



Davis Division Academic Senate

Request for Consultation Responses

PPM 200-45: Pre-Purchasing System Review

November 1, 2011

The enclosed proposal is the result of a collaborative process underway between ADMAN (The UCD Administrative Management Group) to develop campus-wide solutions to common administrative issues. The specific proposal seeks to establish a web system that would enable initiation of purchases by PI's and lab assistants. If adopted the system has the potential to impact PI's campus-wide.

Administrative Partners (DANN TRASK)

October 6, 2011 5:36 PM

No response at this time.

Council of School & College Faculty Chairs (AGRICULTURE)

November 4, 2011 11:39 AM

No response at this time.

Council of School & College Faculty Chairs (BIOLOGICAL SCIENCES)

October 31, 2011 3:05 PM

No response at this time.

Council of School & College Faculty Chairs (MANAGEMENT)

October 24, 2011 8:46 AM

No response at this time.

Council of School & College Faculty Chairs (VETERINARY MEDICINE)

October 4, 2011 2:39 PM

A great idea if it works in the way that it is supposed to do, or if the bugs can be eliminated if they exist.

Elections, Rules & Jurisdiction

October 28, 2011 11:08 AM

No response at this time.

Emeriti

November 1, 2011 3:55 PM

The Senate Emeriti Committee unanimously supports the implementation of the Pre-Purchasing System that would facilitate purchasing for faculty, including emeriti/a, staff, and students. One member of the committee is already using the system and appreciates the ability to place orders while on travel. One member suggested that a telephone "Help Line" be included.

Faculty Welfare

November 3, 2011 11:41 AM

Submitted on behalf of the Academic Senate 2011-12 Faculty Welfare Committee Chair Stuart Hill.

PPM 200-45: Pre-Purchasing System Review

The Faculty Welfare Committee supports the goals of this new purchasing system. We applaud the efforts by the College of Agricultural and Environmental Sciences to streamline the process of acquiring supplies necessary for fulfilling the University's mission. We are in favor of reforms that will lower the substantial amount of time and resources spent complying with the many rules that currently govern purchasing. And if this new system proves successful in its ambitious goals we would support its dissemination through other colleges in the University. Our committee, however, lacks the expertise to judge whether this specific proposal with its proposed interface with the Kuali system will deliver on its promise. We do hope that other committees in the Academic Senate can provide that informed review.

Information Technology

October 25, 2011 10:22 AM

The Information Technology Committee has reviewed the [PPM 200-45: Pre-Purchasing System Review](#) and has completed the following response.

Our review of applications or systems involves inquiries into the following aspects:

1. What is the need? What can be improved over existing systems?
2. Are there off-campus alternatives?
3. Who/what is the focus? Who are the “stakeholders”?
4. Who will be developing the application? What is their record?
5. Who will provide the budget? And for how long?
6. Who will administer the application/system after its release? How will it be improved?
7. How well is the application integrated with the other relevant applications?
8. What is the status of the application? At the concept stage, development, or implementation stage?
9. What will encourage potential users to adopt this application?

Review of Pre-purchasing System

General Comments: This application - somewhat awkwardly named *pre-purchasing system* - actually seeks to streamline all the administrative steps from an initial order by a campus member up to (but not including) the actual placement of the purchase order, including links with the Kualu financial system. It is an initiative of the CA&ES Dean's Office but has effective input from a broad range of individuals, both within and outside the college. It also relies on pre-existing campus systems, such as the Plant Sciences OPS (Online Purchasing System) and the John Muir Institute for the Environment (JMIE) application. The code of the JMIE application will be used to further improve the application by adding features, such as identity and access management and linkage to the accounting and financial systems (Kualu). The proponents expect a large number of users because the project has the active support of the ADMAN group (for which this application was a top priority) and a large number of departments do not have such an application. There will be a customer input system where suggestions and new features can be proposed. The steering committee is prepared to continue the development of this application after its initial delivery, which is scheduled for February 2012. Although the goal is to have as broad an adoption as possible, groups with their own purchasing system (e.g., College of Engineering) will be able to keep it. This system would greatly benefit from a high level routing and workflow overview for the entire system, such that stakeholders in existing department and unit level purchasing systems can easily identify areas of overlap with their system, easing integration and reducing duplicate efforts.

Recommendation: Overall, this application is therefore a positive contribution to the campus administration. It promises to facilitate the work of faculty, staff, and graduate students. A broad coalition has been assembled for its development, which bodes well for its success and future maintenance. The initiative has active support from ADMAN. It also stands a reasonable chance to be well-integrated with the Kualu financial system. The organizers need to make sure that the necessary training will be offered to facilitate transition to this new system. The target date for completion is end of Winter quarter 2012.

Planning & Budget

October 28, 2011 11:08 AM

No response at this time.

Research

November 3, 2011 9:02 AM

The Committee on Research discussed the proposal to create a pre-purchasing system. The electronic purchasing application would provide a streamlined process and would allow students, staff and faculty to easily purchase supplies. COR understands that the College of Agricultural and Environmental Sciences is already using an electronic purchasing system and the process seems to be working although some faculty members don't like the electronic system. One benefit is that the electronic system would allow purchase approvals to continue even if faculty or staff members are on leave or traveling. Approval requests will not just sit in the system waiting for an approval. The main concern is that if the system ever goes down then faculty would not be able to order supplies because the paper ordering system is no longer allowed in many departments. COR would like to emphasize that the interface in particular should be carefully designed to allow users to employ the system **WITH ZERO TRAINING**. Faculty with no technical expertise or training should be able to use the system and achieve their goals easily. The campus does not need another MyTravel system-the antithesis of user friendly.