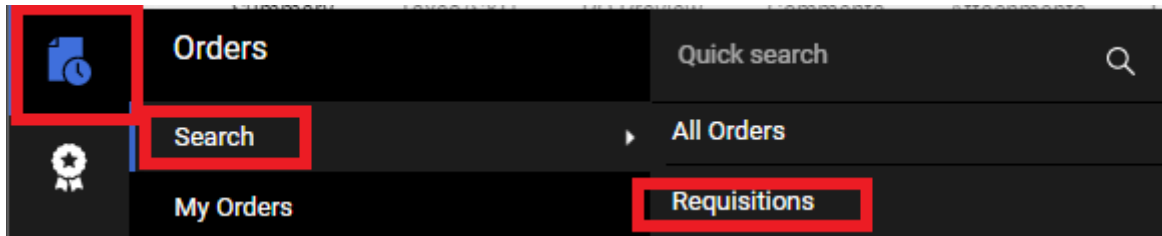If this is a renewal purchase, select "yes" then reference the original requisition number.
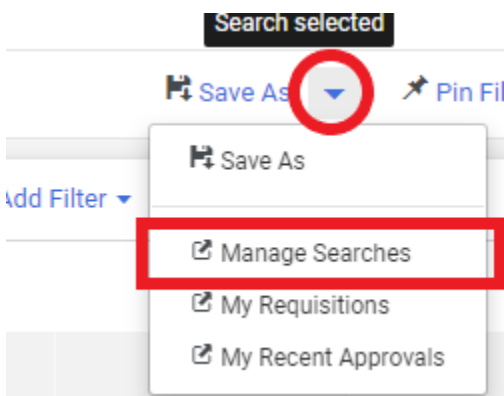
Is this a renewal? ★

◉ Yes   ○ No

What is the original Non-Standard Software and Services reference number? ★
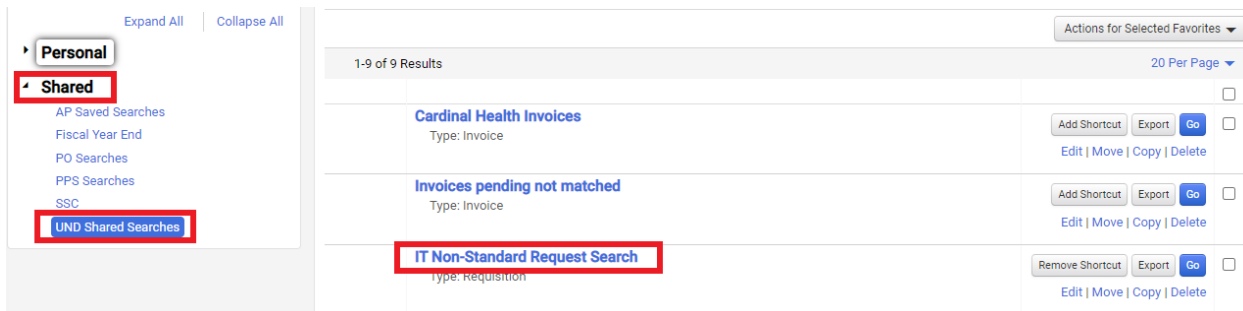
,

How to find previous requests

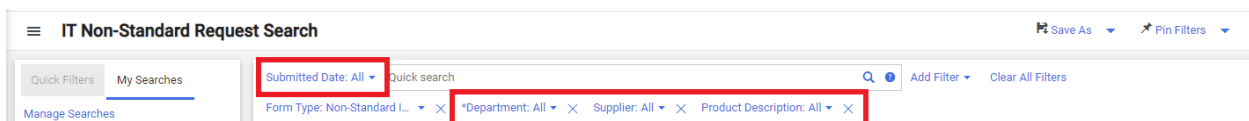From the left-hand menu, select the Orders menu > Search > Requisitions

Select the dropdown next to Save As option then select Manage Searches

Select the "Shared" menu > "UND Shared Searches" > "IT Non-Standard Request Search"

On the search page, adjust the department, supplier, product description and date range as needed.

Contract Signatures

Video: https://und.yuja.com/V/Video?v=5001200&node=17106770&a=366512516&autoplay=1

Select yes if the supplier requires a contract/order form/ETC to be signed.

A new page will populate asking additional questions regarding the agreement.

UND procurement and/or UIT will assist with legal review and signatures for software orders $5K and greater.

For software orders less than $5K, the department is responsible for legal review and obtaining proper signatures. It is recommended that signatures do not occur until the request is fully approved and PO sent. Legal review can be obtained prior to submitting the request or during approval workflow. Review the contract signature policy as needed.

Please note that the request will stop in a Department Contract Approval step to ensure the contract process was completed prior to approving and sending a PO.

Sourcing (Bids, RFPs, RFIs)

Video: https://und.yuja.com/V/Video?v=5000880&node=17105981&a=1658267817&autoplay=1

If RFP/Bid or RFI is selected a new page will populate asking questions about the sourcing event. This will assist the procurement department to setup the event when the request is received.

*For sourcing events select University of North Dakota as the supplier. The sourcing event questions will have a section to identify the suppliers to send the sourcing event to.

Contact Procurement if there are any questions on this page. The questions are very similar to the standalone sourcing request page.

Alternate procurements

Video: https://und.yuja.com/V/Video?v=5000907&node=17106051&a=171810377&autoplay=1

If Alternate Procurement Request is selected a new page will populate asking questions to validate the alternate procurement request. This will assist the procurement department when vetting the request.

*Contact Procurement if there are any questions on this page. The questions are very similar to the standalone alternate procurement request.

Exempt purchases

Video: https://und.yuja.com/V/Video?v=5000907&node=17106051&a=171810377&autoplay=1

If Exemption is selected a new page will populate asking a question to identify the exemption. This will assist the procurement department when vetting the request.

*Contact Procurement if there are any questions on this page. The questions are very similar to the standalone alternate procurement request.

Catalog orders

Video: https://und.yuja.com/V/Video?v=5000880&node=17105981&a=1658267817&autoplay=1

For catalog orders you would complete the form and add it to your cart.

*For catalog orders select University of North Dakota as the supplier.

If not completed already, add the catalog IT item to your cart as well. If should appears similar to the image below.

Additions (additional module or functionality not previously purchased)

Video: https://und.yuja.com/V/Video?v=5000907&node=17106051&a=171810377&autoplay=1

For additions to an existing agreement there are two scenarios. Purchasing the additions in a separate transaction or purchasing the item with a renewal. Either option is fine.

Purchasing additions in a separate transaction or Purchasing additions with a renewal

- If this addition has a total cost less than $10K *(total cost = the addition plus previous costs and future renewal costs)* then …
    - o   identify the original requisition number.

- If this addition brings the total cost greater than $10K then ..
    - o   Identify the original requisition number.
    - o   Identify the agreement if in Jaggaer
    - o   Contact procurement to properly identify which procurement method is needed.

Additional Reminders and Training material

- For orders less than $5000 all backup documentation resides on the request or with the department.
- For Pcard orders or Free software - PO will need to be closed manually as needed.
- May 2022 Training - https://campus.und.edu/finance/procurement-and-payment-services/_files/videos/it-non-standard-process-5-2022.mp4